

By Barbara MacKinnon H.
Published by Amigos de Sian Ka'an A.C.
2004

Acknowledgements

We would like to acknowledge the following organizations and individuals who contributed to this manual.

Organizations



Canadian International
Development Agency

Agence canadienne de
développement international

Author

Barbara MacKinnon H., Coordinator, Program, Conservation of the Birds of the Yucatan Peninsula (CAPY), Amigos de Sian Ka'an, A.C.

Contributors

Dave Gibson, Learning Associates, Canada

Héctor Gómez de Silva, Ornithologist, Universidad Autónoma de México (UNAM), D.F., México

W. Cole Thompson, Department of Landscape Architecture, University of Washington

Paul Wood, Director, T'sil Reserva Natural, Q. Roo, México

Editor

Dave Gibson, Learning Associates, Canada

Project Manager

Mara Kerry, Nature Canada

Reviewers and Advisors

Gonzalo Merediz Alonso, Coordinador de Proyectos, Amigos de Sian Ka'an A.C.

Héctor Gómez de Silva, Ornithologist, Universidad Autónoma de México (UNAM), D.F., México, D.F., México



Table of Contents



Part 1: Introduction5

Rationale	5
Approach	5
Audiences for This Manual	5
How to Use This Manual	6

Part 2: Organizing a Workshop ..7

The Workshop Team	7
Summary of Responsibilities of a Workshop Coordinator	7
Summary of Responsibilities of a Field Coordinator	7
Summary of Responsibilities of an Instructor ...	8
Establishing the Need for a Workshop	8
Initiating a Workshop	9
Making Contact: The Community as Partner	9
Logistics	10
Recruiting Instructors	11
Recruiting and Selecting Participants	11
Criteria	11
Promoting the Workshop	11
How to Set Goals and Objectives of the Workshop	12
The Workshop Timetable	13
Instructor Tips	14

Working with Rural Adult Learners	14
Dealing with Competitive People	15
Tardiness and “No Shows”	15
Small Town Politics	16
Setting up a Room for Participation	16
Basic Materials and Equipment	16
Learning Materials and Expendables	16
Visual Aids	16
Audio Aids	16
A Checklist of Basic Materials and Equipment	17
Binoculars, Scopes, Field Guides and Backpacks	18
Organizing a Bird Walk	19
Planning and Route Selection	19
Leading the Walk	20
Evaluation	22
Indicators of Workshop Success	23
Evaluating the Instructor	23
Indicators of Instructor Success	23
Evaluating the Participant	23
Indicators of Participant Success	25
Reports To Donors	26
Certification, Diplomas and Credit	26



Table of Contents

Part 3: The Workshop Content ..27

Creating a Workshop Timetable/Agenda27

Learning Objectives and Topics29

Learning Objectives and Topics
for a First Workshop29

Learning Objectives and
Topics for a Second Workshop30

Learning Objectives
and Topics for Third Workshop30

Learning Objectives
and Topics for Subsequent Workshops31

Topic 1: Why Birds?33

Topic 2: Bird Identification35

Topic 3: Local Area's Bird Diversity39

**Topic 4: Use, Care and Selection
of Equipment41**

Topic 5: Bird Conservation45

Topic 6: Amazing Facts About Birds51

Topic 7: Bird Natural History53

Topic 8: Monitoring Techniques55

Topic 9: Characteristics of a Good Guide .57

Topic 10: Organizing a Bird Walk61

Topic 11: Birding Ethics63

Topic 12: Safety65

Topic 13: Business Skills67

**Topic 14: Developing a
Nature Trail or Viewing Area69**

Topic 15: Creating a Local Bird Club73

Part 4: Appendices75

Appendix 1: Sample Letter of Invitation75

Appendix 2: Sample Agendas77

Appendix 3: Phonetic English Bird Names83

Appendix 4: Sample Bird Checklist89

Appendix 5: Sample Diploma91

Appendix 6: Workshop and
Instructor Evaluation93

Appendix 7: Charts95

Appendix 8: Recommendations for
a Brief, One-time Bird Training Workshop97

Appendix 9: List of Field Guides99



Part 1: Introduction



We have created this manual to assist organizers and instructors of bird identification workshops in Latin American rural communities. The material in the manual is based on the author's experience in conducting two and three-day "bird identification and guiding" workshops in rural communities, fishing villages and a Mayan forest community, all within protected natural areas on Mexico's Yucatan Peninsula. The workshops were conducted from 2000 to 2004.

Rationale

The ecological, social and economic importance of birds is well documented. Mexico provides a home for about 1,100 species of resident and migratory birds. Despite international conservation efforts, many bird populations are in dramatic decline. In most cases, this is due to the degradation or loss of the natural habitats upon which they depend.

Economic opportunities are limited in many rural communities. Facing poverty and a daily quest to meet their basic needs, many people remain unaware of the value of birds. Nor are they aware of the link between declining bird populations and habitat loss. Unlike a garden or cornfield, natural forest and savannah are not viewed locally as an economic asset. Large patches of natural habitat that do not have local "stewards" can burn into oblivion without generating a sense of loss in the nearby communities.

The key to turning this situation around is to help rural people understand not only the ecological and social values of birds and their habitats but also the tremendous economic opportunities and "eco-tourism" dollars that birds can bring to the region. Bird-watching remains one of the fastest-growing pastimes in an aging, increasingly affluent and globe-hopping human population. Simple bird identification training workshops, if conducted correctly and for an extended period of time, can help rural communities serve this tourism market while significantly improving both the local economy and the stewardship ethic of local residents.

Approach

While international agencies play a key role in coordinating and supporting rural economic and conservation initiatives, it is best to take a local approach. This means creating local partnerships and developing local capacity to address the issues. It is important to build on the experiences of local residents who may understand a great deal about their natural environment but whose perception of its value is tied to survival. The first step is to alter this limited perception by helping the local inhabitants develop eco-tourism activities that will benefit them economically in the long run.

It is also important to consider, in your approach, the scope of the training itself. It is very important that you include training on ethics and basic ecology. Partially-trained guides and ill-conceived eco-tourism activities can also cause ecological damage and, in the long run, undermine any economic gains.

Audiences for this Manual

The manual is written with two main audiences in mind:

- Workshop Coordinators (and/or Field Coordinators) who wish to initiate and organize workshops to train local, rural people as guides for bird walks. These people may be associated with national or international development agencies or local community organizations. These people may or may not be the actual workshop Instructors.



Part 1: Introduction

- Workshop Instructors who are responsible for teaching birding and guiding skills to rural learners with a wide variety of literacy levels, educational backgrounds and work experiences.

How to Use This Manual

This manual provides the building blocks for a series of successful workshops and represents a “guide” or model to assist you. We encourage Coordinators and Instructors to add their own personal touch by customizing their program of study.

Use the Table of Contents and the symbols (below) to quickly locate the parts of this manual that are most useful to you in the role that you have in the workshop coordination or delivery.



Indicates sections that are of primary interest to Workshop Coordinators and Field Coordinators (please refer to Part 2 for a description of the different roles).



Indicates sections that are of primary interest to Workshop Instructors.

- Part 3 is of primary interest to instructors. It covers the basics of selecting the topics to cover in the workshop(s), gives background information and suggests methods and activities to best deliver the information.
- Part 4, the Appendices, supplies varied helpful information mainly for Instructors.

Although the manual provides a wealth of information, it is not exhaustive. Please feel free to add material and/or alter it as best suits your needs. We appreciate any changes or additions you might suggest to improve the manual. Suggestions may be sent to:

Coordinadora, Programa
Conservación de las Aves en la Península de
Yucatán (CAPY)
Amigos de Sian Ka'an, A.C.

Web site: www.amigosdesiankaan.org

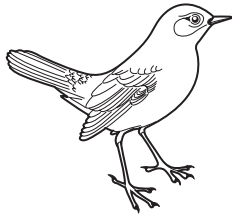
The manual is divided into four separate sections:

- Part 1 provides information on the manual itself and the rationale for “bird guide training workshops”.
- Part 2 offers practical tips for setting up and instructing a workshop or a series of workshops.



Part 2: Organizing a Workshop

THE WORKSHOP TEAM



Below we describe three separate and important roles for people who wish to organize and deliver a successful bird identification workshop. Note that the roles overlap. In some instances, the same individual may take on more than one role. In other situations, an individual may perform only a small part of a larger role (for instance, a Project Director from the participating NGO may play the role of the Workshop Coordinator by making the initial contact with the community.)

How ever you divide the work, you will achieve the most success when you work well as a team to cover the responsibilities described below.



Summary of Responsibilities of a Workshop Coordinator

A Workshop Coordinator provides leadership, guidance and “big picture” vision to a workshop or series of workshops. Ideally the Workshop Coordinator is a leader living in the community or a representative of a non-governmental organization (NGO) working in the area. Access to a phone is critical.

If you are able to recruit a local candidate for this role, you might successfully combine it with the Field Coordinator role (described in the next section).

The Workshop Coordinator:

- Provides leadership in setting the overall goals and objectives of the training program.
- Is the first point of contact with the local community, and determines if a training program is a viable option for the community.
- Helps the community do an assessment of the tourism potential of the local area.
- Enters into formal agreements with the community to set up the workshop series and to lay the groundwork for logistical arrangements.
- Help the Workshop Instructors develop the agenda and create the materials.

- Helps the Workshop Instructors secure slides and a slide projector (if needed), and write up a report. The report should include pictures taken by the Coordinator or Instructors during the workshop.
- Offers other logistical support to the Field Coordinator and Instructors.
- Files a financial report with the non-government organization (NGO) or the immediate funding agency.



Summary of Responsibilities of a Field Coordinator

A Field Coordinator is essential to the success of a program, particularly with communities that do not have a viable communication system. The Field Coordinator should be someone living in or near the community, whether a local political leader, a representative of a local NGO, a visiting researcher or a staff member of a nearby Reserve. Once again, access to a phone is critical. The Field Coordinator works closely with the Workshop Coordinator to:

- Coordinate the dates and logistical details of the workshop between participants and the workshop coordinator.



Part 2: Organizing a Workshop

- Secure a location for the classroom sessions.
- Arrange for any support provided by the community (boat, vehicle, lodging, meals etc.)
- Secure lodging for the instructors.
- Promote local participation in the workshop.



Summary of Responsibilities of an Instructor

The Workshop Instructor is the person who will make the workshop agenda and information come to life for the participants. This person should:

- Act as the workshop facilitator and leader and take an active role in all classroom and field sessions.
- Play an active role in the decision-making around logistics, goals and objectives, timetabling and instructional methods.
- Play an important role in giving feedback to participants in the form of evaluation, certification or simple encouragement.
- Assist the Workshop Coordinator in preparing a report to program sponsors and donors.



Establishing the Need for a Workshop

A number of important criteria must be met before you establish a training program.

- Consider whether tourism potential currently exists in the area. If it does not, you may be creating unrealistic expectations and thereby setting up the community for failure. It will be difficult to re-engage the local population in the future if economic expectations related to tourism are not met.
- Plan how to integrate and operate ecologically-friendly tourism at the site if tourism already exists at the time training is introduced. Develop and implement a land-use and economic plan. To ensure success, involve local residents in the development of the plan and supply expert advice along the way. Besides economic factors, the plan should address both conservation needs and tourist expectations, components that can often be at odds.
- Evaluate whether people in the community perceive a need for the training. It will be difficult to “sell” the workshop idea if no perceived need exists in the minds of potential participants.





Initiating a Workshop

Although there are certain similarities between communities, you should consider each community as a separate entity with its own set of individual characteristics. It is extremely helpful to have a good understanding of the situation in the community before you plan a workshop. Things to consider include:

- The availability of a local and suitable Field Coordinator.
- The number of tourism cooperatives and the relationships between them.
- The profile and number of visitors to the area.
- The profile of the local guides and their organizations, including the level of schooling, the native language spoken and the ability to read and write.
- The relationship between the community and the management of the local reserve.
- The historical, social and economic profile of the village.
- The pressures caused by present tourism activities on the local flora, fauna and habitats.
- The availability of suitable locations for conducting classroom sessions.
- The cultural obligations of participants and their availability during the high tourism, planting or fishing season.
- The logistical challenges within the local area.



Making Contact: The Community as Partner

Consider carefully how and when you invite a community to participate in a series of training workshops. (It can be an ineffective use of time and resources to attempt to convince local people that training will pull them out of poverty and improve their lives if they do not hold the same perceptions.) More often than not, those invitations that prove successful follow previous community development work.

As you prepare to convene the first in a series of workshops, consider the following:

- If possible, offer the training as a response to a petition from members of the community, such as members of a Tourism Cooperative.
- Begin planning by involving community members in an analysis of their situation. Once you have addressed their needs with possible solutions, you can suggest bird guide training as part of an overall community development strategy. In the beginning, the community probably won't care about conservation – they will want development.
- Learn what the motivating factors are and address them. Where tourism is already well developed in a community, economic competition may create a fertile ground for training bird guides. Well-conceived workshops can elevate the local standards of birding ethics and habitat conservation. They may also promote comradeship based on a deeper interest in learning more about birds.
- Treat the community members and supporting organizations as partners from the beginning. Here are a few tips:
 - Involve the maximum number of players initially.
 - Recruit a locally respected, capable Field Coordinator.
 - Include local reserve staff, the president(s) of the tourism cooperative(s), and any local NGO's actively working in the area.
 - Include local experts and all local guides who have received some previous training. The workshops could provide an opportunity to overcome antagonisms based on professional jealousy.
 - Formalize community involvement in the workshop planning and delivery so it is taken seriously in communities that have never partici



Part 2: Organizing a Workshop

pated in similar activities. Send a letter of invitation to the groups and individuals you wish to involve (either in support roles or as participants). The tone of the letter should be friendly but professional, indicating that the workshop is an opportunity. Clearly state your expectations of workshop partners. Indicate that the invitation is not transferable if the letter is directed to an individual. Achieve consensus as to who signs the letter of invitation and how it is delivered. Ideally local reserve personnel or someone from the local conservation NGO who has a presence in the community will sign. Ensure that the letter contains the logo of the reserve and the workshop host organization. Consider including the logos of the donors.

- As Workshop Coordinator, seek support from the community in order to carry out the workshops. If no real need for support exists, create one! You might request support with: a neutral location to hold classroom sessions; a vehicle or boat to assist with taking bird hikes in habitats different from those found in the immediate area; housing; and meals.



Logistics

Logistics, including selecting workshop dates and timetabling the event, can be challenging. The program must not only fit into the daily activities of the community but also with the schedule of the instructors and any activities planned by the local reserve management. The Field Coordinator, with his or her local contacts, is the person who is primarily responsible for negotiating workshop dates and timetables that are convenient for all concerned.

The workshop team will also have to make other logistical arrangements. Clarify who will:

- Arrange transportation by land or water for field trips (pick up trucks, boats, etc.). Consider the appropriateness of the vehicle for the terrain that you will cover. Always verify the condition of local roads and ensure that there is room to turn vehicles around. (This is usually the Field Coordinator's job.)



- Arrange housing for outside guests and instructors (usually the Field Coordinator's job).
- Arrange meals (usually the Field Coordinator's job).
- Arrange refreshment breaks for guests and participants. (This is usually the Instructor's job.)
- Arrange a convenient location that can serve as a classroom. This may involve making a formal request to the political head of the village, the reserve management, a fishing cooperative or another group. Arrangements should be made at least four weeks in advance of the beginning of the program (earlier if possible) and be confirmed the week prior. (This is usually the Field Coordinator's job.)
- Arrange for special services and equipment, where available (such as electricity for a slide projector). This should also be done weeks in advance. (This is usually the Workshop Coordinator's job.)
- Advertise and promote the workshop locally (usually the Field Coordinator's job).

Wherever possible, ask the community to contribute to the workshop in order to establish more of a local commitment to the training effort.





Recruiting Instructors

The Workshop Coordinator or Field Coordinator may be an instructor as well as an organizer. Where this is not the case and where it is possible, choose a Workshop Instructor who is known to the community as an expert in the field of birds. At the same time, avoid those people who represent local authority or who are deeply involved in local gossip, family feuds or "politics". In other words, choose someone as neutral as possible. The Field Coordinator should make the initial contact with the Instructor if he or she is a local person.

We recommend that you recruit one instructor for every six to eight participants. Hire people you can rely upon. Increase this reliability by paying instructors well and sticking with workshop dates once they have been set.



Recruiting and Selecting Participants



Criteria

Initially, participation in the workshop should be completely voluntary. Later on, you may improve attendance if you can convince local reserve management to count your training toward a mandatory accreditation system for local guides who wish to lead tours within the protected area.

State up front that you expect the same participants to attend all sessions in a particular workshop. This is especially important when you have a large number of potential participants vying for limited workshop space and you have had to pre-select candidates.



Promoting the Workshop

You will do most of the workshop promotion as you engage the community if you follow the suggestions in the sections entitled "Initiating a Workshop" and "Making Contact: The Community as Partner." Normally, little additional promotion will be needed other than to have the Field Coordinator remind participants a few days before the workshop. (Naturally, you should have carefully selected the days of the workshop to meet the participants' needs and availability.)

However, where there is a great deal of competition among several Tourism Cooperatives, potential guides may have a tendency to skip the training in order to "grab" clients for that day. Convincing guides to choose the long-term benefits of increasing their knowledge over a tangible short-term economic gain is an uphill struggle. You can encourage a more long-term view if you:

- Patiently and continually develop local role models for participants to follow.
- Offer tangible incentives and recognition for successful training. In addition to certificates, consider awarding cloth "badges" that indicate progressive levels of training and proficiency. These can be sewn onto backpacks, clothing or caps and proudly worn by qualified guides. Hats and t-shirts with special insignia can also raise the profile of your workshops and the guides that attend them. Though such free materials add to your workshop cost, they will be out in the community working for you to promote your next workshop.
- Convince the local reserve management to require certification for all guides who use the reserve and to offer that certification through your workshops.





How to Set Goals and Objectives of the Workshop

Clear goals and objectives provide direction for the Instructor and a means to measure success. Be sure to involve all local stakeholders in setting the workshop purpose and goals.

A purpose or primary goal is a simple statement of what you hope to accomplish generally through your workshops. The purpose or primary goal could read as follows:

- To develop economic opportunities which promote the conservation of natural areas by the inhabitants of the local rural communities, while building local capacity for monitoring bird populations and their habitats.

Goals are more specific things you hope to accomplish through the workshop. They really divide the purpose or primary goal into smaller chunks. Therefore, after outlining your purpose, set a number of more specific goals. Design each workshop agenda so it incorporates the steps that will lead to achieving the goals.

Workshop goals could include all or some of the following:

- To help participants understand the value of the surrounding natural resources and promote their desire to conserve them.
- To cultivate the participants' sense of pride and stewardship for the rich diversity of bird life in their local area.
- To promote the participants' self-esteem by training them to become successful nature guides.
- To promote attitudes and activities that better integrate the community with a nature reserve and its objectives.

- To help participants develop skills to identify bird species on their own and with the aid of an identification book.
- To make participants aware of the threats to the survival of birds and encourage them to address the threats locally.
- To introduce participants to the nomenclature, taxonomy, identification, distribution, status, ecology, migration and local traditional lore of birds.
- To train participants in the care and use of field equipment.
- To help participants develop and practice low-impact bird-watching techniques.
- To rescue and value traditional knowledge, art, stories and myths about birds and their habitats.

After setting workshop goals, the instructor and workshop coordinator should sit down and create specific "*Learning Objectives*" that relate to each goal. Examples are included in Part 3. You may refer to these or write your own. If you write your own, keep in mind that Learning Objectives should:

- Express what the participants will learn (to address each of your goals) through the workshop activities.
- Address changes in knowledge, skills or attitudes that you wish to achieve in the participants.
- State clearly what the participant (i.e., learner) will be able to do after the lesson.
- Be specific.
- Be measurable.
- Be action-oriented (i.e., contain a verb).
- Be realistic and appropriate for the workshop series.

Here are three examples:

- If you wish to write an objective that addresses the goal of “increasing understanding of the value of the surrounding natural resources”, you might say, “The learner will be able to describe three ways birds are valuable to humans.” That objective is specific (it specifies 3 ways), measurable (you can test your success by asking the learner to describe the ways), action-oriented (“describe” is the action) and realistic (it is not too hard for the level of the learner).
- If you wish to write an objective that addresses a skill, such as bird identification, you might say, “The learner will be able to correctly identify 10 local birds by song”.
- Attitude changes are the most difficult to measure. You must specify indicators of attitude change. For instance, if you wish to write an objective to address increased pride and stewardship for the local bird life, you might say, “The learner will denounce activities that lead to local habitat degradation.”



The Workshop Timetable

There is no single workshop timetable or agenda that will fit every situation. Workshop Coordinators, Field Coordinators, Instructors and community partners will have to work as a team to determine the local training priorities and select appropriate learning objectives. Then you will have to arrange suitable activities into a workshop timetable that will meet the needs of all concerned within the constraints of the local topography, climate, available infrastructure and culture. We have provided guidelines for preparing timetables and agendas in Part 3 of this manual (“Creating a Workshop Agenda”). For samples of agendas that have worked well, please refer to the Appendices.





INSTRUCTOR TIPS



Working with Rural Adult Learners

Each learner is different but many share the characteristics described below. Check the sections entitled “Dealing with Competitive People” and “Tardiness and No Shows” if you are facing participants that seem a bit more difficult than the norm.

- *Adult participants will arrive with their own expectations and agendas.* On one hand, try to work with them to determine what they want, then work to meet these expectations within the parameters of your own goals. At the same time, let them know at the beginning of the workshop what you expect of them (never as a threat but rather as a statement of your confidence in them to learn). Be especially clear about:
- *Your expectations for attendance:* Require each participant to sign an attendance list for all classroom sessions and bird walks to demonstrate that you are serious about prompt and regular attendance. Record attendance and reward those with a perfect attendance record. Establish attendance requirements for certification. A lackadaisical attitude easily spreads, and you may quickly find yourself with no control over attendance.
- *Your expectations regarding timeliness and active participation in all sessions:* After all, you could be devoting time, effort and funding to other needy communities. It is important to let the participants know that a lack of participation might mean that future training opportunities could go to another community.

- *Adults come to a presentation with a lot of experience behind them and a desire to contribute.* Avoid overwhelming students with new information at the start. Instead, encourage participants to talk about what they already know about birds, including culturally based stories that have been passed on for generations.
- *Adults want presentations that are relevant and useful.* Help them see how the information and skills they gain will improve their lives.
- *Adults need to maintain their self-esteem.* Make them proud of their heritage and reward them for any information they are able to share about birds, especially in their indigenous language. Do not make the participants feel “stupid” because they cannot properly pronounce names in another language. It will not take long for them to gain self-confidence. During the classroom exercises, especially in the beginning, avoid putting participants in a position of being ashamed because they cannot write or they cannot speak in English. Instead encourage them to feel good about what they do know.
- *Many participants will not have attended school past the sixth grade and often lack writing skills.* Attention spans may also be short.
Remember to:
 - Keep things active.
 - Use activities that can generate as much excitement as possible.
 - Make the sessions as participatory as possible in order to maintain alertness and interest.
 - Avoid activities that require a lot of writing. This will only increase self-consciousness and create stress.
 - Take advantage of participants’ visual skills and memories.
 - As much as possible, create exercises that are fun for all, organizing the class into teams to avoid embarrassment. Even the most experienced guides will get nervous and not respond well under pressure.



- Change classroom-based activities often. Normally, don't stay on a single theme for more than 45 minutes to an hour in order to keep the participants' attention peaked (you might extend this time when the group is advanced and they show interest in the subject matter).

Guide-training workshops can contribute enormously to self-esteem. Rural people do not know the value of their knowledge until they learn to combine it with other skills and become paid nature guides. It is important that you, as an instructor, re-enforce this development of self-esteem during workshop activities. One of your most gratifying moments might be when you help one of your guides "discover" the true value of his knowledge and experience.



Dealing with Competitive People

If the competition for work in the community is so fierce that members of one cooperative avoid all contact with others, you may need to break down a wall of resistance. Here is one method:

- At first, do not recognize any conflicts. Pretend outwardly that they do not exist but do take them into consideration when planning classroom strategies for dissipating antagonisms.
- Create forced alliances between people from competing cooperatives by consciously re-mixing them into new teams.
- Encourage competition with other newly-formed groups.



Tardiness and "No Shows"

Set clear expectations regarding tardiness, as described in the section "Working With Rural Adult Learners". If you are still experiencing challenges, try these tactics:

- Begin on time, or even a minute ahead, with a one-minute warm up activity, such as a brain-teaser, that is fun. Give small prizes (such as candies) to winners.
- Begin with a short review of main points previously covered. Reward correct answers with small treats or prizes.
- Award points (toward an eventual prize) for a perfect "on time" or "attendance" record.
- Do not wait for individuals who are chronically late. This punishes those who are on time.
- Do not repeat the lesson or instructions for those who are chronically late. Ask them to quietly join and come to you later for any instructions missed.

TRY THIS!



Team Formation

Prior to a workshop at which 18 or more individuals have been invited to participate, determine who belongs to which cooperative. Assign a color to each individual's name in such a way that you create two or four color-coded teams, each one containing a mix of people from the different cooperatives. When individuals sign in, they are asked to write their name or nickname on a sticker tag with a brush pen using the same color as the dot next to their name. The color predetermines the team they will join. They wear the name tags to help the instructors recognize individuals during the first day. The individuals on a team sit together, compete in games against the other teams and go on bird walks together. Individuals momentarily forget animosities and petty jealousies. In time, the self-constructed walls of competition begin to crumble, especially after they realize that there is a greater enemy to fear than their competitors ... the untrained guide who can cause the birds to abandon the site.

Part 2: Organizing a Workshop

- If there is a widespread problem, negotiate a “contract” of expectations with the group, explaining that you will only be able to finish on time if you can start on time.

Promptness works both ways –Instructors should NEVER be even a minute late for any of the sessions. You should also strive to take breaks on time and finish on time, unless the group agrees to continue after hours.



Small Town Politics

There is a strong tendency for people living in close proximity to each other to blow up minor disputes into life-long feuds. More often than not, the worst feuds are between families and are caused by conflicting economic interests. You can add to this the differences based on religious beliefs, those based on politics and those due to social differences.

Your best strategy as a Field Coordinator or an Instructor, is to avoid taking sides or getting involved – no matter how strongly you feel toward the issues. Reason never wins out in these circumstances. You have little hope of helping to resolve the issue and you risk destroying your own credibility. Worse yet, both sides may turn against you for interfering!



Setting up a Room for Participation

You may have limited options for your actual classroom space but you can sometimes make a few adjustments to make it work a little better.

- Choose the “front” of your classroom so that participants are not staring into a rising (or setting) sun or bright lights.
- If seating is adjustable:
 - Remove most extra chairs and set those remaining close to the front.
 - Seat people in a semi-circle facing the front (where you will stand). If you can, arrange it so that everyone can see you and see each other without having to turn around.
 - If you have work tables, use them. Set them up so that you have groups seated together. If possible:
 - Arrange them so people are seated on the two or three sides that face the front (and you).
 - Mix up the groups occasionally by asking a few members of each group to switch tables.



BASIC MATERIALS AND EQUIPMENT

Learning Materials and Expendables

Though some of your participants may be without reading and writing skills, have basic paper, pencils (regular and coloured) and pencil sharpeners on hand for note-taking and sketching. Keep coloured markers and a pad of easel paper on hand for your own use. Consider handing out small booklets as journals so the participants can begin the habit of taking field notes.

Visual Aids

Often visual materials of resident birds are much more difficult to obtain than those for North American migratory species but colour pictures can be obtained from bird calendars, photographs, photocopies from books, Internet sources, etc. Always seek permission before creating handouts from copyrighted materials (even if they come from the Internet).





A CHECKLIST OF BASIC MATERIALS AND EQUIPMENT

- ☐ A flipchart or a portable writing board and eraser
- ☐ Masking tape
- ☐ Coloured water-based markers (include green, blue, black, red etc.)
- ☐ Blank paper for individual drawings
- ☐ Coloured pencils and regular pencils
- ☐ A colour drawing of a bird showing the names of all its parts in English and Spanish. (It should be approximately 70 cm X 95 cm, pasted to a piece of stiff material, such as cardboard, and covered by a transparent coating or saran wrap.)
- ☐ A bird migration map of the Americas prepared as above (e.g., National Geographic maps)
- ☐ A series of black-and-white drawings or enlarged photocopies of bird family silhouettes in taxonomic order. (Do not identify any of the families or species on the posters.)
- ☐ Posters, approximately 90 cm X 60 cm, on sturdy paper that can be transported rolled up and attached to a wall or easel. Include:
 - ☐ Beginner identification skill-building posters on which you have pasted up to 15 individual bird photographs measuring 10 cm X 15 cm. (See sidebar for instructions.)
 - ☐ Posters entitled “Migratory Birds” and “Resident Birds” with bird photographs filling the poster and with no names given.
 - ☐ Posters titled “Water Birds”, “Land Birds”, “Estuary Birds” or “Desert Birds” (whichever are appropriate)
- ☐ An album of slides and a slide projector
- ☐ A camera for recording a visual history of the workshops for donor reports and Web page
- ☐ Binoculars (at least one pair per two participants)
- ☐ A spotting scope
- ☐ Field guides (at least two sets) for resident and migratory birds
- ☐ Small back packs or satchels for field guides (water-proofed, or bring plastic bags for this purpose)

Part 2: Organizing a Workshop

An extensive collection of slides of resident and migratory bird species is extremely valuable (if you anticipate having electricity in the classroom). Before a workshop, make an organized and intense search for all useful materials from local, national and international contacts. Once again, seek permission to use copyrighted materials and credit the source where possible.

Audio Aids

An audio player and tapes or CD's of local bird songs can be great learning tools. If you expect to be without electricity, battery-operated players may fit the bill and be useful for field situations.

TRY THIS!



Create a “Skill-Building” Poster

Create a homemade poster to help beginners build bird identification skills in the classroom. Here's how:

1. Acquire about 15 colour photos of local birds, about 10 X 15 cm.
2. Paste them onto a large poster board, leaving about 3-4 cm between pictures.
3. Lay a large sheet of flip chart paper over the poster, covering it exactly. Tape it to the poster all along the top.
4. Cut out openings to expose each picture beneath.
5. Write the names of the birds on the paper immediately below each picture (in the language you wish to teach).
6. With the cover sheet down the bird pictures and names are visible; with the cover sheet up, just the pictures are visible.



Binoculars, Scopes, Field Guides and Backpacks

Ideally, you will have at least one pair of binoculars for every two participants and a set of field guides for every six-to-eight participants. Medium-sized binoculars are recommended for beginners and intermediates and should include 7 X 35 and 8 X 42 models.

A good spotting scope on an easy-to-use tripod is a wonderful asset as long as there are two instructors and one of them is dedicated to setting up the scope at every opportunity. A scope is particularly handy when there are not enough binoculars to go around or when children are involved (their faces are too small for most binoculars).

Carry field guides in backpacks or satchels for easy handling. Always take them into the field, no matter how bulky and heavy they are. They are essential to visually reinforce the brief look most participants will have of a bird and they allow participants to note the bird's distribution on the range maps. See Appendix 9 for a list of field guides.

Try the following sources (as well as your own contacts) to obtain binoculars, scopes and field guides:

- The Birder's Exchange, operated by the American Birding Association, provides mostly used binoculars, spotting scopes, backpacks and field guides. See their web site at: www.americanbirding.org



- Optics for the Tropics, created by Partners-in-Flight, focuses more on the Caribbean area and provides new binoculars at a 50% discount. See their web site at: www.opticsforthetropics.org
- Visiting birdwatchers are often willing to leave their binoculars or field guide books behind once their trip is over, if they know they will go to a good cause.
- Personal contacts are always a good way to get assistance with equipment. To safely transport equipment that you have acquired abroad, use personal contacts that travel between the country of origin and your location (do not take a chance with the postal system). Be sure to have a letter that states how the merchandise is to be used. Note that it is best to distribute large shipments among a number of people because of the weight and potential problems with customs.



Organizing a Bird Walk

You can use bird walks for more than simple bird identification practice. Before you go, plan how you might integrate other objectives such as:

- Promoting a conservation ethic.
- Building alliances between rival groups or individuals.
- Developing leadership and guiding skills in participants.
- Practicing proper use and care of equipment.
- Evaluating your learners.

This section contains some considerations for planning and leading your walk.



Planning and Route Selection

Some considerations to be taken into account when planning bird walks include:

- *Habitat selection.* This is obviously an important factor when considering the type of birds the

class needs practice in identifying. At the same time, your choice of habitats provides the opportunity to establish the value of habitats that are not currently viewed as important to participants. This is crucial in coastal communities that have traditionally depended upon the sea. People there may see no value in scrub or deciduous forests. However, their perception may change dramatically once they experience the wealth of animal life found there.

- *Habitat variety.* Select routes that pass through different habitats to broaden the experiences of the group and to demonstrate all the useable trails for taking visitors in the future.
- *Direction.* Plan to walk along a route that either heads west in the morning or east in the afternoon (or north-south).
- *Inclusion of the village on the route.* Always attempt to use routes that include the village, even though the beginners will be less than enthusiastic and may feel self-conscious. There are many reasons to include the village on the route:
 - It always surprises participants when they find a large variety of birds without going far a-field. This reinforces that one can observe birds anywhere.
 - It demonstrates the importance of certain plant species for attracting birds to one's yard. This will create a new perspective on the importance of the participants' own choice of backyard plants.
 - It raises the community's consciousness of the value of birds.
 - It decreases the feeling of embarrassment that some participants feel in the beginning. Their pride will develop when they are given the chance to demonstrate their knowledge to others.

Part 2: Organizing a Workshop

- *The need to divide the group.* You may have a situation where there are few roads extending beyond the village that are suitable for observing birds. Or, you may not have sufficient transportation to get everyone to a distant location. In this case, you may divide the group, transporting one team further into the field and taking the other team on a trail within walking distance.



Leading the Walk

Some considerations to be taken into account when leading bird walks include:

- *Group size.* Groups should not exceed eight participants per instructor. If the group is composed of novice bird watchers who are using binoculars for the first time in the field, five or six is a more suitable number.
- *Maintaining focus.* Concentrate on one bird at a time. This is crucial to remember and to teach your group. If you are not careful, your group will tend to get dispersed. Then you will face the challenge of having eight people looking at eight different birds (all of which they will expect you to identify). You may find that, during the first two-hour bird walk, beginners will identify only 13 bird species. By the fourth outing, the same group will identify as many as 40 or 50 species (assuming the area is species rich). When you identify the bird, mention all the key identification points and have them check each one out as long as the bird remains in view. Reconfirm the identification marks in the field guide immediately afterward.
- *Describing the location of a bird.* One of the most frustrating challenges to teach from the start is how to quickly describe the location of a bird to others. Obviously, pointing to the “green tree there” does not work when looking at a forest of green trees! Practice looking at different landscapes and ask participants to describe easily notable points of reference. Have them describe the location of birds in tree-tops by using the well-known practice of creating a clock out of the tree.
- *Field guide use.* Always make use of the correct field guide, distinguishing which one is used for identifying resident birds and which one for migrant species. This introduces the concept of the “status” of a bird in the region. From the very beginning, ask one of the participants to carry the bird books (in a knapsack or other carrier). During the first couple of bird walks, explain how to look up the bird in the field guide as you demonstrate. After that, have different participants look up the bird (no matter how long it takes). Practice makes perfect. As soon as participants feel comfortable using the field guides, you will have difficulty getting them to share the task with others.
- *Language.* Decide beforehand which language(s) you are going to use to identify the birds. If the majority of bird watchers visiting the area speak English, teach English names. Be sure to relate the English name to the local name. As the group advances you can start introducing the nationally-accepted names (which may be quite different from local names). Avoid confusion at the beginning by limiting the number of names and languages. Teach using one language until it is learned (especially if it is a language other than the one the participants speak). If local names reflect an indigenous culture, spend time on the source of these names and the importance of sharing this knowledge with visitors who want a richer experience. (NOTE: Indigenous languages are under great pressure from Spanish and English. Try to be sensitive. Balance the tourism needs with the need to value indigenous culture by using bird names and other terms in the participants’ native language. Keep in mind that the workshops are to enrich people’s culture, not replace it.)
- *Note Taking.* Encourage all participants to carry a field notebook so that they can write down the name of the bird. Participants should use correct spelling but also write the sound phonetically so they can better recall its pronunciation.





- **Leadership.** As the group progresses, select different leaders to take your place. Require them to: greet the group (in the language they will need to use with most visitors); select the route; spot the birds; and assist others to see and identify each bird. Constantly offer feedback that will help them fit the profile of a good nature guide (which they should define during class).
 - **Division into groups.** Only if the group is large and clearly composed of unequal abilities, should you divide the group by skills. Otherwise, use the advanced participants as assistant teachers and divide the group based only on number of participants. This accomplishes several things:
 - It helps to reduce the development of “elite” cliques, instead building bridges of shared experience and knowledge between the advanced and less proficient participants.
 - It helps to build self-esteem in the participants who are able to help others.
 - It increases the opportunities for mutual sharing of knowledge and skill between community members.
 - **Evaluation of participants.** Use bird walks to evaluate participants’ skills without them knowing you are doing so. Observe their leadership and birding abilities unobtrusively using criteria from the section entitled “Indicators of Participant Success”. This reduces the pressure of more formal verbal or written evaluations.
- **Training in attitude.** Field trips are a good place to practice using the correct “attitude” when interacting with others. The more adept local guides become in identifying local species, the more they invest their ego in being “right”. Use field trips to teach them to reserve judgment and to NEVER argue with a visitor even if they are sure they are correct. Emphasize that the guide’s role is not to compete with a client but to show them an enjoyable time while seeing some wonderful birds. Also emphasize that the mature guide is able to admit “I don’t know” to a client when a bird has flown past and they did not see it well enough to identify it. Constantly reinforce this point.
- **Training in ethics.** Last but not least, guides must be made aware of their impact on birds every time they call them up, particularly during the reproduction period. It is important to:
 - Encourage them to restrict the use of tape recorders by visitors in order to minimize the disturbing effects.
 - Encourage them to restrict their groups to eight people (ideally).
 - Make them aware of the need to vary their routes if they guide a great many people through their site. If they don’t, they risk losing birds that might otherwise be encountered close to the trails.
 - Be sure they have a copy of the American Birding Association’s “Birding Ethics” that is found under Topic 11 in Part 3 of this manual.
- **Characteristics of a good birding trail.** Your selection of the appropriate birding trail will teach participants the value in choosing wisely. Your trail should allow for maximum viewing by the group (where possible, a trail should be three meters wide). Avoid narrow trails all together – unless you wish to demonstrate their disadvantage.

EVALUATION



Indicators of Workshop Success

It is very challenging to evaluate the effects of the workshop on the individuals and the communities involved but comparisons made through pre-workshop and post-workshop interviews may provide clues. In phrasing the interview questions remember that in some cultures people respond according to what they think the interviewer wants to hear. Here are some success indicators to ask about and watch for:

- *Increased economic benefits to the individual or community.* This is a difficult thing to measure. A guide may increase his or her income but the benefits may not reach the home. You might directly inquire regarding the level of tips (which most guides will want to brag about when they are good).
- *An increase in the number of birds a participant can identify by species name.*
- *A change in the guide's or the community's attitude towards the environment.* (For example, you may perceive an increased concern over environmental destruction that could impact on a guide's vocation or the local tourist industry.)
- *An increase in the guide's knowledge of bird status in the region.* Most participants may have some concept of migrants versus resident birds at the beginning, but they will become much more knowledgeable on the subject through the workshops. However, the subject of status and relative abundance (particularly concerning rare species) seems to remain a major weak point – even for biologists.



- *An increase in the guide's awareness of species of special interest to visitors and the reasons why.*
- *An increase in the number of binoculars in use among participants after two years of training.*
 - *Changes (i.e., reduction) in the local threats to birds.*
 - *Easy recognition and acceptance by guides of the reasons why birds are important to the earth and humans.*
 - *An increase in voluntary participation in monitoring events and local environmental education programs.*
 - *Evidence that guides and their competitors are defending the environment.*
 - *Evidence that guides are sharing of their knowledge of birds with others.*



Evaluating the Instructor

There are three very good reasons to evaluate the instructor:

- *To determine whether he or she is effective in the role.* This is the most threatening reason for the instructor because it implies that a coordinator or supervisor questions his or her abilities. A coordinator might evaluate the instructor directly by observing some of the sessions or indirectly by asking participants to do a confidential written or oral evaluation.
- *To provide constructive feedback that leads to professional growth.* Most good instructors get that way by receiving honest feedback along the way. They prefer to know how they are doing and what they could do to improve. Feedback can be based on observations from participants (a short questionnaire or interview) and coordinators or other instructors. Coordinators

and instructors might also set up formal agreements to give each other constructive feedback about the job they have done.

- *To reinforce the importance of client feedback for the professional guide's success.* If there is doubt in their minds, ask participants whether they would like an unsatisfied client to talk with them about minor problems, or talk with their competitors.



Indicators of Instructor Success

Whether you are a coordinator who wishes to evaluate an instructor or an instructor wishing to get feedback, develop a list of "good Instructor" criteria that you can modify into a checklist or simple questionnaire. Here are some examples:

Preparation

- ☐ Was the room ready and organized?
- ☐ Were materials and equipment ready and organized?

Knowledge

- ☐ Did the instructor appear to know the subject matter?
- ☐ Was the instructor able to answer most questions?

Birding Skills

- ☐ Did the instructor demonstrate skill at bird identification?
- ☐ Did the instructor demonstrate proper use and care of equipment?

Presentation Skills

- ☐ Was the instructor ready to start on time?
- ☐ Did the instructor welcome participants and introduce self?

- ☐ Did the instructor give an overview of the day's activities?
- ☐ Did the instructor present material in an interesting and creative way?
- ☐ Did the instructor speak clearly?
- ☐ Did the instructor make efforts to involve all participants?
- ☐ Did the instructor offer opportunities to practice skills?
- ☐ Did the instructor offer opportunities for questions?
- ☐ Did the instructor treat all participants with respect?
- ☐ Did the instructor admit when he/she didn't have an immediate answer?
- ☐ Did the instructor offer to help find additional information?
- ☐ Did the instructor stick to the agreed-upon materials and timing?



Evaluating the Participant

Your evaluation of the participants should address criteria and indicators of success that are derived from your workshop objectives. Some ideas for criteria and indicators are listed in the next section, “Indicators of Participant Success”.

Evaluation of an individual is always a sensitive issue. This is especially the case with adults who have limited experience in taking tests; the test itself can get in the way. Participants may experience feelings of inadequacy when they are asked to perform at something they have no experience in or feel poorly equipped to do. When you announce to students that you want to evaluate their abilities, no matter how non-aggressively you do it, you will create a great deal of anxiety. For many, their minds will go blank - even for an oral evaluation - and you will learn nothing about their true abilities.

It is best to have several evaluation strategies available, combine them or choose the most appropriate for the situation. Here are some common options:

- *Field evaluation.* For some, evaluation is best done in the field during bird walks, without the participant knowing what you are doing. This can be a very subjective method based on the instructor’s observations and judgements but you can make it objective by using detailed checklists of the behaviours you wish to measure.
- *Structured oral or visual exercises.* You may show bird photos in a slide projector (if the community has electricity and participants can attend evening classes) and make a game out of the identification process.
- *Written or oral tests.* You may show slides of birds or posters with no names visible. This takes a very long time and usually only a small percentage of the group can participate. Those who can often confuse how to list what they know. For instance, some forget to leave a number blank if they don’t know the bird, mak-

ing it very difficult for the instructor to determine the number of correct responses.

Participants can become completely demoralized. You can offer oral evaluations for those who can’t write but these can be equally frightening with few participants really demonstrating what they know. That said:

- Use species from a local bird list to measure knowledge.
- Always begin with the most common bird species in order to develop self-confidence. This cannot be stressed enough. Instructors can very easily frighten potential guides from progressing by overwhelming them.
- Permit bird names in any language during the first evaluation.
- Use between 50 and 70 common species from that specific location in order to evaluate all levels of abilities.
- Base the second evaluation on knowledge of 40 common local species using their English names (if that is language of the tourists to that area).
- Practice the exercises during the first two days of the workshop and give the evaluation on the last day using species already encountered. Workshop participants should not be told in advance that they are going to be evaluated. If possible, the evaluation itself should be disguised as an exercise.
- *Peer feedback.* You might pair individuals off and have them observe one another during the course to give feedback based on criteria you have carefully crafted. For example, feedback could be, “Describe two qualities your partner has that would make him/her a good bird guide.” And, “Describe one thing that your partner could do to improve his/her performance as a bird guide.” Take care to focus on strengths and a few constructive suggestions for improvement.



Evaluations are important for deciding how to divide a large group according to abilities as well as for measuring progress. However, as mentioned above, formal evaluations can be destructive. We strongly recommend that you do “silent” evaluations in the field and try and get feed-back from the guides’ clients.

Indicators of Participant Success

A list of indicators of participants' progress might include the following behavioural and attitudinal indicators.

The participant:

- ☐ Is punctual for bird walks during the training workshops.
- ☐ Organizes or participates in conservation activities in the community.
- ☐ Denounces activities of local habitat destruction that have a negative impact on birds.
- ☐ Adopts a conservation attitude by expressing concern for the health and well-being of local bird populations.
- ☐ Develops cooperative links with competitors in order to confront common threats to their work as a guide.
- ☐ Cooperates with the reserve management.
- ☐ Organizes activities to lessen the threats to local birds.
- ☐ Practices bird observation regularly for pleasure
- ☐ Increases income and self-esteem.
- ☐ Offers support for carrying out workshops.
- ☐ Volunteers to participate in bird monitoring activities to improve personal knowledge.

Some suitable skill and knowledge indicators include:

- ☐ Recognizes, by sight, between 50 and 70 common species from the local bird list.
- ☐ Recognizes and names 40 common local species using their English names (if that is language of the tourists to that area).
- ☐ Recognizes a certain number of species by song.
- ☐ Selects trails that are appropriate for bird viewing.
- ☐ Selects habitats that are appropriate for specific types of birds.
- ☐ Properly adjusts binoculars for own use.
- ☐ Cleans and cares for binoculars before and after use.
- ☐ Uses field guides to identify new species.
- ☐ Accurately interprets symbols used in checklists.

Part 2: Organizing a Workshop



Reports To Donors

We strongly suggested that instructors and/or coordinators prepare a report immediately following each workshop while the results are fresh in your mind. The report should include the following:

- *Identification of the location, dates and instructor names.*
- *A list of participants at all sessions.*
- *Workshop objectives.*
- *A review of the exercises included in the workshop.*
- *A description of the present situation in the community.* Describe tourism activities, relationship among cooperatives (if more than one), level of knowledge, etc.
- *Results and observations.* The results should answer the objectives set for the workshop and, if these are not met, explain why. Observations should identify needs for future workshops. In this way, the planning for the next workshop has already begun.
- *Photographic documentation.* Pictures should show materials and equipment donated; location of workshops; any local infrastructure that is available to birders; activity during bird walks.

- *A bird species list of all birds observed during bird walks in the community.* This list, including the scientific, English and Spanish names (or local name), should be left behind for the local guides. It will serve as the basis for a published bird list for that location and support nature tourism activities as well as future scientific research projects.



Certification, Diplomas and Credit

For many guides, it is important to receive official acknowledgement of their training. A colourful diploma, signed by official personalities (the Workshop Coordinator, the Director of the reserve, Mayor of the village or even the state Secretary of Tourism) dignifies the workshops and ignites a sense of pride in the participant's accomplishments. In many areas, the diploma is tantamount to obtaining official guide certification from the local entity in charge of the activity. This entity may be the reserve in which the guide resides and works or the federal Secretary of Tourism. A sample diploma is included in the Appendices.



Part 3: The Workshop Content

As you develop a series of workshops, consider all the training the local participants will need in order to:

- Become credible guardians of the local natural areas
- Be able to compete with well-trained professional guides from outside the reserve

Part 3 of the manual contains many training topics and ideas that relate to the knowledge, skills and attitudes that a professional guide should possess. These are summarized in “Tables 3.1 to 3.4: Recommended Learning Objectives and Topics.” We have tried to help by organizing the objectives and topics into a suggested series of three (or more) workshops that build on one another and cover the most important material. Simply match the suggested objectives for each workshop to the corresponding topics in the table if your timing and priorities allow. You may decide to use one of the “Sample Agendas” in the Appendix to place the topics and activities in order. Or, you can read through the individual topics in the “Information and Activities” section and create your own agenda.



CREATING A WORKSHOP TIMETABLE/AGENDA

As you plan your workshops, consider the following:

- *Plan the “big picture” first.* Ideally, plan to give three to four workshops at two-month intervals during the course of a year. This structure provides time for participants to practice the skills they have learned and to reach another level before the next workshop. The intervening time also allows an instructor to evaluate the changes in the participants' attitudes, habits and knowledge level. Evaluations should be included in a summary written within a week of the workshop. The summary will prove useful in preparing for the succeeding workshop, especially if indicators of progress are included.
- *Consider your objectives at all times.* When preparing an agenda and work plan for a workshop, set priorities and, where possible, cover the most important topics first. Use Tables 3.1 to 3.4 to help you determine the highest priority objectives and their matching topics. Once you have planned workshops to address your most critical learning objectives, consider subsequent workshops or field exercises on the less critical topics. Sequence your activities so they build on one another and follow the instructional principles described in Part 2.
- *Be flexible.* It is always possible to adjust and make changes in the workshop agenda on any given day. You should aim to achieve all of your objectives even if the agenda and activities require that you adjust to a change in circumstances (unable to go into the field, no electricity, no suitable classroom, etc.).
- *Mix classroom and field sessions.* The workshops should be composed of bird walks and classroom sessions. Always choose the field practice if it is necessary to choose one over the other. This is where you can teach as many themes as you want and make it fun. The field experience is what really motivates the participant to learn and it stimulates enthusiasm. The classroom sessions serve to reinforce what was observed in the field.

Part 3: The Workshop Content

- *Consider timing.* Your choice of best months for carrying out workshops depends upon a number of factors: seasonal activities occurring within the community; weather conditions - rainy season versus dry season; temperature; and the presence of migratory and resident bird species.
- *Consider logistical challenges.* Logistically, at least on the Yucatan Peninsula, distances are such that it is most efficient to carry out workshops over three days in order to incorporate travel time to and from the workshop location. In practice, the workshops each require two full days. Typical arrival time for beginning groups has been 3:00 p.m. in order to accommodate schedules. (Please see the Appendices for samples of timetables.)
- *Introduce important structure.* Set up a sign-in sheet for the entire workshop with divisions for the different segments. Ask participants to sign in for every session. Impress upon everyone the importance of attending all sessions. Also consider other regular routines such as:
 - Initiating bird walks at regular times (e.g., 4:00 p.m. lasting till dusk)
 - Refreshment times
 - Cleaning and turning in binoculars
- *Consider the levels and needs of your participants.* The first two or three workshops should cover very specific information but those that follow should reflect the levels and needs of the group. The Workshop Coordinator or the Instructors must decide if (and when) the group should be divided, based on participants' skill levels and keeping in mind that no instructor should attempt to teach more than eight participants in the field. If the group is large with wide-ranging abilities, provide the more advanced participants with special sessions held concurrently with the regular sessions. This will keep these individuals motivated.
- *Consider alternatives for lack of electricity.* In the classroom, you may have to adjust scheduling and activities if electricity is not available. For example, you may have to avoid evening sessions and replace activities requiring slide projectors or tape recorders with those using different visual aids.



LEARNING OBJECTIVES AND TOPICS


Table 3.1: Recommended Learning Objectives and Topics for a First Workshop

Objectives	Relevant Topics/Activities
<i>At the end of the first workshop, participants will be able to:</i>	
1. Demonstrate enthusiasm for learning to identify birds. (This should be an objective for ALL workshops.)	All Topics
2. Describe at least 10 ways that birds are important in their lives.	Topic 1
3. Describe the basic criteria used for bird identification.	Topic 2
4. Describe the status of some of the common birds in the region (resident and migrant).	Topic 3
5. Describe the basic concept of endemic species.	Topic 3
6. Relate species of birds to particular habitat types.	Topic 2, Topic 5
7. Demonstrate basic skills for identifying all birds.	Topic 2
8. Correctly identify a minimum of 30 bird species in the zone in any language.	Topic 2
9. Correctly pronounce 5 English species names.	Topic 2, Topic 9
10. Demonstrate the correct use and care of binoculars and field guides.	Topic 4



Table 3.2: Recommended Learning Objectives and Topics for a Second Workshop

Objectives	Relevant Topics/Activities
<i>At the end of the second workshop, participants will be able to:</i>	
1. Provide examples of groupings of birds such as water birds, marine birds, land birds, marsh birds, waterfowl, songbirds, etc. in both English and a native language.	Topic 2
2. Correctly identify most bird family silhouettes shown.	Topic 2
3. Accurately describe for others the location of a bird in the field.	Topic 2
4. Describe which birds are of special interest in the region and why.	Topic 3
5. Describe the general threats to birds as well as specific, local threats.	Topic 5
6. List concrete suggestions for mitigating these threats.	Topic 5
7. Create a list of the characteristics of a good nature guide.	Topic 9
8. Demonstrate a better use of a bird's key identification marks.	Topic 2
9. Correctly identify a minimum of 45 bird species, most by English names.	Topic 2



Table 3.3: Recommended Learning Objectives and Topics for a Third Workshop

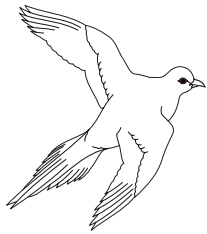
Objectives	Relevant Topics/Activities
<i>At the end of the third workshop, participants will be able to:</i>	
1. Describe the importance of the region for bird populations and bird watching.	Topic 1, Topic 3
2. Describe different status designations of some birds in the region and show how to read the symbols used in a checklist.	Topic 3
3. Describe the basics of bird classification in non-scientific terms.	Topic 2
4. Describe the characteristics of an ideal birding trail and how to help others locate birds.	Topic 10, Topic 14
5. Describe the differences between some of the similar species found in the area.	Topic 2
6. Correctly identify the calls and songs of the more common birds in the area.	Topic 2
7. Correctly identify fifty-sixty bird species, most by English names.	Topic 2
8. Demonstrate the correct format for recording field observations and share this information.	Topic 8



Table 3.4: Recommended Learning Objectives and Topics for Subsequent Workshops

Objectives	Relevant Topics/Activities
<i>At the end of the fourth workshop, participants will be able to:</i>	
1. Demonstrate a sense of stewardship toward birds and their habitats.	All Topics
2. Constructively critique their own and their colleagues' guiding abilities during field trips.	Topic 9
3. Describe the life histories of several local birds of special interest.	Topic 7
4. Hold a discussion on the facets of bird migration.	Topic 6
5. Record field observations on habitat use by birds, including individual species' use of fruits, seeds and nectar.	Topic 2, Topic 7
6. Correctly identify 15 additional species with each workshop.	Topic 2
7. Demonstrate methods for doing point counts and describe the reasons for monitoring birds.	Topic 8
8. Correctly identify additional bird species by their calls and songs.	Topic 2
9. Experience bird identification in a wide variety of habitats.	Topic 2, Topic 5, Topic 7
10. Describe the American Bird Association code of birding ethics.	Topic 11
11. Describe basic risks and safety considerations for a bird walk.	Topic 12
12. Describe the importance of a business plan for their enterprise.	Topic 13
13. Describe general steps involved in creating a business plan.	Topic 13
14. Describe the basic characteristics of a good nature trail and viewing area.	Topic 10, Topic 14
15. Describe reasons for creating a local bird club.	Topic 15
16. Describe steps in creating a local bird club.	Topic 15

Topic 1: Why Birds?



KEY POINTS

- The importance of birds
- The interest in birds by eco-tourists
- The participants' knowledge of birds

BACKGROUND INFORMATION

The Importance of Birds

Birds perform many “ecological services” that we often under-value or even fail to recognize. Many species of plants rely on birds to pollinate them and disperse their seeds. In fact, through such activities, birds strongly influence the biological composition of the ecosystems upon which we all depend.

Birds also contribute to human economies, not just as pollinators and agricultural pest-control agents, but as direct suppliers of food, clothing and bedding products.

Birds serve as indicators for environmental health. Coal miners in the past brought caged canaries into the mines with them to warn of danger. If the singing stopped, it meant the canary was dead – a clear sign that dangerous gases had begun to accumulate in the mine and it was time for the miner to get out. Wild bird populations are our “canaries in the coal mines”. It is a sure sign of environmental crisis if they are in danger and humans cannot be far behind.

Finally, birds enhance our personal, social and cultural well-being. They provide tranquilizing songs and recreational opportunities to observe, paint and photograph them.

Here are some values of birds

(identified by workshop participants):

- Seed dispersers
- Flower pollinators
- Agricultural plague controllers
- Environmental indicators
- Provide feathers used for insulation in clothing, bedcovers and pillows, in addition to use in ceremonies and as material for handcrafts
- Producers of guano (the basic ingredient of fertilizers)
- Producers of high protein meat and eggs for food
- Study of aerodynamics that inspired airplanes
- Studies of human psychology
- Tranquilizing effect of birds and bird songs on people and the human spirit
- Recreational activities such as bird observation, photography and painting

Topic 1: Why Birds?

The Interest in Birds by Eco-tourists

Bird watching is, in itself, a fast-growing recreational pursuit worldwide. Part of the activity's appeal is no doubt its accessibility to the average person, who can find and observe birds almost anywhere on the planet. On the other hand, the sheer variety of species found in some locations (e.g., about 1100 species in Mexico according to one Internet source) and the elusive nature of certain rare birds give the serious birder an opportunity for infinite challenge – and a high level of success. Serious birders from around the world are willing to pay for the opportunity to pursue their passion. This, in turn, gives us an opportunity to profit economically from those tourists who are eager to share in our rich avian heritage.

The Participants' Knowledge of Birds

Birds are everywhere in our lives. Most of us cannot fail to see and hear them everyday. They figure in our culture and heritage as symbols or as the subjects of stories and legends. All participants will have some avian knowledge and experience to share, whether based on fact, observation or myth. And they will all value birds in some way (whether they have thought about it or not).

The training workshops are a great opportunity to rescue oral stories, common names in indigenous language, and traditional knowledge on behaviour, habitat use, distribution, and ecology of birds. This will encourage participants to share such knowledge among them and with the visitors they will guide. A great way to keep diversity in a globalized world!

Instructional Approach

This topic makes an excellent introduction to bird guiding so place it near the beginning of a first workshop. Allot about 30 to 60 minutes.

Through this topic, you can use the participants' shared experience to establish a cooperative and participatory tone for your workshop, and to build the participants' confidence.

Use combinations of individual or small group brainstorming sessions to get participants to think about and share why birds are important to them. Ask participants what they know about certain species they see around their homes and cornfields. If birds figure in local stories and legends, encourage participants to share that knowledge as well.

Emphasize that many people worldwide share a fascination with and love of birds. This presents a unique opportunity for local people to capitalize on the richness of the areas bird species and create economic gains. Further emphasize that protection of these local bird populations and their supporting habitats is critical to the community's future as an eco-tourist destination: if they support the birds, the birds will support them!



Topic 2: Bird Identification



KEY POINTS



Basic identification criteria

- Bird groupings (water birds, marine birds, marsh birds, shore birds, song birds, land birds, birds of prey)
- Parts of a bird
- Bird families: silhouettes, classification and characteristics of specific families
- Bill shape — and relationship to food
- Birds in their habitats and niches
- Bird behaviour
- Identification by song
- Distinguishing similar species

BACKGROUND INFORMATION

Basic Identification Criteria

There is no one simple way to identify birds in the field. Good bird watchers (and guides) are able to decipher a variety of visual and auditory clues that they derive from the birds themselves, and from the surroundings. These include:

- Relative size
- Shape or silhouette
- Colour and colour patterns
- Bill shape
- Special behaviours, including flight patterns, feeding habits, tail wagging etc.
- Location; the range and habitat they occupy or frequent
- Song, call or other auditory clues (such as wing-beating)

Visual clues, such as silhouette and bill shape, can help the birder place a bird into a grouping or family and narrow the search for its identity. Field guides usually organize their information along taxonomic lines.

TRY THIS!



Team List Challenge

After every bird walk, participants should compose a list of the birds identified during the outing.

To do this, divide the group into two teams, with each team selecting a name based on an English bird name (such as the Black Vultures, the Peregrines, etc.)

Divide the blackboard or writing pad in two columns and label each side with a category of bird (“water birds” and “land birds”) using blue and green felt writing pens respectively.

Have the players/teams take turns recording the day’s sightings in the correct category. Also, have the person assign “resident” or “migrant” status to the bird.

Note each error on a scoreboard. If one team errs, allow the other to answer. The team with the highest score loses.

Topic 2: Bird Identification

Most good field guides describe in detail the above criteria and how to apply them to bird identification. As an instructor, use them as your primary source of information.

Bird Groupings

We can place birds into broad, somewhat overlapping groups according to some general characteristics that relate to behaviour and where we tend to find them. These groups include waterfowl, water or aquatic birds, seabirds or marine birds, shorebirds, land birds, gallinaceous or marsh birds, predators, raptors, perching birds and songbirds.

Parts of a Bird

Knowledge of the external features or parts of birds (sometimes called “topography”) is very helpful since guidebooks (and people) refer to these parts to describe identifying marks. (For example, a bird may be described as having black lores.) Look for this information in the front of most good field guides, where it will be portrayed in visual and descriptive form.

Bird Families

Bird classification follows a scientific system with strict rules for naming. The chart below depicts the classification of a common bird (the Clay-coloured Robin) and the human being, along with a helpful analogy to a person’s address.

Bill Shape

The shape of a bird’s bill provides a major clue as to what the bird eats and how it obtains its food. This, in turn, often indicates which family the bird belongs to, helping an individual narrow down a bird’s identity. For example, a short, stout, conical-shaped bill indicates that the bird is a seedeater, whereas a thin, pointed bill usually indicates an insect eater.

Birds in Their Habitat and Niches

The concepts of habitat and niche are explained with Topic 5: Bird Conservation. Where a bird lives (habitat), and the role it plays in its natural community (niche) offer valuable clues to its identity.

Chart I: Sample taxonomic classification

Classification Level	Bird (Clay-coloured Robin)	Human	Address
Phylum	Chordata (vertebrates)	Chordata (vertebrates)	Country
Class	Birds	Mammals	State
Order (based on internal structure)	Passeriformes	Primates	County or Township
Family (based on superficial characteristics)	Turdidae	Moninidae	City/town
Genus (based on very specific characteristics)	Turdus	Homo	District
Species (attributes noted in field guides)	T. grayi	H. sapiens	Precinct or Street



Bird Behaviour

Often the clincher in identifying a bird is its behaviour. For example, if a medium-size bird flies from the top of the trunk of one tree to the base of another and it moves both around and up the trunk in a tropical forest, it is most likely a woodcreeper. Individual or pairs of birds moving along rocks by the coast, bobbing their tails, are most likely Spotted Sandpipers. Black-and White Warblers can be easily distinguished from fellow warblers by the way they search for insects, moving in a “woodpecker” manner up tree trunks and along tree limbs. Field guides usually describe such notable behaviours.

Identification by Song

Birds have characteristic calls that relate to announcing their territories, attracting mates or communicating alarm. Some calls are only used at specific times (e.g., mating season). While you may be able to call birds in with audiotapes, this may also seriously dis-

rupt their life cycles. You might even cause some birds to abandon their territories or nests, so we recommend against this practice. Use audiotapes and audio CD's as learning resources for the instructor and the participants.

Similar Species

Some of the similar species found on the Yucatan Peninsula are:

- Six species of white-plumaged egrets and herons
- Four species of *Myiarchus* flycatchers
- Two species of *Tyrannus* kingbirds
- Eight species of orioles
- Two species of woodpeckers
- Two species of pewees
- Two species of wrens
- A migratory species and resident sub-species of swallows and warblers

TRY THIS!



Which Bird am I?

This exercise is based on good use of the basic criteria for identifying bird species. (The down side of it is that it makes even good birders nervous.) There are two ways to do this activity.

If the group is small, write the names of five species on a piece of paper. Ask a participant to stand and face the others and attach the paper to his back. Show the others the name of the bird. The one standing then has to guess what bird he represents with a limit of 10 questions to be answered with "yes" or "no"

If the group is large, divide it in two. Have each group write five easily-recognized species names on pieces of paper and give them to the instructor. The first player selects (sight unseen) one of the papers from the competing group. His team-mates must then guess what bird name he has chosen, using a total of 10 questions that can be answered with “yes” or “no”. Repeat with members of the other team.

TRY THIS!



Artistic Impressions

This is a good team exercise. Ask all participants to draw a bird they saw that day with coloured pencils. Place a limit of 15 minutes on the exercise. The drawings should not be labelled with the names of the birds. One at a time, give each drawing to a member of the opposing team who, in front of the group, must identify the bird with its English name and describe why he or she believes it is that bird. Here the fun begins! In the end, impress upon everyone the critical identification points they need to note for proper identification of each species.

Topic 2: Bird Identification

Instructional Approach

Learning how to identify birds is not intuitive; it is a many-faceted, learned skill. At the same time, the ability to accurately identify birds is key to the guide's credibility and success. Without it, the guide will be unable to help clients find and identify much-sought-after species. So, spend considerable time and attention on this topic, preferably spread out over several workshops and beginning early in the first one.

You can best cover the basics of bird identification and classification in class but identification skills are only perfected in the field. You must incorporate an extensive field component to the workshop – under the guidance of a skilled instructor.

After each bird walk, follow up in the classroom to reinforce the learning. You might facilitate a simple review of the identification points or you might focus on other themes. For instance, you might ask participants to summarize what they observed about the habitats or niches of some of the birds they saw. Or, you might ask them to summarize what they observed about the behaviour of a species, beak size and shape, etc. You may wish to classify the observed birds into families or other groupings. This all serves to reinforce the field experience. We describe some quick and engaging activities in the “Try This!” boxes in this section.



TRY THIS!



Birds and Habitat

After a bird walk, make a list of the birds seen by the group. (You may wish to have a more advanced student write the list on a piece of easel paper in the language you prefer). In early workshops, have participants classify land and water birds by recording names in different colours (e.g., blue for water birds, green for land birds). In later workshops, have participants name a bird and then identify in more detail the habitat where it can be found.

You can teach bird songs and calls through field experience alone but there are numerous helpful tapes and CDs available for most regions. Use these in the classroom sessions before going into the field if electricity is available (or if you have battery operated equipment). In lieu of tapes, invite experts in identifying bird songs to participate as instructors.

TRY THIS!



Team Quiz

Carry out this exercise with medium and advanced students. It can be an excellent exercise to create strong ties among team-mates (even if they are “enemies” before the workshop).

Divide the group into two or three teams. Begin asking questions about species known to participants. Keep score of wrong answers while alternating the questions between the groups. If the participants are strongly competitive, they will soon want to ask their own questions (which are often much more difficult than those invented by the instructors). Give the teams several minutes to prepare five questions that they can ask alternately to the other groups.

Here are some examples of questions:

- What bird is known to eat the chicks of other birds?
- Name three families of birds that nest in tunnels.
- Name all the white herons and egrets.
- Name three species of warblers that have wing bars.
- Name three species of warblers that have no wing bars.
- Why do orioles build hanging nests?
- What species of bird does not demonstrate sexual dimorphism?
- Why do flycatchers have whiskers?



Topic 3: Bird Diversity of the Area



KEY POINTS

- The area's specialty birds
- Migratory birds
- Concepts of bird status and relative abundance

BACKGROUND INFORMATION

Area's Specialty Birds

Mexico has about 1,100 species of birds in 69 families. Certain geographic areas have become known among birders and ornithologists for the birds that are special to the region. The region may support globally rare, threatened or endangered species. In some cases, an area may support the only wild population of a bird species (an endemic species) which makes it the only place a birder can observe it in the wild. (Mexico has 97 endemic species.) Sometimes the attraction may be a rare phenomenon, such as a nesting colony or huge gathering of a particular species. Even birds with rich cultural significance may attract interest. Research and know what special attractions are available in the region.

Migratory Birds

The presence of migratory birds gives the birder an opportunity to observe large numbers of some bird species at predictable times and locations. The exact species will vary from region to region so you should research and cover:

- What birds migrate in the region?
- When do they migrate?
- Where can they be found?

This is also one more opportunity to bring out some fascinating information for the participants to pass along to their eventual clients. "Topic 6: Amazing Facts About Birds", lists a few more migration-related topics that you might research and present.

TRY THIS!



Mythical Bird Stories

Build knowledge of local birds and cultural pride in a group of indigenous students. Have them consult each other on the details of a mythical story about a local bird and then have them tell it to the instructors. Often this involves a great deal of discussion in their native language as they seek to agree on the details of a story. It may also mean the telling of the story in their language with another member translating. All of this builds self-esteem and eliminates shyness in speaking — in any language. It not only forces them to work together to do a presentation to the guests, it encourages them to teach visitors the names of birds in their native language and explain the origin of the name — something that will greatly enrich the visitors' birding experiences.



Topic 3: Bird Diversity of the Area

Bird Status and Relative Abundance

The status of a bird refers to its likely presence in an area at a given time of year. This can be extremely helpful in narrowing down the identity of an unknown bird.

Here are the bird status symbols used for the Yucatan Peninsula:

- * Breeds (when used alone, implies year round resident)
- *S Breeds; summer visitor only
- *Sw Breeds; mostly summer visitor/small population remains year round
- *W Year round resident with a separate winter, migratory population
- Ws* Mostly winter visitor/small summer breeding population
- W Winter visitor/increased numbers during spring-fall migration
- Ws Mostly winter visitor/small summer population
- Ts* Mostly transient/small summer breeding population
- T Transient
- Tw Transient/small winter population
- AM Altitudinal migrant; winter visitor
- O Occasional visitor; insufficient data to determine status
- V Vagrant; out of normal range

Relative abundance is a measure of the likelihood that you will encounter the bird if you visit the right habitat at the right time.

- An abundant bird is one that you will very likely see in large numbers every time you visit its habitat during the right season.

- A common bird is one that you will see most of the time and/or in smaller numbers when you visit its habitat during the right season.
- A fairly common bird is one that you can find with some searching when you visit its habitat during the right season.
- A rare bird is one that you have only a small chance of seeing, and then only in small numbers, even if you visit its habitat during the right season.

Instructional Approach

While this is an important topic, it can wait until participants have acquired basic knowledge and skill in identifying birds. Emphasize that the information included with this topic is important to the guide for locating and identifying bird species, but equally important for adding value to the clients' experience. Most bird watchers want to know what is special about the birds they see, from a local and global perspective. This is what will draw tourists back to visit again and again.

You may deliver most of this information in one or a series of short classroom sessions but draw on the information while you are in the field. Don't feel you have to cover it all in one workshop.

This is a good opportunity to work with range maps (provided in most good field guides). Use them in the classroom and in the field. Compare range maps of migratory, resident and regionally endemic birds that the participants have identified. Provide a list of the birds endemic to the region where the workshop takes place and a map showing their distribution limits. Emphasize the special attraction of endemic or limited-range species.

Consider providing handouts of important information such as lists of regionally endemic species.

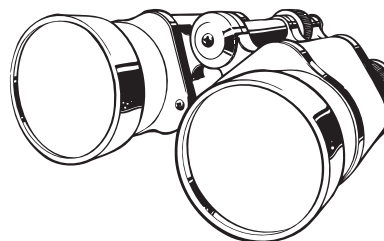


Topic 4: Use, Care and Selection of Equipment



KEY POINTS

- Binoculars
- Field guides
- Telescopes
- Field notebooks



BACKGROUND INFORMATION

Binoculars

Binoculars (and telescopes) are precision instruments. There is more to their proper use than lifting them to eye and looking through the lens. Furthermore, they are essential — and expensive — tools for the professional bird guide.

Binoculars come in a wide variety of makes and models. Prism binoculars with lenses that offer good magnification (7X, 8X or even 10X) while retaining good resolution are best for birding. Popular birding binoculars are in the 7X35 and 8X42 range. More expensive lenses have special coatings to maximize brightness and may be waterproof and nitrogen-filled (to reduce fogging).

Binoculars are fragile. Drop them once and, likely, they will no longer focus properly. Users should immediately place the strap around their necks when they take them from the case — even before attempting to focus or use them.

Users must adjust the binoculars to their own eyes before they can properly focus and use them. To do this, they should hold the binoculars up to their eyes and adjust the width of the lenses first, so that the eyepieces feel comfortable to them. Then they must

adjust the binoculars for any difference in the strength of their eyes. Here's how:

1. Locate the adjustable eyepiece (usually the eyepiece on the right side).
2. Use the lens cap or a hand to cover the objective lens (the large outer lens) on that side and, with both eyes open, focus on a distant object with the central focusing mechanism until it is sharp and clear.
3. To finish the adjustment, cover the other objective lens only (usually the left) and use the adjustable eyepiece to bring the same object into sharp focus.

Now they are ready to use the binoculars.

Users should never touch the lenses with fingers or any material other than a soft rag, special brushes or lens paper. Special lens-cleaning fluid is also recommended. Lenses should be cleaned regularly for best results.

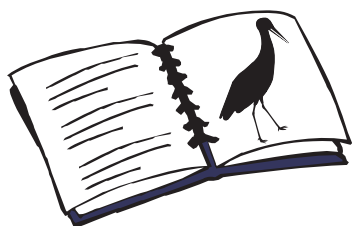
Binoculars are very susceptible to damage from humidity. They should be protected from rain and mist since humidity, once inside the casing, will “fog” the lenses and make viewing difficult. Users should be careful about carrying binoculars for prolonged periods under waterproof rain gear next to the body — the moisture they give off can also enter the casing.



Part 4: Use, Care and Selection of Equipment

Avoid situations where sand and grit (e.g., blowing sand and dust) can come into contact with the binoculars' lenses or focusing mechanisms. Take special care on beaches.

Always store and carry binoculars in their cases with lens caps in place. However, the best recommendation for caring for binoculars in tropical climates is to use them! Binoculars stored for long periods in closed areas are candidates for fungus growth on the lenses.



Field Guides

Field guides are essential equipment. A good field guide should:

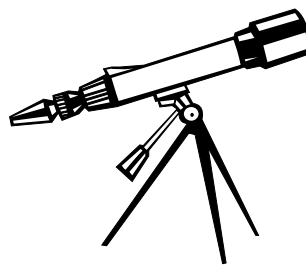
- Be organized according to families of similar birds
- Have good, coloured illustrations along with key field notes
- Show silhouettes
- Show range maps
- Be compact enough and rugged enough for field use

Use guides in the field but also browse through them before you head out. This practice helps you to familiarize yourself with species you may encounter.

We highly recommend that you mark, in colour, the species on the plates that are found in the region where the workshop is given. This quickly limits choices in working out identities of unknown birds. It is also convenient to use a field guide that contains colour plates of both migrant and resident birds if one is available.

If photos and drawings are available, put together a field guide that includes only those species found in the region, thus focusing beginners on potential birds in their area.

Carry field guides in a packsack or waist pack. Ensure that you can protect them from rain or humidity (by packing them in a plastic bag or waterproof pack).



Telescopes

A spotting scope is optional but can be a valuable addition to a bird walk, especially if you have children along or you are working with shore birds. Plan to bring along someone to set it up and focus it on birds of interest. Make sure that you have a sturdy, easy-to-use tripod to set it up on.

Look for a spotting scope that has a wide-angle lens and a viewing piece that is attached from above (this makes it easy for people of different heights to use).

Care and maintenance is similar to that for binoculars.





Field Notebook

- A notebook is a valuable tool for guides who wish to increase their learning as they go. Guides can keep a simple diary of what they have seen and where they saw it (written and/or illustrated). They might also use a very structured approach to note taking, similar to an official “register of field notes” (see “Topic 8: Monitoring Techniques”).

Guides can contribute to published information and receive credit for their observations. This can make them known to visitors who may then wish to hire them as guides.

Instructional Approach

You will probably approach this topic in small chunks as the need arises and integrate it with sessions on bird identification.

Though you may launch your workshop with a bird walk, it is well worth taking the time to explain proper use of the binoculars in a classroom setting where you have everyone’s attention. This should be one of the first topics you deal with overall. Make a point to explain the value of the binoculars, how fragile they are and how difficult they are to acquire. Insist that all binoculars be used only after the strap has been placed around the neck. Teach people how to adjust the width of the lenses, the right eye, and then the use of the focus. Explain about not touching the lenses with their fingers, etc. Then go out and apply the learning immediately on a walk.

When you return from a walk, always have the participants check the binoculars for cleanliness before returning them to their cases. Show them how to

clean the binoculars with a brush, cleaning liquid and lens paper, and have them practice at least twice during each workshop (especially after the last bird walk). Emphasize that a piece of dirt, too much humidity, etc. can cause serious damage. Also stress the cost of the lens paper. All this reinforces the degree of care binoculars require so that the participants will better appreciate them and care for them when they obtain their own.

You should also cover the proper use and care of field guides in a first workshop, perhaps after dealing with the basics of binoculars and just before a second bird walk. While still in the classroom, hand out the field guides and “walk through” with the group how to use them to identify a few common species. Immediately follow up with the use of the field guides while on a bird walk. Once you have introduced the use of the field guides in your workshop, avoid doing the identification work for the participants; always have them practice with the field guides.

You may wish to carry examples of several different guides to give the participants an opportunity to see what choices are available to them.

If you intend to use and teach the use of a spotting scope, do so after the participants are somewhat proficient with binoculars. This will challenge them without overwhelming them with new technology.

You may wish to introduce the concept of field notes early in the course but keep it simple and fun. You may wish to create a simple visual record after your initial bird walk by creating a visual “group journal” on large pieces of chart paper. Incorporate drawings that represent the species you saw, the numbers, the sex, the weather, etc.

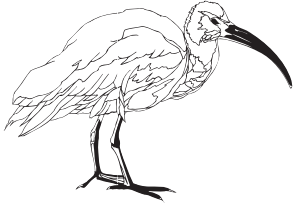
In later workshops, set aside time after each field experience so participants can record their observations in their own notebooks. Occasionally work through some entries together on chart paper to review and reinforce good note-taking technique.



Topic 5: Bird Conservation



KEY POINTS



- Habitat needs and the concept of niches
- Habitat concerns
- Visitation to water bird colonies
- Impacts of bird watching
- Planting for birds
- Solving local garbage and pollution problems
- Identifying and solving educational needs for residents

BACKGROUND INFORMATION

Habitat Needs and the Concept of Niches

All animals, including humans, require habitat to survive. A bird's habitat is the place it lives — its home. Habitat must provide four general things to the bird:

- Its preferred food
- Water
- Shelter (from predators and the elements)
- Space (a territory that provides breeding, feeding, roosting, flying and nesting sites)

Each species has very specific preferences for each of the main habitat elements and for the arrangement of these elements. For example, a Great Blue Heron prefers a wetland habitat that provides fish and frogs for food, water for drinking and nearby trees for roosting, nesting and avoiding predators. Habitats of different animals may overlap so the same wetland might be home to many other birds. However, two organisms do not normally compete directly in all aspects of habitat. Food, nesting sites or other preferences will differ.

The habitat concept explains why you can find certain birds in predictable places — the places that best meet their needs. Habitat knowledge greatly helps you to plan bird walks and identify birds.

TRY THIS!



Bird Threat Scavenger Hunt

There are probably many local habitat threats that participants can find. As an instructor, make a short excursion into the community ahead of time and identify a few types of threats that you can easily find. Write a short list on a piece of chart paper. Divide the group into teams or pairs, and give them 30 minutes to locate as many threats as they can in the community, then return and report. Be sure to follow up with suggestions on how to reduce the threats. An alternative is to do the excursion as one group (if you fear you may lose them or if there is sensitivity around the issue). Here are some common bird threats:

- 1 Glass windows
- 2 Stray cats and dogs
- 3 Land clearing and filling
- 4 Bird capture
- 5 Sling shots

Topic 5: Bird Conservation

Where habitat is the “address” of an organism, niche is its “occupation” or role. Niche is the organism’s total way of life including everything it needs to survive – where it lives; what it eats; when it feeds; what it provides food for; when it is active (day, night or in between); how it reproduces; how it attracts a mate; how and where it nests; how it interacts with other living things; special adaptations, etc.

Habitat Concerns

An animal cannot survive without the right habitat. Despite our acknowledgement that birds are important to us, our human activities often threaten or destroy critical habitat. We sometimes convert natural lands into agricultural or urban areas, interrupt or re-route water flow and degrade water quality with human, agricultural or chemical wastes. Here are some human threats to habitat (examples below were contributed by workshop participants):

- Garbage
- Contamination
- Habitat loss due to deforestation, landfill, agricultural projects, cattle raising, etc.
- Disruption of water flow
- Disturbance by humans
- Forest fires
- Noise from vehicles, planes and radios
- Hunting
- Commercial bird trade
- Urbanization
- Replacement of native vegetation with exotics

Visitation to Water Bird Colonies

Colourful waterbird colonies attract the attention of even the most novice nature lovers. Visitors often pressure local guides and boatmen to approach the birds too closely. When the guides comply, the visit usually causes stress on the birds by interrupting

their feeding and resting periods. Permanent damage to a colony can be caused when boatmen unload passengers directly onto an island where birds are in the process of pairing, building nests, incubating eggs or caring for young. The bird population will inevitably and dramatically decline.

Many reserves have regulations prohibiting visitors from approaching within 100 to 150 meters of the nesting islands and feeding grounds of colonial waterbirds. Unfortunately, most reserves lack park guards. Visitors and guides often don’t respect the regulations until after the bird population has notably declined. It is best to prevent these types of disasters since the recovery of declining populations is an arduous, expensive and uncertain undertaking.

Well-informed local guides have an opportunity to educate visitors and their peers to ensure that these vulnerable bird populations are protected as well as enjoyed.

Impact of Bird Watching

High numbers of birdwatchers passing along the same trail day after day (no matter how discreet they are) cause birds living near the trails to retreat from view. Good design of trails and viewing infrastructure can encourage birds to remain close-by while still offering visitors good viewing opportunities. Rules of conduct for guides and visitors are equally important. Guides can help develop a local code of conduct and ensure that visitors follow it. A local code of conduct might include common sense actions, such as:

- Speaking in soft tones
- Not making abrupt motions
- Not “calling up” birds constantly and never during the nesting season. (If birds are forced to constantly protect their territory they will not be able to dedicate as much time to their young or even their own needs of feeding and preening.)
- Keeping to marked trails

For more ideas, see “Topic 11: Birding Ethics.”



Planting for Birds

A simple yet effective conservation strategy for birds is to artificially provide some of the habitat elements that are limiting. Local people can plant native herbs, shrubs and trees that produce berries and seeds, provide cover or provide good nesting sites. Some communities are sources of valuable traditional knowledge of plants and wild birds' use of plants. Use this knowledge whenever you can.

As a rule, the most successful planting efforts:

- Are planned
- Consider which bird species the group wishes to support and how to meet its needs
- Use only species of plants that are indigenous to the region (so the group doesn't unwittingly unleash a destructive pest)
- Can occur either in wild areas as a supplement to the existing natural vegetation or in villages and agricultural areas to create habitat where it doesn't currently exist
- Are well-publicized locally so that people don't inadvertently undo the work by cutting down or uprooting plants
- Involve the whole community from the beginning

Solving Local Garbage and Pollution Problems

One of the biggest "turn-offs" for bird-watchers is a constant view of garbage along with the birds. Often these eyesores are also human health hazards, particularly in coastal wetland communities or along riverbeds.

Bird guide training, particularly in reserve communities, motivates people to resolve local garbage problems. Bird-watching clients impress upon the guides how disagreeable it is to visit a village with garbage strewn about. At first, guides will participate directly in clean-ups organized by a local conservation organ-

ization or the reserve management. But this, they will soon recognize, is only a temporary solution. With support from the reserve management and a local conservation organization, the guides can serve as leaders, getting the community to adopt a plan to manage the garbage. Afterwards, they become the "watchdogs" that make it happen.

TRY THIS!



Plants for Birds

Organize a conservation project with the participants or the entire community. Take a walk in the community to identify valuable local plant species for birds and some degraded areas that could use some help. Acquire indigenous plants from areas slated for development or areas that are currently well stocked. In some cases, the reserves have nurseries of native plants. Alternatively, have participants collect wild seed to sow (or grow for later planting as part of a school project). Inhabitants of indigenous communities often have extensive knowledge of native plants and may know how to reproduce them.

Plant your acquired growing stock in areas where it will do birds the most good. You might extend current hedgerows or "live fences" for shelter, or plant clumps of seed or berry producing plants. In more urban areas, unoccupied lots are often "cleaned" of all vegetation. Promoting the beautification of such lots with bird-friendly plants may be a way to save valuable habitat that benefits the work of the local bird guides. Planting on slopes, particularly in coastal communities, may help participants understand the additional important role plants play in preventing erosion.

Try to involve the entire community in the project. Children in particular will benefit from the educational nature of the project and the information that the participants can share.

Identifying and Solving Educational Needs for Residents

Some threats to birds and their habitats (and, hence, the local eco-tourism potential) can only be overcome through broad education efforts that target the community. Two notable threats are:

- Needless killing of birds by children using slingshots. This is perhaps the most obvious sign that the community is not entirely supportive of an eco-tourism project.
- The capture of wild birds for commercial reasons (whether legal or not).

Guides can play a lead role in creating or supporting environmental educational programs for primary children in the community. The guide training workshops are a good place to initiate a relationship between the guides and children. Guides can take children out on bird walks as one of the workshop activities. The guides will be motivated when they see how quickly the children learn bird identification in a new language, and the children will learn to see birds from a different perspective.

Instructional Approach

This topic is best addressed through a combination of classroom and field experiences.

Cover the concepts of habitat and niche early on in a classroom session. Help them to understand the concepts by relating to their own habitat needs for food, water, shelter and living space. Continue the analogy by comparing the concept of niche to that of occupation or job, or role within the family/community. Reinforce these concepts as you visit different habitats for bird walks. Relate the habitats to the needs of the birds you find there and note the particular niches that bird species occupy.

After highlighting the importance of habitat, use the participants' experience and observation skills to identify threats to habitat. You might have participants brainstorm threats that they have already seen in the community, or you can take them on a "scavenger hunt" to find threats (as well as birds). Consider tying this in as a secondary theme to one or more of your regular bird walks – participants look for birds and threats.

The participants may identify their own bird watching activities, and those of tourists, as a threat to birds. Brainstorm with them the ways that they can reduce their impact, including:

- Avoiding active nest sites
- Keeping their distance from water bird colonies
- Using ecologically-friendly motors that cut noise and pollution
- Denouncing acts of cruelty to birds (such as tossing baited hooks to gulls and pelicans)
- Not calling up birds constantly and never during nesting season
- Not making abrupt body-arm motions
- Speaking in low tones
- Wearing dull-coloured clothing
- Keeping group numbers at or below 8 people
- Varying birding trails used
- Solving garbage problems



Follow this with strategies participants might use locally to conserve birds and their habitats. Once again, they might brainstorm some solutions to threats they had previously identified. The best solutions will be those that they identify (with your coaching) and that the whole community can implement. Consider organizing a “planting bee” with the class as part of a bird walk. Use native seeds, herbs, shrubs and trees and make the link between the plants and the birds’ natural histories.

Involving the local community in any of the conservation initiatives that you undertake will help to educate them about the issues. You might ask the participants to prepare short presentations for the community or lead a local community bird walk to highlight issues. Children will be the most receptive to such an invitation. They, in turn, will automatically involve parents and school teachers. Encourage and support the guides’ efforts to involve the children in regular bird walks as part of a community-based or school-based environmental education program.





Topic 6: Amazing Facts About Birds



KEY POINTS



- Migration feats
- Messenger service (pigeons and frigatebirds)
- Life span
- Adaptations to urbanization

BACKGROUND INFORMATION

Migration feats

Birds accomplish incredible feats during their migration across oceans and large landmasses. A region like the Yucatan Peninsula plays host to a number of different migrations, such as:

- North-south in winter
- South-north in summer
- Caribbean to coastal islands in summer
- Local migrations and dispersions

The Internet is the best place to seek information on bird migrations for your specific region. Interesting information to research might include:

- Diet adaptations
- How a bird orients itself by the earth's magnetic centre
- Diurnal and nocturnal migration
- Fat accumulation
- Distances and flight speeds
- Importance of wind directions

TRY THIS!



Amazing Bird Facts!

If you have students who have already attended one or more workshops, give them an assignment to research and do a one-minute presentation on their favourite "amazing bird." You might consider accumulating some information ahead of time (magazine articles, etc.) that you can hand out to help them prepare.

To add some fun and humour, ask the participants to present the activity as a sales advertisement on behalf of the bird. (E.g., "It's big! It's beautiful! And it really flies! It's the Laughing Falcon! Be the first to have one in your backyard!")



Topic 6: Amazing Facts About Birds

Messenger Service (Pigeons and Frigatebirds)

The capability of birds to “home” is always a fascinating subject. Most people are aware of the use of pigeons as messengers but many are surprised to learn that the ancient, seafaring people of Polynesia once used the frigatebird as a messenger. They took young frigatebirds from the nest, raised and tamed them, then used them to carry messages between islands up to 70-80 miles apart.

Life Span

Data on avian life span intrigues students of birds. Captive birds live longer than their wild counterparts due to the greater availability of food and the lack of predators. There is documented evidence of a captive macaw that lived for 80 years. The average life span of this species in the wild is usually quite low due to nest predation and the harsh conditions associated with the illegal bird trade. Note that large birds have a higher potential life span than small birds. For example, gulls and shorebirds have been known to live up to 36 years; hawks up to 26 years; and herons, storks and ibises for 20 years. On the other hand, woodpeckers have an optimum life span of only 12 years and warblers even less. Weather conditions during migration and changes in land use that reduce available habitat are also important factors in reducing the potential life span of some families of birds in the wild.

Adaptations to Urbanization

Most urban areas harbour birds that have adapted to human-made structures for the sake of survival. For example, the Great Kiskadee commonly chooses an electric transformer to place its bulky nest. Apparently, the birds welcome the heat generated by the transformer, especially during the tropical rainy season.

Hooded Orioles are known to nest under “roofs” and they really don’t care if the roof is a banana leaf or one made of cement. They commonly attach their deeply-cut nests to electric cabling that passes along a corner beneath an overhanging roof. Electric cables strung along a highway serve to support nests of the Altamira Oriole and Rose-throated Becard, while the Social Flycatcher constructs its nest between the metal supports near the top of the pole. Up on top of a cement utility pole, the Boat-billed Flycatcher commonly builds a small cup-shaped nest and incubates its eggs, even if it means sitting through the occasional torrential downpour.

Instructional Approach

The types of information offered in this section may not be essential for a beginning guide, but they add richness, interest and quality to any guide’s repertoire. These are the small things that tourists will remember and keep coming back for.

You might cover this information in a distinct classroom session, but consider breaking it into smaller, two-to-five minute bits that you can sprinkle throughout the workshop, one item at a time. You can follow up during bird walks to reinforce the information as opportunities arise (for instance, when you see a frigate bird soaring above the surf).

This topic also lends well to “sharing” sessions if you have advanced participants. Some of them may have tidbits of scientific information or local folklore that they can contribute. Be careful to distinguish science from folklore. You may even wish to set up opportunities for participants to prepare and contribute a short presentation at a later date. It is good practice for presentation skills.

If your audience can read, consider handing out copies of the facts in their own language and in English so they can retell the stories later.



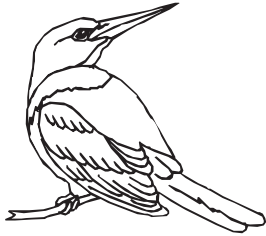
Topic 7: Bird Natural History



KEY POINTS

(For each of several key local species)

- Feeding requirements
- Reproduction history
- Special behaviour



BACKGROUND INFORMATION

The value of natural history information on wading birds and other birds becomes evident as participants express the desire to be able to “talk” to visitors about the local birds. An even stronger reason to include these natural history sessions is to increase visitor and guide awareness about their potential damaging influence on local bird colonies. In fact, guides must understand bird life cycles in order to select the least damaging times to install viewing infrastructure near a nesting or roosting site. They must also understand what viewing distances to keep from the birds and how to interpret bird “body language”.

Select a few representative birds from the region and develop a short presentation on each (maximum 45 minutes). Include information on their feeding reproduction and special behaviours. The choices of birds to feature are many, so we have not included specific information here. Research your information by consulting the Internet or any of the reputable books on the topic (such as “Life Histories of Central American Birds” by Alexander Skutch). Assemble slides or photographs from your own collection or that of colleagues and bird conservation organizations. The Internet may also be a source. Be sure to obtain permission to use someone else’s work.

TRY THIS!



Feature Creature Presentation

Prepare a short presentation on the natural history of a locally important and interesting bird species. Cover identification features as well as the bird’s feeding, breeding and other special behaviours. Use posters, pictures, artefacts and slides to add visual effect. Spice up the information with personal anecdotes from your own field experience. Repeat the presentation format for other species.

Allow other experienced guides to contribute as well. Consider scheduling “feature creature” presentations at regular times, or just pop one into the agenda when you feel you need a change of pace.

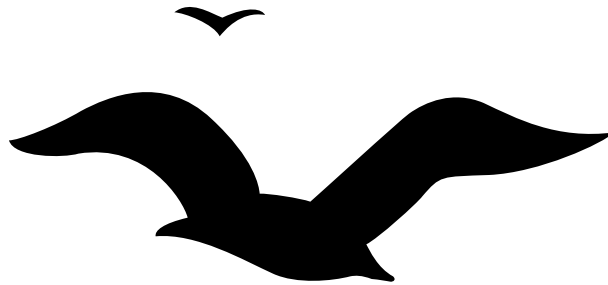
Instructional Approach

This topic lends itself well to an evening slide presentation (or a series of such presentations) that gives an entertaining overview of the life histories of important local bird species. Consider inviting other members of the community as well as workshop participants, in order to generate interest in birds. Do this during a first workshop in your series and consider adding more “life history” sessions in subsequent workshops. Keep each presentation to 45 minutes, or less if there is a lack of exciting visual materials. Make the presentation interactive by encouraging participants to provide information as well.

If you don't have electricity or projection equipment available, use posters and any artefacts you can acquire (such as mounted birds, example nests, etc.) to support your presentation.

You may also decide to cover this topic in a series of short presentations integrated regularly into your other material, particularly if you can't rely on a slide presentation (see the “Feature Creature Presentation” activity in the sidebar).

Always look for opportunities to reinforce the information on bird walks or boat outings, particularly as it relates to responsible behaviour toward the birds themselves.



Topic 8: Monitoring Techniques



KEY POINTS

- Research and monitoring
- Recording and reporting field records
- Participation in scientific studies



BACKGROUND INFORMATION

Research and Monitoring

Our collective understanding of bird biology, behaviour and ecology is a “work in progress”. Scientists use a wide variety of research and monitoring techniques to try to add to this understanding, including “point counts”, netting programs and direct observation in the field.

Bird monitoring programs, because of their repetitive and ongoing nature, help the scientific community to discern and understand trends and changes in bird populations. This, in turn, can be related to more general trends in local and global environments, such as climate change and habitat degradation. The data obtained can advance our collective understanding of bird life histories and even lead to important conservation initiatives.

Recording and Reporting Field Observations

There is educational and scientific value in keeping basic field notes, and there are methods for capturing information in a way that can be used easily by others. When a birder or researcher makes a significant observation, he or she should record the following information:

- Date
- Start and finish time
- Weather conditions; wind direction
- Site
- Habitat type (optional)
- Number of individuals
- Sex (if determinable)
- Behaviour

Participation in Monitoring and Scientific Studies

Guides who participate in research and monitoring programs are exposed to excellent opportunities to extend their own knowledge. Those with good abilities in identifying bird songs can participate in “point counts” and further improve their abilities. The best



Topic 8: Monitoring Techniques

of the local guides may be candidates for helping with scientific field studies during which they will learn to use nets, take measurements, band birds, etc. Ideally, they should take a week's intensive training in banding work first.

In addition, guides are often honoured to volunteer for Christmas Bird Counts or Flamingo monitoring projects.

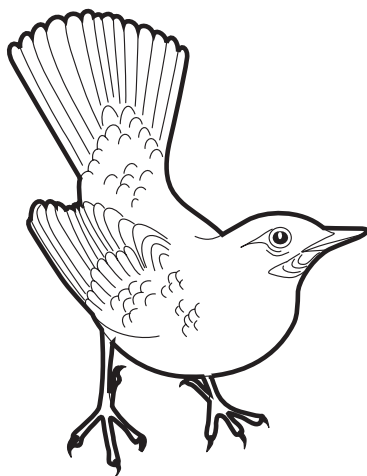
INSTRUCTIONAL APPROACH

Cover note-taking techniques and requirements briefly in the first workshop and follow up in future workshops. Use the basic note-taking points as a guide when you question participants on they sightings they have made on a recent bird walk. Consider

showing them copies of “North American Birds” to demonstrate how the information they write down in their field notebooks is used. Help them to see the personal advantages of getting their name published as a contributor.

If your workshop schedule permits, get involved as a group in a special monitoring event such as a Christmas Bird Count.

If there is a workshop planned for training in monitoring techniques for land birds, support the attendance of the more advanced bird identification workshop participants. The basic training manual for such workshops is entitled: “Manual of Field Methods for Monitoring Land Birds” (Manual de Metodos de Campo para el Monitoreo de Aves Terrestres”) by C. J. Ralph et al.



Topic 9: Characteristics of a Good Guide



KEY POINTS

- Do's and don'ts
- Educating the visitor

BACKGROUND INFORMATION

Do's and Don'ts

There are a number of principles and practices that guides can apply to ensure that the best service is provided to the customer/client. These principles are the foundation of any activity that involves dealing with the public. Applying them consistently creates customer satisfaction and, therefore, return business.

Guides must also be conscious of the effects of their activities on the resource "health". Activities that provide short-term customer satisfaction should not compromise the long-term viability of the wildlife and the ecosystem.

Here are some characteristics of a good nature/bird guide as identified by workshop participants:

- Honest and trustworthy; doesn't invent information
- Clarifies cost of tour, length of time, clothing and equipment needed.
- Punctual
- Well-mannered

- Communicates with clients and not just responds to their questions
- Respectful
- Friendly
- Neat appearance; dresses appropriately (no colourful clothing for bird walks)
- Patient
- If guiding for birds, keeps voice down, walks slowly, keeps groups small, identifies one bird at a time, providing the exact location of bird
- Pre-selects different habitats to take people bird watching
- Selects garbage-free trails
- Keeps the group together at all times
- Tours people at the appropriate hour of day for what they want to see and do
- Never shows disdain for a bird, no matter how common
- Equipment (binoculars, boat, vehicle, etc.) are clean and well-maintained
- Provides client with concise instructions on security and behaviour expected



Topic 9: Characteristics of a Good Guide

- Has a good sense of humour
- Speaks clearly
- Does not drink alcoholic beverages while working
- Knows the area and can speak about its history, natural resources, productive activities, type of soil and vegetation, cultural events, etc.

Educating the Visitor

Visitors often request the guide's help to get "even closer" for a unique photo opportunity or a good look at a nesting bird. One of the greatest challenges for a newly-trained guide is prohibiting a client from doing such things that threaten a bird's well being. Guides are understandably reluctant to risk their tip, which depends on their ability to satisfy the client.

Most clients will, however, respect the guide's honest efforts to protect birds from needless harm, especially if the guide is equipped with superior knowledge of the bird's life history and sensitivities. It is worth noting that, in many cases, guides can make even bigger tips by NOT heeding the request of one particular client when that request is clearly inappropriate.

Guides can take some of the pressure off themselves by creating tactful signs and printed guidelines that provide clear instructions on "do's and don'ts" for visitors. They can hand out the guidelines and post the signs before going a-field.

TRY THIS!



Participant Strength Feedback

This activity helps participants give positive feedback to each other and promotes professional growth.

Part One:

Seat group in a circle on the ground. Hand out a small, blank piece of paper to each person along with a pencil. Have each person write down his or her name on the paper and fold it. Gather up "names" in a cap. Instruct them to each choose a name from the hat (making sure it is not their own) and to keep it secret (this is their secret partner for the day). They will watch this person during the day's activities, noting the positive things that they do, and the strengths they show. Instruct them to try and find two main strengths, being specific and giving examples from the day's activities. "Qualifiers" (i.e., "you did well, but ...") and negative comments are not allowed.

Part Two:

At the end of the day, seat the group in a circle where all can face each other. Tell them it is time to give the strength feedback. You can let them go at random or around the circle.

- Remind the group that "qualifiers" and negative comments are not allowed.
- Also instruct them to use the "first person" and "second person" ("I" and "you") when addressing their partner (e.g., "I noticed that you were always addressing people by name and looking them in the eye.")
- Remind them to maintain eye contact.
- Remind the "receivers" that they can't deny or excuse the positive comments of others!



INSTRUCTIONAL APPROACH

This topic, while critical for guides, can be covered after the basic skills in bird identification are well on their way. It is helpful if the participants have experienced a bird walk led by a “model” guide.

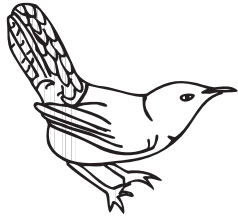
The topic lends well to a discreet classroom session in which the participants can contribute their ideas fully. We recommend a group brainstorming session on “the qualities of a good guide” with a full discussion and evaluation of each of the points brought forward by the group. Consider creating a good copy of your list on chart paper and posting it in a visible location. Go back to your list frequently to add any valuable new ideas that arise during your workshop(s).

Practice, evaluation and feedback are critical aspects of this skill-oriented session. Plan to give the participants opportunities to lead part of a bird walk with their colleagues. Use your “list of qualities” as an evaluation checklist and (discreetly) evaluate their performance. Share the feedback tactfully and confidentially. Begin a feedback session by asking the person how they feel it went. Often they will have a good sense as to what went on. As a rule, begin your feedback by describing what you observed as the person’s strengths and successes, and then describe two or three important things that they can improve. Always give specific, concrete suggestions. For example, if a guide was dressed inappropriately, don’t just say, “You were dressed inappropriately.” Say, “You could improve your professional appearance by wearing a clean shirt and pants.”





Topic 10: Organizing a Bird Walk



KEY POINTS

- Timing and direction
- Control of group
- Concentration on one bird at a time

BACKGROUND INFORMATION

The information that you convey to the participants about this topic is the same information that you apply as the group's instructor. The best principles and practices are described in the section entitled "Organizing a Bird Walk" in Part 2 of this manual. Draw your background material from that section.

INSTRUCTIONAL APPROACH

Introduce this topic after the participants have already experienced several well-run bird walks. Immediately after a successful walk, ask them what makes a bird walk successful. Discuss the factors they should consider as they plan and conduct a walk for their clients.

It is equally important to cover factors that may hinder success. If you have experienced a less successful walk (by accident or design), debrief it immediately afterward. Identify and discuss the factors that impede success and how a guide might plan to avoid pitfalls.

You may wish to summarize a set "guidelines for a successful bird walk" on chart paper and display them, or you can create a handout for the participants.

As with any topic, the participants will benefit by having the opportunity to apply the basic concepts as they plan and conduct a bird walk on their own. You might assign this challenge to groups of participants: each group can plan and conduct a walk for the other groups who, in turn, offer constructive feedback.





Topic 11: Birding Ethics



KEY POINTS

- The American Birding Association (ABA) code

BACKGROUND INFORMATION

The following information is drawn directly from the American Birding Association website: (www.americanbirding.org)

Principles of Birding Ethics

Everyone who enjoys birds and birding must always respect wildlife, its environment and the rights of others.

In any conflict of interest between birds and birders, the welfare of the birds and their environment comes first.

Code of Birding Ethics

1. Promote the welfare of birds and their environment.

- I(a) Support the protection of important bird habitat.
- I(b) Avoid stressing birds or exposing them to danger. Exercise restraint and caution during observation, photography, sound recording or filming.
 - Limit the use of recordings and other methods of attracting birds. Never use such methods in heavily-birded areas or for attracting any species that is Threatened, Endangered, is of Special Concern or is rare in your local area.

- Keep well back from nests and nesting colonies, roosts, display areas and important feeding sites. In such sensitive areas, if there is a need for extended observation, photography, filming or recording, try to use a blind or hide, and take advantage of natural cover.
- Use artificial light sparingly for filming or photography, especially for close-ups.
- I(c) Before advertising the presence of a rare bird, evaluate the potential for disturbance to the bird, its surroundings and other people in the area. Proceed only if access can be controlled, disturbance minimized and permission has been obtained from private landowners. The sites of rare nesting birds should be divulged only to the proper conservation authorities.
- I(d) Stay on roads, trails and paths where they exist; otherwise keep habitat disturbance to a minimum.

2. Respect the law and the rights of others.

- 2(a) Do not enter private property without the owner's explicit permission.
- 2(b) Follow all laws, rules and regulations governing use of roads and public areas, both at home and abroad.
- 2(c) Practice common courtesy in contacts with other people. Your exemplary behaviour will generate goodwill with birders and non-birders alike.



3. Ensure that feeders, nest structures and other artificial bird environments are safe.

- 3(a) Keep dispensers, water and food clean and free of decay or disease. It is important to feed birds continually during harsh weather.
- 3(b) Maintain and clean nest structures regularly.
- 3(c) If you are attracting birds to an area, ensure the birds are not exposed to predation from cats and other domestic animals, or dangers posed by artificial hazards.

4. Group birding, whether organized or impromptu, requires special care.

Each individual in the group, in addition to the obligations spelled out in Items #1 and #2, has responsibilities as a Group Member.

- 4(a) Respect the interests, rights and skills of fellow birders, as well as people participating in other legitimate outdoor activities. Freely share your knowledge and experience, except where code 1(c) applies. Be especially helpful to beginning birders.
- 4(b) If you witness unethical birding behaviour, assess the situation and intervene if you think it prudent. When interceding, inform the person(s) of the inappropriate action and attempt, within reason, to have it stopped. If the behaviour continues, document it and notify appropriate individuals or organizations.

Group Leader Responsibilities [amateur and professional trips and tours].

- 4(d) Be an exemplary ethical role model for the group. Teach through word and example.
- 4(e) Keep groups to a size that limits impact on the environment and does not interfere with others using the same area.
- 4(f) Ensure everyone in the group knows of and practices this code.
- 4(g) Learn and inform the group of any special circumstances applicable to the areas being visited (e.g., no tape recorders allowed).
- 4(h) Acknowledge that professional tour companies bear a special responsibility to place the welfare of birds and the benefits of public knowledge ahead of the company's commercial interests. Ideally, leaders should keep track of tour sightings, document unusual occurrences and submit records to appropriate organizations.

Please follow this code, and distribute and teach it to others.

INSTRUCTIONAL APPROACH

The best way to instruct birding ethics is to practice the code consistently in the field portions of the workshops.

Be sure to hand out and review the code at least once. Discuss the rationale for each point in the code. You may wish to ask the participants to add to the code or rewrite it in their own words so it is clear.

Occasionally, after a bird walk, go through the code as a checklist and verify that the leader and participants followed it.



Topic 12: Safety



KEY POINTS

- Assessing risks
- Water safety
- Designing safe interpretive trails
- Providing first aid
- Emergency communications

BACKGROUND INFORMATION

This is a very broad and important topic. It is beyond the scope of this present manual to describe all the possible safety issues and the desirable knowledge and skills that the well-prepared bird guide should have. All guides should receive, at minimum, basic training in accident prevention and first aid so that they are prepared to:

- Assess and reduce risks of environment-related injuries such as heat stroke, lightning strike, insect sting, snake bite, etc.
- Provide first aid for injury, sudden illness or existing medical conditions that manifest themselves (such as heart attack, diabetic coma, etc.)
- Design safe interpretive trails and field experiences
- Provide or secure emergency communications in remote areas
- Provide water safety if using boats

We hope to add more information on this topic in future editions of this manual.

INSTRUCTIONAL APPROACH

As a minimum, encourage guides to brainstorm possible safety issues that they might face on a bird walk with clients. This is a good opportunity for instructors, guides and participants to share their field experiences frankly. In a particular, they might share what they learned through dealing with past emergencies or “near misses” (situations that might easily have become emergencies).

It is wise to come to the workshop with a list of courses and contacts pertaining to first aid training and safety. Strongly encourage participants to seek the proper first aid training and certification.



Topic 13: Business Skills



KEY POINTS

- Official requirements
- Business planning and financing
- Promotion and advertising
- Self-evaluation
- Economic value of community unity

BACKGROUND INFORMATION

A skilled bird guide can add to his or her financial success by mastering basic business skills. We are unable to provide detail on this topic in this version of the manual. However, some information is available on the Internet and at government offices. Seek specific information on registration, permits and other official requirements that pertain to the area where you are holding your workshop. Also seek general information on:

- How to write a business plan
- How to secure financing
- How to promote and advertise tourism services
- How to create customer satisfaction
- How to improve your business through self-evaluation and customer surveys
- How to create a collaborative business environment locally

INSTRUCTIONAL APPROACH

Include this topic in a later workshop, after the participants have mastered basic birding and guiding skills.

Although business knowledge is not a core learning area for every guide, it is definitely a worthwhile topic for advanced participants who show a desire to run their own eco-tourism business. You might aim to simply inspire and encourage participants to pursue further training that is offered through existing business-related or eco-tourism courses and workshops.

One approach to this topic is to recruit guest speakers to cover different aspects of starting, maintaining and growing an eco-tourism business. You might ask a successful eco-tourism entrepreneur (a local individual, if possible) to outline the steps that he or she went through to establish their business.

Administrators from local or regional government agencies may be able to provide insight or instruction on how to get started in business, secure business loans or grants, hire and manage staff, market the services, etc.

Be prepared to provide a few good contacts for related programs and resources that the participants might access locally or regionally.





Topic 14: Developing a Nature Trail or Viewing Area



KEY POINTS

- Planning and Management
- Site selection
- Trail Layout
- Trail Construction
- Maintenance

BACKGROUND INFORMATION

We expect to add to this chapter in subsequent editions of this manual. Meanwhile, you can find excellent tips on trail design and construction on various Internet sites. Search for “nature trail design tips”, “nature trail construction tips” or “birding trail design tips.”

Planning and Management

- Determine if this will be a self-guided trail, a guided trail or it will incorporate both approaches during operation.
- Determine the goals and objectives of the trail. Is the trail meant to just provide birding opportunities or should it have a comprehensive interpretive approach that reflects the greater ecosystem? Can non-birding visitors enjoy the trail as well?
- Consider carefully what services you will charge for. We recommend that visitors be required to pay for parking on private land, guide service, food, handcrafts, etc. We recommend that you not charge visitors for the use of the trail itself but allow it to bring the other economic benefits to the community.

- Place a sign at the start of the trail system indicating the different trails and the distance of each. Place interpretive media along the trail and at trail junctures to facilitate route finding and to educate the visitor about the ecosystems, bird species, cultural importance, etc.
- Consider a feedback mechanism for visitors. Did they enjoy the experience? What did they learn and what could be improved upon?

Site Selection

Choose a site that will enable you to bring the visitor into safe viewing proximity with the things he or she would most like to see — the local birds of greatest interest. In your selection, also consider:

- Accessibility from the nearest highway. Make sure that the trail is well indicated along all approach routes.
- Accessibility for the disabled. Consider slope and ruggedness of terrain. Obviously, this isn't possible everywhere, especially in backcountry areas. However, it can help set a precedent for future trails.
- The availability of a safe and shady parking area. (Encourage alternative transport too by adding, for example, a bus stop facility.)



Topic 14: Developing a Nature Trail or Viewing Area

- The terrain. You should select a site that allows you to construct a level trail (along the contour lines) that is without loose stones and is easy to walk.

- Orientation. Select a north-south orientation if the trail is in the tropics and in an open area.
- The presence of any “at risk” bird populations that might be disturbed by visitors. Avoid putting trails through areas where the high numbers of visitors might place undue stress on rare or sensitive species.
- Construction materials. Use materials from sustainable sources where possible; line trails with local materials such as limestone rocks, coconuts, etc. This helps to cut costs and it is less visually conspicuous.
- Consider a variety of habitats for the trail. Bird species tend to be more concentrated at the edges of two ecosystems.

Trail Layout

- The trail should be wide enough to permit three people to walk side by side (5 ft is typical). Its length can vary but it should form a circuit so that people do not have to backtrack along the same stretch. This ensures the maximum viewing opportunities for birders and is conducive to trail use for bird monitoring programs.
- Consider developing a system of trails with optional loops that extend from a short main loop. The main circuit should be about 1/2 km while the extended circuit could be one km in total length.
- Develop trails that cover a maximum variety of habitats in a short distance. A trail that includes forest, open grasslands and a wetland is ideal. Birders do not necessarily wish to walk long distances but rather to visit a maximum number of different habitats.

- Locate benches in front of water holes. Add structures (bird blinds) that permit observers to approach or view the birds without being seen.
- Avoid making straight trails. They should wind through the terrain in order to create more viewing opportunities and to increase privacy with larger groups. Allow tree branches to close over the trail in a wooded area and avoid cutting down large trees to make way for the trail.

Trail Construction

- Carry on all construction activities when they interfere least with the birds’ activities.
- Do not undertake construction of trails and other viewing infrastructures during pair bonding or at the height of the nesting season.
- Consider erosion control measures during the construction process to avoid water contamination.
- Minimize soil disturbance during construction. Minimize cut and fill activities and use the ‘lay of the land’ to help dictate on-site construction decisions.
- Install specially-treated boardwalks in low-lying, muddy areas. Use Teflon supports that won’t rust or disintegrate. “TREX” is also a very rot-resistant recycled wood product.



Maintenance

- Good trails provide people with ready access to a variety of bird habitats without the need to wade through the vegetation and with minimum exposure to undesirable fauna, poisonous insects and poisonous plants. In forested areas, you can reduce the rate at which plants re-colonize the trail by maintaining a closed canopy over the trail (i.e., leave the tree tops touching). In some areas you will need to regularly cut the undergrowth, although regular trail use will minimize this.
- Keep the trail well maintained, garbage free and well marked to increase the satisfaction of visitors.

INSTRUCTIONAL APPROACH

We recommend that you introduce this topic in a third or subsequent workshop in the series, after the participants have experienced several good birding trails.

Lead a discussion of the features of a good birding trail and share information on trail design that you have acquired through other means such as the Internet. Create a list of features that you all agree upon and use it as a checklist to evaluate existing trails while you are in the field. Post the list in the classroom and update it as ideas are refined and new ideas emerge.

Consider inviting a guest speaker who has expertise in trail design and construction.





Topic 15: Creating a Local Bird Club



KEY POINTS

- What is a Bird Club?
- Why start a Bird Club?
- How to start a Bird Club

BACKGROUND INFORMATION

When the local guides start going out on their own between workshops for the sole purpose of observing birds, you know you have a dedicated group that will progress rapidly. Often an advanced guide will take along relatives, friends or colleagues from his or her own tourism cooperative. However, it is helpful to establish a more open, organized and accessible local Bird Club if you wish to extend these enrichment opportunities to the community at large.

What is a Bird Club?

Bird Clubs might be as simple as a group of people who decide to get together informally to practice their birding skills. Usually the club will have a name. Clubs might also be more formal and have any of the following:

- Regular meeting times and places
- Elected officers, such as a secretary, a treasurer and a president
- A constitution or set of guidelines for operating
- A formal membership
- Funds and assets belonging to the club
- Means of raising funds from members, the community or grant-giving agencies
- Special events and guest speakers
- A newsletter or Web page

Why Start a Bird Club?

- Bird Clubs can stimulate further learning in professional guides. The adage “the more one knows, the more one wants to know” is true of beginner birders who seek to practice their new skills. Without practice between workshops, participants make little progress. It is well worth leaving a couple of pairs of binoculars and field guides “on loan” to a group of participants if they demonstrate enthusiasm after the workshop. This gives them the means to practice their skills, and it represents the most informal beginnings of a Bird Club.
- Bird Clubs stimulate local interest and promote conservation. The appearance of a group of guides going birding early in the morning sparks interest in the rest of the community. This eventually translates into more requests for training and represents a very visible reminder about the value of birds to the community.
- Bird Clubs provide opportunities to visit new locations. Clubs can help guides to pool their resources or otherwise acquire the means to travel from one community to another for birding and guiding purposes. This helps them to expand their birding knowledge, particularly if they can organize exchanges between, for instance, forested and coastal communities. With the increased experience that such travel allows, local guides can find themselves being hired to travel out of state with international tour companies.



Topic 15: Creating a Local Bird Club

- Bird Clubs enable special presentations by invited experts. Once again, clubs allow people to raise funds to cover travel expenses for invited guest speakers. Often this will include an overnight stay and a trip into the field with the expert.

How to Start a Bird Club

Future editions of this guide will provide more detailed information on how to get a local Bird Club up and running. The Internet is a good source of tips on how to start various types of clubs (try a search on “how to start club” or “start club tips”). Many of the general principles are the same whether you are starting a Bird Club or some other type of club.

INSTRUCTIONAL APPROACH

We recommend that you lay some subtle groundwork for this topic at the end of the first workshop by simply helping the participants agree upon a few times, dates and places that they will meet to prac-

tice their skills before the second workshop comes around. For example, if there is a four-week interval between the first and second workshops, help the group to decide upon a weekly time and place to meet for a morning or evening bird walk. Be sure to leave binoculars and field guides for their use if they do not have their own. You can improve the chances of success by assigning specific tasks and responsibilities to different individuals each week. Spread the responsibility around. Each week, for instance, one person can bring the equipment and guidebooks, another can lead the walk, another can record observations and another can bring a snack for the group.

At the end of subsequent workshops, encourage the group to take initiative to organize outings on their own and formalize regular meeting times. Brainstorm the benefits that a local Bird Club can bring to each of them and help them to decide on a structure for the club. Explore ways that they might raise money for the club and how that money might be used to benefit the club members and the birds themselves. Help them to make contacts with established clubs in other communities and organize exchanges with these communities.



Appendix 1: Sample Letter of Invitation



6 de Marzo del 2002

Estimado _____:

Por ese medio le invitamos a participar en el próximo taller de capacitación en identificación de aves, que tendrá lugar entre a las 15:30 p.m. del miércoles 13 de Marzo, hasta las 14:00 del viernes 15 de Marzo, en el salón social de la Cooperativa Río.

El taller esta organizado por el programa de Conservación de las Aves de la Península de Yucatán (CAPY) en colaboración con la dirección de la Reserva de la Biosfera Ría Lagartos. Cuenta con el apoyo de la Unión Europea, la Fundación Nacional de Pesca y Vida Silvestre de los Estados Unidos de América, y Birder's Exchange.

La invitación esta extendida a las personas que actualmente trabajan como guías y tienen necesidad de estar mejor capacitados en la identificación de las aves como una herramienta para mejorar el servicio que ofrecen al visitante.

Esperamos que usted aproveche esta gran oportunidad para avanzar más en sus conocimientos sobre las aves, y mejorar sus ingresos como guía. El enfoque del taller será en la práctica, utilizando los nombres comunes de las aves en ingles y español. No será requisito el escribir, pero sí pedimos que haga el compromiso de participar en todas las sesiones.

Le recordamos que esta invitación no es transferible y que deben confirmar su asistencia lo más pronto posible con el Biólogo Melgar Tabasco. Anexo se encuentra la agenda en general que vamos a seguir. ¡Estamos planeando que sea muy instructivo y divertido!

Cordialmente,

Barbara MacKinnon H.
Coordinadora, Programa CAPY





Appendix 2: Sample Agendas

AGENDA I

Workshop Objectives:

1. Create enthusiasm for bird identification.
2. Teach the basic criteria for identifying a bird.
3. Recognize the importance of birds for humans.
4. Teach correct use and care of binoculars and field guides.
5. Teach bird status.
6. Teach the significance of endemic bird species.
7. Teach bird names in English.
8. Set an example as to how a guide should perform.
9. Evaluate initial knowledge of bird identification in order to measure future progress.

Friday

3:30 p.m. – 4:00 p.m.

- Welcome and demonstrate how to use and care for binoculars.

4:00 – 6:00 p.m. Bird walk in groups of 6 to 8 participants per instructor.

6:30 – 8:00 p.m.

- Evaluate present knowledge of bird identification with slides or posters of 40-50 locally common species.
- Review birds observed in the field, noting key identifying marks, habitat and status.

Saturday

6:00 – 8:30 a.m. Bird walk in groups of 6 to 8 participants per instructor, visiting different habitats than previous day.

8:30 – 10:00 Breakfast.

10:00 – 11:45 a.m. “How to identify a bird?”

- Parts
- Song
- Relative size
- Form
- Color and patterns
- Behavior
- Habitat



AGENDA I (CONT.)

11:45 a.m. – 12:15 p.m. Break with refreshments.

12:15 – 1:30 p.m. Draw a bird activity. Divide group into field teams and have everyone draw a bird seen during the morning bird walk. Members of opposite teams identify the bird, telling how they arrived at decision, and if correct, provide information as to the status of the bird, if endemic or not, its habitat and behavior.

1:30 – 2:00 p.m. Introduce the endemic bird species found in the region.

2:00 – 4:00 p.m. Midday meal and rest.

4:00 – 6:00 p.m. Bird walk in groups to different habitats.

6:00 – 6:30 p.m. Clean and put away binoculars.

6:30 – 7:30 p.m. Review new birds observed in the field, doing exercises in teams that cover key identification points, habitat, status and behavior.

Sunday

6:00 – 8:30 a.m. Bird walk in groups; followed by cleaning and putting away binoculars.

8:30 – 10:00 a.m. Breakfast

10:00 – 11:00 a.m. Review new birds seen during the bird walk.

11:00 – 11:45 a.m. Exercise on the importance of birds for humans.

11:45 a.m. – 12:15 p.m. Break with refreshments

12:15 – 1:30 p.m. Competitions between teams in properly identifying common birds shown in posters using English names.



AGENDA II

Objectives:

1. Practice using criteria for identifying birds.
2. Improve on ability of describing location of a bird in the field.
3. Introduce birds of special interest to visitors in the area.
4. Identify the characteristics of a good guide.
5. Introduce the theme of ethics in practicing bird observation.
6. Learn to identify bird families by silhouettes.
7. Learn the different names used to describe types of birds in English and Spanish.
8. Relate birds and their needs to habitat selection.
9. Introduce the theme of bird migration.
10. Identify threats to birds and their habitat, in general and locally, and discuss how to combat the threats.

Friday

3:30 – 4:00 p.m. Organize the bird walk and hand out binoculars etc.

4:00 – 6:30 p.m.

- Bird walk.
- Hand in binoculars.

6:30 – 8:00

- Review birds observed in the field, requiring application of the basic criteria for identifying birds, in addition to status, habitat etc.
- Identify silhouettes of bird families as a review of material learned during first workshop.

Saturday

6:00 – 8:30 a.m.

- Bird walk.
- Clean and put away binoculars.

8:30 – 10:00 Breakfast.

10:00 a.m. – 12:00 noon

- Introduce birds of special interest in the area.
- Review bird species observed during morning walk according to key identifying points, behavior, habitat, status, etc.



AGENDA II (CONT.)

12:00 – 12:30 p.m. Break with refreshments.

12:30 – 1:30 p.m.

- Relate birds to type and quality of habitat.
- Discussion on the characteristics of a good naturalist guide.
- Discussion on the ethics to be practiced when observing birds.

1:30 – 3:30 p.m. Main meal and rest.

3:30 – 6:30 p.m.

- Bird walk.
- Put binoculars away.

6:30 – 7:30 p.m.

- Review new birds observed during bird walk etc.
- Presentation on “Why birds migrate” with slides and maps.

Sunday

6:00 – 8:30 a.m.

- Bird walk.
- Clean and put away binoculars

8:30 – 10:00 Breakfast.

10:00 – 11:30 a.m.

- Review new birds observed in the field, providing key identifying points, English name, type of bird, status, food, behavior.
- Provide natural history of a particularly threatened bird in the area or one of special interest to visitors.

11:30 – 12:00 Break with refreshments.

12:00 – 1:30 p.m.

- *Evaluation with same slides or posters used in first workshop carried out within a competitive game.
(Save for third workshop if one is scheduled and use this time for doing an exercise of quickly describing the location of a bird.)
- Discussion of the principal threats to birds and how to abate them.



AGENDA III

Objectives:

1. Teach the importance of the region for its diverse avifauna and bird watchers.
2. Review the symbols for status used in the regional bird list and their implications on when migratory birds can be seen in the area.
3. Explain in non-scientific terms how to classify birds.
4. Review the differences between groups of similar species in the region.
5. Discuss the characteristics for construction of a birding trail and viewing structures.
6. Identify the existing trails and back roads that can be used within the community for bird watching.
7. Evaluate the abilities of participants in identifying birds by song and with English names.
8. Review the correct form for keeping field notes and the importance of sharing this information.

Friday

3:30 – 4:00 p.m. Organize the bird walk.

4:00 – 6:30 p.m.

- Bird walk.
- Put binoculars away.

6:30 – 8:00 p.m.

- Review birds observed on bird walk, applying the criteria for identifying the species; status, habitat etc.
- Presentation on the importance of the region for birds and bird watchers, including migration movements, endemic species, colonial water birds etc. with slides or posters and maps.

Saturday

6:00 – 8:30 a.m.

- Bird walk.
- Clean and put binoculars away.

8:30 – 10:00 Breakfast.

10:00 a.m. – 12:00 noon

- Review new species observed in the field.
- Provide an exercise on the classification of birds.
- Presentation on distinguishing similar species found in the area.

12:00 – 12:30 p.m. Break



AGENDA III (CONT.)

12:30 – 1:30 p.m.

- Discussion on characteristics of a birding trail and other infrastructure for servicing bird observers.
- Introduce the identification of other bird species in the region with posters and use of English names.

1:30 – 3:30 p.m. Main meal and rest.

3:30 – 6:00 p.m. – Organize and leave go on bird walk.

6:00 – 6:30 p.m. Put away binoculars.

6:30 – 7:30 p.m.

- Review new birds observed in the field.
- Identify bird songs with use of tapes.

Sunday

6:00 – 8:30 a.m.

- Bird walk.
- Clean and put away binoculars.

8:30 – 10:00 a.m. Breakfast.

10:00 a.m. – 12:00 noon

- Review new birds observed in the field.
- Introduce birds not yet observed but are found in the area with posters, slides etc.

12:00 – 12:30 p.m. Break.

12:30 – 1:30 p.m.

- Discussion on what information needs to be kept in field notebooks; format to use; for what purpose; how to share the information.
- Advice on how to attract bird watchers to the community.



Appendix 3: Phonetic English Bird Names

Prepared by Paul Wood

A

Acadian	eikéidiðn
Acorn	éikōin
Altamira	altðmírð
Alder	óldðr
Amazon	ámðzðn
American	amérikðn
and	ðn
Anhinga	anínga
Ani	árni
Antbird	ántbðrd
Antshrike	ántʃraik
Antthrush	ántʌrʌʃ
Antvireo	ántviriou
Antwren	ántren
Aplomado	aplomárdou
Aracari	arasári
Attila	atíla
Avocet	ávouset

B

backed	bakt
Baird's	béðrdz
Baltimore	bóltimōr
Bananaquit	bðnánðkouit
Band	band
Bank	bank
Bare	beðr
Barn	barn
Barred	báðrd
Bat	bat
Bay	bei
Beardless	bíðrdlðs
Becard	becárd
bellied	bélid
Belted	béltðd
Bentbill	béntbil
Bicolored	báicʌlðrd
billed	bild
Bittern	bítðrn

Black	blak
Blackbird	blákbðrd
Blackburnian	blakbð'rníðn
Blackpoll	blakpol
Blue	blu
Bluebird	blúbðrd
Boat	bout
Bobolink	bóbolink
Bobwhite	bóbuait
Bonaparte's	bóunðparts
Booby	bubi
Botteri's	bótðris
breasted	bréstðd
Bridled	bráidðld
Bright	brait
Broad	brōrd
Bronzed	brónzd
browed	braud
Brown	braun
Buff	bʌf
Bufflehead	bʌ'fðlhed
Bunting	bʌ'ntiʌ

C

Cacique	casík
Canada	cánðdð
Canivet's	cánivets
Canvasback	cánvðsbak
Cape May	keip mei
capped	kapt
Caracara	karakárð
Cardinal	kardðnðl
Caribbean	karibíðn
Carolina	karoulainð
Caspian	káspiðn
Catbird	kátbðrd
Cattle	kátðl
Cave	keiv
Cedar	síððr
Cerulean	serúliðn
Chachalaca	chachaláka
Chat	chat



Appendix 3: Phonetic English Bird Names

cheeked	chikt
Chestnut	chéstnΛt
Chimney	chímní
Chipping	chípiΛ
Chuck-Will's-Widow	chΛ'k ouilz ouídou
Cinnamon	sínðmðn
Clapper	klápðr
Clay	klei
Cliff	klif
collared	kólðrd
Common	kómðn
Cooper's	kúpðrs
Coot	kut
Cormorant	cōrmðrðnt
Couch's	kauchðz
Cowbird	káubðrd
cowled	káuld
Crake	kreik
crested	krestðd
crowned	kráund
Cuckoo	kúku
Curlew	kðrliu
Currasow	kúrðsau

D	
Dickcissel	díksisðl
Double	dΛbðl
Dove	dΛv
Duck	dΛk
Dunlin	dΛnlin
Dusky	dΛski

E	
Eagle	ígðl
Eared	iðrd
Eastern	ístðrn
Egret	ígrðt
Elaenia	iléinið
Emerald	émrðld
Euphonia	iufónia
eyed	aid
Eye-ringed	áiriΛd

F	
faced	feist
Falcon	fálkðn
Ferruginous	ferúdzinΛs
Finch	finch
Flamingo	flamíΛgou
Flatbill	flátbil
Flycatcher	fláicachðr
Foliage-gleaner	fóulidz-glínðr
footed	fútðd
Forest	fórðst
Fork	fōrk
Forster's	fōrstðrz
Franklin's	fránklinz
Frigatebird	frígðtbðrd
fronted	frΛntðd
Fulvous	fúlvðs

G	
Gadwall	gádwðl
Giant	dzaiðnt
Glossy	glósi
Gnatcatcher	nátkachðr
Gnatwren	nátren
Godwit	góduit
Golden	góldðn
Goldfinch	góldfinch
Grackle	grakðl
Grasshopper	gráshopðr
Grassland	grásland
Grassquit	gráskuit
Gray	grei
Grayish	gréif
Great	greit
Greater	gréitðr
Grebe	grib
Green	grin
Greenish	grínif
Greenlet	grínlðt
Groove	gruv
Grosbeak	gróusbik
Ground	graund
Gull	gΛl



Appendix 3: Phonetic English Bird Names

H

Harrier	háriðr
Harris's	hárisðz
Hawk	hōk
headed	hédðd
Hermit	hðrmit
Heron	hérðn
Herring	hériΛ
Hooded	húððd
Honeycreeper	hΛnikripðr
Hook	huk
Horned	hōrnd
House	haus
Hudsonian	hΛdsóniðn
Hummingbird	hΛmiΛbðrd

I

Ibis	áibis
Indigo	índigou
Ivory	áivðri

J

Jabiru	dzábiru
Jacamar	dzakðmar
Jacana	dzakarnð
Jaeger	dzeigðr
Jay	dzei

K

Kentucky	kentΛki
Kestrel	késtrðl
Killdeer	kíldiðr
King	kiΛ
Kingbird	kíΛbðrd
Kingfisher	kíΛfifðr
Kinglet	kíΛlðt
Kiskadee	kískðdi
Kite	kait
Knot	not

L

Lapland	láplðnd
Laughing	lárfiΛ
Leaftosser	líftosðr
Least	list
Lesser	lésðr
Limpkin	límpkin

Lincoln's	línkðnz
Lineated	línieitðd
Little	lítðl
Long	loΛ
lored	loṛd
Louisiana	luiziána

M

Magnificent	magnífisðnt
Magnolia	magnólið
Mallard	málðrd
Manakin	mánðkin
Mango	mángou
Mangrove	mángrouv
Marbled	márbðld
Martin	mártin
Masked	maskt
Meadowlark	médoulark
Mealy	míli
Melodious	melóudiΛs
Merganser	mérganzðr
Merlin	mérlin
Mexican	méksikðn
Mississippi	misðsípi
Mockingbird	mókiΛbðrd
Montezuma	montðzumð
Moorhen	moṛhen
Motmot	mótmot
Mottled	mótðld
Mourning	moṛniΛ
Muscovy	mΛ'skouvi

N

Nashville	náfvil
necked	nékt
Neotropic	niouchrópik
Night	nait
Nighthawk	naithoṛk
Nightjar	náitdzar
Noddy	nódi
Northern	noṛrΛðrn

Appendix 3: Phonetic English Bird Names

O		Q	
Ocellated	ósəleitəð	Quail	kueil
Ochre	ókəðr		
Olivaceous	oləvɛifəs	R	
Olive	óləv	Rail	reil
Orange	órəndz	Reddish	rédiʃ
Orchard	órçərd	Redhead	rédhed
Oriole	órioul	Redstart	rédiɪstɑrt
Ornate	ornéit	Ridgway's	riɪdzueiz
Oropendola	oropéndələ	Ringed	ríʌd
Osprey	ósprei	Roadrunner	róudrʌnər
Ovenbird	ʌvənbərd	Roadside	róudsaid
Owl	áoul	Robin	róbin
		Rock	rok
P		Rose	rouz
Pale	peil	Roseate	rouzeit
Palm	parm	Rough	rʌf
Parakeet	parəkít	Royal	róiəl
Parrot	párət	Ruby	rúbi
Parula	parúla	Ruddy	rʌ'di
Pauraque	pauráke	Ruff	rʌf
Pectoral	péktərl	Rufous	rúfəs
Pelican	pélɪkən	rumped	rʌmpt
Peppershrike	pépərfraik		
Peregrine	pérəgrin	S	
Phalarope	fálərup	Sabrewing	séibəruilʌ
Pheasant	fézənt	Saltator	saltéitə
Philadelphia	filədélfiə	Sanderling	sándərliʌ
Phoebe	fibi	Sandpiper	sámpaipər
Pied	paid	Sandwich	sánduich
Pigeon	pidzən	Sapsucker	sápsʌkər
Pinnated	píneitəd	Savannah	savánə
Pintail	pínteil	Scaled	skeild
Piping	páipiʌ	Scaly	skéili
Pipit	pípit	Scarlet	skárət
Piratic	pairátik	Scaup	skōrp
Plain	plein	Schiffornis	ʃifō'rnis
Plover	plouvər	Scissor	sízər
Plumbeous	plʌmbiəs	Screech	skrich
Pomarine	pómarin	Scrub	skrʌb
Poorwill	púðruil	Seedeater	síditər
Potoo	póutu	Semipalmated	sémaiparméitəd
Prairie	préiri	Sepia	sípiə
Prothonotary	proʌónəteri	Sharp	ʃarp
Puffbird	pʌ'fbərd	Sheartail	ʃiərteil
Purple	pə'rpəl	Shearwater	ʃiəruōtər
Pygmy	pígmí	shinned	ʃind



Appendix 3: Phonetic English Bird Names

Short	ʃɔrt
shouldered	ʃɔldərd
Shoveler	ʃʌ'vlər
sided	sáidəð
Singing	síʌiʌ
Skimmer	skímər
Slate	sleit
Slaty	sléiti
Smoky	smóuki
Smooth	smuʌ
Snail	sneil
Snipe	snaip
Snowy	snóui
Social	soʃəl
Solitary	sóləteri
Sora	sóra
Sparrow	spárou
Spinetail	spáinteil
Spoonbill	spúnbil
Spot	spot
Spotted	spótəð
Squirrel	skuírəl
Stilt	stilt
Stork	stōrk
Streak	strik
Streaked	stríkt
striped	stráipt
Stub	stʌb
Stygian	stídziən
Sulphur	sʌ'lfər
Summer	sʌ'mər
Sungrebe	sʌ'ngrib
Swainson's	swéinsəns
Swallow	suólou
Swift	suift

T

tailed	teild
Tanager	tánədzər
Tawny	tō'ni
Teal	til
Tennessee	ténəsi
Tern	tərn
Thicket	líkət
Thick-knee	líkni
Thrasher	ʌráfər
throated	ʌróutəð

Thrush	ʌrʌʃ
Thrushlike	ʌrʌ'ʃlaik
Tiger	Táiguər
Tinamou	tínəmu
tipped	tipt
Tityra	titáira
Tody	toudi
toothed	túʌt
Toucan	túkan
Toucanet	tukanét
Tree	chri
Tricolored	chrícʌlərd
Trogon	tróugon
Tropical	chrópikəl
Tropicbird	chrópikbərð
Turkey	tə'rki
Turnstone	tə'rnstoun
Turquoise	tə'rkuoiz
Tyrannulet	tirániulet

U

Upland	ʌ'pland
--------	---------

V

Vaux's	vōrksəz
Veery	viə'ri
vented	véntəð
Vermiculated	vərmíkíuleitəð
Vermilion	vermiliən
Violaceous	váioleifəs
Vireo	víriou
Virginia	vərdzíníə
Vulture	vʌlchər

W

Warbler	uō'rblər
Warbling	uōrbliʌ
Waterthrush	uōrtə'rʌrʌʃ
Waxwing	uáksuiʌ
Wedge	uedz
Western	uéstərən
Whimbrel	uímbrəl
whiskered	uískərd
Whistling	uístliʌ
White	uait
Wigeon	uídzən
Willet	uílət



Appendix 3: Phonetic English Bird Names

Willow	uílou
Wilson's	uílsðns
winged	uíʌd
Wood	wud
Woodcreeper	wúdkripðr
Woodpecker	wúʔdpekðr
Worm-eating	uð'rm-ítiʌ
Wren	ren

X

Xenops zínops

Y

Yellow	íélou
Yellowlegs	íéloulegz
Yellowthroat	íélouʌrout
Yucatan	iúkðtan

Z

Zenaida	zenáida
Zone	zoun





Appendix 4: Sample Bird Checklist

LISTADO DE AVES PENÍNSULA DE YUCATÁN												Compilado por Bárbara MacKinnon H. 2003											
Species/Especies	Status/ Estacionalidad Eng/Esp		A	B	C	D	E	F	G	H	I	J	K										
TINAMOUS/TINAMUES/TINAMIDAE Thicket Tinamou/tinamú canela <i>Crypturellus cinnamomeus</i>	R	R																					
DUCKS & GEESE/PATOS Y GANSOS/ANATIDAE Black-bellied Whistling Duck/pijije ala blanca <i>Dendrocygna autumnalis</i>	W	I																					
Fulvous Whistling-Duck/pijije canelo <i>Dendrocygna bicolor</i>	W	I																					
Greater Wht.-fronted Goose/ganso careto-mayor <i>Anser albifrons</i>	A	A																					
Snow Goose/ganso blanco <i>Chen caerulescens</i>	A	A																					
Brant/ganso de collar <i>Branta bernicla</i>	A	A																					
Muscovy Duck/pato real <i>Cairina moschata</i>	R	R																					
Wood Duck/pato arcoiris <i>Aix sponsa</i>	W	I																					
Gadwall/pato friso <i>Anas strepera</i>	W	I																					
American Wigeon/pato chalcuán <i>Anas americana</i>	W	I																					
Mallard/pato de collar <i>Anas platyrhynchos</i>	A	A																					
Blue-winged Teal/cerceta alazul <i>Anas discors</i>	W	I																					
Cinnamon Teal/cerceta canela <i>Anas cyanoptera</i>	W	I																					
Northern Shoveler/pato chucharón-norteño <i>Anas clypeata</i>	W	I																					
Northern Pintail/pato golondrino <i>Anas acuta</i>	W	I																					
Green-winged Teal/cerceta ala verde <i>Anas crecca</i>	W	I																					
Canvasback/pato coacoxtle <i>valisineria</i>	W	I																					
Redhead/pato cabeza roja <i>Aythya americana</i>	W	I																					
Ring-necked Duck/pato pico anillado <i>Aythya collaris</i>	W	I																					
Greater Scaup/pato boludo-mayor <i>Aythya marila</i>	A	A																					
Lesser Scaup/pato boludo-menor <i>Aythya affinis</i>	W	I																					
Bufflehead/pato monja <i>Bucephala albeola</i>	A	A																					
Common Merganser/mergo mayor <i>Mergus merganser</i>	A	A																					
Red-breasted Merganser/mergo copetón <i>Mergus serrator</i>	A	A																					
Masked Duck/pato enmascarado <i>Nomonyx dominicus</i>	R	R																					
Ruddy Duck/pato tepalcate <i>Oxyura jamaicensis</i>	W	I																					
CURASSOWS & GUANS/CRACIDOS/CRACIDAE Plain Chachalaca/chachalaca vetula <i>Ortalis vetula</i>	R	R																					





Appendix 5: Sample Diploma



Se otorgan la presente


CONSTANCIA

A: _____

Por su participación en el






“Taller de capacitación en la identificación de las aves y técnicas de monitoreo”

Bárbara MacKinnon de Montes
Coordinadora, Península de Yucatán
CAPY y Aves Viajeras del Golfo



Rodrigo Migoya Von Bertrab
Coordinador, Investigación y Monitoreo
Reserva de la Biosfera Ría Lagartos
INE - SEMARNAP

Celestún, Yucatán, del 10 al 12 de Marzo de 2000





Appendix 6: Workshop and Instructor Evaluation



Trainer: _____

Date: _____

Please rate the session by circling the most appropriate responses.

1 Was the session content relevant to your needs?

Yes No Somewhat

Comment: _____

2 Overall the session was:

Excellent Good Fair Poor

Comment: _____

3 Please comment on the session length?

Just right Too Short Too Long

4 The best part of this session was: _____

5 The worst part of this session was: _____

6 Related topics I would like to spend time on next workshop: _____

7 Please rate the presenter.

Excellent Good Fair Poor

Comments: _____

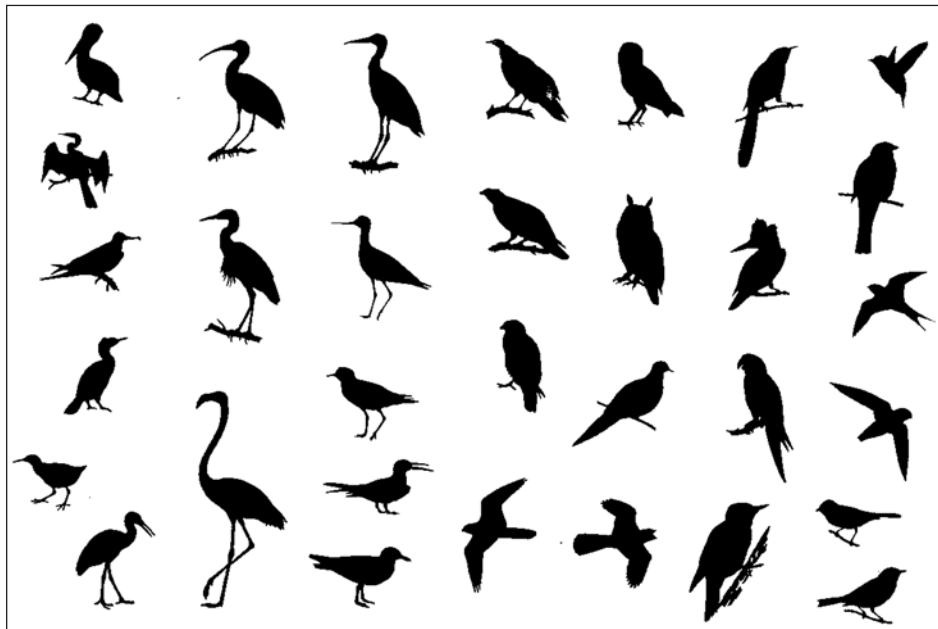
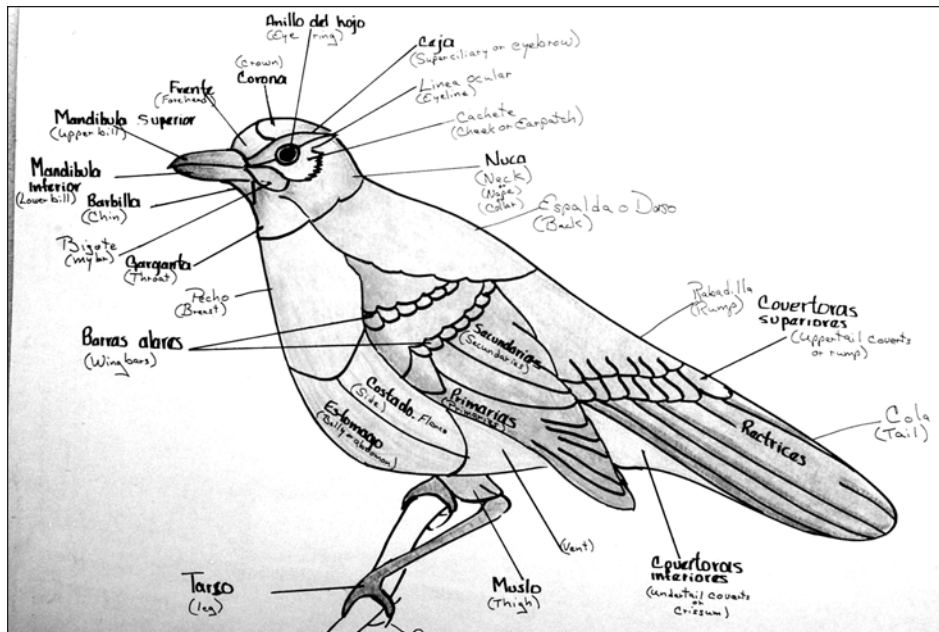
8 Other comments: _____

Thank you!





Appendix 7: Charts





Appendix 8: Recommendations



RECOMMENDATIONS FOR A BRIEF, ONE-TIME BIRD TRAINING WORKSHOP

based on the experiences of Dr. Héctor Gómez de Silva

Although a week-long, one-time bird training workshop does not fit the typical profile of an activity that contributes meaningfully to a long-term conservation strategy, this does not mean that the opportunity should be ignored. However, it is obvious that an entirely different technique is required if positive results are to be attained within the restricted time period. At the same time, the approach described below might well prove extremely effective in starting off training even while more extended periods of training are planned. However, it will need to be tested under the many different circumstances –and varied abilities of participants– in which most community workshops are carried out.

Much will depend upon the profile of the participants as experience has demonstrated that bird identification workshop participants over 50 years of age are very resistant to using bird names other than those they have used their entire lives. It may take more than a year before they will adapt to their usage. Consequently, it is recommended that the technique described here be aimed at participants under 45 years of age with a very strong motivation to learn bird identification and without qualms about learning their English names. It would also be advantageous if the person can read and write, which is not always the case in community workshops, where it is normal not to restrict participants based on a pre-evaluation system.

The first day or so is spent in the “classroom” going over the customized, tailored field guide (a copy containing only the regional species, both resident and

migrant) plate by plate, asking the participants to identify each bird that they recognize and maybe talking a little about it. In case there are species that they do not recognize themselves, the instructor should point these out as birds they should be on the lookout for. For each species, the instructor pronounces the English name clearly and writes it down in Spanish-based phonetic spelling, adding the plate number and species number. All species that are endemics or of special interest to birdwatchers, should be highlighted with one to two asterisks (depending on the bird's relative importance). Make sure everyone has written this information in their notebook before going on to the next species or the next plate. For some species, such as night birds, elusive rails and difficult flycatchers, it would be extremely helpful to use a recording of the birds' vocalizations to support this process. The rest of the training takes place in the field, where participants practice their identification skills and learn to describe the location of a bird in simple English using a basic vocabulary of around 15-20 words taught by the instructor as the need arises.

For a region with more than 150-200 bird species, the training should focus on 100-150 species that are either the most conspicuous or of most interest to visiting birdwatchers (ignoring the subtle differences among Empidonax flycatchers or immature sandpipers, for instance). Also, whenever possible, habitat, behavior or voice (features not depicted on field guide plates) should be emphasized as clues for distinguishing similar species when warranted.





Appendix 9: List of Field Guides



Please note that this list is just a sample of some of the key bird guide resources offered for the region. There are many other guides available. A more detailed list of resources for birding is available on line at Amazon.com.

Eastern Birds: A Guide to Field Identification
James Coe
St. Martin's Press

Guide to Birds of North America v3
Cornell Lab of Ornithology

National Geographic Field Guide to the Birds of North America
Fourth Edition
Mel Baughman & Barbara Brownell, Editors
National Geographic Society

The Sibley Field Guide to Birds of Eastern North America
David A. Sibley
Alfred A. Knopf

Sibley Guide to Birds
Audubon Society Nature Guides Series
David A. Sibley
Random House

National Audubon Society Field Guide to North American Birds
John Bull & John Farrand, Jr.
Random House

Backyard Birds
Peterson Field Guides for Young Naturalists
Houghton Mifflin Co.

Birds of North America
A Guide to Field Identification
Chandler Robbins, Jonathan Latimer
St. Martin's Press

Birds of North America
Kaufman Focus Guides
Kenn Kaufman
Houghton Mifflin Co.

Birds of North America (HB)
A Guide to Field Identification
Chandler Robbins, Jonathan Latimer
St. Martin Press

Bibliography of Brazilian Birds.
Oniki & Willis. 2002. Yoshika Oniki & Edwin O. Willis.
Atualidades Oritológicas, CP 238, 86870-000
Ivaiporã, PR, Brazil.

All the Birds of Brazil: an identification guide.
Deodata Souza.
Atualidades Oritológicas, CP 238, 86870-000
Ivaiporã, PR, Brazil.

Birds of Brazil.
Kevin Zimmer & Andrew Whittaker
The first modern field guide to the birds of Brazil
Princeton University Press.

The Birds of South America, Volume 1, the Oscine Passerines.
Robert S. Ridgely & Guy Tudor,
University of Texas Press & Oxford University Press (UK).

The Birds of South America, Volume 2, the Suboscine Passerines.
Robert S. Ridgely & Guy Tudor,
University of Texas Press & Oxford University Press (UK).



Appendix 9: Bibliography

The Birds of Ecuador. 2 volumes.

Robert S. Ridgely & Paul J. Greenfield
Cornell University Press & Helm.

Birds of Belize.

H. Lee Jones.
University of Texas Press

Birds of the West Indies.

Herbert Raffaele, James Wiley, Orlando Garrido, Allan
Keith & Janis Raffaele
Helm & Princeton University

*A Guide to the Birds of Mexico and Northern Central
America.,*

Steve N.G. Howell & Sophie Webb..
Oxford University Press

Birds of Mexico and Central America (Collins Field Guide).
Ber van Perlo HarperCollins & Princeton University
Press.

*Finding the Birds in Western Mexico: A guide to the states
of Sonora, Sinaloa & Nayarit. Peter Alden.*
University of Arizona Press

*A Field Guide to Mexican Birds: Mexico, Guatemala,
Belize, El Salvador (Peterson Field Guides)*
Roger Tory Peterson

