R2R SPECIES RECOVERY PROGRESS WHEEL SELF-ASSESSMENT INSTRUCTIONS

R2R's *Species Recovery Progress Wheel* organizes biological, social science and human dimensions, co-production, and inclusivity criteria into six broad **action categories** that represent the major components of effective species recovery. Each category is divided into three **segments**, and each segment includes five specific **criteria** that describe key steps in the recovery process. Together, these steps comprise 90 criteria in a structure that is detailed enough to guide planning but still manageable for teams to use. The criteria are intended to provide progressive step-wise guidance, proceeding clockwise from Group Organization to Implementation and from the center toward the periphery (steps 1 to 5) in each of the segments.

The structure of the Wheel helps teams understand where recovery work is strong and where additional attention is needed. It supports collaboration by providing partners a shared language for discussing progress and planning next steps across disciplines. This tool is designed to be accessible in group settings and reflects the complexity of both biological and social processes that influence the recovery of species.

How to Use the Wheel

Species Working Groups / R2R Recovery Teams can use the Wheel to assess how far a species has progressed across the key components of recovery and to visualize where recovery efforts can be focused next. The criteria in each segment represent key recovery activities ranging from understanding vulnerabilities and limiting factors to developing recovery plans, building partnerships, and carrying out management and monitoring. Moving through these steps guides teams as they document activities that are underway, have been completed, or will become future priorities.

The Wheel is designed to track species recovery progress and to provide practical guidance in the integration of efforts across biological and human dimensions. Although the Wheel is designed to be progressive, every species and working group is unique, and a team may indeed find that its assessment may not always populate the Wheel sequentially. (*Following R2R's initial two workshops, however, the segment steps from Vulnerability Assessment through Limiting Factor Identification tend to follow R2R's recommended guidance more prescriptively.*) Working groups can use the completed Wheel for a variety of purposes, including team and recovery organization, tracking recovery progress, strengthening grant proposals, as a gap analysis, or for strategic planning. The Wheel is not intended to score, rank, or otherwise assess the working group itself; rather, it is designed to facilitate shared understanding, coordination, and decision making.

After reading these *Instructions* (first tab), to begin a Species Working Group self-assessment:

1. Enable macros. If you have not already done so when you opened the file, close the file, *Enable Macros*, and open the second tab, *WHEEL CRITERIA*.
2. On the *Wheel Criteria* tab, enter your species name and data in Row 1. To avoid confusing the macros, ***do not add additional rows to the worksheet!***
3. Read through and discuss the *Wheel Criteria* with other members of your team. The tool is designed to be used interactively among working group members. There are short descriptions (Column C) and longer descriptions with some examples (Column D) for each criterion. *We are open to your interpretations of the criteria.* If you have *questions*

or suggestions, record them in Column E and highlight those in **red** text. *The criteria are intended to stimulate discussion—that discussion is as important, if not more so, than simply checking off a criterion!*

4. If you feel your group/species has met the guidelines for a criterion*, or if you feel you have progressed sufficiently to move forward to the next level*, record a "**2**" in Column B. If you feel your group is well along the way toward meeting the criterion (say, 50% or better!), but not quite there, record a "**1**" in column B; this would be equivalent to a "work well in progress, but still a way to go" assessment. Leaving the cell blank is equivalent to recording "0."*If a criterion is totally irrelevant to your group (e.g., a non-migratory species), please code the criterion as "**0**" and enter an appropriate explanatory note in column E.*
5. NOTE: *It is also possible to record a "**9**" in Column B. This option is intended to be discretionary depending on the needs or desires of a Working Group. For example, it might be used to highlight **priority next steps** or to display **progress beyond your first assessment** (perhaps as a result of funding requested or received). In this case, the corresponding Wheel segment(s) will be highlighted in purple. Please make a note explaining how you are using this designation.*
6. As you enter 1, 2, or 0 (blank) [*or 9*] in Column B, the table in the third tab, *PROGRESS WHEEL*, will populate automatically.
7. When you are finished with the self-assessment, go to the *PROGRESS WHEEL* tab and click on the *UPDATE RECOVERY WHEEL* button. The Wheel graphic will be highlighted automatically to reflect your assessment of progress. Criteria segments that have been completed ("2") will be highlighted in **dark blue**; criteria segments which have been partially completed (still more work to be done, "1") will be highlighted in **light blue**.
8. Right-click (CTRL-click) on the center of the Wheel and **select *Save as Picture*** from the contextual menu. This will save a .PNG file to your computer, which can then be resized as needed for pasting into a document or presentation.
9. **Please send a copy of your completed assessment** to r2r@georgetown.edu so that R2R can keep track of the Species Working Groups that have worked with the self-assessment tool and so that R2R staff can process your comments for future updates to the Wheel criteria.

Once a self-assessment is completed, a Species Working Group can use the Wheel graphic to demonstrate progress and/or request funding for future work.

Please note that the Wheel tool tends to articulate the earlier stages of species recovery in greater detail, in keeping with the current status of most species being worked on by most Species Working Groups. We also recognize that every species and every working group is unique, and that a group may therefore not meet all the criteria steps in a segment as they work around the Wheel toward the *Implement Action* category. In fact, *we would encourage groups to begin implementing conservation action as a means of testing hypotheses about*

limiting factors—as long as the group has an adaptive research plan in place that will enable them to evaluate the effectiveness of an implementation strategy and adjust as needed.

If you need assistance in interpreting the criteria, feel free to contact one of the R2R staff members, depending on the nature of the criterion:

- Tom Will, biology and Wheel design — tomcharleswill@gmail.com
- Ken Rosenberg, biology — kvr2@cornell.edu
- Katie Holland, social science & human dimensions — kathleen.holland@georgetown.edu
- Esmeralda Bravo, international connections — eb1573@georgetown.edu
- Brandt Ryder, biology & co-production — brandt.ryder@birdconservancy.org
- Laura Ibarra Flores, biology & technical support — lei7@georgetown.edu
- For general questions and information — r2r@georgetown.edu

Have fun! and may the birds be with you!

R2R Saving Our Shared Birds