



Focal Species Selection Worksheet

Background: Selecting a focal species or assemblage to monitor as a proxy for ecological integrity and plan effectiveness under the 2012 Planning Rule is a complex process. Clear documentation ensures that the process can be efficiently justified, reviewed, and revised in the future. This worksheet is intended to support this effort.

Instructions: Complete steps 1-3 once for each set of ecosystem plan components for which you are selecting a focal species. Complete steps 4-7 for each potential focal species under consideration. Refer to Taylor et al. 2025 for more information.

1. Identify ecological conditions and related plan content to monitor.

Ecosystem plan component(s): What are the top ecological concerns, and for what ecosystems? What plan components address them? Do not bring in focal species yet.

Aspects of ecological integrity: What are the concerns about ecosystem composition, structure, function, and/or connectivity? Do not bring in focal species yet.



2. Identify monitoring questions, metrics, and indicators to measure.

Monitoring questions: What are your ideal ecosystem monitoring questions? Do not bring in focal species yet.

Metrics and indicators: What are your ideal ecosystem indicators? Do not bring in focal species yet.

Would monitoring these metrics via a focal species provide useful information about ecological conditions (even if it simply supports a more direct, affordable, accurate, or existing measure)?

Yes.....*If "yes", proceed to the next step.*

No.....*If "no", then try Step 2 again. Return to Step 1 if needed.*

Unknown.....*If "unknown", proceed to the next step.*



3. List potential focal species to assess further.

List of potential focal species:

Were you able to list at least one species?

Yes.....*If "yes", proceed to the next step.*

No.....*If "no", then try Step 2 again. Return to Step 1 if needed.*



4. Assess potential focal species.

What focal species are you investigating and documenting below?

(A) What can we likely learn about ecological integrity from this species?

(B) What can we likely learn about plan effectiveness from this species?

Do your answers indicate that you can learn about A and B from this species?

Yes.....If “yes”, proceed to the next step.

No.....If “no”, stop here. Try assessing a different species.



5. Ensure an absence of external confounding factors.

List any external confounding factors that might mask the species’ response.

Is there an absence of any confounding factors?

Yes.....If “yes”, proceed to the next step.

No.....If “no”, stop here. Try assessing a different species.



6. Verify that potential focal species' biological traits are appropriate.

(A) Does the species' trend reflect an aspect of ecological integrity?

Yes.....If "yes", proceed to the next question.

No.....If "no", stop here. Try assessing a different species.

Details:

(B) Does the species exhibit a low range of natural variability?

Yes.....If "yes", proceed to the next question.

No.....If "no", stop here. Try assessing a different species.

Details:

(C) Does the species rely on a single ecosystem (to ensure that changes in another ecosystem do not mask the species' response)?

Yes.....If "yes", proceed to the next question.

No.....If "no", stop here. Try assessing a different species.

Details:



(D) Is the species' response relatively stable to human activities outside the plan?

Yes.....*If "yes", proceed to the next question.*

No.....*If "no", stop here. Try assessing a different species.*

Details:

(E) Is there existing scientific evidence that the association between the species and Step 1 conditions is measurable at relevant scales?

Yes.....*If "yes", proceed to the next question.*

No.....*If "no", stop here. Try assessing a different species.*

Details:



7. Assess if it is feasible to monitor the species.

(A) Would the cost of monitoring this species be reasonable for the unit?

Yes.....*If "yes", proceed to the next question.*

No.....*If "no", stop here. Try assessing a different species.*

Details:



(B) Would the logistics and technical challenges of monitoring be reasonable?

Yes.....*If “yes”, proceed to the next question.*

No.....*If “no”, stop here. Try assessing a different species.*

Details:

(C) Is the species sufficiently common, well-distributed, and easy to detect?

Yes.....*If “yes”, proceed to the next question.*

No.....*If “no”, stop here. Try assessing a different species.*

Details:

(D) Is it feasible to detect changes during the life of the plan?

Yes.....*If “yes”, proceed to the next question.*

No.....*If “no”, stop here. Try assessing a different species.*

Details:

(E) Do standardized monitoring methods exist to ensure that defensible conclusions can be drawn from the monitoring data?

Yes.....*If “yes”, proceed to the next question.*

No.....*If “no”, stop here. Try assessing a different species.*



Details:

(F) Is there background knowledge about regional, national, or global status and/or trends, making it easier to place the trend on the planning unit in a broader context?

Yes.....*If "yes", proceed to the next question.*

No.....*If "no", stop here. Try assessing a different species.*

Details:



8. Select your focal species (or species assemblage).

If you reached the end of this worksheet, then the potential focal species you assessed may be a good option to address your monitoring questions. Proceed to monitoring method development with the proposed focal species.

Additional information or documentation about the species selection process: