

## BYLAWS OF THE ILLINOIS ORNITHOLOGICAL RECORDS COMMITTEE

### Section I. NAME

The official name of this organization shall be the "Illinois Ornithological Records Committee", hereafter referred to as the "IORC" or the "Committee".

### Section II. PURPOSES

- A. To evaluate the evidence for records of birds that are accidental, rare, or unusual in Illinois.
- B. To maintain permanently the original bird records and all Committee votes and comments for use by future bird students.
- C. To publish at least minimal data on all records receiving a decision.
- D. To maintain the official Illinois State List of Birds.
- E. To review, revise and coordinate the distribution of the forms used in recording data on Illinois birds when determined necessary by the Committee.
- F. To strive to improve the quality of submitted ornithological field data in Illinois both through example and through the dissemination of pertinent information and suggested techniques.

### Section III. AFFILIATION

This committee is a standing committee of the Illinois Ornithological Society. The judgments of the Committee are entirely independent of the Illinois Ornithological Society or any other organization.

### Section IV. MEMBERSHIP

- A. Number and Definitions. The Committee shall consist of seven people, as follows: six "Members", one of whom is the "Vice-Secretary", plus a "Secretary", each with one vote on bird records and other Committee business (except as noted below). For the purposes of these Bylaws, the Secretary is not considered a "Member", but the Vice-Secretary is. The term "Voting Member" includes all six Members and the Secretary.
- B. Qualifications. Anyone is eligible to become a Voting Member if, in the estimation of the existing Members, that person has demonstrated an expert ability in and knowledge of field identification and distribution of the birds likely to be reviewed by the Committee.
- C. Members.
  - (1) Election and Term of Office.
    - (a) The six Members shall be elected on a staggered basis, each for a term of three years, so that two will be elected each year. Election shall be by vote of a quorum of Voting

Members present in person or represented by written ballot at the Annual Meeting of the Committee; proxies shall not be used in this election, but an absent Voting Member may vote by indicating his choices to the Secretary in writing prior to the meeting. The two candidates receiving the largest number of votes shall be elected; if necessary, ties shall be decided by additional ballot(s) listing only those persons tied.

- (b) Members take office at the close of the Annual Meeting at which they were elected and serve until the close of the third Annual Meeting after election or until their successors are elected. The Members-Elect may, at the discretion of the existing Committee, be seated, without vote, during the remainder of the Annual Meeting at which they were elected.
- (c) Members may serve two consecutive, full terms, after which they must retire until the next annual meeting before they may be considered for re-election.

- (2) Nominations. Nominations of Members shall be made only by Voting Members, either at the Annual Meeting or in writing to the Secretary prior to said meeting. It is the responsibility of the nominator to obtain approval of willingness to serve from the nominees submitted. A nominator may not nominate oneself. If the total number of nominees is not sufficient to fill the vacant seats, it is the responsibility of the Secretary to nominate the number of persons required.

D. Secretary.

- (1) Qualifications. In addition to the Qualifications for Membership above, the Secretary must not at the same time be both Secretary and one of the six Members.
- (2) Election and Term of Office.
  - (a) The Secretary shall be elected for a term of one year. Election shall be by vote of four or more Members present in person, not by proxy or ballot, at the Annual Meeting of the Committee. The candidate receiving the largest number of votes shall be elected; if necessary, a tie shall be decided by an additional ballot(s) listing only those persons tied. The election shall be conducted by the Vice-Secretary, or, if the Vice-Secretary is absent or is running for Secretary, by another Member.
  - (b) The Secretary takes office at the close of the Annual Meeting at which elected and serves until the close of the next Annual Meeting or until a successor is elected.
  - (c) The Secretary may serve an unlimited number of terms.

- (d) The Secretary must notify all Members at least three weeks in advance of an Annual Meeting of an intention to retire.
- (3) Nominations. Nominations for Secretary shall be made only by Members (not the Secretary or other persons) at any time prior to or at the Annual Meeting, either in person or by letter to an attending Member. It is the responsibility of the nominator to obtain willingness to serve from the nominee submitted. A nominator may make a maximum of one nomination, and may not nominate oneself.
- (4) Duties.
- (a) Receive, circulate, recirculate and file all bird records and supporting data submitted to the Committee.
  - (b) Vote on bird records (see Voting) and in all elections except that for the Secretaryship.
  - (c) Procure additional data on records when deemed desirable, especially when a record is to come up for discussion at a meeting of the Committee; prior to a meeting, furnish Members with a list of records to be discussed.
  - (d) Tabulate results of all votes of the Committee, including votes on bird records, but excepting the election of the Secretary.
  - (e) With the approval of the Members, appoint chairpersons of subcommittees.
  - (f) Call and preside at Committee meetings.
  - (g) Keep or cause to keep minutes of Committee meetings.
  - (h) Keep current the Review List, furnish it to anyone upon request, and make it publicly available.
  - (i) Furnish Members with such equipment as needed, including Evaluation Forms.
  - (j) Furnish or cause to be furnished to anyone, upon request, all appropriate evidence, including committee comments, concerning any accepted or rejected bird record. Such evidence may be in the form of copies of documents or photographs.
  - (k) Furnish Documentation Forms to anyone upon request and free of charge.
  - (l) Keep current a master copy of these Bylaws, assure that they are properly applied, and supply the President and Recording Secretary of the Illinois Ornithological Society with up-to-date copies.

E. Vice-Secretary.

(1) Qualifications. In addition to the qualifications for Membership given above, the Vice-Secretary must be one of the six Members.

(2) Election and Term of Office.

(a) The Vice-Secretary shall be elected for a term of one year. Election shall be by vote of a quorum present in person, not by proxy or ballot, at the Annual Meeting of the Committee. The candidate receiving the largest number of votes shall be elected; if necessary, ties shall be decided by an additional ballot(s) listing only those persons tied. The Secretary, or, if absent, a Member other than the Vice-Secretary, shall conduct this election. All Voting Members, including the current Vice-Secretary and all candidates, may vote.

(b) The Vice-Secretary takes office at the close of the Annual Meeting at which elected and serves until the close of the next Annual Meeting or until a successor is elected.

(c) The Vice-Secretary may serve an unlimited number of terms, except as provided in the Bylaws controlling the number of terms that a Member may serve.

(3) Nominations. Nominations for Vice-Secretary shall be made only by Voting Members, and only at the Annual Meeting, either in person or by letter to an attending Voting Member. It is the responsibility of the nominator to obtain approval of willingness to serve from the nominee submitted. A nominator may make a maximum of one nomination, and may not nominate oneself.

(4) Duties. The Vice-Secretary shall, at the Secretary's request, assist in carrying out Secretarial duties. If the Secretary shall be unable to serve, then the Vice-Secretary shall act as Secretary in all respects. The Vice-Secretary, or, if absent, a representative Member, shall conduct the election of the Secretary.

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

G. Vacancies and Special Elections. If the Committee loses a Voting Member during mid-term (through death, resignation, removal, or otherwise), the Secretary shall immediately conduct an election, termed a Special Election, for the purpose of filling the vacancy. A Special Election may be conducted at a meeting or by individual contact (such as mail or telephone), whichever is most expedient in the opinion of the Secretary. The manner of nomination and election shall

be similar, with appropriate exceptions, to the regular selection of a Member or Secretary, whichever pertains. The person elected shall serve the unexpired term of the person being replaced.

- H. Alternates. In case a Member is temporarily unable to fulfill his/her duties, an Alternate may be appointed by the Secretary from a list of potential alternates approved by a majority of the Committee.
- I. Compensation. Neither the Secretary nor an IOS Member may receive compensation for Committee work, but may be reimbursed by the Illinois Ornithological Society for expenses reasonably incurred in the performance of Committee duties.

#### Section V. MEETINGS

- A. Annual Meeting. An Annual Meeting of the Committee shall be held once a year, at a time and place set by the Secretary after consultation with the Members, for the purpose of transacting such business as may be brought before the meeting. The Secretary must give to all Members prior notice of the Annual Meeting, together with an agenda.
- B. Special Meetings. Special Meetings of the Committee may be called by the Secretary or by agreement of four or more Members. Whoever calls the meeting must notify and provide an agenda to each Voting Member prior to the meeting.
- C. Quorum. Five Voting Members in good standing, present in person, not by proxy, shall constitute a quorum for any meeting of the Committee.

#### Section VI. BYLAWS

- A. Formation. All Bylaws and other procedures for the Committee are to be as determined by and only by the Committee.
- B. Review. The Bylaws shall be reviewed regularly, at least once every five years, by the Committee.
- C. Changes. These Bylaws may be changed by an affirmative vote of all or all but one of a quorum at any Committee meeting.
- D. Dissemination. One set each of the current Bylaws shall be supplied to the President and Recording Secretary of the Illinois Ornithological Society.

#### Section VII. BIRD RECORDS

- A. Definitions.
  - (1) For the purposes of this Committee and these Bylaws, a "record" is considered to be the body of evidence submitted to the Committee as proof of the stated identity of a sighted, heard, collected, banded, or photographed bird or group of birds. The

body of evidence for a bird record can be a written description and/or sketch preferably taken in the field during observation (or shortly thereafter), a historical description in the literature, a transparency or photograph, a specimen (either complete or incomplete), a video or audio recording, a digital, or any type of electronic image or description on the internet. A formal bird record submission by the original observer(s) is recommended but any evidence presented either by a Committee member or an individual outside the Committee may be submitted. The Committee adopts the taxonomy and nomenclature of the most-recently published A.O.S. Checklist of North American Birds and its supplements.

- (2) The status in Illinois of bird forms (superspecies, species, subspecies, hybrid combinations, etc.) for which there is at least one Committee accepted Illinois record will be described using the terminology defined below. Exceptions to, and alterations of, these definitions may be made by a vote of all or all but one of a quorum at any Meeting. The status of bird forms shall be reviewed at least every five years.
  - (a) General Terms:
    - (i) Regular: Forms seen in at least 8 of the previous 10 years. This includes most of the Code 3 and virtually all of the Code 4 species (see VII.A.(2)(b), below).
    - (ii) Extirpated: Forms that were formerly Regular but not recorded in the state in the previous 50 years.
    - (iii) Extinct: Forms that no longer exist.
  - (b) Status Codes For Scarcer Illinois Forms
    - (i) Status Code 0: Accidental. Forms with accepted records but no records of Class higher than A-S (1) (i.e., accepted sight records documented by only one observer; see Section VII.G.(2)(a)).
    - (ii) Status Code 1: Accidental. Either 5 or fewer records in the state, or 2 or fewer records in the previous 10 years (e.g., Yellow-billed Loon, Wood Stork, Sharp-tailed Sandpiper, Ross' Gull).
    - (iii) Status Code 2: Casual. At least 6 records in the state, or from 3 to 7 records in the previous 10 years (e.g., White Ibis, Curlew Sandpiper, Black-headed Gull).
    - (iv) Status Code 3: Casual. At least 8 records in the previous 10 years: Occurs in most years although almost always in small numbers (averaging up to 4 per year over the previous ten years). Cannot be counted

upon at a particular date and location anywhere in the state (e.g., Tricolored Heron, Red Phalarope, Sabine's Gull).

- (v) Status Code 4: Regular. Locally uncommon. Rare in most of the state but seen every year; in most cases occurs in numbers in at least a limited portion of the state at an appropriate time of year (e.g., Peregrine Falcon, Red-necked Phalarope, Thayer's Gull, Smith's Longspur).
- (3) The "Review List" consists of all forms for which the Committee will review all records (possibly excepting records from specified areas for some forms); it is to include all species of Status Codes 0, 1, 2, or 3, except extinct and extirpated species; first state nesting records for a species; out of season Christmas Bird Count rarities, as well as such other forms as the Committee shall decide upon. The Committee may, as it sees fit, add other species (such as those whose identification is difficult) or forms (superspecies, subspecies, hybrid combinations, etc.) to the Review List. To add or delete a form from the Review List shall require a vote of all or all but one affirmative votes of a quorum at any Committee Meeting.

B. Records Reviewed.

- (1) Records only from the State of Illinois will be reviewed.
- (2) All records, including past records, of forms on the Review List will be reviewed.
- (3) All records of species for which there are no accepted records will be reviewed.
- (4) All other submitted records, including records of Regular forms from unusual locations and/or times, shall be reviewed at the discretion of the Secretary or if determined to be desirable by the Committee, using the following procedure:
  - (a) Periodically, the Secretary shall provide Members with a list of all recently submitted records which do not require automatic review and were not reviewed at his/her discretion. Members should indicate to the Secretary those records which they feel need to be reviewed.
  - (b) Those records for which three or more Members indicate an interest in reviewing shall be circulated in the usual fashion.
  - (c) Those records for which at most two Members indicate an interest in reviewing shall not be reviewed and will be filed with the other unreviewed records.

- (d) However, any Member may request that any unreviewed record be discussed at a meeting for the purpose of determining whether the record should be reviewed. After discussion, a vote will be taken: all or all but one or two of a quorum must give affirmative votes in order to change the record to active.
  - (5) The Secretary will be sure that the Review List is made broadly and publicly available.
  - (6) The criteria and procedures used for determining which records the Committee reviews will be reviewed by the Committee at least once every five years.
- C. Submission.
  - (1) Records should be, but need not be, submitted on the Committee's official Report Form. The Secretary must see that these forms are readily available at no charge to all who request them.
  - (2) Any record, whether published or not, old or new, may be submitted by a Member or other person, whether or not an observer, if he has first attempted to obtain details from the observer(s). An exception to this is a record that has received a previous Committee decision (see Resubmission). The need for review of a submitted record is then determined by the criteria and procedures under Section VII.B.(5).
- D. Resubmission. A record that has received a final Committee decision, whether accepted or rejected, and even though published in the Committee Annual Report, may be resubmitted by the Secretary, a Member, an observer, or any other person, if and only if there becomes available new and substantial documentary evidence that might affect the decision. For a record rejected because of questionable origin, such evidence might include the recognition of a natural pattern of occurrence. Such a record must be resubmitted and circulated as if never before submitted, except that it should be accompanied by all previous votes and comments of the Committee, its publication status, and all new evidence marked as such.
- E. Retraction. A record submitted to the Committee by the observer(s) involved may not be retracted after circulation has begun. The observer(s) may submit opinions or additional data that totally or partially negate the record. Such new information shall be treated as "new and substantial documentary evidence" (see VII.D.) and the record shall have its first submission terminated at the end of the then current circulation and be resubmitted under the same record number, except that if the record has already received a final "reject" vote, no further circulations need take place.



F. Circulation Procedures.

- (1) Initial Receipt by Secretary. Upon receipt of a record, the Secretary should do the following:
  - (a) Determine whether the record should be reviewed (Section VII.B.).
  - (b) For records which are to be reviewed, the Secretary shall:
    - (i) Affix to it a unique number, consisting of the year of the initial observation followed by a decimal point and the next available unused number, starting with 001 (and proceeding through 999 if necessary). If a record is represented by descriptions from more than one person, each description should receive the same number.
    - (ii) Record in a safe place at least the name of the documenting observer(s), the name of the bird, the date and locality of the record, and the record's number.
    - (iii) Check the description for completeness and clarity and, if deemed desirable, request additional information from the reporter or other observers. Details thus acquired must be clearly marked as such and kept separate from the original submission; the original submission should not be returned to the reporter except in copy form.
    - (iv) Vote on the record (see Voting, VII.G.) before sending it to other Voting Members.
    - (v) When further evidence does not appear to be forthcoming, send the record (along with other records, if desired) to each member simultaneously, with a vote record sheet. If desirable, these can be sent and received electronically.
    - (vi) When it is impossible or inadvisable to circulate some part of the evidence (e.g., a specimen), the following procedure shall be implemented for first round voting. All written evidence shall be circulated as usual; however, Members will be told by the Secretary to refrain for voting at this time. The additional evidence shall then be examined at the next possible meeting. The Secretary will see that Evaluation Forms are available at the Meeting, and any votes that are finalized will be collected at the Meeting. Upon request by any Member, an electronic copy of the Evaluation Form will be provided by the Secretary, and finalized votes can be received electronically.

- (vii) Records received close to the time of the next Meeting may, upon the discretion of the Secretary, be handled in a similar manner to (vi).
  - (c) Records that will not be reviewed shall be assigned a record number consisting of the year of initial observation, hyphen, "S," hyphen, and next available unused number, starting with 001 (and proceeding through 999 if necessary) and then shall be filed in the Suspense File along with the date received.
- (2) Receipt by Member. Upon receipt of a record, the Member shall do the following;
- (a) Judge its validity and vote.
  - (b) Send the completed Evaluation Form to the Secretary.
  - (c) Proposed lengthy periods of unavailability should be reported to the Secretary. In such cases, records can be circulated to an alternate Member as deemed necessary by the Secretary.
- (3) Recirculation.
- (a) A record shall be recirculated automatically, with the votes and comments of every Member from previous circulations, until it has received a decision vote (see VII.G.(12)), until three circulations (two recirculations) have been completed, or until it is resubmitted, which ever comes first.
  - (b) If after the third circulation the record still has not received a decision vote, it will be kept by the Secretary until it can be discussed at a meeting of the Committee.
  - (c) The Secretary should solicit additional information from the reporter or other observers for any record scheduled to come before the assembled Committee.
  - (d) Prior to each meeting, the Secretary should inform Members of any records scheduled for discussion.
  - (e) A record that has not received a final decision after three circulations shall be discussed at a meeting of the Committee. No final decision shall be made at the meeting. Instead, the record shall receive a final vote (see VII.G.(11)) during a fourth and final circulation to those Members on the Committee at the start of said meeting.
  - (f) A record that has received a "final" decision during its first circulation (but not during its second, third, or fourth circulations) shall nevertheless be recirculated upon request of any Voting Member or if the Secretary feels that the

Committee's first-circulation comments might alter the decision.

- (g) A record that has received a "final" decision during its regular three circulations shall nevertheless be brought to a Committee meeting upon request of any Voting Member and shall be discussed. If the original decision was made on the first or second circulations, the Committee shall decide by vote whether (1) to uphold the original decision or (2) to continue the interrupted series of circulations. An affirmative vote of at least two Members shall be needed to cause recirculation. A lesser vote shall result in the original decision being finalized. If the original decision was made during the third circulation, a final decision shall be reached in the same manner as for a record brought to a meeting because no final decision was reached during three circulations (see VII.F.(3)(e)).
- (h) Except as noted above, all decisions are final unless a record is to be resubmitted.

G. Voting.

- (1) Evaluation Forms. The vote of each Voting Member, together with his comments, if any, must be submitted on an official Evaluation Form. This form must include spaces for at least the (a) record number, (b) name of the bird form, (c) name of the Committee Member, (d) date of review, (e) number of the circulation, (f) Member's vote, and (g) comments.
- (2) Voting Categories.
  - (a) Votes to Accept
    - (i) Class A-E --- A record that is accepted (A) based on one of the following types of hard evidence (E): an existing identifiable specimen adequately labeled as to date, place and collector, or diagnostic photograph of such a specimen; a diagnostic photograph adequately labeled as to date, place and photographer; a diagnostic recording and/or sonogram, or a diagnostic digital or electronic image adequately labeled as to date, place and recorder.  
  
(Note: a specimen, photograph, recording or sonogram that is not diagnostic or adequately labeled may be used as supporting evidence for an acceptable sight record.)
    - (ii) Class A-S (n) --- An acceptable (A) sight (S) record adequately documented independently by each of a number (n) of observers.

(b) Votes to Reject

- (i) Class U-O --- A record of a correctly identified bird that is unaccepted (U) because the identified species is of questionable origin (O), i.e., it likely represents either an escapee, or it is likely a member of an introduced population which is not yet established as a viable, wild breeding population.
  - (ii) Class U-I --- A record which is unaccepted (U) because the evidence available does not assure the complete identification (I) of the bird(s) to the satisfaction of Members.
- (3) Abstentions. Members may not abstain from voting on records.
  - (4) Voting on a package should not be deferred, and should be completed in a timely manner, unless extraordinary circumstances arise. The Secretary should be notified in case a Member finds it necessary to defer voting on a package, and should be kept apprised of any changes in the routing of any package.
  - (5) Secretary Vote. The Secretary must vote. On each circulation, he must vote prior to sending the record to Members (thus without seeing Members' comments for that circulation).
  - (6) Comments. On the first circulation, a "reject" vote on any record, and a "reject" or "accept" vote on any potential state record, should be supported by comments. On the second, third, and fourth circulations, either a "reject" or "accept" vote should be supported by comments.
  - (7) Consultations. On any circulation, pre-vote discussions with other Voting Members are acceptable. On any circulation, a Member may consult anyone outside the Committee before voting.
  - (8) Voting Criteria. The criteria used by a Member for acceptance or rejection of a record are an individual matter and should not be dictated by these Bylaws.
  - (9) Change of Members. A circulation in progress at the time a new Member is elected should be completed by the retired Member if possible, except that removed Members do not qualify; subsequent circulations, and hence in some cases final voting, should be completed by the new Member(s), except as noted in VII.F.(3)(e).
  - (10) Tabulation. The voting results shall be tabulated by the Secretary after all Voting Members have voted.
  - (11) Decisions During the First Three Circulations. On any of the first three circulations, with all Members voting,

- (a) a record is considered accepted if it receives no more than one "reject" vote.
- (b) a record is considered rejected if it receives four or more "reject" votes.
- (c) a record is not considered to have received a "final" decision and is to be recirculated, or after three circulations is to be presented at a meeting, if it receives two or three "reject" votes.

(12) Decisions During the Fourth Circulation. A record receiving a fourth and final circulation (see VII.F.(3)(e)) shall be accepted if it receives all or all but one "accept" votes and rejected if it receives two or more "reject" votes.

(13) Class of the Final Decision. In all cases, the Class of a record which has received a final vote shall be the highest Class for which at least 6 Members voted at that level or higher.

H. Publication.

- (1) The decisions of the Committee shall be published regularly, annually if possible, in Meadowlark, under the authorship of the Secretary and/or others if desired.
- (2) The published data for accepted records shall include at least the name of the bird, date(s) of observation, locality, and reporting observers. Other data may be added at the discretion of the author(s) and the Voting Members. An attempt should be made by the author(s) to determine the exact span of dates for each record.
- (3) Rejected records should also be published with the above data, except that the observers' names should not be included. In publications, the term "unaccepted" should be used instead of "rejected".

Historical Summary:

The first Bylaws of the Committee were written by John C. Robinson and the IORC Steering Committee during 1985. After modification in February 1987, these were published in Illinois Birds and Birding (2:90-101).

The present replacement draft was written by Ronald E. Goetz (Secretary) from January 1988 through August 1989, using the California Bird Record Committee's Bylaws as a model, and with considerable input from Laurence C.

Binford and the Committee. It was adopted by a vote of the Committee conducted by mail during September 1989.

A replacement draft was adopted 21 November 1993 with modifications of those Bylaws accepted September 1989. The present Bylaws were put into effect 21 November 1993.

Modifications to the bylaws were adopted accepting the taxonomy and nomenclature of the most recent A.O.U. check-list revisions. General Terms were revised. These changes accepted 10 March 1996.

Modifications to the bylaws were adopted revising general bird status terms for the state bird checklist. These changes accepted 19 January 1997.

Modifications to the bylaws were adopted to permit the Committee to review digital or electronic images of bird records off the internet. These changes were accepted 7 February 1999.

Modifications to Section VII(F) Circulation Procedures were adopted to adjust the circulation practices to reflect the use of electronic communication to effect circulation and voting. These changes were accepted 16 January 2016.

At the 12 February 2017 Annual Meeting of IORC, changes were adopted to streamline various procedural matters, including availability of forms and the Review List, reference to the A.O.S. (previously A.O.U.) Checklist, direct conveyance to IORC of records submitted for publication in Meadowlark, and assigning identifying numbers to Suspense File records. Additionally, the prohibition to discuss records among Members during the first circulation was eliminated.