

Georgia Ornithological Society

FOUNDED 1936

HANDBOOK FOR THE CHECKLIST AND RECORDS COMMITTEE

I. Name and Affiliation

A. Name. The official name of this organization shall be the "Georgia Ornithological Society's Checklist and Records Committee," which may be shortened to the "C & R Committee," or "Georgia Bird Records Committee," and is hereafter referred to as the "Committee."

B. Affiliation. This is a committee of the Georgia Ornithological Society.

II. Purposes

A. Validate reports of selected birds from the State of Georgia and adjacent waters. "Adjacent waters" is herein defined as that area within 200 nautical miles of the nearest part of the Georgia coast between latitudinal lines drawn due east from the Georgia state borders with South Carolina and Florida: at the Georgia/South Carolina border, 32°0'55"N between 80°50'59"W and 75°45'W and at the Georgia/Florida border, 30°42'40"N between 81°26'38"W and 78°14'W.

B. Maintain permanently the original bird records and all committee votes for use by future bird students.

C. Publish at least minimal data on all reports receiving a decision.

D. Provide a means by which sight records can gain universal acceptance as valuable scientific data.

E. Increase knowledge of the birds of Georgia.

F. Establish standards of observation and reporting against which field observers may compare their own techniques.

G. Keep or cause to keep the official Georgia State List of Birds.

III. Membership

A. Number and Definitions. The Committee shall consist of at least 5 persons, as follows: at least four "Members" plus a "Secretary," each with one vote. The term "Voting Member" includes all Members and the Secretary.

B. Qualifications. In choosing persons to serve as Voting Members on the Committee, consideration should be given to demonstrated expertise in field identification of birds, knowledge of avian biology and distribution and active participation in GOS functions.

C. Members.

1. Appointment and Term of Office.

a. The four or more members shall be appointed by the President of the Georgia Ornithological Society for two-year terms (except in the case of the Secretary, as defined below).

b. Members take office at the close of the GOS Fall Meeting at which they were appointed and serve until the close of the GOS Fall Meeting two years later.

c. Members may serve three consecutive full terms, after which they must retire for two years before they may be considered for reappointment.

d. During the initial two years of operation of the Committee under this Handbook, two Members will have terms less than two years. Two will retire after the initial year. Decision as to whom will retire will be made by first calling for volunteers. If less than two persons volunteer for retirement, then the President of the Georgia Ornithological Society will make a selection.

2. Nominations. While the authority to appoint Voting Members is the responsibility of the GOS President, nominations from the serving Voting Members of the Committee is appropriate. The Committee Chair will poll serving Voting Members 30 days prior to the biennial GOS Fall meeting in which a new GOS President is to be installed and make recommendations for new Voting Members. Each nominator may make a maximum of one nomination per each vacancy. If the total number of nominees is not sufficient to fill the vacant seats, it is the responsibility of the Chair to nominate the number of persons required. The Chair shall mail the names of the nominees to the GOS President at least three weeks in advance of the biennial GOS Fall Meeting.

D. Chair.

1. Qualifications. In addition to the Qualifications of Membership above, the Chair must not at the same time be the Secretary.

2. Appointment and Term of Office.

a. The Chair is appointed by and serves at the discretion of the GOS President for a two-year term.

b. The Chair takes office at the close of the biennial GOS Fall Meeting at which he/she is appointed and serves until the close of the next biennial GOS Fall Meeting or until a successor is appointed.

3. Duties.

a. Call and preside at Committee Meetings. b. Assure that the bylaws are appropriately applied.

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c. With the approval of members, appoint chairs of subcommittees.

d. Present Committee reports to the GOS Executive Committee at least annually, as directed by the GOS President.

e. Furnish the GOS President with a list of nominees for membership at least three weeks prior to the GOS Fall Meeting.

E. Secretary.

1. Qualifications.

a. In addition to the qualifications of Membership above, the Secretary must not at the same time be the Chair.

b. The Secretary must have been a Member for at least one year (not necessarily the previous year).

c. The Secretary cannot take office if he/she has just completed three consecutive terms of office on the Committee.

d. During the initial two years of operation under these bylaws, the requirement for the Secretary to have been a Member for one year is not applicable.

2. Election and Term of Office.

a. The Secretary shall be elected for a term of two years. Election shall be by vote of a quorum, present in person, not by proxy or absentee ballot, at the Annual Meeting of the Committee. Election should be by written ballot of those present. The candidate receiving the largest number of votes shall be elected; if necessary, a tie shall be decided by an additional ballot(s) listing only those

persons tied. The Chair, if present, shall conduct the election. All Voting members, including the candidate(s), may vote.

b. The Secretary takes office at the close of the Annual Meeting of the Committee at which he/she is elected and serves until the close of the next Annual Meeting of the Committee.

c. If the Secretary's term exceeds his/her appointed term as a member, his/her term as a Member shall be extended, with the approval of the GOS President, to be concurrent with his/her term as Secretary.

3. Nominations. Nominations for Secretary shall be made only by Voting Members and only at the Annual Meeting of the Committee, either in person or by letter to an attending Member. Each nominator may make a maximum of one nomination, and may not nominate himself.

4. Duties.

a. Receive, acknowledge, circulate, and file all bird reports and supporting data submitted to the Committee. Whenever possible the records filed should be originals, as copies fade with age.

b. Vote on bird records (see voting) and in all elections.

c. When possible, procure additional data on records when deemed desirable by a Voting Member, and especially when a record is to come up for discussion at a meeting of the Committee.

d. Prior to any meeting, furnish Members with a list of post-second-circulating records to be discussed.

e. Tabulate the results of all votes of the Committee, including votes on bird records, but excepting the election of the Secretary.

f. Keep current the Review List, furnish it to anyone upon request, and occasionally publish it in The Oriole and/or The Goshawk.

g. Furnish members with such equipment as needed, including Validation Forms.

h. Furnish anyone, upon request, with copies of all evidence, including Committee comments (without Member's names), concerning any accepted or rejected bird records.

- i. Furnish Report Forms to anyone upon request and free of charge.
- j. Keep current a roaster copy of this Handbook.
- k. Keep or cause to keep minutes of the Committee.

F. Removals. The Committee may remove, for cause, the Secretary or Members (except the Chair) who are delinquent in their duties. Such action requires a vote of the majority of all other Voting Members, not merely of a quorum. A removal must be accomplished at a meeting of the Committee; absent Voting Members may vote by an absentee ballot to the Committee.

G. Vacancies and Special Elections. If the Committee loses a Voting Member during mid-term (through death, resignation, removal, or otherwise), the Chair shall immediately request the GOS President appoint a replacement to serve out the unexpired term.

H. Compensation. Neither the Chair, Secretary nor Member may receive compensation for Committee work, but may be reimbursed by the Treasurer of the Georgia Ornithological Society for expenses reasonably incurred in the performance of Committee duties.

IV. Meetings

A. Annual Meeting. An Annual Meeting of the Committee shall be held once a year, at a time and place set by the Chair in consultation with the Members, for the purpose of election and for transacting such other business as may be brought before the meeting. The Chair must give to all members prior notice of the Annual Meeting. An agenda and list of nominees for Members and Secretary shall be provided at least three weeks prior to the Annual Meeting.

B. Special Meetings. Special Meetings of the Committee shall be called by the Chair, or by agreement of three or more members. Whoever calls the meeting must notify and provide an agenda to each Voting Member prior to the meeting.

C. Quorum. Three Voting Members in good standing, present in person, not by proxy, shall constitute a quorum for any meeting of the Committee.

V. Handbook

A. Formation. This Handbook and other procedures of the Committee are to be determined by and only by the Committee, except that they may not be inconsistent with the bylaws of the Georgia Ornithological Society or with rules adopted by its Executive Committee.

B. Review. This Handbook shall be reviewed regularly, at least once every five years, by the Committee.

C. Changes. This Handbook may be changed by a majority vote of a quorum at any Committee meeting.

VI. Bird Records.

A. Definitions. For the purposes of this Committee and this Handbook, a "record" is considered to be written documentation submitted to the Committee as proof of the identity of a sighted, heard, collected, banded, or photographed bird. The "Review List" is that most recent list of species that will be accepted for review by the Committee.

B. Records Treated.

1. Records only from the State of Georgia and adjacent waters, as defined in paragraph II.A., will be treated.

2. The species treated will be as determined from time to time by the Committee. In general, the Review List will initially consist of species that have occurred within Georgia and adjacent waters ten times or less. In addition, any record which the Secretary judges to be sufficiently rare or unusual to require action by the Committee may be considered. By majority vote of a quorum at a meeting, the Committee may as it sees fit, revise the Review List. Records of species not on the Review List, but for which there is no accepted records for Georgia, will be treated.

3. The criteria for inclusion on the Review List and the species treated, will be reviewed at least once every five years.

4. The Secretary will be responsible to have the Review List duplicated, made available to all who request it, and occasionally published in The Oriole and/or The Goshawk.

5. Records based on specimens or bandings will be accepted and treated in the same manner as other records.

6. Any record, whether published or not, old or new, may be submitted by a Voting Member or other person, whether or not an observer, if he/she has first attempted to obtain

details from the observer(s). An exception to this is a record that has received a previous Committee Decision (See Resubmission).

7. Records concerning species that are only locally or temporally rare in Georgia will generally not be treated.

8. Subspecies or species pairs will not be treated unless listed on the Review List.

C. Submission. Records should be, but not need be, submitted on the Committee's official Report Form, along with any supporting documentation.

D. Resubmission. A record that has received a final Committee decision, whether accepted or rejected, and even though published in the Committee Annual Report, may be resubmitted by the Chair, Secretary, a Member, an observer, or any other person, if and only if there becomes available new and substantial documentary evidence that might reverse the decision. For a record rejected because of questionable origin, such evidence might include the recognition of a natural pattern of occurrence. Such a record might be resubmitted and circulated as if never before submitted, except that it should be accompanied by all previous votes and comments of the Committee, its publication status, and all new evidence marked as such.

E. Retraction. A record submitted to the Committee by the observer(s) involved may not be retracted after circulation has begun. The observer(s) may submit opinions or additional data that totally or partially negate the record. Such information shall be treated as "new and substantial documentary evidence" (See paragraph VI.D.) and the record shall have its first submission terminated at the end of the then current circulation and be resubmitted under the same record number, except that if the record has already received a final "reject" vote, no further circulation need take place.

F. Circulation Procedures.

1. Initial Receipt by the Secretary. Upon receipt of a record, the Secretary should do the following:

a. Affix to it a unique number, consisting of the year of receipt (not the year of observation) followed by a hyphen and the next available unused number, starting with "I", for that year. If a record is represented by descriptions from more than one person, each description should receive the same number followed by a capital letter in sequence beginning with "A".

b. Record in a safe place at least the name of the

reporter, the name of the bird species, the date and locality of the record, and the record number.

c. Check the description for completeness and clarity and, if deemed desirable, request additional information from the reporter or other observers. Details thus acquired must be clearly marked as such and kept separate from the original submission; the original submission should not be returned to the reporter except in copy form.

d. Vote on the record (see voting).

e. When 5-10 reports have accumulated or three months have elapsed since receipt of the first record, send the record(s) to a Member along with a cover sheet, which must list, in order of circulation, the names and addresses of all Voting Members, with the Secretary listed last, as well as the numbers both of the records(s) and the circulation round.

2. Receipt by Member. Upon receipt of a record, the member should do the following:

a. Judge its validity and vote.

b. Send the record to the next Member as soon as possible.

c. Send the completed Validation Form to the Secretary.

d. The last member to vote should return the record to the Secretary.

e. Proposed lengthy absences from a Member's mailing address should be reported to the Secretary. The circulation may be rerouted to accommodate such absences.

3. Recirculation.

a. A record shall be recirculated automatically, together with the votes and comments of every member from the previous circulation (without the member's name), if it does not receive a decision vote on the first round.

b. If after recirculation the record still has not received a decision vote, it will be kept by the Secretary until it can be discussed at a meeting of the Committee.

c. The Secretary should solicit additional information from the reporter or other observers for any record scheduled to come before the assembled committee.

d. Prior to each meeting, the Secretary should inform

Members of any post-recirculation records scheduled for discussion.

e. A record that has not received a decision vote after two circulations is to be discussed and voted upon at a meeting of the Committee. The final decision must be made at the first meeting in which the record is discussed.

f. Regardless of whether or not a "final" decision is reached during the two circulations (but not at a meeting), any Voting Member may bring up a controversial record for discussion at a meeting of the Committee.

g. Regardless of whether or not a "final" decision is reached during the first circulation (but not during the recirculation), the Secretary may recirculate a record if he/she feels that the Committee's comments might alter the decision.

h. All decisions are final unless a record is to be resubmitted.

G. Voting.

1. Validation Forms. The votes of each Voting Member, together with his/her comments, if any, must be submitted on an official Validation Form or reasonable facsimile thereof. This form must include spaces for at least the: (a) record number, (b) name of the species, (c) name of the Voting Member, (d) date of review, (e) number of the circulation, (f) Voting Member's decision, and (g) comments.

2. Voting categories.

a. Accept

b. Reject, origin questionable.

c. Reject, identification questionable.

Note: (b) and (c) are both termed "non-accept" votes.

3. Abstentions.

a. Voting Members may abstain from voting, if, in their opinion, they do not personally feel expertly qualified to pass judgment.

b. Voting members will abstain from voting on their own records.

4. Secretary Vote. The Secretary must vote. On the first circulation, he/she must vote prior to sending the record to members (thus without seeing Members' comments).

5. Comments. On all circulations, an "accept" vote should

be supported by appropriate comments. "Reject" votes must be supported by appropriate comments.

6. Consultations. On the first circulation, a Voting Member should not discuss a record with another Voting Member prior to both having voted. On the second circulation, pre-vote discussions with other Voting Members are acceptable. On any circulation, a Voting Member may consult anyone outside the Committee before voting.

7. Voting Criteria. Except for the categorization of a species as "Hypothetical" (see below), the criteria used by a Voting Member for acceptance or rejection of a record are an individual matter and are not treated by this Handbook.

8. Change in members. A circulation in progress at the time new Member(s) is/are elected should be completed by the retired Member (except that removed Members do not qualify). Subsequent circulations, and hence in some cases final voting, should be completed by the new Member(s).

9. Tabulation. The Secretary will tabulate the results after all Members have voted.

10. Decision from Circulations. On any circulation round, with all Members voting:

a. A record is considered accepted if it receives a unanimous "accept" vote or it receives no more than one "non-accept" vote.

b. A record is considered rejected if it receives any combination of three or more "non-accept" votes.

c. A record is to be recirculated, or after two circulations is to be presented at a meeting, if it receives votes in any combination other than in (a) or (b) above.

11. Voting at Meetings. Voting on records at meetings should be by written ballot of those present.

12. Rejected Records. Any record that receives three or more "reject, identification questionable" votes will be published as "unaccepted, identification questionable." All other rejected records will be published as "unaccepted, origin questionable."

H. Official State List. Species reported from Georgia may be placed on one of three lists.

1. Regular Species List

a. A species shall be included in the Regular Species List of Georgia Birds when a specimen has been collected in

the state, identified by one or more qualified individuals, and preserved and deposited at an institution in the public domain, preferably at the University of Georgia Museum of Natural History.

b. A species shall be included in the Regular Species List of Georgia Birds when one or more photographs, tape recordings, or sonograms clearly demonstrating definitive characters have been obtained and submitted to the Committee. Photographs should preferably be published in *The Oriole* or elsewhere, with an account of the record and original photo-graph(s), tape(s), sonogram(s), etc., placed in the files of the University of Georgia Museum of Natural History.

c. A species shall be included in the Regular Species List of Georgia Birds when four or more independent sight records of separate occurrences have been made. Each record of occurrence must be submitted with substantiating details including species, exact locality, date, observer(s), optical equipment, habitat, length of time observed, description, reasons for identification, and the observers' experience with the species. These accounts should be published in *The Oriole* or submitted to the Committee on a standardized Georgia Rare Bird Record Form. Non-acceptance does not preclude publication of reports.

d. An introduced or escaped species, not directly dependent on man, must have bred successfully in the state for 10 years before acceptance onto the Regular Species List of Georgia Birds. Only those species maintaining a stable or increasing population through successful reproduction will be considered.

e. All species considered for the Regular Species List of Georgia Birds must also be on the current official A.O.U. Checklist.

2. Provisional Species List. Species for which fewer than four accepted sight records exist shall be placed on the Provisional Species List.

3. Hypothetical Species List. Species represented by only unsubstantiated accounts or deemed "non-accepted" by the Committee shall be placed on the Hypothetical Species List. Birds suspected of being escapes, birds directly dependent on human support, or whose origin as a wild bird is in doubt shall also be placed on the Hypothetical Species List.

I. Publication.

1. The Secretary shall report the vote results of the Committee to the person(s) submitting records prior to publication elsewhere.

2. The decisions of the Committee shall be published annually, under the authorship of the Secretary and/or others as desired, in the form of an Annual Report, in *The Oriole*. A section of this Annual Report shall be devoted to bringing the Georgia State List up to date.

3. The published data for accepted and rejected records should include at least the name of the species, date(s) of observation, and locality. Names of observers for rejected records should not be published. The term "unaccepted" should be used instead of "rejected." Other data may be added at the discretion of the author(s) and Voting Members.

4. Ideally, publication of a full account of an occurrence should not take place until after acceptance by the Committee. However, the Committee cannot veto publication of records in *The Oriole* but may append a comment about a published account of questionable occurrence, if the editor so desires.

5. Committee members shall follow all Committee decisions in all publications that they author, or annotate any deviations.

Historical Summary

This Handbook is a modification of the Bylaws of the Western Field Ornithologists' California Bird Records Committee. As written by William P. Blakeslee, 1995 Voting Member, and adopted December 2, 1995: William C. Hunter (Chair), Giff Beaton, John Paget, John Parrish, and Emil Urban.

Sources:

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