

| Conservation Planner Designation Recertification - Level | | Revised 8/2024 | |
|---|--|--|----------------|
| Planner Name: | | Planner Title: | |
| Review | Records | Reference | Date Completed |
| Maintained or improved upon the knowledge, skills, and abilities for current planner designation | 1. Understanding of 9-step planning process. - Display understanding of the 9-step planning process. - Show current copy of National Planning Procedures Handbook. (Hardcopy, electronic copy, how to find on eDirectives) | 180-VI-NPPH | |
| | 2. Resource Concern List and Planning Criteria - Display ability to reference this document for the most current list of resource concerns, which tools are used for different land uses and resource concerns, and the planning criteria required to document the minimum level of treatment required to address the resource concern. | National Resource Concern and Planning Criteria - FOTG Section III | |
| | 3. Practice Standards and Implementation Requirement Sheets - Demonstrate understanding, show electronic location, and explain importance of practice standards and implementation requirement sheets. | FOTG Section IV | |
| | 4. Technical Notes - Demonstrate understanding and show electronic location of applicable Technical Notes for common practices in work area. Example - MN Agronomy Technical Notes #31 and #33. | Technical Notes (National and State) | |
| | 5. Assessment Tools - Demonstrate knowledge and ability to use applicable assessment tools to document common resource concerns and planning criteria in work area (Examples - RUSLE2, WEPS, PCS, WHES, etc.). | | |
| | 6. Business Tools -- Demonstrate knowledge and ability to use conservation planning tools (Conservation Desktop, CART, etc.). | | |
| | 7. Environmental Evaluation - Demonstrate knowledge, importance, location, and ability to complete all sections of the NRCS-CPA-052 form. | NRCS-CPA-052 | |
| | 8. Job Approval Authority Review - Show copy of current JAA levels. - Review current JAA with employee and make adjustments as needed. JAA needs to reflect common practices in work area. | 190-417-GM | |
| | 9. Conservation Planning Activities - Show and explain your recent planning activities and accomplishments during the past 12 months. The planner needs to demonstrate that their planning skills remain current and active. | | |
| Conservation Plan Review | Levels 2, 3, and 4 conservation planners must pass a quality assurance review during a repeating 3-year period (known as the recertification cycle) to maintain their current highest conservation planner designation. At least one conservation plan must be reviewed to determine that the conservation planner has developed conservation plans that meet the NRCS planning policy and follows the procedures and guidelines listed in the National Planning Procedures Handbook (NPPH). Exhibit 5 contains the plan evaluation worksheets for individual conservation plans. | 180-409-GM Exhibit 5 | |

***PLANNER'S RESPONSIBILITY TO UPLOAD SIGNED CHECKLIST TO AGLEARN - RECORD OF LEARNING - OTHER EVIDENCE**

| REQUIRED SIGNATURES | | |
|--|-------------|----------|
| Supervisor Concurrence | | Remarks: |
| Supervisor Signature: _____ | Date: _____ | |
| Area Resource Conservationist or Designee Concurrence | | Remarks: |
| Area Resource Conservationist or Designee Signature: _____ | Date: _____ | |

Worksheet to Evaluate Conservation Plans Instructions for using this worksheet:

- When using this worksheet, review the indicated conservation plan components.
 - For each component, if the plan contains and thoroughly represents all the listed information, where applicable, give a rating of “Satisfactory.”
 - For each component, if there is applicable information missing from what has been listed or the information is vague or unclear, give a rating of “Unsatisfactory.”
 - For each component, if the information provided goes beyond what has been listed or shows an exceptional level of effort and understanding from the planner, a rating of “Exceeds Expectations” may be given.
 - The “Comments” column may be used to describe the reasons for the rating that was given.
- When making the final assessment at the end of this worksheet, review the ratings that were given to each component.
 - If all components were rated as “Satisfactory,” then the conservation plan “meets” all the conservation plan requirements.
 - If one or more of the components were rated as “Unsatisfactory,” then the conservation plan “does not meet” all the requirements and corrective or other further actions should be listed for the planner.
 - If one or more of the components were rated as “Exceeds Expectations” and none of the components were rated as “Unsatisfactory” then the conservation plan “exceeds” all the conservation plan requirements.
 - The reviewer may leave comments or follow-up actions for the conservation planner.

❖ **Conservation Planner:** _____ **Date:** _____

Title of Conservation Plan: _____

| <p style="text-align: center;">Conservation Plan Component</p> | <p style="text-align: center;">Rating: Unsatisfactory Satisfactory Exceeds Expectations</p> | <p style="text-align: center;">Comments/Follow-up Actions</p> |
|--|--|--|
| <p>Identify Problems, Opportunities, and Client Objectives</p> <p>Client information – the plan contains a record of discussions about his or her . . .</p> <ul style="list-style-type: none"> • Problems, opportunities, and concerns associated with all natural resources of the land, operation, or both. • Production and business goals. • Desired future conditions for planning areas as compared to existing conditions. • Financial constraints and willingness to accept risk. • Facilities and machinery. • Managerial level. • Commitment to conservation. • Objectives. <p>When reviewing the plan in the field and speaking with the customer, it is obvious that the above items have been discussed.</p> | | |

| Conservation Plan Component | Rating: Unsatisfactory Satisfactory Exceeds Expectations | Comments/Follow-up Actions |
|--|---|-------------------------------|
| <p>Inventory Resources and Analyze Resource Data</p> <p>The plan contains basic operational information:</p> <ul style="list-style-type: none"> • Identification of the client’s planning land units. • A record of utilities, easements, and legal limitations associated with the property in question. • The land’s relationship to the entire operation or watershed. <p>Upon field review, it is apparent that the client understands how the above constraints affect their planning process.</p> | | |
| <p>Resource inventories – where applicable, the plan includes the appropriate technical worksheets for . . .</p> <ul style="list-style-type: none"> • Soils information. • Crop inventory. • Pasture inventory. • Rangeland inventory. • Forest management inventory. • Developed land inventory. • Associated land inventory. • Cultural resource and historic property inventory. <p>Upon field review, it is apparent that these inventories have been correctly completed and discussed with the client.</p> | | |

| <p style="text-align: center;">Conservation Plan Component</p> | <p style="text-align: center;">Rating: Unsatisfactory Satisfactory Exceeds Expectations</p> | <p style="text-align: center;">Comments/Follow-up Actions</p> |
|---|--|--|
| <p>Existing condition data – the plan describes the type, extent, and location of . . .</p> <ul style="list-style-type: none"> • Existing conservation and management practices. • Identified resource concerns, including the appropriate analysis tools used. • Human considerations. • Special environmental concerns. <p>Upon field review, it is obvious that the above items have been correctly and completely identified and discussed with the client.</p> | | |
| <p>Formulate and Evaluate Alternatives</p> <p>The plan documents that . . .</p> <ul style="list-style-type: none"> • The client has been provided with multiple feasible approaches to address their objectives and resource concerns. • The client has been given information that compares short-term and long-term ecological, economic, and social outcomes of the available practice options. <p>A field review reveals that all alternatives were appropriate, and the client fully understood the advantages and disadvantages of each.</p> | | |
| <p>Make Decisions and Implement Plan</p> <p>Record of client’s planning decisions include the following plan components:</p> <ul style="list-style-type: none"> • A list of conservation practices and the amounts of each necessary to meet the planned level of treatment. • A realistic schedule for implementation of chosen practices. • Assistance notes (e.g., CPA-6) or other documentation of the objectives, discussions with, and decisions made by the client. | | |

| Conservation Plan Component | Rating: Unsatisfactory Satisfactory Exceeds Expectations | Comments/Follow-up Actions |
|--|---|-------------------------------|
| <p>Implementation Requirements: Detailed information concerning the practices contained in the plan and made available to the client, including all applicable components:</p> <ul style="list-style-type: none"> • Designs, drawings, or illustrations. • Engineering notes. • Preparation for implementation. • Method or technique of implementation. • Required equipment. • Material specifications (natural and man-made). • Supporting practices. • Operation & maintenance. <p>Upon field review, it is apparent that the client understood and agreed to the above details.</p> | | |
| <p>Maps – conservation plan maps, soils maps, topographic maps, and other appropriate resource maps are included with the plan.</p> <p>Upon field review, it is apparent that the client has received and understands the included maps. The maps accurately describe and depict conditions of the client’s circumstances.</p> | | |
| <p>Determinations – the appropriate HELC and WC determinations have been documented, where applicable.</p> <p>When applicable, a field review reveals that the client understands the process and implications of HELC/WC determinations.</p> | | |

Reviewer Assessment:

This conservation plan does not meet meets exceeds

all the conservation plan requirements for NRCS conservation planner role designation or redesignation. Further required actions, if any, are listed below.

Comments and further required actions, if applicable:

Title of Reviewer: _____

Signature: _____

Date: _____

Planner Acknowledgment:

I have read and understand all elements, ratings, and results of this conservation plan review. The assessment has been explained to me by the reviewer, and I am aware of and understand any further actions that are required regarding this conservation plan submitted for conservation planner role designation or redesignation.

Comments:

Signature: _____

Date: _____