

**GUIDELINES TO APPROVE CONSERVATION PLANNERS
IN WEST VIRGINIA**

MAY 2001

Guidelines for Implementing Conservation Planning Policy (Part 409) and Instituting Approved Conservation Planners

PURPOSE

Certification programs are designed to test and document a person's readiness to perform a job. Certification defines excellence in terms of performance outcomes, measures individual achievement to these standards, and holds people accountable for what they know and can do. Certification in NRCS provides a vehicle for State Conservationists to approve both agency and private sector employees to develop natural resource conservation plans on private lands. Certification in NRCS involves a series of steps that will lead to an adequately trained and knowledgeable workforce. The process is a dynamic one that uses ongoing training, continuing education, and opportunities for individuals to improve and broaden their conservation planning skills. Further, the process is a commitment by management to planners and by planners to the mission of the agency.

AUTHORITY

Conservation Planning Policy in 180-GM, Amend 16, May 2001 requires State Conservationists to create and maintain a list of approved conservation planners employed or utilized by NRCS for use in their state. The policy directs the State Conservationist to develop a list of qualifications (knowledge, skills, and abilities) required for Certified Conservation Planner designations. The State Conservationist will ensure that all NRCS employees, district employees, conservation volunteers, natural resource agency

employees, and commercial providers (third party vendors) employed or utilized by NRCS for conservation planning, meet minimum NRCS conservation planning training and approved requirements. Therefore, this supplement provides guidance to comply with this policy.

MINIMUM STANDARDS FOR CONSERVATION PLANNING CERTIFICATION

To be certified as a approved conservation planner the individual planner must meet the following requirements:

- a) Complete the first five modules of the NRCS Conservation Planning Course (<http://www.ftw.nrcs.usda.gov/nedc/homepage.html>)
- b) Complete the remaining four modules of the NRCS Conservation Planning Course and in-field training of pertinent topics within one year of completing the first five modules.
- c) Each planner will develop independently three acceptable conservation plans (Module 9) within three months of completion of Modules 1-8. The three plans may be a Resource Management System (RMS) and/or progressive plans. Each plan will have a minimum of two land uses and the three plans will include cropland, pastureland, hayland, forestland, wildlife habitat and animal feeding operation.

The State Conservationist may provide the person a letter of waiver of these requirements if an individual has previously demonstrated competence in RMS plan development.

To retain certification, each approved planner shall:

1. Submit at least one conservation plan per year to their NRCS line officer or designate NRCS official for review and approval.
2. Third party vendors will submit at least one acceptable conservation plan to the NRCS State Resource Conservationist on or before December 30 of each year.
3. Receive 6 hours of NRCS approved conservation planning credit annually.
4. The approved conservation planner will keep and update their own personal training plan to reflect training received or needed to maintain their conservation planning skill level. The planner will provide a copy of their training plan and documentation to the reviewing NRCS official, as requested.

GUIDELINES TO IMPLEMENT CERTIFICATION

1. Field Office Technical Guide – The FOTG is the primary technical reference for the conservation planner.
2. Skills Assessment – Exhibit 1 contains the information WV will collect before conducting training. The information will be used to determine teachers or mentors, and provide guidance on designing course content.
3. Training – The training will include the following:
 - a. First five modules of NEDC Conservation Planning Course will be completed on-line at the following web site:
<http://www.ftw.nrcs.usda.gov/nedc/homepage.html>

- b. Classroom and in-field training that covers modules 6-8 in NEDC Conservation Planning course as well as other pertinent subjects.
- c. Topics listed in Appendix 1.

PROCESS AND CRITERIA FOR CONSERVATION PLAN REVIEW

The three conservation plans will be evaluated by a line officer or designated NRCS official to determine if they are in accordance with the National Planning Procedures Handbook (NPPH) and the Field Office Technical guide (FOTG). The evaluation will include a review of the conservation plan(s), review of alternatives provided to the client, site review when necessary, and a visit with the landowner when appropriate. This will be documented on form [Exhibit 2]. For third party vendors the State Resource Conservationist will evaluate the three conservation plans. The reviewing official will make their recommendation to the State Conservationist on adequacy of the plan(s) and ability of the planner to meet planning criteria.

Each conservation planner must also demonstrate the required abilities, skills, and knowledge (ASK) of the planning process prior to issuance of conservation planning certification. Each planner would be rated for field and farm planning units as defined in the NPPH. The rating will initially be completed by module 6-8 trainers after the planner is determined to be knowledgeable for each planning unit. Succeeding ratings will be completed by the designated NRCS employee. Planners are rated on their ability, skill,

and knowledge (KSA) in applying of the nine step planning process [Exhibit 3] and their ability to plan and implement conservation practices common to their work area [Exhibit 4]. This is documented on forms Exhibit 3 and Exhibit 4. In addition the planner must possess and demonstrate KSAs in applying approved erosion prediction technology, knowledge of federal, state and local laws or regulations, skills in using site vulnerability assessment tools, and awareness of the National Conservation Program.

CERTIFYING OFFICIAL

The State Conservationist is the certifying official for approved conservation planners. The State Conservationist will create and maintain a list of approved conservation planners, employed or utilized by NRCS in West Virginia which will be made available to clients, if requested.

REMOVAL FROM APPROVED PLANNERS LIST

If an existing approved planner does not meet the minimum criteria for certification, the planner has three months to correct deficiencies and submit a new plan. If the planner does not earn the needed continuing education credit, or a training plan is not provided to the reviewing NRCS official a new plan doesn't meet minimum criteria, the planner will be removed from the approved list. Once removed, the previously approved planner is required to complete all requirements of an entry level planner.

APPENDIX 1

This curriculum would include training on the following pertinent topics:

NRCS Planning Policy, Agricultural Environmental Management, FOTG, Pre-Planning Activities, Soil Loss Calculation, Identifying Watersheds and Watershed Concerns, Hydrologically Sensitive Areas, NEPA, Pathogens, Whole Farm Forage Systems, Feeds and Feeding Efficiency, Barnyard and Farm Headquarters Considerations, Manure Storage, Concentrated Sources, Air Quality (especially odor control) , Facilitation Skills for Conservation Planning, Soils, Geology, Engineering, Hydrology, Biology, Wetlands, Plant Materials, Forestry, Agronomy, Water Quality, Economics, Cultural Resources, Grazing, Livestock Landscape Architecture, Urban Interface, Wildlife, Threatened and Endangered Species, federal, state and local laws and regulations.

Exhibit 1

United States Department of Agriculture – Natural Resources Conservation Service

**INDIVIDUAL CERTIFICATION RATING SYSTEM
SKILLS ASSESSMENT**

Section A: Current Position Information				
Employee Name and Title				
Employer		Position Grade		
Location		Years There		
Section B: Summary of Past Positions (enter applicable positions; attach additional sheets if necessary)				
Employer	Location	Title	Grade	Years
Section C: Academic History				
Institution	Major	Degree	Year	
Section D: Continuing Education (list other college courses taken beyond those for degree requirements and the year the course was completed)				
Institution	Course	Year		
Section E: Professional Training				
Agency	Course	Year		

Section F: Training Experience (List experience gained as a trainer)		
Agency	Course	Year
Section G: Other Significant Experience and Skills (From OJT or Other Sources)		
List Applicable Knowledge, Skills, or Abilities (Including AEM)		
Section H: Training Required (List all training you feel you should complete which will facilitate your performance. Include AEM training as necessary.)		
Training Required	Target Date to Complete	
Section I: Willingness to Train or Act as a Mentor		
Would you be willing to be a trainer?		Would you be willing to be a mentor?
Trainer Information		
Course or study subject	Are you willing to travel within the state?	
Mentor Information		
Subject or Skills Area	Employee Position or Grade You are Willing to Mentor	

Exhibit 2

Checklist for Evaluating an Existing Plan

Planner _____
 Client _____

Reviewer _____ Date _____

	Yes	No
1. Principal client(s) and Decisionmaking authority recorded		
2. Client's statement of problems, concerns, and opportunities clearly recorded		
3. Client's objectives recorded		
4. Land units recorded		
5. Location described		
6. Owners and operators identified		
7. Utilities, easements, constraints and determinations recorded		
8. Soils recorded		
9. Benchmark system (and/or current system) including narrative, existing practices, and effects recorded		
10. Problem identification consistent with SWAPA and quality criteria		
11. Supporting forms and worksheets for inventory and evaluation in case file, for example, calculations for soil loss, sediment delivery, etc.		
12. Discussions between client and planner recorded		
13. Discussion with client supplies evidence of adequate planner communication with and involvement of client		
14. Planned system meets quality criteria for resource concerns and client objectives		
15. CPPE worksheets – completed for each alternative, resource concerns consistent with benchmark, practices consistent with alternative, effects reasonable		
16. Discussions between client and planner recorded		
17. Revisions recorded including scheduled practice application		
18. Case file contains conservation plan map including scale, location, date prepared, north arrow, property boundaries, field boundaries, field labels including NRCS land use and acres		
19. Case file contains soils map and legend		
20. Discussion with client supplies evidence of adequate planner communication with and involvement of client		

**The plan meets NPPH requirements
 and addresses the clients resource concerns**

 (Signature)

 (Date)

COMMENTS:

Exhibit 3

U.S. DEPARTMENT OF AGRICULTURE – NATURAL RESOURCES CONSERVATION SERVICE

JOB APPROVAL AUTHORITY

INDIVIDUAL CERTIFICATION RATING SYSTEM SKILLS TO APPLY THE CONSERVATION PLANNING PROCESS

A: Planners Information

NAME:		TITLE:
LOCATION:	AGENCY:	GRADE AND STEP:

B. Concurrence and Authorized Signatures

SUPERVISOR	SIGNATURE:	DATE:
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C. Rating

PLANNING PROCESS NPPH	<i>PLANNING UNITS</i>			
	FIELD	FARM	TRAINING COMMENTS	TARGET COMPETENCY
	Certification Rating Levels			
9 - STEPS	RMS	RMS		
1. Identify Problems				
2. Determine Objectives				
3. Identify Resources				
4. Analyze Resource Data				
5. Formulate Alternatives				
6. Evaluate Alternatives				
7. Make Decisions				
8. Implement Plan				
9. Evaluate Plan				

COMMENTS: _____

D. General Notes

- a) Certification Rating Levels:
 - 1) Awareness and Understanding
 - 2) Perform with Supervision
 - 3) Perform Independently and proficiently
 - 4) Perform Proficiently and Capable of Providing Training

- b) Resource Management System (RMS) planning will address all identified concerns for the treatment of soil, water, air, plant, animal, and human resources (SWAPA+H) treated to the quality criteria in Section III of the Field Office Technical Guide (FOTG).

- c) The Planning Process and Planning Units are defined and outlined in the National Planning Procedures Handbook (NPPH).

Exhibit 4
INDIVIDUAL CERTIFICATION RATING SYSTEM
PLANNING/APPLYING PRACTICES

A: Planners Information

NAME:		TITLE:	
LOCATION:	AGENCY:	GRADE AND STEP:	

B. Concurrence and Authorized Signatures

SUPERVISOR	SIGNATURE:	DATE:
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C. Ability to Plan/Apply Practices

Practice Name	Practice Code/Units	Required Competency Level	Certification Rating Levels		Training Needs and Comments
			Planning	Application	
Animal Trails and Walkways*	575/ft				
Composting Facility*	317/no				
Conservation Crop Rotation	328/ac				
Contour Buffer Strips	332/ac				
Contour Farming	330/ac				
Cover Crop					
Critical Area Planting	342/ac				
Fence	382/ft				
Field Border	386/ft				
Filter Strip	393/ac				
Forest Site Preparation	490/ac				
Grassed Waterway	412/ac				
Hedgerow Planting	422/ft				
Nutrient Management	590/ac				
Pasture and Hayland Planting	512/ac				
Pest Management	595/ac				
Prescribed Grazing	528A/ac				
Residue Management, No-till & Strip-till	329A/ac				
Residue Management, Mulch-till	329B/ac				
Residue Management, Seasonal	344/ac				
Riparian Forest Buffer	391/ac				
Stripcropping Contour	585/ac				
Trees/Shrub Establishment	612/ac				
Waste Management System	312/no				
Waste Utilization	633/ac				
Wildlife Upland Habitat Management	645/ac				

COMMENTS:

Exhibit 4 (cont.)

D. Rating for other National or State Practices Not Listed Above

Practice Name	Practice Code/Units	Target Competency Level	Certification Rating Levels			Training Needs and Comments
			Inventory & Evaluate	Planning	Application	

COMMENTS: _____

E. Competency Rating Levels:

- 1) Awareness and Understanding
- 2) Perform with Supervision
- 3) Perform Independently and Proficiently
- 4) Perform Proficiently and Capable of Providing Training

F. General Notes

- a) Certification ratings will be developed to meet the criteria of the current standards found in Section V of the Field Office Technical Guide (FOTG).
- b) All practices to be applied by the Area and Field office personnel and all other practices above the approval level of the Area Conservationist, Agronomist, or Resource Conservationist are to be co-approved by the Assistant State Conservationist and the appropriate state discipline specialist (Agronomist, Forester, Biologist, Cultural Resource Specialist).