

MCBBA2 Block Survey Guide

Field Ethics and Personal Safety¹

If you are participating in MCBBA2, it goes without saying that you hold our local birdlife dear to your heart. Certainly, our principal motivation for conducting a study like this is wildlife conservation. Surely, then, birders themselves do not pose a significant threat to the wellbeing of wild birds? Even if that is true in the grand scheme, it seems worthwhile to review some basic points of field ethics, if only to rest assured that participants embrace, and perhaps disseminate by example through the wider birding world, a core set of ground rules that will keep our birds undisturbed during the most sensitive moments of their life-cycles. We append to these considerations a few thoughts about personal safety to bear in mind while conducting block surveys.

Observation vs avoidance. Here is a basic paradox. It is almost impossible to observe breeding birds without disturbing their peace in some measure. Yet we are asking you to record such observations. To begin with, then, you should be conscious of how your presence impinges on the objects of your investigation. Among the breeding codes that we have adopted for this study is **A** for ‘agitation’ – a form of behavior that will possibly be directed at you, the observer. If a bird is agitated by your presence, move away until it has stopped alarm-calling. Some of our breeding species are somewhat more demonstrative of agitation (from our perspective) than others. Think of Bewick’s Wren or Wrentit. Others seems always remote enough as to be nearly oblivious: Band-tailed Pigeon, Osprey. Nevertheless, birds are often aware of your presence even when you do not realize that they are. If a White-tailed Kite can detect a vole among bunchgrasses while kiting several meters above it, then it stands to reason that it can sense your heavy hiking shoes, even at several times that distance. If in doubt, you should assume the bird knows you’re there (and would prefer you were not), and minimize your disturbance. Note that birds are most prone to abandoning a nest site early in the nesting period (e.g., during building and laying).

Minimize your disturbance. Birds are most prone to abandoning a nest site early the nesting period (during building and laying). Being aware of this, you should always strive to minimize your impact on breeding birds. Consider again those signs of agitation. If you notice that your presence is disturbing to a bird, you should adjust your behavior and/or location. Now that you know the origin of the alarm or scolding call, the patient use of your field glasses from a somewhat greater distance may get you to higher behavior than simply **A**. In sum, you should 1) consider that the agitation you detect may well be caused by you; 2) move away from the bird and attempt to observe it from a distance.

Be measured and discreet. With this in mind, you should tread lightly and remain in the vicinity of a nest for only as long as necessary to gather the critical facts. This often means keeping your distance from any nest you find or suspect, and not necessarily seeking the exact location of the nest if you confirm nesting (e.g., if you detect behaviors like **NB** = nest building or **CF** = carrying food), despite your curiosity. Avoid prolonged presence in the vicinity of a likely

¹ This chapter benefited from numerous improvements proposed by Diana Humple and Megan Elrod of Point Blue Conservation Science.

nesting location. If you find a good sit spot to watch for nesting behavior, be silent and unobtrusive. Approach and leave silently, but also understand that your footfall can be heard as stalking, and your presence, however quiet, can create disturbance and stress. Take a minimalist approach to your advance and movement. If at any time you think you are altering a bird's behavior, you should leave the area.

Avoiding disturbance while taking coordinates. None of these recommendations conflicts with our need to derive geospatial coordinates for higher breeding behaviors, including nest locations. What should be emphasized here is that taking coordinates does not require that you stand near or under a nest. It is enough that you take note of the true or approximate location, either by drawing a point on a paper map or dropping a pin on a phone-based or online mapping tool. How close is 'approximate'? As a rule of thumb, the reported location should represent, as nearly as possible, the habitat and, if possible, plant community in which the nest (or higher behavior) was observed. If you find a Pacific Wren's nest beside a trail within a stand of redwoods, you may judge that your own location is an accurate datum for that detection; whereas, if you see a hawk's nest in a distant Douglas Fir, it is best that you use a map to approximate its true location.

Attracting predators. Corvids, and especially the jays, are uncannily aware of the attentions of humans. Closely inspecting a nest-site can betray its presence to an alert and marauding jay. Note that for visual predators like corvids, the danger is not limited to low nests; they can tell you're watching a bird or a nest even from a distance. If you are undertaking an extended stake-out, please be aware of the corvids in your immediate vicinity, and avoid bringing their attention to the birds you are watching, if any appear to be nesting nearby. NEVER approach a nest when you can see or hear a nest predator in the area. If you must approach a nest when there is not a predator present, or you happened upon one, it is helpful to perform "dummy nest checks" to get any visual or scent predators off track: walk around and peer at a few other shrubs or locations similar to where the nest was located, distributing the attention you paid to the nest. Also, especially if you are off-trail, avoid "out and back" paths to a nest (i.e., keep walking past the nest in the direction you were going, or meander through the area to deter curious predators). Also remember that domestic cats pose a significant threat to wild birds – and are equally skilled as interpreters of human gesture.

Revealing the location of nests. Do not reveal nests to the public or to birders who are not on the project and unlikely to be aware of these guidelines. (Please consult your RC for rare exceptions, such as discrete outreach opportunities that will not result in disturbance.) Excessive human bustle, especially when it brings about a sudden change that the birds in question are unused to, can – and does – cause nest failure, for reasons mentioned above (i.e., through disturbance and potential abandonment, or bringing it to the attention of predators). MCBBA2 is asking that you submit coordinates for higher territorial and nesting behavior, including nest locations, should you determine them. However, these data are gathered for the purpose of mapping breeding behavior onto landscape features, especially plant communities. They will not be made public, though general geographic ranges may be included in technical publications. If you are recording PR and CO codes in eBird, be forewarned that eBird's reviewers are not normally looking for nesting information among the observer's annotations. If you are using eBird for recording field observations, please delay publication of your eBird list until after you have performed data entry in our project database (or submitted your data directly to project

staff); whereupon you may scrub your eBird submission of nest locations and geospatial coordinates.

Documenting unusual records. As a means of documenting unusual records, you may be asked by project staff to obtain photographs of a nest. Do so, if asked, without unduly disturbing the nest or its inhabitants. Your photo does not need to be of high quality, only good enough for the utilitarian purpose of documentation. Always favor the welfare of the bird(s) over the quality of your photograph. We will, however, find other means of documentation if a photograph would cause any disturbance. Should this be the case, work with your Regional Coordinator to find an acceptable method (such as a second witness, or further written or hand-illustrated details).

Using playback, ‘mob tapes’, etc. MCBBA2 is asking its volunteers not to use playback or other sound recordings or sound synthesis (including mechanical devices, such as bird calls) for any bird species. It is illegal to disturb, including through the use of playback, any threatened or endangered species (e.g., Spotted Owls, Ridgway’s Rails, Black Rails). Sound recordings are often effective means to attract birds or make them ‘show’, but they are also a form of disturbance and will irritate, agitate, or spook. You should always be patient, willing to watch and wait. We encourage sit-spots or, so to speak, ‘becoming a tree’. Leave the playback to licensed, professional biologists, who know to use it sparingly and in accordance with received protocols, particularly during the sensitive nesting season.

Pishing, clapping, owl mimicry, etc. Much the same could be said of human-produced sounds. They should be used sparingly, if at all, and never in order to draw out or flush a bird you strongly suspect to be on or near its nest. Exercise especially strong restraint in the presence, known or suspected, of listed birds or those ‘of special concern’ (on which see further below).

Walking off-trail. It is difficult to formulate a single rule for all situations. In some cases, such as a visit to a private farm or ranch, there may be little choice but to walk off-trail. In others, it may be positively desirable to deviate from a trail in order to approach habitats otherwise inaccessible. Marin County is exceptionally well served by its trails and byways, so this point will often seem moot. In many cases, too, your ears, recording equipment, and good optics will expand the terrain you can cover. Do not endanger yourself. Also, also, avoid treading in rare and sensitive habitats, even where access is not expressly prohibited. Two such habitats that come to mind are salt marsh and fragile serpentine communities. In other cases, guidance should be available for public lands; on private property, common sense should guide you. Seek out information on lands not clearly marked, such as State-owned lands not obviously part of parks. Most State-owned lands are considered sensitive habitats and require permission to enter. Additionally, ground nesting species are of particular concern and great care should be taken to avoid stepping on nests or disturbing these sensitive, often rare species, which are often just off trail. See above under predators regarding avoiding making out and back path (through disturbed vegetation or simply a scent trail) to a nest. Again, behaviors can be observed and breeding confirmed from a safe distance without need to enter difficult, easily disturbed habitats.

Know (and generally keep a greater distance from) your ‘listed’ species. Be aware of any ‘listed’ species that may occur in your block. For such species, extraordinary care should be

taken. These include five categories of birds, here accompanied by the species known to breed in Marin County:

- Federal endangered [Ridgway's Rail ssp *obsoletus*]
- Federal threatened [Snowy Plover, (Northern) Spotted Owl ssp *caurina*]
- State endangered [Ridgway's Rail ssp *obsoletus*, Bald Eagle]
- State threatened [Black Rail, (Northern) Spotted Owl ssp *caurina*, Tricolored Blackbird]
- California species of special concern (by priority listing scheme) [Tricolored Blackbird (1), Ashy Storm-Petrel (2), Burrowing Owl (2), Olive-sided Flycatcher (2), Loggerhead Shrike (2), Purple Martin (2), Yellow Warbler (2), Grasshopper Sparrow (2), Northern Harrier (3), Short-eared Owl (3), Samuels Song Sparrow (3)]

In most, if not all, cases, data on these birds will be gathered under controlled conditions by professional biologists. If you know this to be the case in your block, please leave direct investigation to them; if you have any doubts or questions, please communicate with your RC or the atlas coordinator. For endangered and threatened species, it is unlawful to intentionally disturb a bird at its nest (i.e., to disrupt their normal behavior related to nesting, and also related to foraging or sheltering) without a permit. Disruption can occur simply by entering the habitat for sensitive tidal marsh species (Ridgway's Rail, Black Rail, Samuels Song Sparrow). Disruption also includes the use of playback and should not be employed for these species (see above section).

Review the ABA Birder's Code of Ethics. <https://www.aba.org/aba-code-of-birding-ethics/>

Respecting private lands. Never trespass on private property. In densely populated areas, use only public rights-of-way, unless expressly invited onto a property by a landowner or current tenant. In the case of larger tracts of private property, such as farms, ranches, educational institutions, etc., please seek express permission to enter and survey. When requesting permission, always explain clearly what you are doing (you may mention the Marin County Breeding Bird Atlas), and make sure you cooperate with the owners or managers on fixing the time, duration, and frequency of your visits. Needless to say, your courtesy and compliance with the landowner's rules are highly important. Remember that you want to leave a good impression so that MCBBA2 might be invited back. Your RC will help you find names and contacts of owners. If you need help getting in touch with them, please work through MCBBA2 staff. Owners offer a wide spectrum of access and permission, from 'NO!' all the way to 'Come any time!' If you are denied access, your RC will help you devise a plan to achieve the best practicable results.

Thoughts about your personal safety. You should never permit your sense of duty, as defined by this project, to supersede your own instinct for self-preservation! Nor should you ever attempt to secure 'good' or 'sought-after' records at the risk of life, limb, health, or good cheer. Here is a proposed checklist of things to remember while preparing for your block survey:

- A minimal first-aid kit: tweezers, snips, bandages or gauze + adhesive, an elastic wrap for ankle or knee, mosquito salve, antihistamine
- Sun hat, sunscreen, extra water

- Extra layers, extra socks, and a rucksack for storage
- A good trail map (even if you have a smart phone)
- A well-charged communication device and emergency telephone numbers

Young birders. Volunteers who are younger than 18 years old must provide atlas staff with proof of permission to participate from their parents / legal guardians. Please get in touch with atlas staff for a permission form, which incorporates a liability waiver. Also, those younger than 18 must be accompanied by an adult when conducting official site visits for MCBBA2. For more information, please get in touch with project staff.

Public health measures. Current recommendations and guidelines on public health are found here: <https://www.marinhhs.org/public-health>. Be respectful of the health concerns of others, especially the elderly.

Poison oak. You should be able to identify poison oak; sensible precautions are almost always enough. With some experience, you will come to recognize the conditions most conducive to a thick growth of poison oak, and, as you do, you'll learn how to avoid it. By the beginning of the official field season (15 April), most poison oak has put out new leaf growth, and its oily leaves are glistening in the mottled sunlight that it favors. It is unmistakable. But take care, because this is a versatile plant that can grow in knotted bushy patches or climb vine-like, sometimes mingling its probing leaves among those of another bush or tree more amicable to human touch. Many nature-lovers manage to spend countless hours in the field without taking any special precautions, other than keeping a watchful eye out. If you have reacted severely in the past, please protect yourself against possible contact and consider packing your favorite home- or commercial remedies. If you cannot safely avoid a stand of poison oak, consider using remote means for detecting the presence of birds: make a recording of a dawn chorus, bring a telescope, etc. Get in touch with your RC to seek help with difficult terrain.

Ticks. Via a simple internet search, you can discover ways to protect yourself from ticks. For what it's worth, Marin County is not a location of high incidence of Lyme disease, yielding only minute numbers of positive hits on ticks submitted for testing. According to the Marin County Department of Health and Human Services, "Nationwide 95% of confirmed Lyme disease cases are reported from the 14 states that are considered high-incidence Lyme disease areas (i.e., Connecticut, New Jersey, and Virginia)" [<https://www.marinhhs.org/lyme-disease-borrelia-burgdorferi>]. Check for ticks if you brush against grasses and low-growing shrubs. If you find a tick attached, draw it out straight upward by grasping it as near your skin as possible, preferably with tweezers, and giving a slow, gentle pull. Do not twist the tick's body. Remove as soon after detection as possible and swab immediately with alcohol and / or hydrogen peroxide.