

Area-Search Protocol for Surveying Shorebirds in Coastal Estuaries

PLEASE READ: The usefulness of data collected as part of these surveys requires that all observers closely follow the protocol outlined here. Please read the protocol and associated documents (area description(s), map(s), and data forms) thoroughly before conducting a survey. If you have any questions, please contact your local site coordinator or Khara Strum (kstrum@pointblue.org). Thank you in advance for your hard work and enthusiasm for birds. **Note:** This protocol and other documents recommended below can be found on The Pacific Flyway Shorebird Survey webpage under Resources (www.prbo.org/pfss/resources).

PURPOSE

These surveys are designed to obtain data on annual variation, long-term trends, and habitat associations of wintering shorebirds in coastal estuaries. These data will be combined annually with comparable data from other sites across the Pacific Flyway to assess spatial and temporal patterns of shorebird abundance at a broader scale.

SURVEY DESIGN

Each survey consists of searching a set of pre-defined survey areas (preferably defined based on habitat) within a coastal estuary on the same date and time to obtain a “snap-shot” of shorebird use each year. Surveys are coordinated across an estuary at tidal conditions that allow all shorebirds within the survey area to be identified to species (i.e., birds are not too far away to be accurately counted; preferably <300m) but BEFORE birds move to high-tide roosting locations. The optimal tidal conditions that satisfy these criteria may vary among estuaries, but each survey of the same estuary should occur during the same tidal conditions each year. For large estuaries, the exact timing of the survey may vary. We recommend careful evaluation of the tidal conditions that will be optimal for conducting surveys before finalizing a protocol for long-term monitoring. Observers count and identify all shorebirds and raptors within their survey area regardless of whether they are roosting or not. Surveys are conducted once annually during the survey window (November 15 – December 15).

IMPORTANT THINGS TO REMEMBER

- **Plan Ahead:** Tidal estuary shorebird surveys should occur within a relatively short time period (~2 hours) when the tide is optimal and should be coordinated across the estuary. Because factors on the day of the count (e.g., wind, atmospheric pressure) may influence tidal height and timing, please try to be at your area slightly before the predicted start time to ensure adequate time to complete the survey.
- **Inclement Weather:** Surveys should not be conducted in weather with strong winds (>24 mph), heavy fog (<200m visibility), or steady rain. You will be notified if the count is canceled due to weather.
- **Observers:** Under most conditions, surveys should be conducted by one observer. Having multiple observers counting simultaneously may bias results. We recommend working in pairs where one person counts birds (Observer) and a second person records data (Data Recorder). In large areas or areas with large numbers of birds, additional observers should split the count effort (by species or sub-divided areas) to enable completion of the count in the allotted time window. All observers (people counting) and data recorders should be listed on the data sheet and entered into the California Avian Data Center (CADDC).

- **Pre-survey scouting:** We encourage you to visit your survey area prior to the day of the survey so you are certain how to easily access the area.
- **Datasheet:** Please refer to accompanying datasheet along with this protocol.

SURVEY PROTOCOL AND DATA COLLECTION

Begin each area-search survey by recording the **Start Time** (24-hr clock; e.g. 3PM = 1500), **Date** (mm/dd/yyyy), **Observer(s)** who counted birds (full name[s]), and **Data Recorder(s)** on the datasheet. Record the observer's full name[s] – multiple observers should only be recorded if a survey area was split between two observers.

Then move around, as needed, to count and identify to species all shorebirds using the survey area as defined on your map. This includes birds that enter or leave the survey area during the survey. For shorebirds to be considered “using” the survey area, it needs to be on the ground within the defined survey area for at least part of the time it takes to do the survey. Thus, shorebirds that fly over the survey area but do not land in it should **NOT** be counted. Keep track of bird movements and do not to double-count shorebirds if they leave and then re-enter the survey area or if they fly from one side of the road to the other. Also, count all raptors (e.g., hawks, falcons) by species that are within, perched adjacent to, or foraging over the survey area. Record numbers of each **species** seen in the **tally** column (see www.prbo.org/pfss/resources for recording tips).

Once the area has been thoroughly searched and all shorebird and raptors recorded, the count is considered complete. At that point, the **End Time** should be noted on the datasheet and thereafter **NO** additional birds should be recorded for that survey area. The total number of each species observed during the count of each survey area should be entered into the **Total** column.

Coastal area-search surveys must be complete within the allotted time as indicated by your project leader (usually 1-2hours). Please make sure to pace yourself accordingly, whether you are surveying one large survey area or multiple smaller survey areas, so that you finish on time.

NOTE: Site coordinators should match the number of observers with the size of the survey area and the expected number of birds in that area, so that the count can be completed within the optimal tidal window.

Counting Methods

It usually will be possible to make exact counts of small groups of birds (<50 individuals), but estimation may be needed for larger flocks. However, it may not be possible to identify a few or, sometimes, even large numbers of shorebirds because of poor lighting, quick or distant views, similarity of species, or other factors. Try to count or estimate numbers by whatever technique works best as listed here in order of preference (also see tips on how to estimate flock size at www.prbo.org/pfss):

1. Identify species and their abundance (i.e., 148 Western Sandpipers, 153 Dunlin, 308 Least Sandpipers)
2. Estimate the proportion of species in flock and use the proportions and total flock size to calculate the total of each species (i.e., 600 birds: 25% Western, 25% Dunlin, 50% Least = 150 Western, 150 Dunlin, and 300 Least). **Note:** only do this calculation if you are confident the proportions are accurate. Please use a mixed-species code if necessary (see next bullet).

3. Estimate size of flock and species present (i.e., 600 birds, composed of Western Sandpipers, Least Sandpipers and Dunlin in unknown proportions). Please see the species list at the end of the protocol for commonly recorded mixed-species flocks.

Following bird observations fill out the remainder of the datasheet completely, including **Survey Area Conditions** (see below). *Data should be recorded on a separate datasheet for each unique Survey Area* as named on the survey area map. Please fill out a datasheet **even if no birds were detected**. These data will help us determine the total effort expended during each survey and knowing that zero birds were observed are important data for determining the conditions that influence bird use.

SURVEY AREA CONDITIONS

Record weather and habitat conditions for each survey area using the following codes. Because the survey may take over an hour and cover a large area, we recommend keeping notes on weather and survey area characteristics while moving through the survey area. The survey area map can be useful for tracking survey area characteristics. You can then summarize survey area conditions during your survey on the data sheet using the criteria below. If weather conditions shift during the course of the survey, record the average condition observed.

WEATHER

Wind speed (**Wind**): *Do not conduct surveys when wind speed is consistently >24 mph (category 5 below)*

0 – *calm* (<1 mph): smoke rises vertically; mirror-like surface to water

1 – *light air* (1 – 3 mph): smoke drifts; scaly ripples on water, no foam crests

2 – *light breeze* (4 – 7 mph): felt on face, leaves rustle; small wavelets, crests glassy, no white caps

3 – *gentle breeze* (8 – 12 mph): leaves and small twigs in constant motion; large wavelets, crests begin breaking, scattered white caps

4 – *moderate breeze* (13 – 18 mph): dust, leaves, and loose paper rise up; small branches move; small waves 1-4 ft., numerous white caps

5 – *fresh breeze* (19 – 24 mph): small trees sway; moderate waves, 4-8 ft., many whitecaps and some spray

6 – *strong breeze* (25 – 30 mph): large branches in motion; larger waves, 8-13 ft., white caps common, more spray

Cloud cover (**Cloud**): *Indicate the percent of sky covered by clouds*

Enter numeric percentage (0 – 100)

Precipitation (**Precip**): *Ideally, surveys should not be conducted in steady rain. But if the survey is conducted despite steady rain at your survey area or rain starts when in the field, please record 3 as the code.*

0 – none

1 – light intermittent; mist, sprinkle, drizzle

2 – fog

3 – steady rain

CHARACTERISTICS

When recording site characteristics, be sure to distinguish between the dominant Cover Types (**Type**) present at the time of the survey (not all of which will be potential shorebird habitat) versus the Cover Types that are being used by shorebirds; the latter is not recorded in this survey.

Cover Type (Type): Document the cover type(s) that best describes the **dominant characteristic(s)** of the survey area. Record the one or two cover types **that each comprise at least 40% of the survey area**; if no cover type meets this criterion, leave blank and describe the composition of the cover types in the notes section of the survey datasheet.

- 1 – **Wetland:** open water with tules, cattails, and some grasses and sedges.
- 2 – **Rice:** flooded or dry field with clearly defined internal levees; if dry, the field may be tilled or have standing stubble.
- 3 – **Pasture:** predominantly grasses; if irrigated it will be green year round.
- 4 – **Hay:** various types of grass/herbs mowed and cured for fodder.
- 5 – **Irrigated Row Crop:** likely dirt field with raised beds or with standing stubble (e.g. corn, tomatoes, cotton)
- 6 – **Winter Crop:** emergent green vegetation from tilled soil (e.g. winter wheat)
- 7 – **Freshwater Lake/Pond:** large body of freshwater including reservoirs
- 8 – **Evaporation Pond:** settling pond constructed to collect agricultural wastewater
- 9 – **Wastewater Pond:** pond associated with wastewater from sewage or other industrial operations
- 10 – **Orchard:** trees (e.g. almonds, apples etc.)
- 11 – **Forest:** extensive woody vegetation, non-agricultural (e.g. willows in riparian)
- 12 – **Developed:** houses, cemetery, parking lot, other human-made structures etc.
- 13 – **Salt Pond:** shallow, artificial pods of water (without vegetation) associated with salt production. This includes the levee around the salt pond.
- 14 – **Tidal Salt Marsh:** coastal marsh (with vegetation) inundated by high tides
- 15 – **Tidal Mud Flat:** areas of mud, sand, or gravel (generally lacking vegetation) alternately exposed and inundated by tides. If mudflats are covered with water at the time of the survey, the cover type should be considered “Bay/Ocean” (see 19 below).
- 16 – **Beach:** sandy shoreline; sand can be coarse or fine grain and composed of multiple substrates
- 17 – **Rocky Shoreline:** (includes riprap, i.e., embankments lined with rocks or chunks of concrete to limit erosion).
- 18 – **Agriculture Field** (non-orchard) includes categories 3, 4, 5 and 6 from above. Use this category only when unable to determine a more specific field type.
- 19 – **Bay/Ocean:** open water within a tidal system. Includes waters over subtidal areas, water covering tidal flats at time of survey, and the ocean.
- 20 – **Diked Salt Marsh:** muted or non-tidal salt marsh. Area may be entirely diked, and, if so, usually includes some salt marsh vegetation. Muted tidal areas have a narrow break in the dike (or a tidal culvert or gate) allowing tidal flow to slowly enter or leave the diked area. In such cases, high and low tides are delayed relative to the adjacent portions of the bay. The proportion of tidal flat or marsh vegetation may depend on various factors, including time since restoration of tidal action, slope or profile of area, degree of subsidence, etc. This type includes salt ponds recently restored to tidal action.
- 21 – **Levee**
- 22 – **Islands**
- 23 – **Lagoon:** saline, alkaline, or fresh water pools separated from a main body of water by a shoal; pooled water may be from waves washing over shoreline berms, waters stranded by declining lake levels, or water from drains or streams that pools up behind beaches or other shoreline features. Lagoon shorelines may be barren or may support marsh plants or trees.
- 24 – **Saline Lake:** landlocked lake with high concentrations of mineral salts (saline or alkaline).
- 99 – **Other:** describe in notes

Tidal Conditions (Tide): Each coastal estuary site should be surveyed under the same tidal conditions each year. However these may vary due to weather conditions. Please record you best assessment of the tidal conditions at your survey area.

- 1 – high
- 2 – almost high, and rising
- 3 – almost high, and falling
- 4 – half tide, rising
- 5 – half tide falling
- 6 – almost low, rising
- 7 – almost low, falling
- 8 – low
- 9 – not observed, not applicable, or observations made during more than one of these periods.

Area Surveyed (Visible Area): Because wintering shorebirds can only be detected through visual observation, visual obstructions (e.g. levee, tall vegetation, distance) may limit your ability to see some portions of the survey, it is important to record the percent of the survey area you could see and subsequently count. If you cannot see over (e.g. vegetation >5ft tall) or through vegetation it is blocking part of the survey area and should be accounted for by reducing the Visible Area. However do not reduce the visible area if there is short vegetation that does not block your overall view of the survey area.

Enter data as numeric percentage: (0–100) -or- U: Unknown/Cannot Determine

Percent Flooded, Percent Bare Ground, Percent Vegetated

**The following 3 variables (PercFlood, PercBare, PercVeg) often will sum to 100% but do not have to.*

When estimating proportions of these variables, it may be useful to mentally divide the survey or visible area into a grid to better visualize the extent of each. Another option is to sketch the extent of the flooded, vegetated, and bare areas on your map. If tracking on your map, do this based on what you see on the ground during the survey, as things may have changed since the aerial photo was taken, or it may have been taken at a different tide than that on the survey date.

Percent Flooded (PercFlood): Percent of visible area with open standing water; encompasses the sum of flooded fresh or brackish areas, salt ponds, and open bay waters, including tidally inundated areas at the time of the survey.

Enter numeric percentage: (0 – 100) -OR- U: Cannot Determine

Percent Bare Ground (PercBare): Percent of visible area with open dirt or mud at the time of the survey.

Enter numeric percentage: (0 – 100) -OR- U: Cannot Determine

Percent Vegetated (Perc Veg): Percent of visible area with vegetation at the time of the survey.

Enter numeric percentage: (0 – 100) -OR- U: Cannot Determine

Vegetation Height (VegHt): Visual estimate of the average vegetation height in the visible survey area. If the survey area is flooded, estimate the height of the vegetation emerging from the water.

- | | |
|----------------|-----------------|
| 0: Bare | 3: >12 – 18 in. |
| 1: 1 – 6 in. | 4: >18 – 24 in. |
| 2: >6 – 12 in. | 5: >24 in. |

Notes: Record any additional details about factors that may have influenced the accuracy of your count in the notes section of the datasheet. Such factors might include intense disturbance by raptors or large mammals (coyotes, dogs), machinery, crop dusters flying overhead, etc.

WHAT TO TAKE IN THE FIELD

Survey Area Map(s)	Scope and tripod
Protocol & Species list	Watch
Datasheets	Sunscreen
Permit and keys (if applicable)	Water
Pencils or Permanent Ink Pen	Field guide
Binoculars	Clip Board

DATA ENTRY

Data should be entered directly into the appropriate project in California Avian Data Center (CADC; www.prbo.org/cadc) within a few days of the survey. If you have not registered for a CADC account please see the CADC protocol on the PFSS website (<http://www.prbo.org/pfss/resources>) for instructions on how to register with CADC and enter data.

SHOREBIRD SPECIES IDENTIFICATION

View or download instructional shorebird identification materials on the Pacific Flyway Shorebird Survey website: <http://www.prbo.org/pfss/resources>.

PACIFIC FLYWAY SHOREBIRD SURVEY SPECIES LIST

The following list contains the primary species of shorebirds, including mixed flocks, and diurnal raptors that may be seen in or around shallow-water habitats in the Pacific Flyway in winter. Note that some of these species may be rare or absent as you move north to south or from the coast to the interior of the state. Also, this list is NOT comprehensive and, hence, we ask that you record all shorebirds and diurnal raptors that you identify. The California Avian Data Center (CADC) will allow you to look up the "Species Code" for species that are not listed here (please see the CADC data entry protocol for more information).

SHOREBIRDS

Black-bellied Plover (BBPL)
American Golden-Plover (AMGP)
Pacific Golden-Plover (PAGP)
Snowy Plover (SNPL)
Semipalmated Plover (SEPL)
Killdeer (KILL)
Mountain Plover (MOPL)
Black Oystercatcher (BLOY)
Black-necked Stilt (BNST)
American Avocet (AMAV)
Spotted Sandpiper (SPSA)
Solitary Sandpiper (SOSA)
Wandering Tattler (WATA)
Greater Yellowlegs (GRYE)
Lesser Yellowlegs (LEYE)
Greater/Lesser Yellowlegs (XYEL)
Willet (WILL)
Whimbrel (WHIM)
Long-billed Curlew (LBCU)
Whimbrel/Curlew (XNUM)
Marbled Godwit (MAGO)
Curlew/Godwit (XCGO)
Whimbrel/Curlew/Godwit (XWCG)
Godwit/ Whimbrel/Willet/Curlew (XWNG)
Ruddy Turnstone (RUTU)
Black Turnstone (BLTU)
Surfbird (SURF)
Red Knot (REKN)
Sanderling (SAND)
Semipalmated Sandpiper (SESA)
Western Sandpiper (WESA)
Least Sandpiper (LESA)
Baird's Sandpiper (BASA)
Pectoral Sandpiper (PESA)

Rock Sandpiper (ROSA)
Dunlin (DUNL)
Western/Least Sandpiper (XWLS)
Western/Least/Dunlin (XWLD)
Stilt Sandpiper (STSA)
Ruff (RUFF)
Short-billed Dowitcher (SBDO)
Long-billed Dowitcher (LBDO)
Short-billed/Long-billed Dowitcher (XDOW)
Wilson's Snipe (WISN)
Wilson's Phalarope (WIPH)
Red-necked Phalarope (RNPH)
Red Phalarope (REPH)
Wilson's/Red-necked Phalarope (XWRP)
Wilson's/Red-necked/Red Phalarope (XPHL)

DIURNAL RAPTORS

Turkey Vulture (TUVU)
Osprey (OSPR)
White-tailed Kite (WTKI)
Bald Eagle (BAEA)
Northern Harrier (NOHA)
Sharp-shinned Hawk (SSHA)
Cooper's Hawk (COHA)
Sharp-shinned/Cooper's (XSCH)
Red-shouldered Hawk (RSHA)
Swainson's Hawk (SWHA)
Red-tailed Hawk (RTHA)
Ferruginous Hawk (FEHA)
Rough-legged Hawk (RLHA)
Golden Eagle (GOEA)
American Kestrel (AMKE)
Merlin (MERL)
Peregrine Falcon (PEFA)
Prairie Falcon (PRFA)