

CALIFORNIA BIRD RECORDS COMMITTEE (CBRC) ANNUAL MEETING MINUTES

Pasadena, CA 27-28 January 2017

27 JANUARY 2017

Meeting called to order at 13:08, 27 January 2017 (Chair presiding). Members: Steve Rottenborn (Chair), Scott Terrill (Vice-Chair), Tom Benson (non-voting Secretary), Lauren Harter, Kristie Nelson, John Garrett, Brian Daniels, Jim Tietz, Guy McCaskie, Jonathan Feenstra.

Welcome and introductory comments by Rottenborn.

Rottenborn thanked Daniels for hosting the meeting.

1) ELECTION OF NEW MEMBERS

- a. Election of members** (three-year terms). The term of Daniels, Garrett and Tietz expire after the 2017 meeting.

Nominations:

Gary Nunn

Jon Dunn

Rob Fowler

Catherine Hamilton

Alex Rinkert

Justyn Stahl

Jon Dunn, Rob Fowler, Justyn Stahl elected.

- b. Election of Chair** (one-year term) – nomination: Steve Rottenborn (Nelson). Rottenborn elected.

- c. Election of Vice-Chair** (one-year term) – nomination: Scott Terrill (Nelson, Rottenborn). Terrill elected.

- d. Election of the Secretary** (one-year term) – nomination: Tom Benson (Nelson, Rottenborn). Benson elected.

- e. Discussion of member nomination and selection process** – Rottenborn led a Committee discussion of general considerations of potential Committee members.

- 1) Field experience and knowledge of avian identification criteria
- 2) Ability to meet workload requirements
- 3) State regional balance and representation
- 4) Age balance

- 5) Gender balance
- 6) Balance between experienced Committee members and new members
- 7) Members should be supportive of the Committee process.

f. **Discussion of Potential Future Members** - A number of potential future members were discussed. Once again, there was consensus that the Committee is fortunate to have a very strong field of potential qualified candidates that are willing to serve on the Committee.

2) BYLAW PROPOSALS

- a. **Amend Article III Section C (1) (c)** as follows: "Voting Members may serve only one full term, after which they must retire ~~until~~ through the next annual meeting ~~before~~ after which they may be considered for reelection." The effect of this amendment is to increase from one to two the number of years between a voting member's terms on the committee. In general, it was felt that the Committee is achieving a good balance of new and experienced members under the current system. No motion.
- b. **Amend Article VI (B) 2** as follows: "The forms treated will be determined from time to time by the Committee. In general, the Review List will consist of species that have occurred within California and adjacent ocean on an average of four or fewer times per year during the ten-year period immediately preceding revision of the Review List. For species with 100 or more accepted records, that threshold may be lowered to an average of two or fewer times during the same period. By vote of at least seven members at a meeting or by other voting procedure...." Most members felt that the current system is functioning well. Motion to amend the Article as described above (Nelson/no second).
- c. **Amend Article II Section A.** As currently written, Rottenborn proposed that this section requires amendment to the effect of: "...'Adjacent Ocean' is herein defined as that area within the United States Fisheries Conservation Zone, ~~where the nearest point of land is~~ within 200 nautical miles of the California coast, for which the nearest point of land is within California, except where the southern boundary is affected by areas under the jurisdiction of Mexico pursuant to international law."

The Committee discussed wording change as needed because the wording of the amendment from the 2014 meeting was unclear. There was extensive discussion of offshore boundaries and the manner in which offshore records are logged by the CBRC. In particular, two primary issues were discussed: (1) What state boundary should the

Committee be using, and (2) what standard should the Committee be using when referring to counties for offshore records.

The Committee decided to continue to use the “closest point of land” without assigning the offshore record itself to a particular county, but rather continuing to indicate the County in which the closest point of land lies. Land includes all offshore islands and rocks.

Motion to amend Article II Section A as follows: “Endorse records of selected birds from the State of California and adjacent ocean, including, but not limited to, all such records submitted for publication to any official journal or checklist of the Western Field Ornithologists. ‘Adjacent Ocean’ is herein defined as that area ~~within the United States Fisheries Conservation Zone where the nearest point of land is within 200 nautical miles of the California coast, except where the southern boundary is affected by areas under the jurisdiction of Mexico pursuant to international law~~ and for which California is the nearest point of land.” (Rottenborn, McCaskie); passed 9-0.

- d. **Amend Article VI Section G (4)** as follows: “The Chair must vote, and the Secretary must vote if s/he is also a Voting Member ~~and the Chair must vote~~. On each circulation, such the Secretary’s votes must be cast prior to sending the record to the remaining Members (thus without seeing other Members’ comments for votes on that circulation).” Motion to amend Article VI Section G (4) as indicated above (Rottenborn, McCaskie); passed 9-0.
- e. **Amend the end of Article VI Section B (2)** as follows: “Records of species or hybrids between two species not on the Review List, but for which there are no accepted records for California, will be treated.”

This issue relates to the “Brown” Shrike record below. The Committee determined that this change was not necessary because per Bylaw VI B(7), the Committee can decide to review any record with all or all but one vote at a meeting, even a record of a hybrid combination that is not on the Review List.

- f. **Discuss, and possibly amend, Article VI Section G (13)** as follows: “Supplemental List. The Committee shall maintain a Supplemental List of those species ~~not yet that are not~~ on the State List ~~because all~~ but for which there is at least one records have been determined to be ‘not accepted, natural occurrence questionable’, and but with respect to that record, for which a majority of members believe there is enough potential for natural occurrence for inclusion on the Supplemental List. If a record of a species not on the State List is not accepted on the grounds of questionable natural occurrence, but all members agree that the bird’s identity was established, then any member may move to

add the species to the Supplemental List. The species will then be added to the Supplemental List with a majority vote, either at a meeting or through other voting means, but approved by a majority of Members on a final vote as described in Article VI, Section G, Paragraph 11, or at an annual meeting. All records of species fitting these criteria which are not yet on the State List, and which a majority did not accept on a final vote, shall be brought to the next available annual meeting, where a majority vote will be needed to place the species on the Supplemental List.”

Thus, birds not on the State List can be added to the Supplemental List if accepted on identification and a majority of members votes in favor of inclusion on the Supplemental List. The Committee noted that inclusion should be considered based on the perceived likelihood of a particular individual bird of a species not on the State List occurring naturally, not the perceived likelihood of that species *per se* occurring naturally (although these concepts are not mutually independent). The Committee discussed re-circulating a record of Yellow Grosbeak with a deformed or damaged bill to consider for addition to the Supplemental List. However, there was no motion to recirculate the Yellow Grosbeak record.

Motion to amend Article VI Section G as indicated above (Rottenborn, Tietz); passed 9-0

- g. Amend Article III D (4)(d)** as follows: “Keep current the Review List, furnish it to anyone upon request, and publish it ~~(or a link to a website where it can be accessed)~~ in Western Birds, preferably with each Annual Report.” A motion to amend Article III D (4)(d) as indicated above (Rottenborn, McCaskie); passed 9-0.
- h. Amendments related to expedited review** – Bylaw proposals related to Expedited review were discussed with the *Expedited Review and CBRC/eBird Relationship* agenda item below.

3) PROCEDURAL ISSUES

- a. Publishing records recirculated as a “slash”**. Records that have circulated first as a given species and were not accepted as that species and then circulated as a “slash” (or vice versa), e.g. Masked/Nazca Booby, have been published in the annual CBRC report based on the rejection without waiting for the decision on the second circulation. Tietz noted that the online update has not been reporting not accepted records for Masked and Nazca boobies or Magnificent/Great/Lesser Frigatebird.
 1. The Committee decided not to publish the not accepted record until the second circulation (as a slash) is completed. Following the completion of the second circulation, the annual report will cover both circulations under a single account of the results of both circulations.

2. In the online update, the Committee decided to include the original record as not accepted and then treat the accepted “slash” record under a separate record number. Tietz will edit the online update to reflect this approach.

b. **Indicating the initial observer of a bird in reports.** In species accounts in the annual reports, the Committee has been indicating the observer(s) who initially discovered a bird by using a semicolon to separate the initial observer(s) from the rest of the contributing observers, whose initials are separated by commas. The Committee discussed several alternatives and decided upon placing the initials of the initial observer’s name in italics and then listing the other observers in normal font and separating all observers, including the initial observers, by commas. Motion to make this change (Rottenborn, McCaskie); passed 9-0.

c. **Expedited review and the CBRC/eBird relationship**

Per the direction of the CBRC at its 2016 meeting, a steering committee considered the following issues:

1. eBird integration into the CBRC process – does this benefit the CBRC or the birding community?
 - a. Archiving documentation – does eBird assist the CBRC in archiving documentation of records?
 - b. Expediting review – can eBird be used to facilitate or expedite review of records on the CBRC’s review list?
2. Expedited review – is this something the CBRC should implement, and how would it work?

See the attached summary and recommendations of the steering committee. The steering committee’s conclusions regarding expedited review were:

1.a. eBird will not facilitate CBRC archival of documentation as compared to existing CBRC practices, but it can serve as a tool that the CBRC can use to permanently archive documentation digitally.

1.b. Relying on eBird reviewers to assist with CBRC review, or with identifying records eligible for expedited CBRC review, would increase the Secretary’s workload and may actually delay the CBRC review process to some extent given the number of eBird reviewers. In the future, the CBRC should consider whether there is some role for a limited number of reviewers with statewide eBird privileges to assist with CBRC activities (perhaps by helping to identify eBird submissions with appropriate documentation for CBRC consideration), but in the near-term,

expedited CBRC review can be accomplished without assistance by eBird reviewers, as described below. Tom has already set up an eBird account to receive alerts of CBRC review species using the secretary@californiabirds.org email address. The committee should pursue obtaining statewide eBird review privileges for the Secretary, something that Tom can do by contacting the eBird team.

2. *An expedited review process for “easy” records would have several benefits to the CBRC. Expedited review would benefit the Secretary (in terms of reducing workload) by allowing the Secretary to enter all of the votes more quickly (e.g., all “accepts” for each member), reducing time spent tracking batches that aren’t completed for weeks or months under the current review system, and reducing the extent of comments that the Secretary would have to deal with when finalizing batches. Presumably, expedited review would benefit voting members as well by packaging these straightforward records together, and because voting members do not actually have to cast a vote for records in these batches if they’d prefer to accept the records by default. Also, expedited review would make more records available to report authors sooner rather than remaining tied up in batches.*

The Committee discussed the potential procedure for expedited review. It was generally agreed that batches of records determined by the Secretary and Chair to be relatively “straightforward” would more quickly move records out of the Secretary’s queue. The Committee decided that the Secretary could not consider acceptance of an expedited review batch without confirmed acceptance of the batch by at least five Committee members. If a member has an issue with a record that is accepted “by default” through the expedited review process, that member can request that the record be brought to a meeting for discussion.

Expedited Review Bylaw Proposals

- VI.F. Add “(Standard Review)” after “Circulation Procedures” to distinguish the circulation procedures described in VI.F. from those involved in expedited review.
- VI.G. Add (“Standard Review”) after “Voting”.
- Insert the following after VI.G (Voting):
H. Expedited Review:

- (1) Well-documented records of select species that are easily identifiable can undergo expedited review, rather than undergoing the review process described in Sections VI.F and VI.G.
- (2) The Committee will maintain an Expedited Review-Eligible Species List consisting of species with at least 20 accepted records and whose identification is relatively straightforward, given high-quality physical documentation. By vote of at least seven members at a meeting or by other voting procedure, the Committee may, as it sees fit, add species to or remove species from this list.
- (3) Records of eligible species that are well-supported with photo, video, and/or audio documentation supporting the claimed identification will be selected by the Secretary and compiled into expedited review batches after the procedures described in Section VI.F(1)(a-c) are implemented. Each expedited review batch will be reviewed by the Chair, who may remove any records from the batch at his or her discretion to undergo standard review.
- (4) The Secretary will then distribute the expedited review batch electronically to all Committee members, who will have two weeks to review the records.
 - (a) If any member does not agree that a record in the expedited review batch should be accepted or wishes to request a standard review of a record for any reason, that member will communicate this to the Secretary within two weeks of receipt of the expedited review batch. The record will then be circulated under the standard review process as a new (first circulation) record without consideration of any votes cast by other members during the review of that record in the expedited review batch.
 - (b) If a member does not notify the Secretary that she/he does not accept a record, or that she/he would like a record to undergo standard review, within two weeks, the record will be deemed accepted by that member. Members may send brief comments on records to the Secretary if desired.
- (5) The Secretary will confirm that members have received the expedited review batch.

- (6) Each record will be considered accepted if, after the two-week review period, the Secretary has not received a request for standard circulation.
- (7) Change the lettering of “Historical acceptance or non-acceptance of records” to “I.” and of “Publication” to J.”

A motion to adopt the above bylaw changes (Terrill, Tietz); passed 9-0.

A motion to adopt the following Expedited Review List (Feenstra, Harter); passed 9-0. Numbers of accepted records, and percent of records accepted, in the following table are as of February 2016.

Species	Number of Accepted Records	Percent of Records Accepted
Emperor Goose	93	79
King Eider	45	90
Yellow-billed Loon	99	66
Short-tailed Albatross	40	83
Red-tailed Tropicbird	43	96
Masked Booby	22	81
Red-footed Booby	21	78
Tricolored Heron	62	93
Roseate Spoonbill	138	98
Mississippi Kite	50	75
Wilson’s Plover	26	72
Upland Sandpiper	31	86
Hudsonian Godwit	52	81
Bar-tailed Godwit	44	63
Curlew Sandpiper	46	55
Black-headed Gull	26	72
Ruddy Ground-Dove	109	88
Snowy Owl	61	82
Broad-billed Hummingbird	87	89
Greater Pewee	41	84
Dusky-capped Flycatcher	103	88
Thick-billed Kingbird	23	85
White-eyed Vireo	76	97
Wood Thrush	30	97
Rufous-backed Robin	20	91
Curve-billed Thrasher	31	76
White-Wagtail	29	74

Snow Bunting	131	88
Worm-eating Warbler	126	93
Golden-winged Warbler	75	96
Blue-winged Warbler	50	78
Connecticut Warbler	121	85
Cape May Warbler	63	90
Grace's Warbler	70	89
Red-faced Warbler	25	76
Cassin's Sparrow	53	95
Le Conte's Sparrow	36	86
Rusty Blackbird	46	88
Common Grackle	95	68
Common Redpoll	174	87

Several species proposed to be included on the Expedited Review List were removed following Committee discussion. These species were: Magnificent Frigatebird and Little Gull (which were removed from the Review List altogether) and Mourning Warbler, for which members thought identification difficulties and the potential for Mourning x MacGillivray's warbler hybrids necessitated standard review.

4) ANNUAL REPORTS

- a. **40th report** ((2014 records); authored by Singer, Dunn, Harter, and McCaskie was published in 47(4).
- b. **41st report** (2015 records); being authored by Searcy, Tietz, Daniels, and Feenstra. It is preparation.
- c. **42nd report** (2016 records); being authored by McCaskie, Rottenborn and Terrill. It is in preparation.
- d. **Review of draft annual reports.** It was noted that photos with captions need to be circulated along with the text to CBRC Committee members for review of draft annual reports.
- e. The committee decided to add the Secretary as a co-author on annual reports in recognition of all the work the Secretary puts into the compilation of the records for the reports.

5) REVIEW LIST

- a. It requires seven votes to add or remove a species from the Review List.
- b. **Potential additions:**

Townsend's Storm-Petrel. The potential addition of this taxon (recently elevated to species status from being considered a subspecies of Leach's Storm-Petrel) to the review list was discussed. The Committee considered this species likely regular in extreme southern California waters. Inclusion on the state list is based upon specimens (Grinnell and Miller 1944. The Distribution of the Birds of California.). Motion not to add (McCaskie, Daniels); passed 9-0.

c. Potential deletions:

Broad-billed Hummingbird. No motion to remove this species from the Review List.

Little Gull. Although there were 118 accepted records at the time of the meeting, this species has a low recent acceptance rate of 3 over the past 5 years and 2.8 over the past 10 years. Thus, the species met the general guideline for removal of over 100 accepted records, but not the guideline of 4+/year. The Committee decided to remove the species based on the number of accepted records, coupled with the relatively straightforward identification. Motion to remove Little Gull from the Review List (McCaskie, Daniels); passed 7-2.

Iceland Gull. This problematic taxon was discussed once again. The Committee acknowledges that morphological criteria used to separate Kumlien's Iceland Gull from Thayer's Gull represent a continuum, especially with respect to first-cycle birds, and that the "line" along this continuum at which species are identified as one taxon or the other is arbitrary and has been relatively dynamic over the years.

The Committee discussed the value of continued review of Iceland Gulls. There was general agreement that older birds and birds that appeared to fit nominate *glaucoides*, or close to it, are not as much of an issue as first-cycle birds. However, some (Searcy and Dunn in written comments on the agenda) provided the opinion that there may not be much gained by continued review of Iceland Gull.

Finally, the Committee noted that there is a possibility that the Thayer's/Iceland Gull complex will be lumped into a single species by the North American AOS Checklist Committee this year (Dunn in written comments on the agenda), in which case it would automatically be removed from the Review List.

Motion to remove Iceland Gull from the Review List (Harter, no second) failed.

Motion to establish a procedure so that members would only accept birds showing the characters of nominate *glaucoides* as Iceland Gulls (Tietz, Nelson); 2-7 failed.

The Committee decided to circulate all records through 2016 but not to review 2017 records until after the AOS vote on whether to lump Iceland and Thayer's gulls. If the AOS does not lump them, then 2017 records will be circulated.

Yellow-billed Loon. One hundred accepted records with a 5 year acceptance rate of 2.6 and a 10 year acceptance rate of 2.5. No motion to remove this species from the Review List.

Magnificent Frigatebird. This species was considered for deletion during the 2016 meeting based on 58 records since the species was added to the review list in 2010, which produced a rate of 11.6/year. The Committee did not remove the species then (failed 5-4), but since that time, there has been a significant influx of accepted records (17 records in 2016). Thus, the Committee voted to remove the species from the Review List (and hence automatically from the Expedited Review list) at this meeting: motion to remove Magnificent Frigatebird from the review list (Harter, McCaskie); passed 9-0. Motion to remove Magnificent/Great/Lesser Frigatebird (Daniels, Feenstra); passed 9-0.

Dusky-capped Flycatcher. Although there are well over 100 accepted records, the Committee continues to consider that this species represents an identification issue and thus, there was no motion to remove Dusky-capped Flycatcher from the Review List (the same outcome occurred during the 2016 annual meeting).

Common Redpoll. Although there have been 175 accepted records (5-year acceptance rate 19/yr. and 10-year acceptance rate 9.8/yr.), this species is highly "irruptive" and there has been a recent influx of birds in the state. No motion to remove Common Redpoll from the Review List.

Snow Bunting. Although there have been 136 accepted records, the 5-year and 10-year acceptance rates are 2.6 and 3 per year respectively. Most members consider this a relatively straightforward identification with the exception of separating it from McKay's Bunting. Motion to remove Snow Bunting from the Review List (McCaskie, Terrill); failed (5-4).

Worm-eating Warbler. There are 129 accepted records of this species, but a low acceptance rate over the past 5 (1.8/yr.) and 10 (2.6/yr.) years. The Committee generally agreed that this species does not represent a complex identification issue, but the rarity of the species in recent years was discussed. Motion to remove Worm-eating Warbler from the Review List (McCaskie, Daniels); failed (6-3).

Connecticut Warbler. There are 121 accepted records, but low recent acceptance rates over the past 5 (1.6/yr.) and 10 (2.1) years. Records of this species and the next are disproportionately from SE. Farallon Island and both species are considered by the Committee to represent potential identification issues. No motion to remove Connecticut Warbler from the Review List.

Mourning Warbler. Similar to Connecticut Warbler, there are 133 accepted records, but low acceptance rates over the past 5 (2.2/yr.) and 10 (1.8/yr.). Records of this species and the former are disproportionately from SE. Farallon Island and both species are considered by the Committee to represent potential identification issues. No motion to remove this species from the Review List.

Cape May Warbler. This species was re-added to the Review List in 2011 (it was reviewed from 1972 through 1974). The species now has over 40 accepted records at an acceptance rate of 6.4/yr. over the past 5 years. The population cycles of this species were discussed at the meeting. Motion to remove Cape May Warbler from the Review List (Rottenborn, Daniels); failed 4-5.

Rusty Blackbird. This species was on the Review List from 1972 through 1974 and then added back on the list in 2006 due to a substantial decrease in reports (likely related to the substantial overall population decrease this species has experienced in the past several decades). There have been approximate 50 records accepted and the species has a five-year acceptance rate of 5.4. It was noted in discussion at the meeting that the species appears to continue to decline. Therefore, there was no motion to remove Rusty Blackbird from the Review List.

Common Grackle. Although typically not a difficult species to identify, identification issues with hybrid Great-tailed Grackle X Brewer's Blackbirds, and pure types of both species continue to represent identification issues. No motion to remove Common Grackle from the Review List.

6) SPECIFIC RECORDS BROUGHT TO THE MEETING

- a. Fourth and Final:** The following records without a decision after three rounds of voting were brought to the meeting and discussed before a final circulation, and then voted upon at the meeting (voting results are indicated for each record):

2015-073 Emperor Goose near Hershey COL/YOL 1 Feb 2015 (not accepted, 4-5)

2015-151 Rusty Blackbird Furnace Creek Ranch INY 5 Nov 2015 (not accepted, 1-8)

2000-165 Chatham Albatross, Cordell Bank MRN 29 Jul-10 Sep 2000 (not accepted, 1-8)

A motion was made to add Salvin's/Chatham to the Review List (Rottenborn, Tietz); passed 9-0.

First day's meeting adjourned at 18:35.

28 JANUARY 2017

Second day's meeting called to order at 09:02 with all members present.

SPECIFIC RECORDS BROUGHT TO THE MEETING (continued from 27 January 2017).

6) SPECIFIC RECORDS BROUGHT TO THE MEETING (continued)

b. Records brought to the meeting by request:

1999-142 White-winged Tern at Moss Landing MTY 4 Sep – 16 Oct 1999. An observer (Rob Fowler) provided documentation from an earlier date, so there was a motion to extend the early date to 17 Aug 1999 (McCaskie, Terrill); passed 9-0.

2015-097 Red-footed Booby near Catalina Island LA and Dana Point Harbor ORA 13-15 Sep 2015. This bird landed on a boat near Catalina Island LA and road the boat into Dana Harbor ORA where it died. Of the six Committee members who addressed the question of location, opinions were evenly split (3-3) between accepting this bird in LA only, or both LA and ORA. A motion was made to list the occurrence as just LA in the database and describe the circumstances of the record in the annual report (Garrett, Feenstra); passed 9-0.

2015-081 Magnificent Frigatebird near Santa Cruz Island SBA 7 Jul 2015. There was uncertainty involving the date and precise location. The Committee felt it needed more clarification on when the uncertain date/location vote category is applied and this was discussed. This record was not accepted on the second circulation (failed 4-5); however, the Committee can vote to restart a not accepted-record circulation to go the remainder of the original circulations if it so chooses. This is not considered a resubmission, but rather a recirculation per VI F(3)(e)). A motion to recirculate the record (McCaskie/Tietz) passed 8-1.

2015-034 & 37, 2016-004, & 039 Kelp Gull. Multiple records of Kelp Gull in northern and southern CA have been accepted as involving the same individual. The records were brought to the meeting to discuss some potential differences visible in photos. One of these differences involved the apparent difference in the relative length of the outer primaries. The Committee decided that the apparent differences could

well have been the result of the camera angles relative to the birds' open wings. In addition, all photos documenting these records showed a bird that lacked any mirror in the outermost primary (p10), which apparently is relatively rare in Kelp Gull. The Committee did note that more detailed information about the apparent scarcity of Kelp Gulls lacking a mirror on p10 would be helpful. No motion.

2015-122 LeConte's Sparrow Galileo Hill KER 22 Oct 2015. There was discussion of difficult-to-interpret photos of a bird very briefly observed. No motion.

2015-145 Winter Wren Clear Lake State Park LAK 7 Nov-10 Feb 2016. There was discussion of vocalization and morphological differences between Winter and Pacific wrens. Tietz led a discussion of vocalization (calls) differences between the two species based on sonogram analysis. No action, and the record will go a 3rd circulation.

2015-126A Masked/Nazca Booby Sutil Rock SBA 26 Oct 2015. See discussion of Masked and Nazca booby below.

2015-046 Magnificent Frigatebird La Jolla SD. This record was not accepted and the Committee elected to vote on this record at the meeting rather than recirculating. The record was evaluated as a Magnificent/Great/Lesser Frigatebird and accepted 9-0.

7) Masked and Nazca Boobies

The Committee had an extended discussion and review of the criteria used by members when accepting birds as pure Masked or Nazca Boobies and how the existence of hybrids influences Committee decisions. The reliability of bill color, and the age at which adult bill color tones begin to come into the bill of young birds was discussed. In addition, the variability and relative extent of white in the tails of the two species was discussed. The pivotal paper by Pitman and Jehl (1998, Geographic Variation and Reassessment of Species Limits in the "Masked" Boobies of the Eastern Pacific Ocean, *Wilson Bulletin* 110:155-170) was examined and discussed. Comments by Pitman on specific records were reviewed and discussed.

The Committee agreed that more information about the relative abundance of hybrids, as well as photos of bird identified as hybrids by Pitman and others, if they exist, would be potentially helpful in informing Committee evaluations of (primarily young) birds. With respect to hybrids, Pitman and Jehl indicate that they are rare; however, newer information indicates that Masked and Nazca boobies may hybridize more frequently at the northern part of the range and that Nazca Booby is

expanding its range north. The Committee (McCaskie) will contact Pitman to see if he can provide this information.

2016-003 Nazca Booby Pt. Pinos MTY 1 Feb 2016. A motion to reconsider this record as a Masked/Nazca Booby when the Committee receives more information from Pitman relating to the appearance of presumed hybrids and their frequency (McCaskie, Garrett); passed 8-1.

2015-167 Nazca Booby Oceanside SD, 30 Oct 2015. The Committee decided not to circulate this record a third round until more information is received from Pitman.

2015-088 Nazca Booby Pt. Loma SD 1 Sept 2015. This record currently stands as accepted. A motion to re-evaluate the record when the Committee receives the above described additional information from Pitman (Daniels, Feenstra); passed 9-0.

2015-103 Sutil Rock SBA 27-28 Sep 2015. 2015-103 and 2015-126 were decided in vote on 2015-103 that the two records involved the same individual: 2015-103 was accepted as a Masked/Nazca Booby and 2015-126 was not accepted as a Masked Booby and is circulating as a Masked/Nazca Booby. A motion to evaluate these two records to re-consider if they involve different birds (Nelson, Garrett); passed 6-3. A motion to hold off on evaluating 2015-126 as a Masked/Nazca Booby until the Committee receives the additional information from Pitman (see above) regarding age and bill maturation (i.e., how old can a Nazca Booby be and not show orange on the bill) (Rottenborn, Daniels); passed 9-0.

8) *Plegadis Ibis*

Issues with North American members of this genus that the Committee discussed included:

1. How to handle cases where some red, pink, or purple is apparently visible on the facial skin or in the eye but: (a) the observers noted no red, pink or purple hues in the field; and (b) those colors do not appear clear or extensive, they just show up in some of the pixels of enlarged images? The Committee discussed this at a CBRC meeting several years ago, and decided that sometimes apparent red pixels show up where they really are not present, so unless the colors are clearly present in the photos, it might be better to defer to a conflicting written description (indicating that no red/pink/purple was present).
2. If a basic-plumaged individual is more than a year old and has no red/pink/purple in the face or the eye, is it a Glossy?

3. What is the value of characters such as tertial color or bill color, and if a bird looks good for a Glossy but has the “wrong” tertial or bill color, should it not be accepted?

During the discussion, several records involving photos of birds that appeared to show slight red tints in the eye, etc., but otherwise appeared to be Glossy Ibis (and no red was apparent in eye or facial skin on these birds carefully studied in the field), were examined. The photos were blown up to extreme pixilation, which brought out an odd distribution of reddish pixels dispersed among non- reddish pixels in the eye and facial skin. Thus, in these cases, the red appears to be a photographic artifact. Of interest during the discussion is that there was significant individual variation in the visual perception of red among Committee members.

In pre-meeting comments on these issues, Jon Dunn commented that White-faced Ibis should have pink in the facial skin and a red eye by about six months of age.

9) Other records

2011-182 Common Eider at Crescent City, DN 20-29 Nov 2011 – In late October 2016, a female Common Eider of the Atlantic race *dresseri* was reported to have escaped from a waterfowl collection on Fir Island, WA, and a birder found it nearby. Kenneth P. Able had learned of this collection during his research into the paper on the Crescent City bird’s occurrence (following Committee evaluation and vote to accept the record) and included discussion of it in the paper on the occurrence (Able et al. 2014. *First occurrence of an Atlantic Common Eider (Somateria mollissima dresseri) in the Pacific Ocean*. *Western Birds* 45 92-99). The Committee discussed whether it wanted to re-evaluate the record on light of this “new” information. No motion.

1986-450 Oriental Greenfinch at Arcata, HUM 4 Dec 1986-3 Apr 1987 – One was on St. Paul Island, AK on 12 June 1996 and another was in southwestern B.C. in the fall of 2015. Do these records represent “new and substantial evidence” that would support re-evaluating the Arcata record? From *Rare Birds of California*: “*The record of a widely seen Oriental Greenfinch present from 4 December 1986 to 3 April 1987 in Arcata, Humboldt County, circulated four times through the Committee and gained five or six votes of acceptance during each round (9 of the 16 members to vote on the record never took this position). Members generally agreed that the record pertains to Chloris sinica kawaraha, a requisite for consideration as a genuine vagrant in the state because it is a migratory subspecies that migrates between the Kamchatka Peninsula and the Kuril Islands and is accidental in Alaska and British Columbia (Nov 2015 at Victoria). Factors weighing against the bird’s*

natural occurrence include the species' failure to establish a pattern of vagrancy in the Old World, known instances of captivity in the United States, and perhaps this individual's unusual association with House Finches. Thus, while most members considered the odds of this bird being an escapee to be small, the record never mustered the support needed for the CBRC to endorse it as involving a naturally occurring vagrant. In Taiwan, wintering birds are apparently captured and kept (Yen 1984). In the United States, the species is rare, but not unknown, in captivity. A 10 March 2005 query of the International Species Information System yielded a total of eight captive Oriental Greenfinches at zoos and other participating institutions in North America: five in Quebec and three in Manitoba."

The Committee discussed whether it wanted to re-review the record in light of the recent accepted record for British Columbia. The Committee decided to try and obtain more information on the identification of subspecies, and the evaluation of the British Columbia bird to subspecies, and then revisit the record.

2015-019 "Brown" Shrike at Manchester S.P., MEN 5 Mar-22 Apr 2015. At its 2016 meeting, the Committee decided that it did not want to formally evaluate this record as being that of a Red-backed X Turkestan Shrike. Peter Pyle (senior author of The Mendocino Shrike: Red-backed Shrike (*Lanius collurio*) x Turkestan Shrike (*L. phoenicuroides*) hybrid, 2015, North American Birds 69:4-35 initially made the following request

"After some contemplation I'd like to request that the CBRC review the Mendocino shrike as a Red-backed Shrike X Turkestan Shrike. I'm thinking that the decision at the meeting not to do this may have come too soon after our NAB paper was available (and before it was published) and that members did not have the opportunity to fully digest the results and conclusions of the paper before making this decision. Simply leaving it as a rejected Brown Shrike without further contemplation as the published identified taxon feels incomplete to me. Also, I have no idea whether or not the AOU or ABA-CLC will consider this record or not, but if they do they will be looking to the CBRC decision for guidance and I think it would be better to provide a bit more than letting the first-round decision on it stand."

Per Bylaw VI B(7), the Committee could decide to review this record with all or all but one vote at a meeting, even though this hybrid combination is not on the Review List.

Peter later amended his request as follows:

"It appears that the bylaws were not written in anticipation of a hybrid between two new species for California. I think that the bylaws should be

amended and would suggest changing the last sentence in VI.B.2 to "Records of species or hybrids between two species not on the Review List, but for which there are no accepted records for California, will be treated." Of course, the last thing that should happen is to add "Red-backed X Turksetan Shrike" to the review list, to have the record rejected, and then to have the combination on the review list in perpetuity. But I think having this proviso and possibility has impeded the progress of the record so far.

Therefore I would like to amend my request. I would like for the CBRC to first consider amending the last sentence of bylaw VI.B.2 as I have suggested above. If the CBRC votes to do this then I would request the Mendocino shrike proceed to round two. If the first vote is to not change the bylaws then I'll be happy to let the record stand as a rejected Brown Shrike."

The Committee determined that the request could not be granted as written. Going to round 2 violates current bylaws, which require "Records of the same bird but circulated as a different species or form shall receive a new record number." F(1)a. Any record with a new number starts over as round 1 with full privileges.

Pyle et al. (2015) included the following statements casting at least a bit of uncertainty on the identification:

- "As in all identifications involving hybrids (and many involving pure species), a degree of uncertainty is unavoidable."
- "...indicates this as the most parsimonious conclusion and a reasonable one within the realm of identification certainties."
- "...a hybrid between Red-backed and Turkestan Shrike seems most likely."

The Committee discussed the situation in detail. The Committee decided not to formally review the shrike as a Red-backed x Turkestan as proposed by Pyle et al. (2015). The reasoning was that Pyle et al. (2015) had indicated the hybrid combination of Red-backed and Turkestan Shrike seemed most likely, but that a degree of uncertainty with respect to hybrid lineage in this case was unavoidable. The Committee members agreed that Pyle et al. (2015) was an excellent paper analyzing this remarkable record and a majority agreed with all of the results of the paper, including the acknowledgement of a degree of uncertainty surrounding parental lineage, but that a hybrid between Red-backed and Turkestan Shrike seems most likely. Members did not feel that the CBRC could reach a more definitive decision than Pyle et al. did.

2013-015 Snow Bunting at Sweetwater Reservoir, SD 11 Jan 2013 - The 39th CBRC report says that record was not accepted on the basis of “date and/or location uncertain”, and the online update states, “Not accepted, location and date not established”. However, that category was not officially added in our bylaws until the 2016 meeting, so the record was not accepted on the basis of identification not established. The Committee decided it should formally vote to apply the “date and/or location uncertain” status to the record, and the online update should be changed to “date and/or location uncertain” because “location and date not established” is not a CBRC category. Motion to change category of non-acceptance to “date and/or location uncertain” (Garrett, McCaskie); passed 9-0.

2013-203 Mississippi Kite, Pasadena, LA 25 Oct 2013 - The 39th CBRC report and online update states that the record was not accepted on the basis of questionable natural occurrence, but this was one of the records that spawned a decision at the 2016 meeting to adopt the category of rejection “date and/or location uncertain”. The Committee determined it should formally vote to apply the “date and/or location uncertain” status to the record. Motion to change category of non-acceptance to “date and/or location uncertain” (Garrett, McCaskie); passed 9-0.

2007-243 Bulwer’s Petrel, Santa Barbara Channel, VEN 5 Sep 2007 and 1993-118 Bulwer’s Petrel, Whitewater River, Salton Sea RIV, 10 Jul 1993 – Some members did not accept these records because Jouanin’s was not eliminated. If Jouanin’s is accepted to the State List based on the Monterey Bay or Santa Barbara Island records currently in circulation, the Committee discussed whether it wanted to re-evaluate either of these records as “Bulwer’s/Jouanin’s Petrel” and/or add “Bulwer’s/Jouanin’s Petrel” to the review list. The Committee decided it was premature to take any action prior to the evaluation of the Monterey Bay or Santa Barbara records submitted as Jouanin’s. No motion.

2015-074 Gray Thrasher, Famosa Slough SD, 2 Aug 2015 – Considered for addition to Supplemental List. All nine members endorsed the identification, and all eight rejecting members did so questioning natural occurrence. The Committee discussed the supplemental list and agreed that the list was designed to include species that (a) were not on the state list of accepted records because of questionable natural occurrence, but (b) have at least one non-accepted record that most members think may have been of a naturally occurring individual. The Committee further discussed the concept that the addition of a species on the supplemental list should be based on the likelihood of a particular individual possibly reflecting natural occurrence, not the likelihood of the species occurring naturally (the example of Yellow Grosbeak was brought up, in which a bird was not accepted on natural occurrence due to its condition, but many Committee members have felt that this species is a candidate for natural vagrancy in the state). The same concept extended to Gray Thrasher, but

again, a majority of the Committee members present felt the condition of the bird's feathers, bill, and feet created doubt about this individual occurring without anthropogenic influence. A motion to add Gray Thrasher to the Supplemental List (McCaskie, Tietz); failed 2-7.

SLO Black Vultures – Tom Edell sent information to Benson on two reports of Black Vulture from SLO in 2008, pre-dating any of the other records from VEN/SBA/SLO, in light of the subsequent pattern of occurrence that developed for this species in that region. The Committee discussed whether or not to assign record numbers to the reports and circulate them.

Black Vulture – 20 Feb 2008, one was reportedly seen with Turkey Vultures near the intersection of Hwy 1 and Hwy 46. A motion to review the record (McCaskie/Feenstra); passed 9-0.

Black Vulture – 29 Jun 2008, From trail beginning off Foothill Boulevard. A motion to review the record (Harter/Garrett); passed 9-0.

10) FIELD-IDENTIFIABLE SUBSPECIES

Procedures for adding subspecies to the Review List

The Committee has, in the past, discussed the potential addition of subspecies to the Review List. Currently, there appear to be no formal procedures for adding subspecies to the list of field-identifiable subspecies. Past meeting minutes include mention of voting to add or remove certain species, but neither meeting minutes, nor bylaws, indicate what the vote needs to be to add subspecies. The procedure for adding species to the formal Review List mentions subspecies – “By vote of at least seven members at a meeting or by other voting procedure, the Committee may, as it sees fit, add other species (such as those whose identification is difficult) or forms (such as superspecies, subspecies, or hybrid combinations) to the Review List.” In the past, the Secretary (then McCaskie) has noted that the Secretary had no procedure to process subspecies records. The Committee discussed forming a subcommittee that could develop and maintain a separate database that follows standard CBRC procedures, which might also include voting on subspecies records. The Committee discussed retention of documentation for recognizable subspecies, especially those subspecies likely to be involved in future “splits”. The Committee envisioned a volunteer subcommittee to handle subspecies reports independently from the Secretary. In the event that any of these subspecies is elevated to species level, the Subspecies Subcommittee would be tasked with preparing records of those birds to provide to the Secretary for normal processing. The Committee will be following up with individuals that might be interested in participating in such a subcommittee. The Committee discussed whether there are any subspecies that might warrant addition. Several subspecies were discussed, including Kamchatka

Gull, Red-backed Junco and Stejneger's Scoter. In addition, the Committee reviewed the history of the CBRC soliciting information on subspecies, including the following excerpt from the 31st CBRC report:

*“At the 2007 meeting the committee revisited the issue of field-identifiable subspecies, discussed previously by Erickson and Terrill (1996)¹. While the committee unanimously agreed not to review subspecies formally, it is interested in continuing to archive reports of subspecies rare in California. California birders show increased interest in reporting taxa below the species level, reaffirming for the Committee that archiving such reports is essential for understanding the distribution and abundance of California birds; this archive would facilitate review in the event of future splits. Obviously the level of detail required in the documentation of birds on the list below is quite high, and the problems posed by introgression are in some cases intractable, so extensive photographs, field descriptions and sketches, recordings of vocalizations, and (in some cases) a specimen are essential. Erickson and Terrill (1996) presented a list of field-identifiable or possibly field-identifiable subspecies reported in California for which the committee would like to archive records. In 2007 the committee added the Vega Herring Gull (*Larus argentatus vegae*) and Eastern Red-shouldered Hawk (*Buteo lineatus lineatus*), on the basis of recent reports (*N. Am. Birds* 59:321 and Pyle et al. 2004, respectively); records of the former are of particular interest to the committee. The current list includes the following subspecies, reported from California and meeting review-list criteria:*

*Atlantic, Light-bellied, or American Brant (*Branta bernicla hrota*), including “Gray-bellied” Brant*

*Bewick's Tundra Swan (*Cygnus columbianus bewickii*)*

*Eastern or Northern Red-shouldered Hawk (*Buteo lineatus lineatus*)*

*Eurasian Whimbrel (*Numenius phaeopus variegatus/phaeopus*)*

*Vega herring Gull (*Larus argentatus vegae*)*

*Eastern/Texas Bell's Vireo (*Vireo bellii bellii/medius*)*

*Eastern Hermit Thrush (*Catharus guttatus faxoni/euborius*)*

*Siberian American Pipit (*Anthus rubescens japonicus*)*

*Yellow Palm Warbler (*Dendroica palmarum hypochrysea*)*

¹ Erickson, R. A. and S. B. Terrill. 1996. Nineteenth Report of the California Bird Records Committee: 1993 Records. *Western Birds* 27:93-126.

White-winged Dark-eyed Junco (Junco hyemalis aikenii)

Eastern Purple finch (Carpodacus purpureus purpureus)

The Siberian Common Tern (Sterna hirundo longipennis) had been included by Erickson and Terrill (1996), but the committee unanimously voted to remove that subspecies from the list given that we are aware of no confirmed reports (i.e., photographs, specimens, etc.) of it from the west coast south of Alaska; one in New Jersey (N. Am. Birds 57:473, 573) is apparently the only one reported in North America away from western Alaska. Certain other rare field-identifiable subspecies or forms, such as the Eurasian Green-winged or Common Teal (Anas crecca crecca) and the Eastern, Yukon, or Red Fox Sparrow (Passerculus iliaca zaboria/iliaca) do not meet the review-list threshold of fewer than four records per year. Note that many other subspecies of birds on the California list occur as vagrants, but at this point are not yet considered by the CBRC—mainly because they are not readily identified in the field and reports are not being generated by the birding community; an example is the eastern subspecies of the Brown Creeper (Certhia americana americana).”

11) RARE BIRDS ONLINE

Rottenborn will be following up with the Western Field Ornithologist Board of Directors and Publications Committee to make corrections to Rare Birds Online.

12) ARCHIVING

Recommendations regarding archiving records were forwarded by the CBRC Expedited Review Process Steering Committee prior to the 2017 meeting. The Steering Committee consisted of Tom Benson, Dan Singer, Jim Tietz, Adam Searcy and Steve Rottenborn. The following report on eBird integration into the CBRC process and archiving was provided to the Committee prior to the meeting:

“Two issues:

(A) Archiving documentation – does eBird assist the CBRC in archiving documentation of records?

a. Expediting review – can eBird be used to facilitate or expedite review of records on the CBRC’s review list?

(A) Archiving documentation:

(1) If the only documentation of a record is included in a single eBird checklist, then a link to that checklist easily gets one to all the documentation for a record. If the CBRC decided that it did not want to archive that documentation separately (e.g., in the CBRC’s own files), and if that

documentation really is permanently available to the public, then in this limited circumstance, relying on eBird documentation of a record could potentially save the CBRC the time of archiving documentation of that record.

- (2) However, if there are multiple eBird checklists with documentation of a given record, or if some documentation is submitted to the CBRC that is not on eBird, then all documentation for that record cannot be stored in one location on eBird unless the CBRC decides to archive as a single-species incidental record. In the long term, whether to archive all documentation for individual CBRC records on eBird is a separate issue that the CBRC will consider, but in the short-term, it would not be acceptable to the CBRC to have some documentation in eBird and some in the CBRC archives, with no single location where all the documentation can be found. The Secretary's current practice is that documentation (descriptions, photos, audio) included in eBird checklists is generally not included in the CBRC archives, unless the observer submits his/her eBird checklist as documentation to the CBRC. In rare circumstances, either where an eBird checklist is the only documentation for a record, or there is exceptionally good documentation for an otherwise poorly documented record, the Secretary will copy a checklist from eBird to archive with the CBRC's records. For most records, there are two separate archives between which there is little overlap, but only the CBRC's archives consistently contain the documentation that the CBRC believes is necessary to document the record (the eBird archive may not meet this standard for some records).*
- (3) If an eBird record is officially rejected/invalidated by an eBird reviewer, it is still accessible to eBird reviewers and the submitter but not the public. As a result, the CBRC would not be able to rely on eBird checklists for archiving publically-available documentation of rejected records.*
- (4) Photos submitted to eBird via the Macaulay Library are permanently archived, and the observer cannot remove them. Otherwise, however, an eBird user can delete his/her eBird checklist, remove photos, and/or change documentation after the original checklist is submitted. As a result, the CBRC cannot rely on documentation in someone's eBird checklist as permanent documentation of a record.*

Steering Committee's conclusions – the CBRC cannot rely on individual birders' eBird submissions for the purpose of archiving CBRC records and documentation. It is important that there be a complete archive somewhere, and the CBRC's current practice of archiving its own documentation of accepted and rejected

records achieves this. The CBRC Secretary should continue to copy eBird checklists as necessary to provide documentation for CBRC review and archiving, or to supplement documentation obtained through other means (e.g., direct submission to the CBRC).

However, the CBRC could utilize eBird for archiving purposes in the future. For example, all CBRC-accepted records could be submitted to eBird as single-species incidental records, accompanied by some level of documentation (from some minimal amount of documentation such as a sample photo, video, or audio, if available, to full sets of documentation, depending on what the Committee decides). Older records might also include a citation to the published report. This issue can be discussed in the future.

In short, eBird will not facilitate CBRC archival of documentation as compared to existing CBRC practices, but it can serve as a tool that the CBRC can use to permanently archive documentation digitally.”

The Committee reviewed and discussed the guidelines and there was a motion to affirm concurrence with the Steering Committee conclusions to continue the CBRC standard procedure of maintaining a complete and full archive of all documentation used to evaluate and document a record on file at the Western Foundation of Vertebrate Zoology in Camarillo, California (Terrill, Tietz); passed 9-0.

CBRC members are encouraged to be WFVZ members.

13) BUDGET

- a. 2016 WFO budget for CBRC. In 2016, the WFO budgeted \$200 for hosting and domain name costs for californiabirds.org and wfopublications.org, and \$200 for general CBRC expenses such as postage (which amounted to \$67.71 in 2016) and WFVZ file maintenance charges (which amounted to \$130.41 in 2016).
- b. 2017 WFO budget for CBRC. The 2017 WFO budget includes \$300 for web hosting/domain name costs for all WFO websites, \$200 for the CBRC’s miscellaneous expenses (\$150 for postage and \$50 for any WFVZ or other costs), and \$200 for the new California bird checklist (see Item 14 below).
- c. Page charges for annual reports. Two CBRC reports were published in 2016. The 39th report (2013 records) was 25 pages = \$750 @ \$30/page, and the 40th report was 23 pages = \$690 @ \$30/page, for a total of \$1,440. CBRC members contributed \$520 to cover page charges for the 39th report, and Joe Morlan found a donor to contribute \$510 toward that report. CBRC members also contributed \$280 toward the 40th report. As a result, the CBRC funded \$1,310 of the \$1,440 in page charges for the two 2016 CBRC reports. One report is expected in 2017. Donations by Committee are strongly encouraged, no matter the amount. The simplest way for

Committee members (and others) to donate is to visit <https://www.westernfieldornithologists.org/pagecharges.php>. Indicate which report you're donating toward.

- d. Dropbox account – the promotional 48 GB Dropbox account used by the Secretary (Benson) was to expire in approximately 60 days after this CBRC meeting and revert to a basic 2 GB (free) account. This will not be enough to support the CBRC files currently stored. Dropbox is easy and convenient to use for sharing record files with committee members, and Benson would like to continue using it. The simplest (and least expensive) option would be to upgrade to an individual “Pro” account for a cost of \$8.50 per month. There are other options available for multiple users, but this will suffice for CBRC purposes, and the CBRC could upgrade to a business/team account later if the need arises. Rottenborn will discuss how this will be funded with the WFO Board.

14) NEW CALIFORNIA CHECKLIST

- a. The Western Field Ornithologists (WFO) Board of Directors has requested that the CBRC compile a new state checklist. The Board would leave it up to the Committee to determine format, but Jon Dunn suggested that it include orders and families, similar to the 2000 checklist in California Fish and Game. He suggested that it include checklist boxes, codes, and blank pages with rows at end. Rottenborn suggested that the Committee might want to consider a reduced “pocket version”. Rottenborn will discuss funding mechanisms with the WFO Board.
- b. The Committee discussed the option of formatting the checklist so that it can be downloaded and printed out by the user rather than printing it out for sale. Most Committee members present expressed the opinion that this approach seems preferable to the Committee printing out a pile of checklists and then being responsible for mailing and distributing them. In comments to Rottenborn prior to this meeting, Joseph Morlan noted that handling numerous small orders can represent a labor-intensive process and that printed checklists quickly become outdated, whereas an online checklist can be constantly updated. Morlan also noted that the official online checklist is available for download and it can be imported into a spreadsheet and formatted for printing in a variety of ways. The text file is at: http://www.californiabirds.org/main_list.txt
- c. It may be that an online checklist that is readily and easily printable in field checklist format might be a good solution.
- d. The CBRC (Rottenborn) will coordinate with the WFO Publications Committee regarding the details of finalizing and publishing a new checklist.

15) INTRODUCED BIRDS SUBCOMMITTEE REPORT

- a. The 2016 Introduced Birds Subcommittee (IBSC) consisted of Kimball Garrett, John Garrett, Adam Searcy and Thomas Benson.
- b. The Subcommittee discussed the following items:
 - 1) The IBSC was going to look into the Gray Partridge and "Ringed Turtle-Dove" history with the likely result of verifying that neither taxon was ever established in California. If that is the result, as expected, then neither should be on the state list with an "EI" annotation". But the IBSC plans some effort to learn more about past status and then make this recommendation. That work is ongoing. Kimball Garrett reported that Gray Partridge and Ringed-turtle Dove are currently off the list and that other than Rock Pigeon, the Committee has not added feral species to the state list. He noted that if the Committee added Ringed Turtle Dove to the state list, it would necessitate adding Common Peafowl to the list for consistency. The subcommittee has no interest in recommending that these birds be added to the state list.
 - 2) John Garrett reported on comparing Florida to California with respect to introduced species and state list composition. He noted that some species on the Florida list, but not on the Official California Checklist are at least as, if not more, common in California as they are in Florida (example was Red-whiskered Bulbul, which appears near the threshold for adding to the California list).
 - 3) Kimball Garrett noted that the Subcommittee considered Orange (Northern Red) Bishops for listing, but he indicated that the population has apparently plateaued. Both Kimball Garrett and John Garrett indicated that several parrots are being considered for addition to the state list, but the Subcommittee is not proposing any for addition at this time.
 - 4) John Garrett noted that Pin-tailed WYdahs are brood parasites on Scaly-breasted Munias, which have been added to the state list, and so WYdahs may increase to the point of consideration for addition to the list, especially if they start to parasitize other species as well as munias.
 - 5) The Committee discussed a watch list to be approved by the Committee and Tietz suggested, and members discussed, placing all established introduced species on a separate list and ranking them by status (for example, the American Bird Association code could be added to each species on the list.
 - 6) The Introduced Bird Subcommittee now has an official email address (ibs@californiabirds.org). The CBRC website now requests that information/documentation for species on our watch list be sent to the Subcommittee using this address.

- c. The Introduced Bird Subcommittee going forward will consist of Kimball Garrett, Jim Tietz, John Garrett, and Thomas Benson.

16) OUTREACH AND PUBLIC RELATIONS

- a. Kimball Garrett has agreed to continue as CBRC spokesperson on Calbirds.
- b. The Committee discussed the possibility of additional outreach and a Public Relations Subcommittee. The Committee discussed some public relations issues that have arisen over time and how to address those (subcommittee?).
- c. The Committee discussed Steve Rottenborn presenting a CBRC update at the upcoming WFO meeting in Pueblo, Colorado and decided to convene a panel discussion instead.
- d. Lauren Harter volunteered to provide CBRC material to Frances Oliver to represent the Committee on the WFO's Facebook page.
- e. The Committee discussed giving more presentations about the Committee to local organizations and events in addition to the WFO annual meetings.

17) NEXT MEETINGS

- a. WFO conference – Pueblo, Colorado, 16-20 August 2017. The CBRC will hold a panel discussion about Committee function and philosophy to the WFO membership.
- b. CBRC annual meeting – will be held 19-20 January 2018 at the H.T. Harvey offices in Los Gatos, California.
- c. CBRC meetings in southern CA – venue. Linnea Hall at the Western Foundation of Vertebrate Zoology has indicated that the Committee is likely to be able to hold the next southern California meeting (2019) at the WFVZ.

18) APPRECIATIONS

Brian Daniels, John Garrett, and Jim Tietz for their service to the CBRC

Brian Daniels and Psomas for hosting the meeting.

Tom Benson for his critical work as Secretary.

Joe Morlan for his work updating the CBRC website.

Jim Tietz for maintaining updates to "Rare Birds" on our web site.

WFVZ and Linnea Hall for their archiving services.

Adjournment 4:00 pm 28 January 2017

Minutes prepared by Scott B. Terrill and Steve Rottenborn 16 April 2017

CBRC Expedited Review Process

Report from the Steering Committee: Tom Benson, Dan Singer, Jim Tietz, Adam Searcy, Steve Rottenborn – 22 June 2016

Per the direction of the CBRC at its 2016 meeting, this steering committee considered two issues:

- (1) eBird integration into the CBRC process – does this benefit the CBRC or the birding community?
- (2) Expedited review – is this something the CBRC should implement, and how would it work?

I. eBird integration into CBRC process

Two issues:

- (B) Archiving documentation – does eBird assist the CBRC in archiving documentation of records?
- (C) Expediting review – can eBird be used to facilitate or expedite review of records on the CBRC's review list?

(A) Archiving documentation:

- (5) If the only documentation of a record is included in a single eBird checklist, then a link to that checklist easily gets one to all the documentation for a record. If the CBRC decided that it did not want to archive that documentation separately (e.g., in the CBRC's own files), and if that documentation really is permanently available to the public, then in this limited circumstance, relying on eBird documentation of a record could potentially save the CBRC the time of archiving documentation of that record.
- (6) However, if there are multiple eBird checklists with documentation of a given record, or if some documentation is submitted to the CBRC that is not on eBird, then all documentation for that record cannot be stored in one location on eBird unless the CBRC decides to archive as a single-species incidental record. In the long term, whether to archive all documentation for individual CBRC records on eBird is a separate issue that the CBRC will consider, but in the short-term, it would not be acceptable to the CBRC to have some documentation in eBird and some in the CBRC archives, with no single location where all the documentation can be found. The Secretary's current practice is that documentation (descriptions, photos, audio) included in eBird checklists is generally not included in the CBRC archives, unless the observer submits his/her eBird checklist as documentation to the CBRC. In rare circumstances, either where an eBird checklist is the only documentation for a record, or there is exceptionally good documentation for an otherwise poorly documented record, the Secretary will copy a checklist from eBird to archive with the CBRC's records. For most records, there are two separate archives between which there is little overlap, but only the CBRC's archives consistently contain the documentation that the CBRC believes is necessary to document the record (the eBird archive may not meet this standard for some records).

- (7) If an eBird record is officially rejected/invalidated by an eBird reviewer, it is still accessible to eBird reviewers and the submitter but not the public. As a result, the CBRC would not be able to rely on eBird checklists for archiving publically-available documentation of rejected records.
- (8) Photos submitted to eBird via the Macaulay Library are permanently archived, and the observer cannot remove them. Otherwise, however, an eBird user can delete his/her eBird checklist, remove photos, and/or change documentation after the original checklist is submitted. As a result, the CBRC cannot rely on documentation in someone's eBird checklist as permanent documentation of a record.

Steering Committee's conclusions – the CBRC cannot rely on individual birders' eBird submissions for the purpose of archiving CBRC records and documentation. It is important that there be a complete archive somewhere, and the CBRC's current practice of archiving its own documentation of accepted and rejected records achieves this. The CBRC Secretary should continue to copy eBird checklists as necessary to provide documentation for CBRC review and archiving, or to supplement documentation obtained through other means (e.g., direct submission to the CBRC).

However, the CBRC could utilize eBird for archiving purposes in the future. For example, all CBRC-accepted records could be submitted to eBird as single-species incidental records, accompanied by some level of documentation (from some minimal amount of documentation such as a sample photo, video, or audio, if available, to full sets of documentation, depending on what the Committee decides). Older records might also include a citation to the published report. This issue can be discussed in the future.

In short, eBird will not *facilitate* CBRC archival of documentation as compared to existing CBRC practices, but it can serve as a tool that the CBRC can use to permanently archive documentation digitally.

(B) Expediting review via eBird:

Tom has set up a CBRC eBird Alert account that notifies the Secretary when review list species have been submitted to eBird (i.e., a CBRC Secretary account with a life list populated with all non-review species and with a needs alert for California). This will expedite getting such records into CBRC review, especially in cases where no documentation reaches the CBRC by some other means. This may also make it easier to determine arrival and departure dates (based on the dates of eBird checklist submission), although the Secretary would use discretion regarding which eBird checklists to include in the CBRC's documentation packets for a record (e.g., it would not be useful to archive checklists in the middle of a bird's stay, unless they provided exceptional documentation). Setting up a CBRC eBird Alert account can and should be done whether or not there is any other eBird input to the review process. Currently, the Secretary has eBird review privileges only for a few counties; eBird administrators ought to be willing to provide statewide privileges.

For eBird *reviewers* to have a role in expediting CBRC review, eBird reviewers would have to be able to perform some role that the Secretary or Chair won't be doing, and in a timely manner. For example, if eBird reviewers quickly validated all records accompanied by photos, video, or audio documentation, and notified the Secretary when that occurred, and the Secretary or Chair did not then have to review all

those records themselves, this could expedite CBRC review. If eBird reviewers forwarded documentation from eBird to the Secretary, reliably enough that no follow-up or monitoring by the Secretary were needed, that would also ease the Secretary's workload. However:

- (1) The CBRC cannot rely on all eBird reviewers to provide their reviews/recommendations in a timely manner without the Secretary or Chair having to hound them, or to download and forward eBird documentation to the Secretary reliably enough that it saves the Secretary work/time. There are too many eBird reviewers in California (close to 70) for us to be able to rely on them all to do this. Furthermore, in requesting that eBird reviewers forward documentation to the Secretary, we run the risk of significantly increasing the Secretary's workload with tons of documentation for each record, and according to the bylaws, the Secretary is required to archive all documentation received.
- (2) Both the Secretary and Chair always review all batches before they circulate. Why not just rely on the Secretary and Chair to perform the initial review to verify that these are records that warrant inclusion in "expedited review" batches, instead of having to incorporate the additional step of requiring eBird reviewer validation of those records? In the future, the Secretary may not always be as identification-savvy as Tom, but because records eligible for "expedited review" should be straightforward identifications, the Secretary and Chair ought to be capable of determining whether records are appropriate for inclusion in expedited review batches. This should not increase the burden on the Secretary or Chair.
- (3) There might be some PR value in involving eBird reviewers in the CBRC review process (making the review process seem like it involves more of California's birders), but if they won't actually reduce the Secretary's workload or expedite review of records (and instead they could be increasing the Secretary's workload or delaying review of records), this PR value is not worth the additional burden on the CBRC process. There are a relatively small number of reviewers with statewide privileges. The CBRC could consider whether some subset of this group could be targeted for some involvement in the CBRC review process.

Steering Committee's conclusions – relying on eBird reviewers to assist with CBRC review, or with identifying records eligible for expedited CBRC review, would increase the Secretary's workload and may actually delay the CBRC review process to some extent given the number of eBird reviewers. In the future, the CBRC should consider whether there is some role for a limited number of reviewers with statewide eBird privileges to assist with CBRC activities (perhaps by helping to identify eBird submissions with appropriate documentation for CBRC consideration), but in the near-term, expedited CBRC review can be accomplished without assistance by eBird reviewers, as described below. Tom has already set up an eBird account to receive alerts of CBRC review species using the secretary@californiabirds.org email address. The committee should pursue obtaining statewide eBird review privileges for the Secretary, something that Tom can do by contacting the eBird team.

II. Expedited review

The CBRC should still consider whether there is the potential for implementation of expedited review procedures that can improve the pace of review/acceptance of records that are obviously valid. In this case, though, we should consider including any obviously acceptable record in the expedited review process – not just eBird records. For example, there is no difference in the potential acceptability between a record of a well-photographed Little Gull that is submitted to the CBRC via normal channels and an equally well-photographed record submitted to eBird, so expedited review could be implemented for all such straightforward records, regardless of the source.

Expedited review would benefit the Secretary (in terms of reducing workload) by allowing the Secretary to enter all of the votes more quickly (e.g., all “accepts” for each member), reducing time spent tracking batches that aren’t completed for weeks or months under the current review system, and reducing the extent of comments that the Secretary would have to deal with when finalizing batches. Presumably, expedited review would benefit voting members as well by packaging these straightforward records together, and because voting members do not actually have to cast a vote for records in these batches if they’d prefer to accept the records by default.

Following are the procedures recommended by the steering committee for how expedited review would work:

- (1) The CBRC will approve the list of species that will be subject to expedited review. As a guideline, these will be species on the Review List with at least 20 accepted records and whose identification is relatively straightforward, and the individual records will need to be well-supported with photo, video, and/or audio documentation.
- (2) Eligible records will be selected by the Secretary and compiled into batches. Expedited batch numbers will be numbered sequentially with regular batches, but be given the suffix “x” to denote an expedited batch (e.g., Batch 17Dx).
- (3) Each batch will be reviewed by the Chair. After review, the Chair may remove any records from the batch at his or her discretion for standard review.
- (4) The Secretary and Chair will take a cautious approach to including records in expedited review batches. If the physical documentation is not 100% compelling (clearly supporting the claimed identification), in the opinion of the Secretary and Chair (e.g., if photos are distant, blurry, or poorly exposed so that there might be some question regarding the accuracy of the claimed identification), then records will circulate via standard procedures.
- (5) The Secretary and Chair will indicate clearly on the batch cover sheet any “same bird” determinations or other considerations (e.g., age or sex) that accompany a given record.
- (6) The Secretary will then distribute the expedited review batch to all Committee members, who will have two weeks to review the records. The default will be that a Committee member accepts all records unless s/he explicitly requests a standard circulation for a record. If a member desires to add a brief comment on (but has no other issues with) a record, she/he may do so by sending her/his comment to the Secretary.
- (7) If any CBRC member does not agree that a record in the expedited review batch should be accepted or wishes to request a standard review of a record for other reasons, that member would explicitly communicate this to the Secretary within two weeks of receipt of the expedited

review batch. The record will then be circulated under the normal review process as a new (first circulation) record without consideration of any votes cast by other members during the review of that record in the expedited review batch.

- (8) CBRC members would be expected to review all expedited review batches as carefully as they deem appropriate. However, any records for which no request for standard circulation has been received during the two-week review period will be considered accepted and the batch finalized after two weeks, even if CBRC members have not explicitly submitted “accept” votes. The only exception to this would be if a member has indicated that s/he would be unable to review a batch within that period; that member and the Secretary would coordinate regarding when the review of the batch would be finalized.

Following is a list of species recommended by the steering committee for expedited review eligibility. As noted above, keep in mind that these species will only be included in expedited review batches if the documentation clearly supports the identification in the opinion of the Secretary and Chair (e.g., a poorly photographed, distant loon that looks like it may be a Yellow-billed would not be eligible for expedited review). After the “Expedited Review-Eligible Species List” is initially approved, it would be updated (with species being added or removed) annually based on a vote at a CBRC meeting, following the same procedures used to add or remove species from the Review List.

Note that the color coding of “Number of Accepted Records” and “Percent of Records Accepted” is explained at the bottom of the table; this color coding is provided to indicate species with higher or lower numbers of accepted records and/or acceptance rate, for the purpose of CBRC review of the list.

Species	Number of Accepted Records	Percent of Records Accepted
Emperor Goose	93	79
King Eider	45	90
Yellow-billed Loon	99	66
Short-tailed Albatross	40	83
Red-tailed Tropicbird	43	96
Magnificent Frigatebird	49	98
Masked Booby	22	81
Red-footed Booby	21	78
Tricolored Heron	62	93
Glossy Ibis	33	66
Roseate Spoonbill	138	98
Mississippi Kite	50	75
Wilson’s Plover	26	72
Upland Sandpiper	31	86
Hudsonian Godwit	52	81
Bar-tailed Godwit	44	63
Curlew Sandpiper	46	55
Thick-billed Murre	50	81
Long-billed Murrelet	31	84

Black-headed Gull	26	72
Little Gull	117	94
Ruddy Ground-Dove	109	88
Snowy Owl	61	82
Broad-billed Hummingbird	87	89
Greater Pewee	41	84
Dusky-capped Flycatcher	103	88
Great Crested Flycatcher	60	80
Thick-billed Kingbird	23	85
White-eyed Vireo	76	97
Wood Thrush	30	97
Rufous-backed Robin	20	91
Curve-billed Thrasher	31	76
White-Wagtail	29	74
Snow Bunting	131	88
Worm-eating Warbler	126	93
Golden-winged Warbler	75	96
Blue-winged Warbler	50	78
Connecticut Warbler	121	85
Mourning Warbler	149	81
Cape May Warbler	63	90
Grace's Warbler	70	89
Red-faced Warbler	25	76
Cassin's Sparrow	53	95
Le Conte's Sparrow	36	86
Pyrrhuloxia	29	88
Rusty Blackbird	46	88
Common Grackle	95	68
Common Redpoll	174	87
Explanation of Color Coding		
Green	≥30	≥80%
Orange	20-29	70-79%
Red	---	<70%

If there is strong support for expedited review, changes to the bylaws will be necessary to describe this process. Following are proposed changes:

- VI.F. Add (“Standard Review”) after “Circulation Procedures” to distinguish the circulation procedures described in VI.F. from those involved in expedited review
- VI.G. Add (“Standard Review”) after “Voting”
- Insert the following after VI.G (voting):

H. Expedited Review.

- (8) Well-documented records of select species that are easily identifiable can undergo expedited review, rather than undergoing the review process described in Sections VI.F and VI.G.
- (9) The Committee will maintain an Expedited Review-Eligible Species List consisting of species with a minimum number of accepted records (e.g., at least 20, as a guideline) and whose identification is relatively straightforward, given high-quality physical documentation. By vote of at least seven members at a meeting or by other voting procedure, the Committee may, as it sees fit, add species to or remove species from this list.
- (10) Records of eligible species that are well-supported with photo, video, and/or audio documentation supporting the claimed identification will be selected by the Secretary and compiled into expedited review batches after the procedures described in Section VI.F(1)(a-c) are implemented. Each expedited review batch will be reviewed by the Chair, who may remove any records from the batch at his or her discretion to undergo standard review.
- (11) The Secretary will then distribute the expedited review batch electronically to all Committee members, who will have two weeks to review the records.
 - (c) If any member does not agree that a record in the expedited review batch should be accepted or wishes to request a standard review of a record for any reason, that member will communicate this to the Secretary within two weeks of receipt of the expedited review batch. The record will then be circulated under the standard review process as a new (first circulation) record without consideration of any votes cast by other members during the review of that record in the expedited review batch.
 - (d) If a member does not notify the Secretary that she/he does not accept a record, or that she/he would like a record to undergo standard review, within two weeks, the record will be deemed accepted by that member. Members may send brief comments on records to the Secretary if desired.
 - (e) If a member indicates in advance that she/he would be unable to review an expedited review batch within two weeks, additional review time should be arranged with the Secretary.

- Change the lettering of “Historical acceptance or non-acceptance of records” to “I.” and of “Publication” to “J.”

We would like for each Committee member to consider the issues above and be prepared to discuss, and then vote on, whether to institute expedited review in 2016. Opinions regarding eBird integration into the CBRC process are welcome as well, but given the steering committee’s conclusions regarding this issue, this issue should be discussed further at the 2017 annual meeting rather than before then (i.e., we are not optimistic that eBird integration will occur soon). Therefore, please consider:

- (1) Do you support the expedited review concept? If not, why not?
- (2) Would you like to suggest changes to the procedures, species list, or bylaw changes described above, and if so, what changes do you suggest?

We would appreciate having all members provide a response to this by email. If you disagree that expedited review is a good idea, please indicate your reasoning. If you agree with the concept but would like to suggest changes in the procedures, species list, or bylaw revisions, please be clear regarding what you would propose changing. If we can reach agreement on this, we would like to ask for a formal vote on making these bylaw changes and allowing this to be implemented this year.