Records Committee, Iowa Ornithologists' Union Printed: 08/05/93

Tricolored Heron Record Number: 89-13
29 Apr 1989 Classification: A-D
Cone M., Louisa Co., IA
*Kent
IBL 59:78, 79, 61:84, Kent 1991

DOCUMENTATIONS
Thomas H. Kent
Dick Shaffer (note)
LETTERS
T. H. Kent to I.O.U. Records Committee, 24 Sep 1989
Bruce Peterjohn to Thomas H. Kent, 16 Sep 1989 [excerpt included with Kent's letter]
Ross Silcock to Carl Bendorf, 29 Jul 1989
Carl Bendorf to Records Committee, 17 Aug 1989 [includes material dated to 24 Sep]
REFERENCES
Field Reports: IBL 59:78, 79
Records Committee: IBL 61:84
Kent, T. H. 1991. Tricolored Heron at Cone Marsh. IBL 61:1-4.
VOTE: 3 A-D, 3 NA, 1 abstain
A-D. It's about time.
NA. Immature Tricolored Heron is eliminated by lack of chestnut in neck and back. Because a nearly completely moulted Little Blue Heron seems remotely possible at this time I am voting NA for now. The neck and back color seems to match Little Blue Heron as good or better than Tricolored. No maroon or buff lower back feather were described even though I would expect a Tricolored to be in breeding plumage at this time of year. I can't analyze the yellow feet comment except to wonder what color the legs were. If the described white areas were very clearly seen and well defined then this vote should be changed to A-D.
NA. I have two reasons for not accepting this record. First, the description is not as complete as I would like for a first state record--no mention of bill shape or size, white front of neck, color of legs. Also, I'm not sure whether the bird was seen well or not. My second reason for not accepting this record concerns an opinion published by this committee in IBL 57(3): 78. I quote part of it "...a sight record by a single observer for a species that is new to the state and difficult to identify should be beyond doubt." This record clearly fits the first two reasons, and, if it was not seen very well, I think it fits "difficult to identify."
A-D. Combination of white belly and dark neck are diagnostic for this species.
NA. Problem is possibility (albeit slight) of Little Blue with white belly. "Blue bill and yellow feet" could apply to such a Little Blue. Also, neck described as 'dark', whereas Tricolor has white foreneck. Although expected, a first state record needs virtually 100% certainty. Did the other observers document?

1st REVOTE: 3 A-D, 3 NA, 1 abstain
A-D. NAs evidently feel there is potential for confusion with

Little Blue. Given the time of year, I feel an immature Little Blue would have been mostly white with some blue splotching, not mostly blue with some white. Also, I have seen a number of molting or "calico" Little Blues, and amid the variety of combinations, have not seen one that has the symmetry of the one here described. Most are rather randomly splotched. I agree that the details were less thorough than we would have hoped, but disagree that this is a difficult-to-identify species.

NA. I still feel more supporting details the author seems to be describing a bird that was not seen as well as he would have liked to.

NA. I concur with the other NA that bird is not well enough described for a first state record. Furthermore, the opinion published by this committee concerning single observer, first state records seems applicable to this record.

A-D. I have seen scores of immature Little Blue Herons both here in Iowa, Florida and Virginia and I do not think one could have an all white belly without some white in the back and wings. I do not think there is a molt sequence that would come close to the coloration of the description of this bird. I have also seen at least 50 Tricolored Herons in Florida and Virginia and the Kent description is consistent with this species. Long thin neck also suggests Tricolored. At times the white foreneck is hard to see or is in shadow and looks dark. The description does adequately eliminate any other species and appears beyond doubt to me.

NA. My original feelings on this are added to by 2 other NA votes--although possibly a correct ID, sighting was brief, and not adequate for first state record.

2nd REVOTE: 4 A-D, 2 NA, 1 abstain

A-D. This record is clear cut: an extremely easy-to-identify species with conclusive diagnostic features that were clearly present, seen, and documented. In addition, this observer is experienced with this species and is also generally quite conservative with his identifications. Examination of the available literature by Kent shows no factual support for the possibility of some form of Little Blue Heron. Careful study of the original documentation form also should make it clear that this bird was well seen under good conditions.

A-D. This record transends "beyond reasonable doubt." This is a fully adequate description of a completely unmistakable bird.

A-D. I will try to explain my NA vote, which as I look back was bias based on my preception of the viewing conditions. 1) Overcast means to me a condition in which distance viewing is suspect in regards to detail and color. 2) The bird as I read the documentation was always into the sun east and southeast of the observer, poor conditions for color distinction. 3) The time of viewing, although reported as nine minutes, I calculate to be only 30 seconds inside the 100 yd range. 4) The bird was reported as approaching to "50 yds at the closest" indicating that it's closest approach was somewhere outside 50 yds. I then looked at 5 different field guides, deciding that since only 2 guides showed

immatures, and they both had large amounts of chestnut, I could eliminate immatures. I assumed and still think that the time was right for a nonimmature with a blue bill to be in breeding plumage. All the dark areas described still seem to fit either species. So, then I thought a Little Blue (much more expected in Iowa) could match this description if it had almost completed it's molt to an adult. I therefore explained away the most significant field mark reported, the white belly. Although I have seen several hundred Tricolored in Florida and Texas my experience is basically useless. I can't even recall any plumages or age differences. The only thing I can remember is that they were not at all difficult to identify. I am changing my vote to AD for the following reasons: 1) To see the shinier blue in the wing coverts tells me the bird was seen at least at times in good light. 2) I somehow disregarded or overlooked the underwing coverts as being reported as white a diagnostic field mark. 3) As the A-Ds and the Abstainee pointed out no one has apparently ever seen a Little Blue with only a white belly left in it's molt to adult.

NA. See attached comments. [2 pages attached]

A-D. I do not see where the NA voters could possibly use the argument of the brief sighting period and not seen well enough for a first state record on this particular record. All necessary diagnostic field marks were noted and indeed substantiate this sight record. It is true that I did not do indepth research on this record or this species because at the time of voting (and on the revote) I did not think that we had a documentation that was so poorly written or the bird was so poorly described that it warranted all that much research. To me the bird was seen and described adequately enough for this record to be accepted as a documented state record. The additional comments to the revote that were circulated with this batch says it all. I am anxious to see the NA voters rebuttal; but I do think we need to vote on the record as documented.

NA. This is a very difficult decision. So-called 'easy-to-identify' birds often are hardest to document in writing, just as docs of 'difficult-to-identify' birds are easiest to criticize. I believe I raise legitimate reasonable doubts based on plumage characters, and also present data to indicate occurrence of this species in Iowa is not a foregone conclusion. [5 pages attached]

3rd REVOTE: 7 A-D

A-D: This provides Iowa with a long expected record. To me the document is sufficient for acceptance of a Tri-colored Heron and I do not understand the reasons for not accepting the record on its first circulation.

A-D: The new material consisting of a map of records and chart of seasonal occurrence from records in American Birds is very interesting. Clearly, late April is a good time with a large peak in May illstrating the spring overshoot nature of this species.

This bird is not a common fall migrant and doesn't seem to be a post-breeding wanderer. This is in agreement with an earlier NA evaluator whose map looked a little different from this one.
In the final analysis, however, this remains an undeniably easy bird to identify, even under less ideal conditions than in this record. My goodness, this was a medium sized heron that flew right by an experienced oberver at 50 yards! I'm convinced!!

A-D: I think we've commented enough on this one, and I feel the preponderance of evidence supports the identification as a Tri-colored Heron.

A-D: I will stay with my changed revote of A-D due to white belly and underwing linings. These are, as far as I can determine from the limited useful info available, diagnostic. In my mind two thing would further solidfy this sighting. 1) a detail description of the viewing condition not just the view of the bird. What kind of overcast was it bright/dark? Was the color determined the whole way or was it just available at the closer ranges? Was there any useful field marks noted as the bird set in the tree and how far away was this estimated to be. 2) Is there any chance to get written info from Dick Shaffer who go a good look at the bird?

A-D: After reading all the comments and additional information that came with this re-review I am still drawn to the same conclusion as the first round of review which to me describes a diagnostically described Tri-colored Heron and is beyond any form of reasonable doubt. The white belly, dark neck, long thin neck, white underwing coverts are all mentioned in the original documentation and are (when seen together, especially) diagnostic for this species. Nothing in the comments on subsequent reviews has brought forth any evidence that would change my vote to anything but A-D:

A-D: I now believe this record acceptable "beyond reasonable doubt".

CONTENTS

FRONT COVER: Long-eared Owl, Sioux City, Woodbury County, 9 December 1990. Photo by Randall D. Williams.

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BACK COVER: Meeting Dates, Report Deadlines, Birdline, Materials Available.

TRICOLORED HERON AT CONE MARSH

THOMAS H. KENT

On 29 April 1989 at 10:50 a.m., I was on the dike at the middle of the east pond at Cone Marsh, Louisa County, when I saw a heron flying over the trees to the south. It appeared too small for a great blue, so I put my glasses on it and immediately noticed the white belly and long dark neck and head. The bird flew over the dike in front of me, across the pond and lit in a small tree. After a few minutes it flew northwest to the corner of the marsh. I did not see it land. Back at the car at 11:04, I dictated the following, "A dark-fronted, white bellied heron flew over. Dark from head to mid-breast, and all white from there to tail. The bill was blue, feet yellow. As the bird turned, I could see an all slate-blue upperwing, shinier blue in the coverts. From underneath, the wing coverts were white and primaries dark blue. The tail was about the same color as the upperwing surface. It was a medium-sized heron, about the size of a Little Blue Heron." The bird had a long thin neck, held crooked in flight and straightened briefly when it landed. I was not able to tell if there was white in front of the neck, and I did not see any plumes. The sky was overcast, and I estimated that the bird came as close as 50 yards as I viewed in with a 10x binocular.

As I made my way back across the dike, I met the Shaffers. I told them about the bird, dictated notes at the car, searched briefly for the bird at the north end of the marsh, and drove to Lone Tree to call other birders. After I had returned and searched the north end on foot, I found a note on my car from Dick Shaffer, telling me that they found the heron and got a good look at it. Over the next two days, many people searched for the bird, but it was not seen again. Months later, I was intrigued to find on the cover of The Loon a picture of a Tricolored Heron that had arrived in Bloomington, Minnesota, on 4 May 1989 (Hertzel 1989). The same bird?

Although there are no previous records of Tricolored Heron in Iowa, this species has long been expected (Dinsmore, et al. 1984) and has occurred in all states touching Iowa (Figure 1). Although I had thought about ways to find this species in Iowa, I had never considered it an identification problem when I had seen it in the South and was not expecting to see it on this morning. I identified the bird instantly, looked at all parts of the bird as it flew over, dictated notes five minutes after observing the bird, and then became preoccupied with finding it again for others. The bird later became an identification problem when the Records Committee failed to accept the record on a split vote. This had the positive effect of forcing me to learn all I could about this species and similar species. I submitted the results of my research to the Records Committee, and the record was later accepted.

The field guides have very brief descriptions of Tricolored Heron, do not indicate any identification problems, and do not discuss aging. Peterson (1980) provides a typical description, "Note the contrasting white belly, the key field mark of this very slender, dark heron. Rump white." The "white rump" bothered me as I had not seen it in spite of having a good view of the upperparts, and I did not find the white rump illustrated in any of the many books I ended up looking at. In the spring of 1990 in Texas, I did, however, have a chance to look at a number of Tricolored Herons. I saw the white rump on some, but not others. Another distressing point was my failure to describe white line down the foreneck. I do not know whether I saw this mark and failed to record it, whether I failed to look for it, or whether it was not visible. I

found some photographs I had taken in Florida in which this mark is not conspicuous even on birds at close range that were facing the camera. I was not at all surprised not to see plumes, as these may be held down in flight or may be inconspicuous in one-year-old birds. In hindsight, I would have looked at the size and shape of the bill better, concentrated more on the foreneck and rump, and recorded the leg color (the feet were yellower than the legs). I was pleased that I had noted the white underwing coverts sharply contrasting with blue flight feathers, a mark that I had not recalled from my previous experiences.

The only species mentioned as an alternative possibility was an immature Little Blue Heron. According to Palmer (1962), the molt of Little Blue Herons from white to blue-gray begins in late first winter (prealternate I molt) and involves head, neck, and mantle feathers, continues from early in the second year (prebasic II molt) involving the same areas and inner secondaries, and is completed in late winter or early spring of the second year (prealternate II molt). The pattern in the second year with white primaries and variable blue-gray wing coverts is opposite that of Tricolored Heron, which has dark primaries and white underwing coverts. I have not seen one of these "calico" or "pied" herons, but according to Eckert and Karalus (1981), "the white birds get blotched, speckled, patched, and spotted with blue--a phenomenon unique among the herons." In Mississippi, Toups and Jackson (1987) note "First-year birds are white; second-year birds are mottled (called 'calico'); these immatures generally outnumber adults at all seasons." To my knowledge, Little Blue Herons seen in the upper Midwest in spring have the adult, all-blue plumage, but even if a calico bird were to appear, it would not have the neat, anatomically uniform markings of a Tricolored Heron.

Figure 1.Uupper Midwest records of Tricolored Heron through 1989. Triangles point up for spring, down for fall records. Large dots are summer records, stipled areas have more than 10 records. Black area is normal range. Plus signs are states with one or more records, minus signs are states with no records.

Someone suggested to me that there might be other herons in the world that were similar to Tricolored Heron. Of the 59 herons of the world (Hancock and Elliott 1978), I found only three white-bellied herons; they look quite different from Tricolored Heron and are native to Australia, the East Indies, and southern Asia.

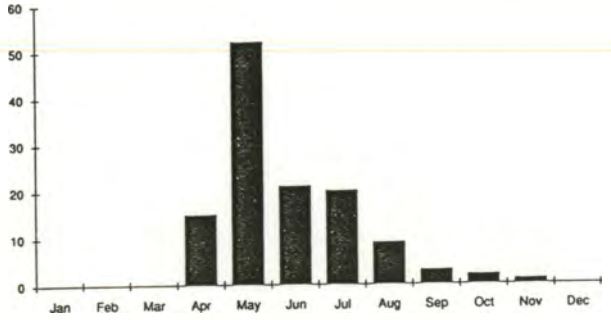

Figure 2. Midwest Tricolored Heron records by month.

One Records Committee reviewer asserted that Tricolored Heron is unlikely in Iowa. I plotted all the records that I could find in states and provinces away from the normal range (Figure 1). Tricolored Herons are seen almost every year in Illinois across from St. Louis and near Chicago and at the eastern end of Lake Erie. There are also many records from Indiana, Wisconsin, and Minnesota, and scattered records to the west of Iowa. I was surprised to learn that Tricolored Heron occurs most commonly in the Midwest in spring with some birds lingering into summer and a few into fall (Figure 2). In contrast to Little Blue Heron, juvenile Tricolored Herons

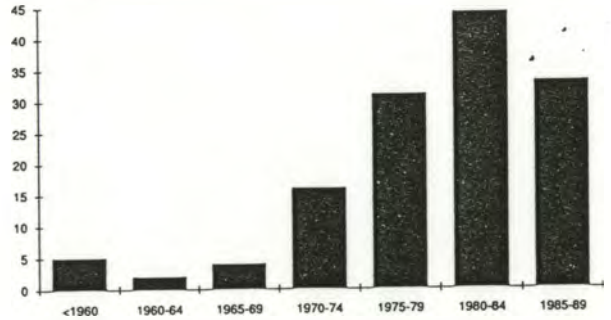

Figure 3. Midwest Tricolored Heron records by year.

are not seen in the upper Midwest in late summer. Some of the spring Midwest birds have been described as one-year-old birds and others may have been, as some birds retain juvenile features over winter into the next spring and others do not. Full breeding plumage is seen only on the breeding grounds and even then it is short lived.

The movement of Tricolored Herons into the upper Midwest is a recent phenomenon, because there are few records before 1970 and a sharp increase since then (Figure 3).

Although the Tricolored Heron was a long-overdue, easily identified bird, it provided a valuable educational experienced birder for me.

LITERATURE CITED

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211 Richards Street, Iowa City, IA 52246

BIRDING CONE MARSH

CAROL THOMPSON

Cone Marsh State Wildlife Management Area is located in northwestern Louisa County on a lowland between the Iowa and Cedar rivers. This lowland area, called the Lake Calvin Basin, was thought to be the lakebed of a glacial lake formed when Illinoian (300,000 years before present) ice advanced into eastern Iowa and blocked these southeast-flowing rivers. More recent studies have shown that the landscape is actually composed of younger Wisconsinan and Holocene (less than 30,000 years before present) deposits. Alluvial features such as broad floodplains, terraces, and dunes are the dominant landforms, creating large areas of flat terrain. The marsh, located in the Iowa River floodplain, was formed from a series of abandoned meander loops (oxbow lakes).

The 701-acre wildlife area was acquired by the state in 1960 with smaller purchases in 1968 and 1969. Much of the actual marshland is owned by two private hunting clubs. The boundary of the state land is indicated on Figure 1. There are no facilities at the marsh. Part of the area is diked to provide artificial water control. The marsh can be especially productive for migrating waterfowl and shorebirds and, in some years, marsh birds (rails, herons, etc). Rarities in recent years include Cinnamon Teal, White-faced Ibis, Little Blue Heron, Tricolored Heron, Black, Yellow, and King rails, and Common Moorhen. The habitat fluctuates with changing water level and ranges from numerous pools of open water to vegetation-covered mudflats. The pools at the north end are the deepest and tend to be permanent. The pools at the south end fluctuate more and can provide excellent mudflats in late summer. Other habitats include old fields with a lot of brush, dense willow stands, and a small area of mature timber (mostly burr oak). Atlasing efforts at the marsh and surrounding area yielded 76 species, 70 percent of which are probable or confirmed nesters.

Cone Marsh is an excellent place for group or individual outings and can be birded either by foot or by car. To reach the marsh, drive south from Lone Tree on X-14 (this road becomes G-28 at the Louisa County line) for approximately 6 miles. At this point the paved road turns east, and there is a gravel road to the south. This is the northwest corner of the map in Figure 1. If you are birding in the early morning, it is usually best to continue east on the paved road for another 1.25 miles and then turn south (left) on a gravel road. This allows a tour of the marsh in a clockwise direction with the sun behind you for the first few stops. Drive south along the road approximately 0.75 miles until you can overlook the marsh (#1 on Figure 1). All of this side of the marsh is private property. The old railroad car at the nearby farm has given this spot the colloquial name "caboose." Scoping the marsh from here can be very productive. Many ducks, geese (including sporadic large flocks of Snows and occasional Greater White-fronted), shorebirds, and wading birds may be seen. There is a little drainageway just off the road leading down to the marsh where American Pipits and Common Snipe have been seen.

Continue south to the intersection and turn west. During migration both Lapland and Smith's longspurs are sometimes found in the cultivated fields to the south (#2). Check the other fields in the general area as well. NOTE: these fields are private property, but area farmers have been very cooperative and have allowed hiking, especially in early spring. After a snowstorm, the birds can often be found along gravel roads in the general area.

89-13

89-13

To: Records Committee
From: Carl Bendorf, Secretary
Date: August 17, 1990

Subject: 89-13 Tri-colored Heron

Enclosed are all the materials for your re-review. Due to the amount of material, below is a table of contents for your reference.

1. Letter from Ross Silcock requesting re-review.

2. Copy of original documentation. Since this is a third generation copy and kind of fuzzy, I typed a transcription which appears on the reverse side.

3. Copy of note left on Kent's car by Dick Shaffer.

4. Print-out of record committee results and comments from three rounds of review labeled "Vote", "Revote", and "2nd Revote".

5. Additional Comments to Revote received from a committee member on the 2nd Revote.

6. Two pages of comments from a committee member from the 2nd Revote.

7. Five pages of comments (including two pages of maps) from a committee member from the 2nd Revote.

8. Nine page letter from Kent to the Committee dated 24 September 1989. This letter led to 2nd Revote and includes:
   a. Six pages from Kent including additional research.
   b. Excerpt of letter from Bruce Peterjohn, Regional Editor of American Birds.
   c. Copy of note from the Loon about a Tri-colored Heron seen shortly after Kent's observation. Also includes copy of cover photo showing Tri-colored Heron.

9. Map and graph submitted by Kent showing his research on Tri-colored Heron records. (These two items have not been previously circulated).

Batch 10
1989
89-13

Mr. Carl Bendorf
Secretary
Iowa Ornithologists' Union Records Committee
Iowa City, IA

29 July 1990

Dear Carl,

Please accept this letter as a request to re-evaluate IOU Records Committee # 89-13 (Tricolored Heron, Cone Marsh, 29 April 1989).

Although I have no new evidence bearing directly on the record itself, I am basing this request on what I believe was a misjudgement on my part. This misjudgement was a result of my overly strict application of the standard "beyond reasonable doubt" stemming from my increasing perception that records were being rejected by the Records Committee based on what I perceived to be increasingly exacting standards. I felt that in order to engender consistency in the output of the Committee I should toughen my own standards. A significant result was my rejection of # 89-13.

In retrospect, and knowing now some of the problems that were going on within the Committee during the period when # 89-13 was being evaluated, I believe that my judgement was unnecessarily exacting and in fact a violation of the operating procedures of the Committee, and, I submit, sufficient basis to re-evaluate # 89-13 in a different environment.

Yours Sincerely,

Ross Silcock

Tabor, Iowa.

DOCUMENTATION FORM

For Extraordinary Bird Sightings in Iowa

89-13

What species? Tricolored Heron *How many?* 1

Location? Cone M., Louisa Co., IA

Type of Habitat? marsh

When? date(s): 29 April 1989 *time:* 10 50 *to* 10 59

Who? your name and address: Thomas H. Kent, 211 Richards St., Iowa City, IA 52246

Others with you: none

Others before or after you: Dick Shaffer saw bird sometime in the next hour

Describe the bird(s) including only what you observed. Include size, shape, details of all parts (bill, eye, head, neck, back, wing, tail, throat, breast, belly, undertail, legs, feet). Also mention voice and behavior.

I was on the dike at the middle of the east pond when I saw a heron over the trees to the south. It appeared too small for a Great Blue, so I put my glasses on it and immediately noticed the white belly and long dark neck and head. The bird flew over the dike in front of me, across the pond and lit in a small tree. After a few minutes it flew northwest to the NW corner of the marsh. I did not see it land. Back at the car at 11 04, I dictated the following, "A dark-fronted, white bellied heron flew over. Dark from head to mid-breast, and all white from there to tail. The bill was blue, feet yellow. As the bird turned, I could see all slate blue upperwing, shinier blue in the coverts. From underneath the wing coverts were white and primaries dark blue. The tail was about the same color as the upper wing surface. It was a medium-sized heron, about the size of a Little Blue Heron." The bird had a long thin neck, held crooked in flight and straightened briefly when it landing. I wasn't able to tell if there was white on the front of the neck and I didn't see plumes.

Similar species; how eliminated:

Size and white belly eliminate other herons.
Apparently an immature or non-breeding plumaged adult.

Did any one disagree or have reservations about the identification? no
If yes, explain:

Viewing conditions: give lighting, distance (how measured), optical equipment.

Overcast. 50 yards at closest (east). 10 x binoculars.

Previous experience with species and similar ones: have seen many in south

References and persons consulted before writing description: looked at field guide about an hour after dictating

How long before field notes made? 5 min *this form completed?* 6 hours

Send completed form to Field Reports or CBC editor (address on back cover of Iowa Bird Life).

89-13

Tricolored Heron 1
Cone M., Louisa Co., IA
marsh
29 April 1989 10:50 10:59
Thomas H. Kent, 211 Richards St., Iowa City, IA 52246
none
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Looked at field guide about an hour after dictating.

5 min. 6 hours.

89-13

Tom -

We saw the
tricolor come
back to where
you first saw it -

It is at the far end
of the dike and
then to the right.
I got a good look
at it.

Nick Shaffer

Records Committee, Iowa Ornithologists' Union Printed: 07/24/90

Tricolored Heron
29 04 1989
Cone M., Louisa Co., IA
*Kent

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Classification: NA

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A-D. It's about time.

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REVOTE: 3 A-D, 3 NA, 1 abstain

A-D. NAs evidently feel there is potential for confusion with Little Blue. Given the time of year, I feel an immature Little Blue would have been mostly white with some blue splotching, not mostly blue with some white. Also, I have seen a number of molting or "calico" Little Blues, and amid the variety of combinations, have not seen one that has the symmetry of the one here described. Most are rather randomly splotched. I agree that the details were less thorough than we would have hoped, but disagree that this is a difficult-to-identify species.

NA. I still feel more supporting details the author seems to be describing a bird that was not seen as well as he would have liked to.

NA. I concur with the other NA that bird is not well enough described for a first state record. Furthermore, the opinion published by this committee concerning single observer, first state records seems applicable to this record.

A-D. I have seen scores of immature Little Blue Herons both here in Iowa, Florida and Virginia and I do not think one could have an all white belly without some white in the back and wings. I do not think there is a molt sequence that would come close to the coloration of the description of this bird. I have also seen at least 50 Tricolored Herons in Florida and Virginia and the Kent description is consistent with this species. Long thin neck also suggests Tricolored. At times the white foreneck is hard to see or is in shadow and looks dark. The description does adequately eliminate any other species and appears beyond doubt to me.

NA. My original feelings on this are added to by 2 other NA votes--although possibly a correct ID, sighting was brief, and not adequate for first state record.

2nd REVOTE: 4 A-D, 2 NA, 1 abstain

A-D. This record is clear cut: an extremely easy-to-identify species with conclusive diagnostic features that were clearly present, seen, and documented. In addition, this observer is experienced with this species and is also generally quite conservative with his identifications. Examination of the available literature by Kent shows no factual support for the possibility of some form of Little Blue Heron. Careful study of the original documentation form also should make it clear that this bird was well seen under good conditions.

A-D. This record transends "beyond reasonable doubt." This is a fully adequate description of a completely unmistakable bird.

A-D. I will try to explain my NA vote, which as I look back was bias based on my preception of the viewing conditions. 1) Overcast means to me a condition in which distance viewing is suspect in regards to detail and color. 2) The bird as I read the documentation was always into the sun east and southeast of the observer, poor conditions for color distinction. 3) The time of viewing, although reported as nine minutes, I calculate to be only 30 seconds inside the 100 yd range. 4) The bird was reported as approaching to "50 yds at the closest" indicating that it's closest approach was somewhere outside 50 yds. I then looked at 5 different field guides, deciding that since only 2 guides showed immatures, and they both had large amounts of chestnut, I could eliminate immatures. I assumed and still think that the time was right for a nonimmature with a blue bill to be in breeding plumage. All the dark areas described still seem to fit either species. So, then I thought a Little Blue (much more expected in Iowa) could match this description if it had almost completed it's molt to an adult. I therefore explained away the most significant field mark reported, the white belly. Although I have seen several hundred Tricolored in Florida and Texas my experience is basically useless. I can't even recall any plumages or age differences. The only thing I can remember is that they were not at all difficult to identify. I am changing my vote to AD for the following reasons: 1) To see the shinier blue in the wing coverts tells me the bird was seen at least at times in good light. 2) I somehow disregarded or overlooked the underwing

coverts as being reported as white a diagnostic field mark. 3) As the A-Ds and the Abstainee pointed out no one has apparently ever seen a Little Blue with only a white belly left in it's molt to adult.

NA. See attached comments. [2 pages attached]

A-D. I do not see where the NA voters could possibly use the argument of the brief sighting period and not seen well enough for a first state record on this particular record. All necessary diagnostic field marks were noted and indeed substantiate this sight record. It is true that I did not do indepth research on this record or this species because at the time of voting (and on the revote) I did not think that we had a documentation that was so poorly written or the bird was so poorly described that it warranted all that much research. To me the bird was seen and described adequately enough for this record to be accepted as a documented state record. The additional comments to the revote that were circulated with this batch says it all. I am anxious to see the NA voters rebuttal; but I do think we need to vote on the record as documented.

NA. This is a very difficult decision. So-called 'easy-to-identify' birds often are hardest to document in writing, just as docs of 'difficult-to-identify' birds are easiest to criticize. I believe I raise legitimate reasonable doubts based on plumage characters, and also present data to indicate occurrence of this species in Iowa is not a foregone conclusion. [5 pages attached]

89-13

Received 9-27-89

ADDITONAL COMMENTS TO REVOTE

I continued to be perplexed by the reasoning behind the non-acceptance of the Tricolored Heron record by half the members of the Records Committee, and decided to do some additional research. I initially felt this research was unnecessary (and still do) but did it anyway.

As one reviewer stated, the "combination of white belly and dark neck are diagnostic for this species." I have found nothing to refute this. The Master Guide to Birding (1983)states that the Tricolored is "an unmistakable dark, slate-blue heron with a white belly." Cruikshank, in his Pocket Guide (1953) to Birds states that this is the only dark, gray-blue heron with a contrasting white belly." Other field guides (Peterson, NGS, etc.) all describe these features as diagnostic. None mention the possibility of confusion with other herons. Regardless, there seems to be some contention that this bird could have been a molting Little Blue.

In my initial revote comments, I challenged whether the molt of a Little Blue would demonstrate the symmetry of the white underparts of the bird documented. While I based that upon personal experience and use of commonly available field guides, further research supported the conclusion. Palmer, in his Handbook of North American Birds (1962)described transitional Little Blues as "splotched" and Cruikshank as "blotched." These terms are self-explanatory, and do not describe the bird being reviewed.

There seems to be some confusion regarding the plumages of Tricolored. I agree with the observer that this bird is an immature (but not juvenal) or a non-breeding adult. According to Palmer, the Chestnut on the neck and back occurs in juvenal plumage only. During the first fall and early winter, this changes to Basic I, in which the dark feathers are dark-slaty. Complete molt to adult plumage occurs at about one year or older. This corresponds to the bird described. A Tricolored in immature plumage could also explain the observer not seeing the white foreneck. According to Birds of Eastern North America (Chapman, 1966), an immature Tricolor has an indistinct white foreneck. Failing to observe this should not rule out this species. The observer does note that the bird had "a long, thin neck," a field mark noted by Chapman, Subjective perhaps, but supportive.

Finally, there seems to be some question as to how well this bird was seen. Since I wasn't there, I have to take the observer's word for it. It was seen for a period of nine minutes, and as close as 50 yards away with 10x binoculars. Most birders worth their salt can identify sparrows under these conditions, let alone Tricolored Herons. This is not a difficult to identify species, as asserted by one reviewer. With Great Blue, this is probably the most easily identified heron in North America. When I've seen Tricolored, I've never wondered it it was really a Little Blue - if it's a dark heron with a white belly, it's a Tricolored. Also regarding the quality of the view, the bird was seen in flight (white underwing coverts duly noted) and at rest. Finally, we have a skilled observer with experience with the species. Since this is asked on the documentation form, I presume it should be considered.

89-13

Comments on 89-13

I don't think there is any doubt that the observer saw a heron. The bird was described as "dark from head to mid-breast, and all white from there to tail...bill was blue, feet yellow...slate blue upperwing...tail same color as upperwing surface...a medium-sized heron, about the size of a Little Blue Heron." All of these features would be consistent with a Tricolored Heron. However, the observer did not see the white foreneck, nor is there any mention of a lighter rump. These are also key field marks of a Tricolored Heron. Also, as I pointed out in my earlier review, I don't get the impression that the bird was seen well. The sky was overcast, so colors should be subdued. The observer stated that the bird "flew over the dike in front of me, across the pond and lit in a small tree." The estimated viewing distance was 50 yards at the closest. As I interpreted the documentation, the bird flew by the observer(50 yards at closest) and then lit in a tree. How far away was the tree the bird lit in? Kent later states that the bird "lit in a brushy tree at several hundred yards." So, the heron flew by the observer and then lit in a tree several hundred yards away. I think it would be very difficult to see much on a medium-sized heron several hundred yards away if you had only 10x binoculars. So, the best looks at the bird appear to have occurred in the short period of time when the bird flew by the observer. So, as I stated in my earlier review, it does not sound like the bird was seen very well. I don't think the observer had a good look at the bird when it was perched, and had only a brief look at the bird in flight.

Now, for my "difficult to identify" logic. I think everyone will admit that a House Sparrow seen in poor light, or for a brief period of time, or in an odd plumage, etc. might be considered difficult to identify. The viewing conditions or plumage can obscure the field marks and make the bird hard to identify. And, as I stated above, I do not believe that this bird was seen well. So, like the House Sparrow example, the heron the observer saw might be considered "difficult to identify."

Another criteria I looked at regards the policy and/or actions of the committee. I think it is important that we be consistent in the manner in which we reach our decisions. Therefore, I tried to follow some of the logic used in evaluating past records. One of the things I looked at was the reasons why other potential first state records(among other records) were rejected. Let me run through some examples.

1) Iceland Gull-size and bill shape were described, but rejected because of possibility of small, female Glaucous Gull.

2) Gyrfalcon-rejected because other falcons, accipiters, or buteos(whew!) not excluded.

3) California Gull-rejected for reasons I discussed on our first round of votes.

4) Yellow-billed Loon-rejected because post-auricular patch not noted and because of rarity in Midwest(there is now a pattern of inland records of this species), although yellow bill was described.

5) Little Gull-rejected because dark crown not noted, although diagnostic wing pattern was described. One voter questioned whether wing pattern could have been seen clearly at 200 yards with a 20-45x scope.

In each case, the record was rejected, despite the fact that

diagnostic features were noted by the observer(s). So, what am I to conclude? Is a record acceptable if at least one diagnostic feature is described? Apparently not. It seems that nearly all of the critical features of the bird in question must be seen and described if the bird is to be found acceptable. Time and time again, this committee has judged potential first state records by some "higher" standards, contrary to what Kent says. And, as far as I am concerned, if other records have gone by the wayside because of those standards, then this record should also be rejected.

I also don't agree with Kent's comment that "statements in the annual reports pertaining to individual records do not set policy or precedence for evaluation of other records." They most certainly do! Unless I am missing something, the annual report should not contain any personal opinions of the author. I always thought that comments in the annual report were exerpted from the comments of individual voters, or else they represented a general(majority) concensus of the committee. If this is not the case, then we shouldn't be publishing these comments as if they represent the opinions of the entire committee.

So, after considering all of the evidence, I decided to vote against acceptance of this record. I am not concluding that the bird wasn't a Tricolored Heron, but rather that given the evidence, I cannot conclude with certainty that this bird was correctly identified. I also cannot go against committee precedent and accept a first state record which is not seen especially well and is not described in complete detail. Basically, I am unwilling to vote for a record when records of other equally rare species have been rejected, even though they have been described as well as or better than this bird was described.

I should apologize for making such a hasty review of this record on the first two circulations. However, I do hope that I have now cleared up any misconceptions as to why I have voted against this record.

89-13

TRICOLORED HERON (#89-13)

I agree that "NA voters owe the other members of the committee an explanation" of their votes. However I do not believe that I must respond to each count of Tom's criticism, as my rejection of the record was based on only the following three points:

1. the "possibility (albeit slight) of Little Blue with white belly."

2. "neck described as `dark', whereas Tricolor has white foreneck"

3. "although expected, a first state record needs virtually 100% certainty"

I will elaborate on each of these.

The Possibility of a White-bellied Little Blue Heron

Much material was presented by Tom and by others with the apparent aim of reducing the "possibility of a Little Blue Heron with a white belly" to zero. Suggestions were made that little or no research was done on this, and many references were cited to the effect that if these had been consulted, the "possibility" would have to be rejected. Indeed, I did my homework, and am dismayed that despite the extensive literature search, either the searchers did not carefully read Palmer's "Handbook of North American Birds" (1962), or (say it ain't so) they cited Palmer selectively to support their case. To cite Palmer:

> "Basic II: Evidently white with areas of dull slate which vary individually in extent ... usually head, neck, mantle, and in some a few inner secondaries (hence "calico bird")."

Consider a basically white heron with "head, neck, mantle" dull slate. To me, this describes a Little Blue Heron with white underparts. It also suggests that the underparts are last to turn blue, implying that if the neck and head are the first to do so then the belly may turn blue last. Furthermore, while Palmer states that transitional Little Blues are "splotched", I must point out that Webster's Dictionary defines a "splotch" as a large area with uneven edges, and, indeed, Palmer also states that Little Blues in transition have "areas of slaty feathers intermingled with the white ones". To me, this indicates that there are patches of blue feathers and patches of white feathers, not necessarily an intermingling of individual blue and white feathers (although this is possible and I have seen it).

An interesting observation in the documentation is the mention of "white underwing coverts". This could also be an effect of white areas of feathering characteristic of transition-plumaged Little Blue Herons.

Finally, my personal field experience leads me to believe very strongly that a Little Blue with blue feathering and a white belly is likely. I saw several Little Blues with bilaterally symmetrical white feather patches at the Cattle Egret nesting colony at Folsom Lake in Mills County a few years ago.

To summarize, the above considerations raise the definite "possibility" that a Little Blue Heron might indeed have a white belly and could be confused with a Tricolored Heron by some observers. References I checked indicate little difference in size between the two species, in most cases less than 10%, a difference difficult to judge in the field on individual birds. Specifically, I do not buy Tom's statement that "Size and white belly eliminate other herons."

Coloration of the Foreneck

I am willing to cencede that this point is moot, as the white foreneck is indeed often concealed.

Virtual 100% Certainty for First State Records

At this juncture, I must state that if evaluation of this record depended solely on observer reliability I would accept it. Initial reading of the documentation indicates a correct identification. However this is offset by what I consider to be two important further considerations.

First, while I agree that every record should be evaluated on its merits as inferred from the documentation at hand, I am also a firm believer in the (null hypothesis?) approach that proof for an event that has never occurred previously (eg a first state record) must be rigorous to say the least, with no reasonable basis for refutation. Tom's challenge to NA voters is to base their votes on "whether the observed features identify the bird to species beyond reasonable doubt", a criterion well-established as the basis upon which the Records Committee is to evaluate records. I believe that my evaluation of the possibility of a white-bellied Little Blue Heron contributes to the establishment of "reasonable doubt".

Second, and this is one of the parameters of the "VALID" system, "likelihood" of a species' appearing in a state must be considered. As discussed above, I believe proof for occurrence of an event never before observed must be rigorous. Such proof may include evidence of the increasing likelihood that a given species might occur in a given location (eg Iowa), and would include range expansion in the direction of the location or a pattern of movement (including migration) that would in all likelihood result in the occurrence of the species in the location.

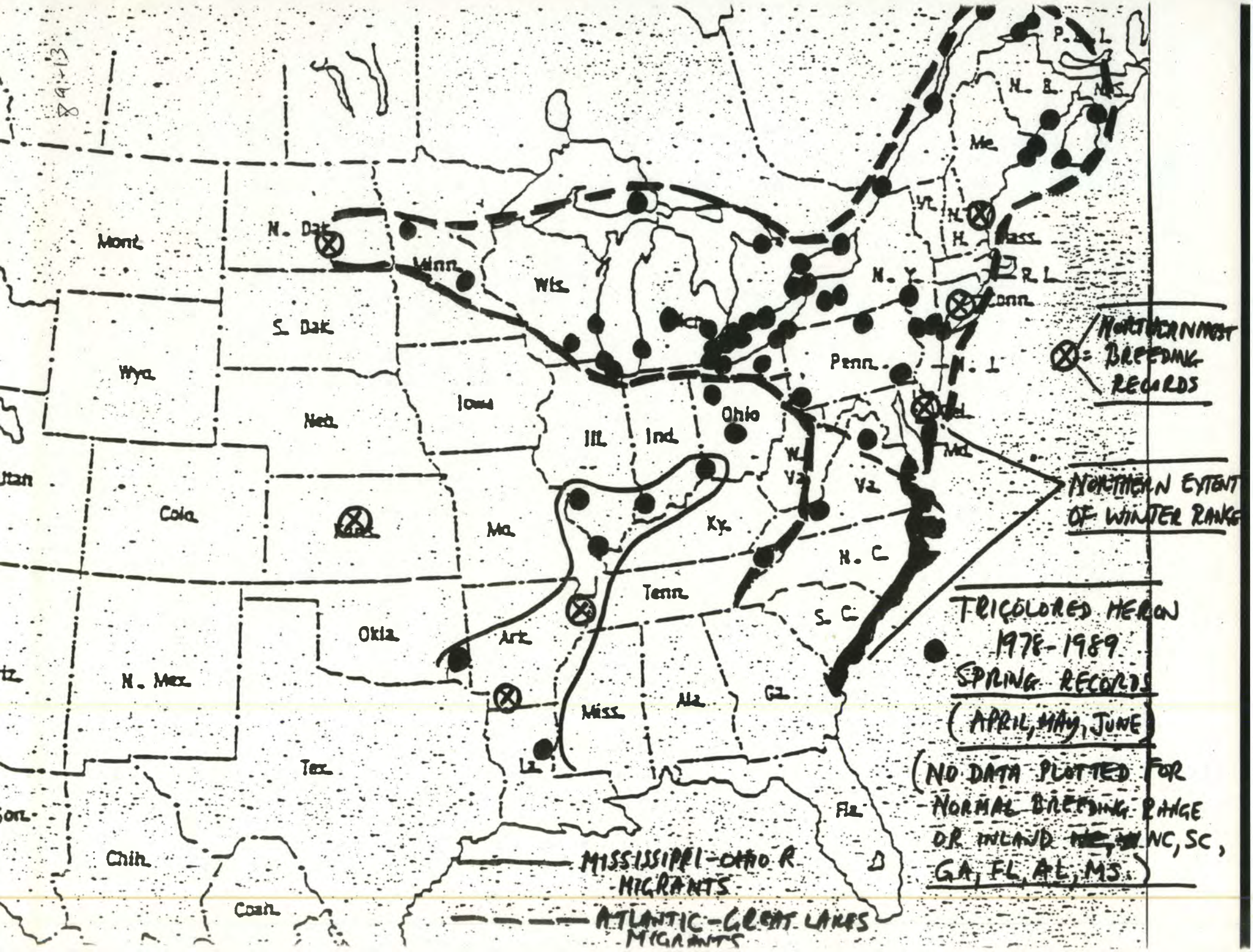
Tricolored Heron is an interesting case study in this context. I have plotted all records of Tricolored Heron published in "American Birds" from 1978 to date on two maps of eastern North America (attached). One shows April, May, and June records, and the other shows July and later records. It is clear from these maps that spring movement in this species is far more extensive than fall movement. The movements of Tricoloreds in

spring as shown on the map can readily be explained by a tendency to follow large bodies of water such as the Great Lakes, the St. Lawrence River, and even to some extent the Mississippi River. When one looks at the probable sources of spring dispersers, the winter range extends north to coastal Maryland, providing a "jumping-off" point for such dispersers. The map shows that a few birds follow the Atlantic coast northward, even as far as the Canadian Maritimes, with breeding as far north as southern Maine, but the great majority seem to move northwestward to the Great Lakes, and regularly follow the Lakes west as far as Lake Calumet in northeast Illinois (see for example Peterjohn, "Middlewestern Prairie Region"). A few of these birds apparently round the southern tip of Lake Michigan and continue northwestward into Wisconsin and ~~Illinois.~~ MINNESOTA. The major pathways from the Atlantic coast inland appear to begin at either the Hudson River mouth or at Chesapeake Bay. Birds which reach the St. Lawrence system in the Lake Huron area may turn west or northeast, although most obviously move further west. There are few records of stragglers inland in Virginia, West Virginia, and Ohio, probably because Tricolors seem not to stray far from large bodies of water or the migration pathways suggested above. In spring a minor migration seems to occur in the Mississippi River valley, resulting in two isolated records of breeding in Arkansas (see map). Apparently there are overshoots from this source, resulting in a few scattered records in southern Illinois and along the Ohio River in southern Indiana. Arguing against this source as likely for occurrences in Iowa are the facts that Mississippi River valley records are decidedly irregular while the species is now annual in northeast Illinois, and that there are no Mississippi River records north of southern Illinois.

What is clear from the above data is that appearance of Tricolored Heron in Iowa is much more likely in spring than in fall, either as an overshoot from the southern Mississippi River valley, or as a westward vagrant from the Great Lakes population of spring migrants. What is also clear however is that such an appearance is by no means to be "expected", nor can it be considered "about time" that a Tricolored Heron appear in Iowa. The distributional considerations outlined above suggest that there is no tendency for this species to disperse inland other than around major bodies of water such as the Great Lakes, nor is post-breeding dispersal extensive enough to provide a reasonable expectation of fall vagrants in Iowa.

Notwithstanding, the record under consideration, #89-13, is at a time and location which would be predicted from the above distributional data.

My decision to vote NA was precipitated by "reasonable doubt" derived from two considerations: the reasonable possibility that the bird could have been a white-bellied Little Blue Heron, and the indications from distributional data that occurrence of Tricolored Heron in Iowa is not at all a likely event.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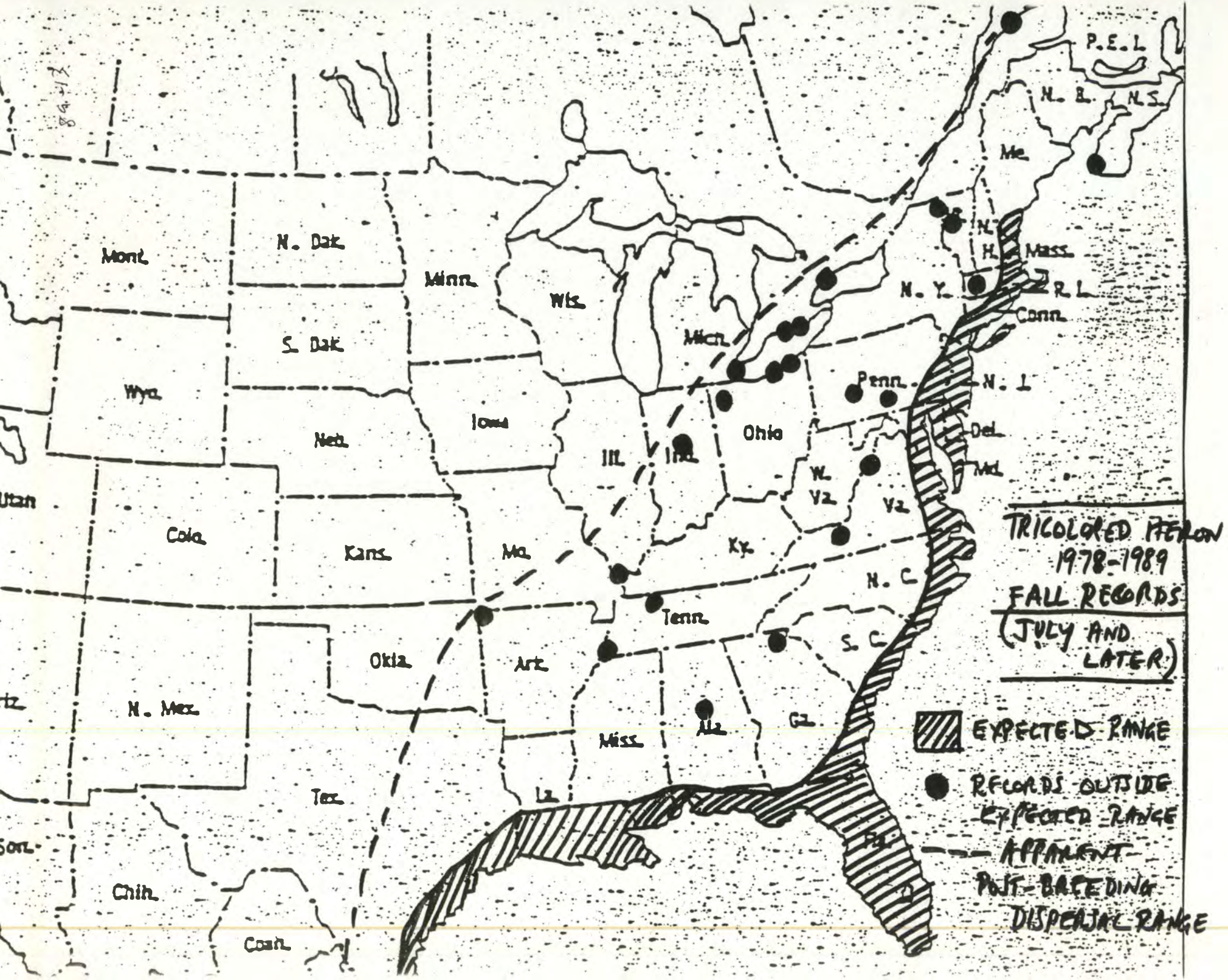
NORTHERNMOST BREEDING RECORDS
NORTHERN EXTENT OF WINTER RANGE
TRICOLORED HERON
1978-1989
SPRING RECORDS
(APRIL, MAY, JUNE)
(NO DATA PLOTTED FOR NORMAL BREEDING RANGE OR INLAND NC, SC, GA, FL, AL, MS)
MISSISSIPPI-OHIO R. MIGRANTS
ATLANTIC-GREAT LAKES MIGRANTS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Wyo.
S. Dak.
N. Dak.
Mont.
Utah
N. Mex.
Ariz.
Chih.
Coah.
Son.
TRICOLORED HERON
1978-1989
FALL RECORDS
(JULY AND LATER)
EXPECTED RANGE
RECORDS OUTSIDE EXPECTED RANGE
APPARENT POST-BREEDING DISPERSAL RANGE

89-13

24 September 1989
TO: I.O.U. Records Committee
FROM: T. H. Kent

Re: Request for re-review of Record #89-13 Tricolored Heron, 29 April 1989, Cone Marsh, Louisa County, Iowa.

I respectfully request that the committee re-review this record for the following reasons:

1. Some committee members seem to have a misunderstanding of established procedures for evaluation of records.
2. In the first round it appears to me that no one did any research on the findings presented, at least no one cited any references. On the second round only three members analyzed the field marks in any systematic way, and again it appears that no one did any literature research.
3. I present additional comments on what I saw and the viewing conditions.
4. I present the results of my research on identification of this species.
5. I present the analysis of an outside reviewer.

I will discuss each of these items at some length.

1. Committee procedures for evaluation of records.

Since inception of the Records Committee, it has been generally agreed that evaluation should encompass two general principles: (1) each record is evaluated individually in an unbiased manner, and (2) the only criterion for acceptance is that the *identification* is beyond reasonable doubt. The procedures for the committee are laid out in the Bylaws and in the minutes of committee meetings. Statements in the annual reports pertaining to individual records do not set policy or precedence for evaluation of other records. Committee policy is set by a majority vote of committee members, not by voting patterns or off hand statements in the annual report or comments by individual members on particular records.

The following statements relating to evaluation of records are abstracted from the Bylaws and minutes of the committee since its inception.

a. The initial bylaws were adopted unanimously by the Committee on 2Ø September 198Ø and were published in the first committee report (Kent, T. H. 1982. Report of the I.O.U. Records Committee. Iowa Bird Life 52:39-43).

> *Classification should be made on individual judgment, but may be based on guidelines set up by the Committee. An "accepted" vote of Class I, II, or II should mean that the record is considered beyond reasonable doubt.*

b. The second and current set of bylaws was approved by the Board of Directors on 2Ø August 1985 and published (1986. Bylaws of the Records Committee. Iowa Bird Life 56:111, 128).

> *4. The committee shall set up its own procedures for evaluation of records and publish them or any changes in them with their annual report.*

c. The minutes of 2Ø September 198Ø contain the following:

> *7. A reference to the VALID system of evaluating sight records was distributed. The parameters and their weight are as follows: V = view obtained (third); A = ability of observer (second); L = likelihood (first); I = identification ease (second); D = details provided (third). Members, if they wish, may use these guidelines to judge records, but the primary criteria remains "beyond reasonable doubt".*

These are the only citations I can find in the bylaws, minutes, and annual reports that deal with policy on acceptance of records. I know that in the past we rejected proposals to require a different vote for first state records or accidentals. We also resisted setting different criteria for such records. The reason the committee did not set specific standards for any type of record is because they wanted the evaluation of each record to be based only on the identification of the bird in question. Therefore, voting should not be based on issues other than the identification of the bird in question such as (1) whether or not there are previous reports of the species, (2) previous votes or comments on records of the same or other species, (3) whether the record is a sight record or supported by tangible evidence, or (4) who the observer is unless the observer is known to be inexperienced. It is unreasonable for members to set policy by votes on individual records. Policy is set by majority vote of the committee members.

NA voters on 89-13 imply to me that they are voting based on votes on previous records and on whether this is a first state record. They also state that they are voting on what was not seen. Unless what was not seen is critical to identification, the vote should be based on whether the observed features identify the bird to species beyond reasonable doubt (more on this below).

2. Adequacy of review

The NA voters appear to have rejected the record based on how well the bird was seen and on implied policy based on other records (see above), and thus they did not provide a detailed analysis of the positive findings. In particular they did not deal with the statement by the documenter, "Size and white belly eliminate other herons." It would seem to me to be a minimal responsibility of records committee members to refute any misconceptions that they think the observer has.

It is most disappointing that no one appeared to have done any research on this record. The field guides are very inadequate and brief (see below). Even the A-D voters, did not do any significant research after the widely split vote was evident.

The lack of research (and perhaps experience with this species) shows up in the NA voters comments. "The neck and back color seems to match Little Blue Heron as good or better than Tricolored" is fine if one just looks in the NGS field guide which does not show the most common plumage of this species. The same reviewer continues, "No maroon or buff lower back feather were described even though I would expect a Tricolored to be in breeding plumage at this time of year." I think this observer or someone else should have discovered that, "Just after nuptials, when the young bird is about sixteen months old, a molt occurs in which the last of the juvenile plumage is lost and the bird emerges with complete adult plumage for the first time. (Eckert and Karalus 1981) and "The nuptial phase is marked not only by the growth of ornamental plumes but also by alterations in soft part colours. The brownish yellow dusky-tipped bill becomes bright blue with black tip, the greenish yellow legs deep pink or, in *rufimentum*, orange (ffrench 1973). Dickey and van Rossum (1938) describe the iris as yellowish white in El Salvador specimens but it is not clear whether this turns to the scarlet normally noted elsewhere. The lores change rather briefly from drab yellow or orange to a pale mauve. **All these colour changes** [bold mine] except the iris are very ephemeral, apparently serving the purpose of attracting a mate but of no significance in maintaining the pair bond. At one Florida heronry in early April, when Great Blue Herons and Great White Herons were already feeding young but the Tricolored Herons had not yet laid, in several cases only one of the pair was in full nuptial plumage." (Hancock and Elliott 1978). The quotations above support my statement, "Apparently an immature or non-breeding plumaged adult", which the reviewers did not fully address.

Another NA voter says, "Problem is possibility (albeit slight) of Little Blue with white belly." No evidence is presented that such a pattern ever occurs. I found no evidence for this in the literature (see attached NOTES ON HERONS).

Another NA voter bases his vote partially on the absence of three features, and, further, jumps to the conclusion that the bird was not well seen for this reason. One of these features was bill shape and size. Does he think this might have been a night-heron, bittern, cormorant, or ibis? Herons with long necks have heron-like bill shape and it would be difficult to give an objective description of bill size under the circumstances. More importantly, the reviewer failed to discuss how bill shape and size would affect the identification of this bird. What are the alternatives? The second feature was white front of the neck. The documentation states, "I wasn't able to tell if there was white on the front of the neck." The reviewer should discuss why this was critical to identification. See below for further discussion of this field mark. The third feature was color of the legs. Again, what difference does it make? Votes should not be made solely on whether the bird was seen well, but on whether what was seen under the circumstances is diagnostic.

Finally, on second review the NA voters make a blanket conclusion that the bird was not seen well and base their vote on this without clearly offering any conclusive evidence that the bird was not seen well. Was the light bad? No, overcast sky at mid-day. Was the distance great? No, 5Ø yards with 1Øx binocular. Try looking at a stop light at 5Ø paces with 1Øx binoculars. Try this statement, "... if it was not seen very well, I think it fits 'difficult to identify'." What kind of logic is this? Tricolored Heron is a very distinctive bird that can be easily identified with a scope at one-half mile, with a binocular at one-quarter mile, and with the naked eye at 5Ø yards. I challenge the reviewer to back up his statement by citing the literature. Do the reviewers consider 9 minutes a short observation time?

3. Additional comments on what I saw and viewing conditions.

I identified this bird within one second of getting my binocular on it. I looked at my watch. I watched the bird with my binocular as it flew slowly from about one-quarter mile toward me and within 5Ø yards (my estimates of distance are known to be conservative) and as it flew away from me and lit in a brushy tree at several hundred yards. For a heron, that's got to be a good view. I carefully looked at all parts of the birds anatomy. By my watch, I was back at the car within 5 minutes after viewing and dictated notes as quoted. These may have been a bit brief, and I may have lost some of what I saw in 5 minutes, but the notes were made without any cluing from a book. My description of the legs and feet was not very accurate. The legs and feet were dull yellow or yellow-green with the feet appearing more yellow. I decided to quote my notes directly rather than adding this detail later. Describing the bill shape didn't enter my mind for such an obvious small, long-necked heron. I don't think I really concentrated on the neck. However, I think it is quite reasonable that the white down the front of the neck was obscured. See attached photo of a Tricolored Heron facing me at close range in Florida. The white on the neck is not evident. I saw the upper and lower surfaces of the wings very well. The under wing coverts were white and there was no other white in the wings. This is a very distinctive feature of Tricolored Heron. One mark that I did not mention that should have been present, was not mentioned by the reviewers either. The rump is said to be white in most texts, but one does not include this mark (Sprunt 1954). I could not tell from the literature whether this is present in all plumages and I found no illustration of this mark. The tail looked the same as the upper wing to me. Of all the accidental species I have seen in Iowa, I would consider this one about the easiest identification.

4. Research on identification of Tricolored Heron

The only other species mentioned by the reviewers as a possibility was Little Blue Heron. I consulted a number of field guides and texts and extracted the pertinent statements (see attached NOTES ON HERONS). The illustrations and descriptions in the field guides are very limited and do not show all plumages. Peterson does not include his usual paragraph on 'Similar species', nor do the other guides mention any identification problems. Peterson, Master Guide, and Pough imply that the white belly is diagnostic; Eckert and Karalus say it is unique.

Little Blue Heron in calico molting plumage is described as blotchy and unique in appearance. I could find no mention of it ever being confused with Tricolored Heron.

I can not even deal with this bird not being a heron--I wouldn't know where to start. Bitterns and night-herons are clearly excluded by the long thin neck and pattern of coloration. Reddish Egret is all white or all dark; other egrets are all white. Great Blue Heron has a dark belly.

Hancock and Elliott (1978) list 59 herons of the world. The White-faced Heron of Australia and nearby islands has a white belly, but also a distinctive white face. The Imperial Heron is a large heron with white belly limited to southern Asia. The Sumatran Heron is a large brown heron with white belly found in the East Indies and nearby areas.

5. Outside review.

The Regional Editor for *American Birds* accepted this record and I solicited his comments. See attached letter from Bruce Peterjohn on this and other recent records reviewed by the committee.

An interesting sidelight is the appearance of a Tricolored Heron near Minneapolis on 4 May 1989 (Loon 61:cover, 82). It seems quite possible to me that this might have been the same bird.

I must say that this record is very perplexing to me. I think the NA voters owe the other members of the committee an explanation for their failure to evaluate the diagnostic features of this bird; for broad, sometimes incorrect and unsubstantiated statements; and for basing their vote on issues unrelated to this particular record.

89-13

NOTES ON HERONS, SEPTEMBER 1989, T. H. KENT

COMMENTS IN FIELD GUIDES AND TEXTS ON TRICOLORED AND LITTLE BLUE HERONS.

National Geographic Society 1987:
Tricolored: "White belly and foreneck contrast with mainly dark blue upperparts ..."
Little Blue: "... During first spring, immature's white plumage begins gradual molt to adult plumage...."

Robbins, Bruun, and Zim 1983:
Tricolored: "... This dark heron with white underparts appears more slender-necked than other herons...."
Little Blue: "... Molting one-year birds (calico herons) are blotched blue and white."

Peterson 1980:
Tricolored: "Note the contrasting white belly, the key field mark of this very slender, dark heron. Rump white."
Little Blue: "... Birds in transition are boldly pied with white on dark."

Master Guide to Birding 1983:
Tricolored: "An unmistakable dark, slate-blue heron with a white belly and rump...."
Little Blue: "... Birds changing from immature to adult are pied blue and white."

Pough 1951:
Tricolored: "... its most noticeable characteristics in any plumage are its white under parts and rump...."

Sprunt, A. 1954. Florida Bird Life. New York: Coward-McCann.
Tricolored: "Adult: Head, neck, wings, and tail slate-gray; long feathers on occiput purplish maroon and white; body and under wing-coverts white; chin white, the throat marked with tawny..."
Little Blue: "...In changing plumage, the immature birds present a pied appearance."

Oberholser, H. C. 1974. The Bird Life of Texas. Austin: University of Texas Press.
Little Blue: "...First winter: Attained by wear from juvenal, from which it does not differ materially....First nuptial: Acquired by partial prenuptial molt. Crown pale slate gray; wings and tail mostly slate color or mostly white; feathers of back partly slate gray; rest of plumage dull white or grayish white; feathers of back partly slate gray; rest of plumage dull white or grayish white, variously mixed with slate-colored feathers; occipital, dorsal, scapular, and jugular plumes more or less developed...."

Eckert, A. W., and K. E. Karalus. 1981. The Wading Birds of North America. Garden City, NY: Doubleday.
Tricolored: "Coloration and markings: adult: On a very general basis, the bird is a dark grayish-blue in color with a white underside and white rump. This highly contasting white underside (which is unique to the Louisiana Heron) is a key identification marking, and is apparent at all stages of the plumage and in all seasons. The adult's legs are a dingy yellowish-green in the rear and dusky grayish in front and on the tops of the toes."
Little Blue: "... When the change in plumage does occur (a change which takes place gradually over the entire year) the white birds get blotched, speckled, patched, and spotted with blue--a phenomenon unique among the herons."

Hancock, J., and H. Elliott. 1978. The Herons of the World. New York: Harper and Row.

Tricolored: "... its general appearance is so distinctive, particularly the contrast between blackish to slaty blue head, neck, wings, and tail and the snowy white of the belly, rump, underwing and the two or three white plumes adorning its crown in the breeding season, that many authoriteis prefer to keep it in the separate genus 'Hydranassa' erected for it by Baird in 1858 and subsequently used by Bock (1956) to distinguish a miscellaneous group of species from more typical egrets...."

Lowery, G. H. 1955. Louisiana Birds. Louisiana State University Press.
Tricolored: "The dark-colored upper parts and contrasting white belly identify the present species at a glance. ..."
Little Blue: "... A few Little Blue Herons winter in the coastal marshes, but the vast majority of them leave for Central America in October. In spring they migrate mainly up the coast of Mexico and Texas and by mid-March are again on their nesting grounds throughout the interior of Louisiana. The so-called "calico bird" or "spotted crane" is the immature Little Blue Heron in the process of losing its white plumage and acquiring the blue. Hence it has a mixture of feathers of both colors. The first spring molt of immature birds takes place in the winter home, prior to migration, for by the time they return to the United States nearly all one-year-olds have the adult plumage and cannot be distinguished from full adults."

Toups, J. A., and J. A. Jackson. 1987. Birds and Birding on the Mississippi Coast. Jackson, MI: University Press of Mississippi.
Little Blue: "... First-year birds are white; second-year birds are mottled (called "calico"); these immatures generally outnumber adults at all seasons...."

89-B

105-K E. Ticonderoga Dr.
Westerville, OH 43081
Sept. 16, 1989

Thomas H. Kent, Secretary
I.O.U. Records Committee
211 Richards St.
Iowa City, IA 52246

Dear Tom:

• • •

Tricolored Heron (29 Apr. 1989 at Cone Marsh): I accepted the record without any reservations. The combination of dark head, neck and upper breast sharply demarcated from the white belly plus the white underwing coverts are diagnostic for this species. Even though this is the first record for Iowa and was only observed relatively briefly, I firmly believe that the bird was correctly identified.

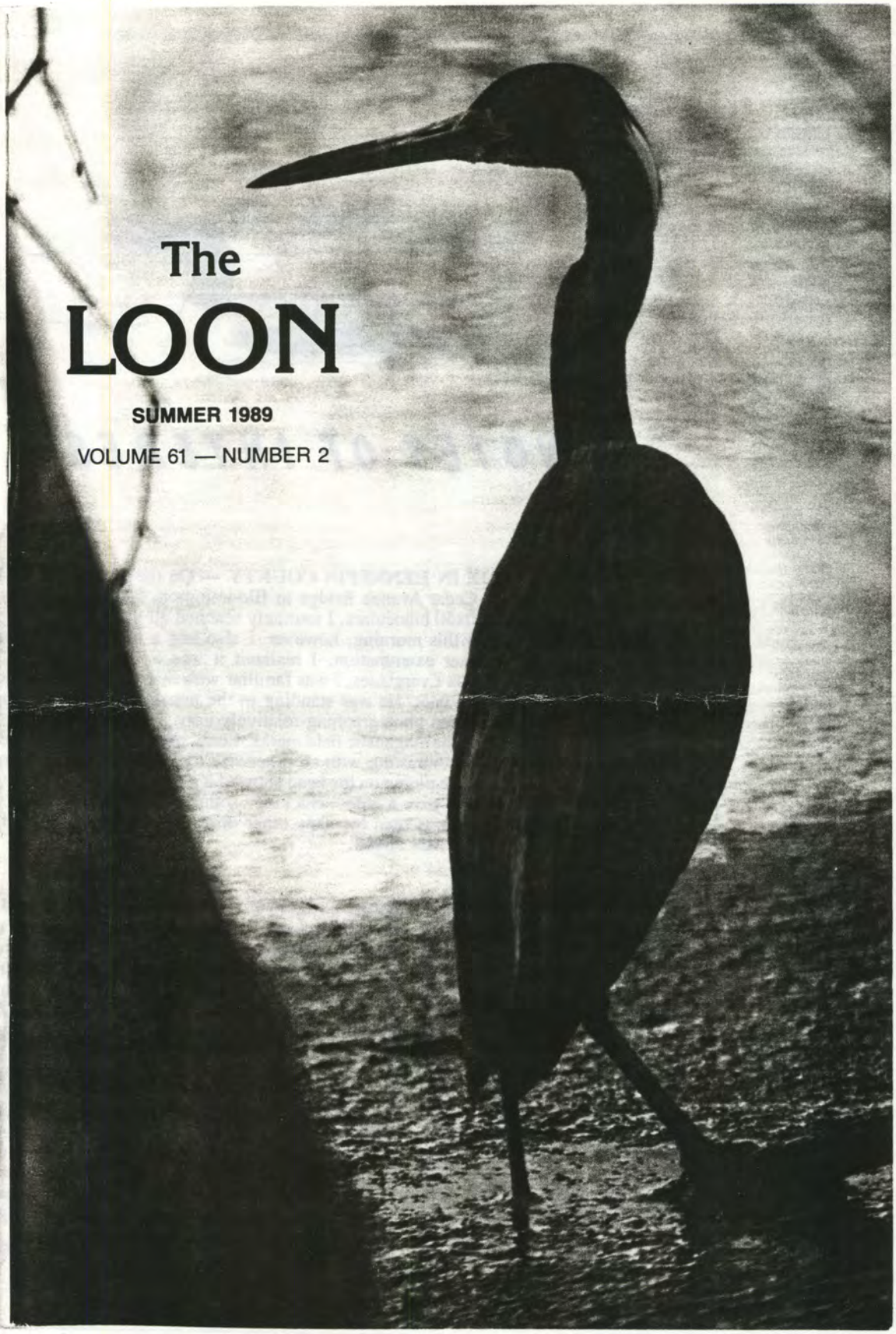
• • •

Sincerely,

Bruce Peterjohn

Bruce Peterjohn

89-13



The LOON

SUMMER 1989

VOLUME 61 — NUMBER 2

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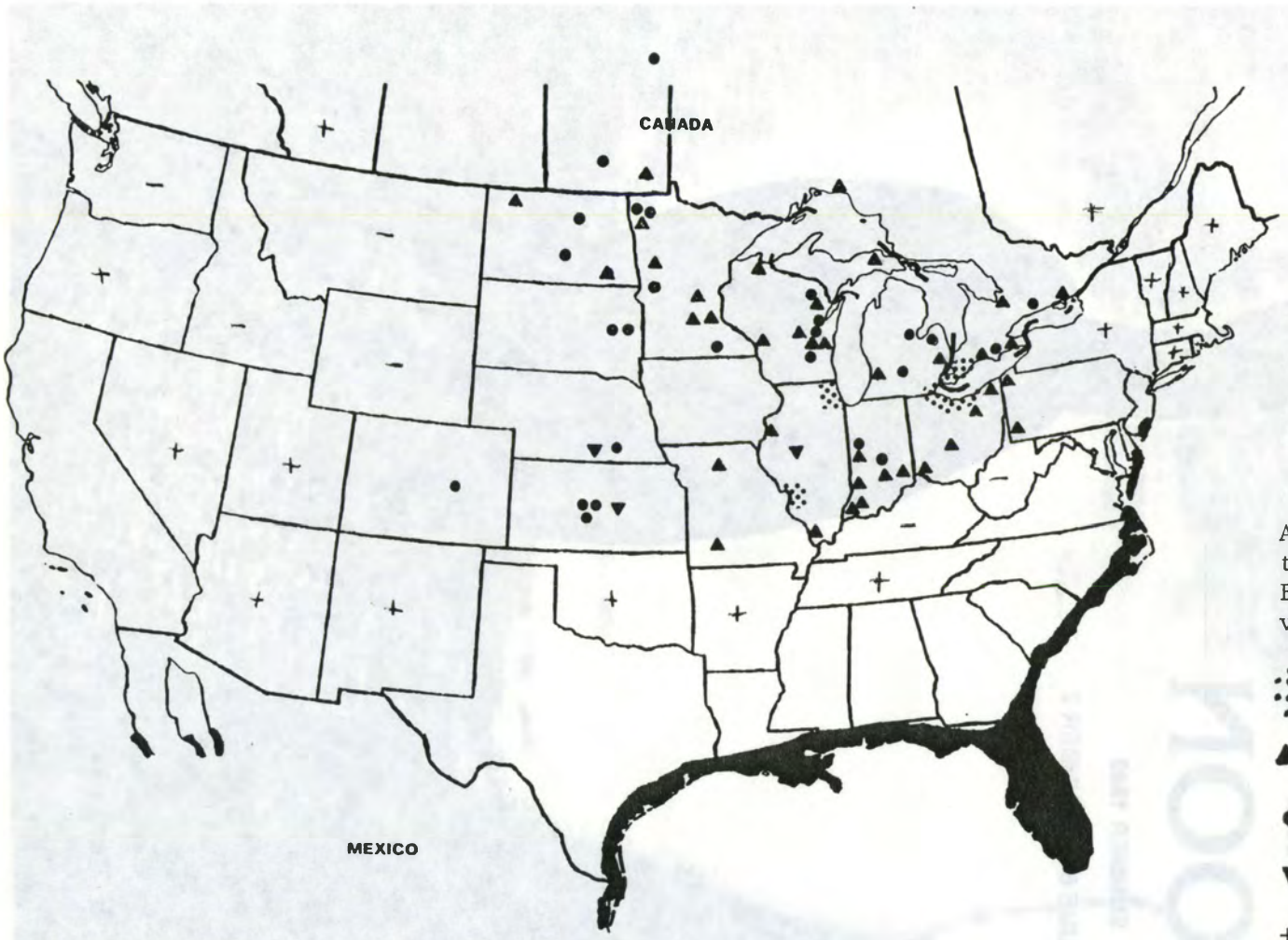
sletter editor. See inside
for "The Season" should
February, May, July and
side front cover.

E, BLOOMINGTON,

NOTES OF INTEREST

TRICOLORED HERON IN HENNEPIN COUNTY — On the morning of 4 May 1989, I was birding at the old Cedar Avenue Bridge in Bloomington, Hennepin County, looking for rails. Using Minolta 10x50 binoculars, I routinely scanned all the herons standing among the reeds and cattails. On this morning, however, I also saw a heron quite different from the others and, upon closer examination, I realized it was a Tricolored Heron. Having previously birded the Florida Everglades, I was familiar with this species and did not consult my field guides until much later. He was standing in the marsh in an area of short cattails which made identification and photographing relatively easy. I observed the bird for about 45 minutes, checking for all the diagnostic field marks. Long, pale legs ruled out Green-backed Heron and the white belly contrasting with an otherwise dark, bluish body confirmed it as a Tricolored Heron. The white plume on his head showed a reddish color at the base. I should also note that it occasionally gave a quiet "clucking" sound when I seemed to approach too closely. Eventually the bird was seen by many other observers. **Anthony Hertzel, 2321 S. DuPont, #6, Minneapolis, MN 55405.**

PRAIRIE WARBLER IN HENNEPIN COUNTY — On our way home from Aitkin, 13 May 1989, my wife Teri and I stopped to check several locations in northern Hennepin County for spring migrants. Finding almost no shorebirds in the area, we decided to concentrate on passerines. At about 11:15 a.m., we arrived at the south end of Elm Creek Park Reserve. We had walked less than a quarter mile when I spotted a yellow warbler about three feet off the ground in a small shrub on the side of the trail. For a moment I thought it might be a Cape May. When it came into full view, however, I immediately called out, "It's a Prairie Warbler!" In 1980 I had observed several Prairie Warblers in Missouri, but this experience was hardly necessary to make the identification. The bird was less than twelve feet away, below eye level, and in direct sunlight. Most striking at first glance were the rows of black streaks on each side of the otherwise bright yellow underparts. A closer look showed that the vent, undertail coverts and most of the underside of the tail were white. Above the streaks, on each side of the lower neck, was a thicker black mark. There were two blackish-olive marks on the yellow face. One of these was a broken eye-stripe; the other, slightly wider, was a moustachial stripe. Together they formed an imperfect, open triangle. The supercilium was bright yellow. This yellow area continued behind and below the eye, giving



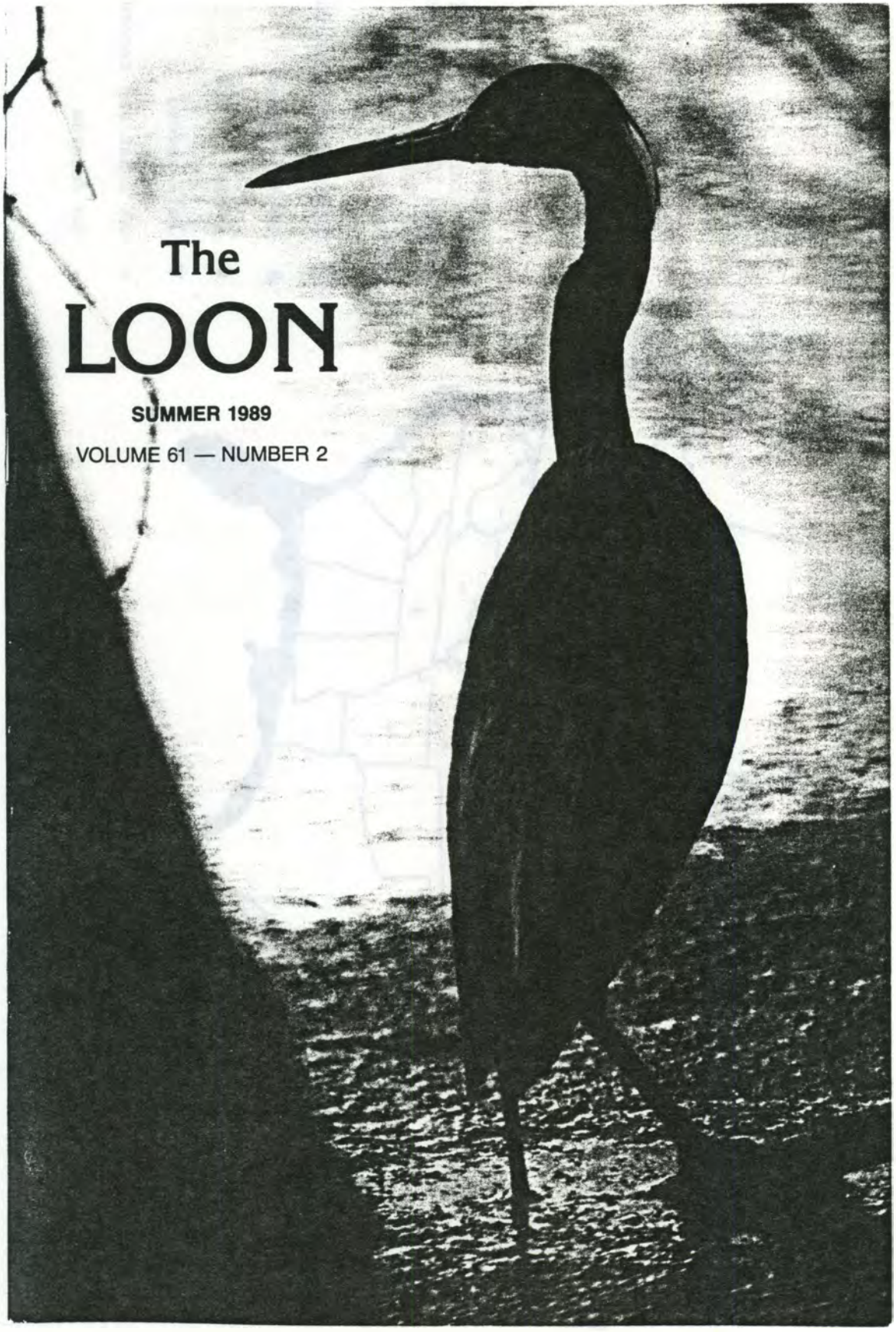
Tri-colored Heron

All extralimital records through 1989 - From American Birds, DeSante & Pyle, and various state books.

- More than 10 records
- ▲ Spring record
- ● Summer record
- ▼ Fall record
- \+ At least one record
- \- No records

T.H. Kent 1989

89-13



The LOON

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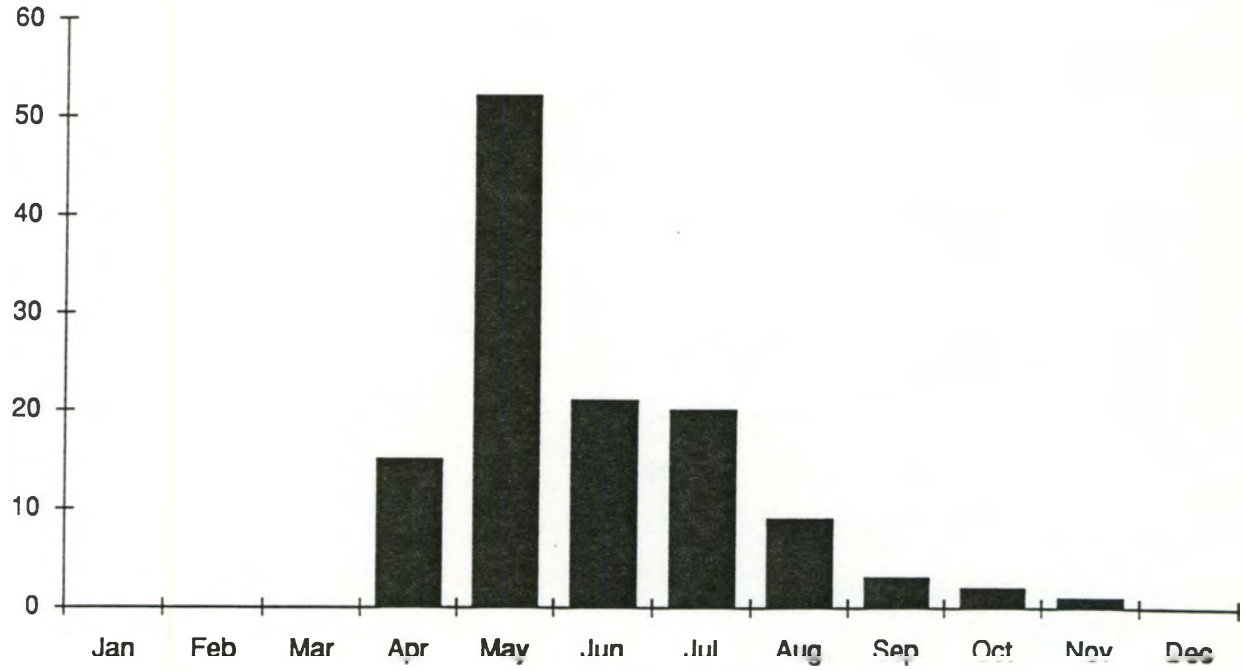
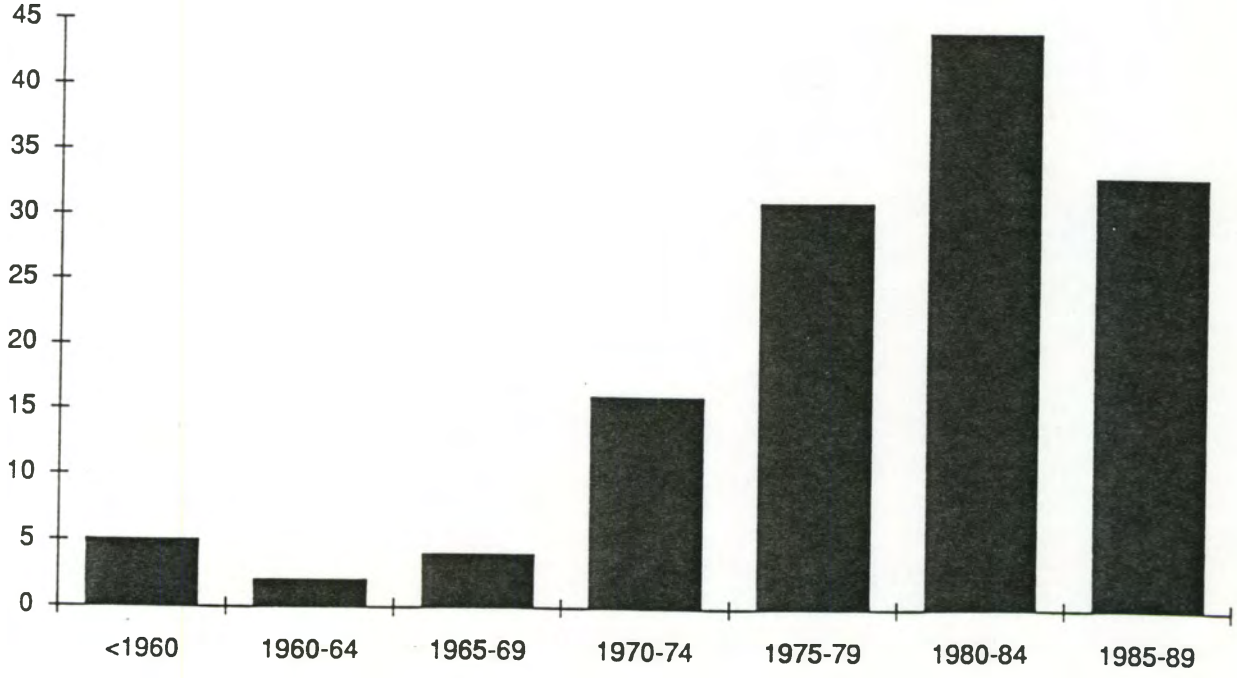
89-13

Midwest Tricolored Heron Records By Month



Midwest Tricolored Heron Records By Years



DOCUMENTATION FORM

For Extraordinary Bird Sightings in Iowa

89-13

What species? Tricolored Heron *How many?* 1

Location? Cone M., Louisa Co., IA

Type of Habitat? marsh

When? date(s): 29 April 1989 *time:* 10 50 *to* 10 59

Who? your name and address: Thomas H. Kent, 211 Richards St., Iowa City, IA 52246

Others with you: none

Others before or after you: Dick Shaffer saw bird sometime in the next hour

Describe the bird(s) including only what you observed. Include size, shape, details of all parts (bill, eye, head, neck, back, wing, tail, throat, breast, belly, undertail, legs, feet). Also mention voice and behavior.

I was on the dike at the middle of the east pond when I saw a heron over the trees to the south. It appeared too small for a Great Blue, so I put my glasses on it and immediately noticed the white belly and long dark neck and head. The bird flew over the dike in front of me, across the pond and lit in a small tree. After a few minutes it flew northwest to the NW corner of the marsh. I did not see it land. Back at the car at 11 04, I dictated the following, "A dark-fronted, white bellied heron flew over. Dark from head to mid-breast, and all white from there to tail. The bill was blue, feet yellow. As the bird turned, I could see all slate blue upperwing, shoulder blue in the coverts. From underneath the wing coverts were white and primaries dark blue. The tail was about the same color as the upper wing surface. It was a medium-sized heron, about the size of a Little Blue Heron." The bird had a long thin neck, held crooked in flight and straightened briefly when it landing. I wasn't able to tell if there was white on the front of the neck and I didn't see plumes.

Similar species; how eliminated:

Size and white belly eliminate other herons.
Apparently an immature or non-breeding plumaged adult.

Did any one disagree or have reservations about the identification? no
If yes, explain:

Viewing conditions: give lighting, distance (how measured), optical equipment.

Overcast. 50 yards at closest (est). 10 x binoculars.

Previous experience with species and similar ones: have seen many in south

References and persons consulted before writing description: looked at field guide about an hour after dictating

How long before field notes made? 5 min *this form completed?* 6 hours

Send completed form to Field Reports or CBC editor (address on back cover of Iowa Bird Life).

89-13

Tom -

We saw the
tricolor come
back to where
you first saw it -

It is at the far end
of the dike and
then to the right.
I got a good look
at it.

Dick Shaffer