

Planning Guidance

Pennsylvania NRCS Conservation Planning Guidance

Instructions: Do not include this document in the customer folder. This document is intended to provide guidance on Conservation Plan requirements. It is not meant to include any customer specific information. Discard after each use.

This Conservation Planning Guidance identifies and explains the required elements of a Conservation Plan. Every Conservation Plan will include all items identified in this document unless they are marked “optional,” “if applicable,” or “as needed.”

The Conservation Plan document provided to the customer is a quality document containing information that is meaningful for the customer. The plan exhibits technical adequacy, administrative completeness, and consistency among documents. All plan documents are in accordance with NRCS policy, planning guidance, and practice standards and specifications.

Ultimately the Conservation Plan* is a document that records the customer’s decision. The plan includes a statement identifying the customer’s objectives, as well as a standard statement clarifying conservation goals or “limitations of objectives.”

***Note** – All NRCS Case Files contain copies of all documents provided to the customer, in addition to all other required internal documents.

Business/Customer Information

Decision-maker* (Customer) Name, Mailing Address, Telephone

- Owner Name, Mailing Address, Telephone
- Operator Name, Mailing Address, Telephone
- Farm Mailing Address

***Note** – in the case of a partnership, corporation, etc., clearly identify the individual acting as the decision-maker.

Objective Statement*

Clearly states the purpose of the customer’s conservation goals using quantitative or qualitative statements of desired future conditions as determined by the customer. The objective statement also includes basic site information such as cropping system and/or type and number of livestock.

***Note** – this statement is commonly included at the beginning of the Conservation Practice Schedule.

Assistance Notes (NRCS-CPA-6)

Assistance Notes – Legible notes, maintained by planners. These notes are included in the case file and serve as a concise, factual, and chronological record of significant conservation activities. They may summarize progress in planning and implementation for certifying practices.

Include any notes or records of customer objectives, technical or management alternatives discussed with customer, decisions made when and by whom, etc.

Correspondence Documents (if applicable) – letters, e-mails, supporting maps, etc.

Conservation District cooperative agreement (if applicable)

Conservation Plan Maps

The maps are clear and concise, serving as a visual summary of activities occurring on the operation.

All maps contain:

- Title block showing:
 - A map title (i.e. Location Map, Conservation Plan, Soils, Topographic Map)
 - Name of Conservation District, County, and State in which the operation is located
 - The date the map was prepared
 - FSA Farm number (can be placed in "Legal Description" block)
 - FSA Tract number (can be placed in "Legal Description" block)
 - Customer's name
 - Planner's name (optional)
- A scale bar (1:660 or comparable scale is recommended, as applicable to the size of the operation.)
- Legend - contains information relevant to each map
- North arrow
- NRCS Symbol (optional)

Required Maps

- Location Map** (if more than one tract in plan):

The Location Map clearly identifies the location of the operation when multiple tracts are involved in the plan (i.e., Nutrient Management Plan, Grazing Plan, CSP Contract, Cover Crop Contract). Labels displaying **FSA Farm and Tract number** are included.

- Conservation Plan* Map** including:

The Conservation Plan map clearly identifies the location of the operation, individual land units, land use designations, and acreage for each land unit. HEL designation should also be displayed.

The Conservation Plan map also identifies the location and extent of **all** planned and/or existing conservation practices.

- Field and tract boundaries (yellow)
- Field Labels (yellow)**
 - Field Numbers (whole numbers only)
 - NRCS Land Use Designation
 - Field Acreage (to the 1/10 acre)
 - HEL determination
- Road Names - Include labels for a minimum of two roads. There is no need to display roads where roads are clearly visible on imagery. Do not include label for "unnamed streets."
- Waters of the Commonwealth (shown in blue), with labels for all named tributaries (labeled in blue)
- Location of all known utilities (power lines, cables, pipelines, etc.)

Required Maps (continued)

Conservation Plan* Map including: (Continued)

- Conservation Practices
 - All existing and planned structural practices with unique symbols
 - All existing or planned vegetative or management practices with a footprint that is less than the whole field.
- Map legend that clearly labels all practices. Practice names in the legend are consistent with names of the practices used in the Conservation Practice Schedule.

***Note** – It may be necessary to use more than one map to show all required information. See Detail Maps section.

****Note** – These labels must correspond with the land use/field numbers in the plan document.

Detail Maps (as needed)

Separate maps may be needed to show more detail for specific land units, conservation systems, or to display the main objective of the plan. In these cases, it may be beneficial to split the information into multiple maps to provide more detail and clarity. The deciding factor is readability. Title the map appropriately.

For example:

Headquarters Map – A close-up map of the headquarters, if needed to show multiple practices in the same land unit

Fencing, Water System, Earth Disturbing Practices, etc. – As needed to show complex systems located within the same field, as is common with grazing systems.

Operator Management Map – Required for CNMP plans and for PA Clean Streams - Chapter 91, Act 38 and CAFO compliance purposes. This is **required** by statutory regulation for **all land receiving manure**.

The **Operator Management Map** is to include the following:

- farm boundary
- field boundaries
- field identification
- field specific acreage (this information can be shown directly on the map for each field, or can be included as part of the map legend indicating the field acreage for each individually identified field)
- manure application setbacks and buffers (with an identification of the landscape feature that requires the setback, such as location of the stream or sinkhole)
- location of existing and proposed structural BMPs (including manure storage facilities),
- location of existing or proposed emergency manure-stacking areas or infield manure-stacking areas, **and**
- roads and road names adjacent to and within the operation.

PA Clean Streams Law, Chapter 102.4 Near Stream – Clearly delineate and identify additional conservation practices (or BMPs) for near-stream cropland to protect water quality as required when crop fields have less than 25% “plant cover (living and dead plant material)” and are within 100 feet of rivers and streams.

Land Capability Class, Hydric Soil, Drainage Class, etc. – As relevant to customer’s objectives or identified resource concerns.

Required Maps (continued)

Soils Map including:

- Field and tract boundaries (yellow)
- Soils polygons (red)*
- Map Unit symbols which reference appropriate soil descriptions

*Note - Soils polygon layer will be the same color as the soils label

Topographic Map* including:

- Field and tract boundaries

*Note - Contour map is an acceptable substitute if county data is available.

Record of Customer's Decision

This record of decision is also referred to as the Conservation Practice Schedule, Conservation Schedule, Conservation Plan of Operation, Toolkit Conservation Plan Report, or CPA-68.

The record of customer's decision includes the customer's conservation objective(s) and brief description of the operation, an implementation schedule for all planned practices, a record of all existing practices that continue to be operated and maintained, and complete narrative statements for each practice.

- The **Objective Statement** clearly states the purpose of the customer's conservation goals using quantitative or qualitative statements of desired future conditions as determined by the customer. The objective statement also includes basic site information such as cropping system and/or type and number of livestock.
- Implementation schedule** - Includes the appropriate label for the land unit (i.e., Field 1), the official practice name, the amount of each planned practice, and month and year the practice is planned to be implemented.
- A **narrative statement** is included with each practice or activity. The narrative includes a brief description of the practice/activity, addresses practice/activity definition, the purpose(s) of the practice/activity, and what is being done. In some cases, the Operation and Maintenance statement is also included in the practice narrative. If using a Job Sheet for a specific practice, include a reference to the Job Sheet in the appropriate narrative. The use of 'G' narratives is encouraged. Adapt these narratives to be more site-specific.

When a practice is **planned to be implemented**, the narrative includes enough detail so that the producer knows what is expected when applying the practice(s). The basic or 'G' narratives are modified to fit the planning site and include basic information required for practice certification (refer to practice Check Out Documentation form(s)). For practices that will function together as a system, it is important to clearly identify how these practices will work together (i.e., a Roof Runoff Structure that includes an Underground Outlet and Structure for Water Control). For practices being implemented with NRCS financial assistance, it is helpful to include reference to funding program (i.e. - EQIP-FY2010, AMA-FY2009, etc.) in the practice narrative.

For example –

The **Conservation Crop Rotation** (328) narrative identifies the crops and cropping sequence that are part of the rotation as well as residue and tillage management of the field, and includes a reference to the RUSLE2 reports. **The narrative also clearly states whether or not the planned rotation meets or exceeds the tolerable soil loss level or "T" for each field. If field is within 150 feet of a stream, the near-stream field treatment practices or managements are clearly identified.**

Record of Customer's Decision (Continued)

The **Fence** (382) narrative states the type of fence (2 strand, 4 strand, high tensile electric, woven wire, barbed wire, etc.) as well as the purpose (interior or exterior, critical or non-critical confinement, etc.).

The **Watering Facility** (614) narrative identifies the type of trough (portable, permanent, and/or frost free, etc.) as well as the source of water (spring development, well, etc.).

The **Pipeline** (516) narrative states the purpose (irrigation, livestock water, waste management component, etc.), the type of pipe (buried-shallow, buried-frost free, above ground and portable), as well as the inlet and outlet location of the pipe.

The **Waste Storage Facility** (313) narrative identifies the estimated length of storage (6 months, 60 days, etc.) as well as manure type (liquid, solid, bedded pack, poultry litter, etc.) and if applicable a brief description of separation method.

The **Roof Runoff Structure** (558) narrative states what type of system is planned (gutter, drip line drain, etc.) and clearly identifies the location of the outlet.

If the practice has **already been applied*** and is included in the schedule as part of a management system or for maintenance purposes, please clearly state this in the narrative.

*Note – In this case, since no management change is occurring, record the original implementation date in both the planned and applied sections of the practice schedule.

- Operation and Maintenance** (O&M) activities, as detailed in the PA NRCS Practice Standards, must either be included in the narrative statement, Job Sheet, or design package. If they are included in the design package or Job Sheet, the narrative statement will reference the appropriate O&M document.
- Pennsylvania Job Sheets*** have been developed for many practices. The intent of the Job Sheet is to provide information to the customer that would be too cumbersome to include in a brief narrative statement. When planning a practice for which a Job Sheet exists, use of the Job Sheet is encouraged. When using Job Sheets, complete all applicable sections.

*Note – PA Job Sheets are located in Section IV of the PA FOTG. Include copies of all completed Job Sheets in both the customer and office file.

Land Use Requirements- Crop

Crop – Land used primarily for the production of field crops or orchard crops alone or in association with seed crops.

- Soil loss rate* for each field and cropping system is documented.**
 - Before and after plan implementation, soil loss will be documented using RUSLE2**.
 - The following RUSLE2 information must be included in the plan file:
 - Plan View printout with the following information:
 - Predominant soil type in each field
 - Tolerable (T) level of soil loss for each soil type
 - Slope length, feet
 - Slope steepness, percentage
 - Erosion rate (tons/acre/year) and description of crop rotation and tillage system for each field
 - Soil Conditioning Index (SCI)
 - Soil Tillage Intensity Rating (STIR)
 - Management View printout for each rotation with the following information:
 - Field Operations
 - Vegetation type
 - Crop Yield (if significantly different from default value)

*Rounding – at the discretion of the planner, RUSLE2 soil loss estimates may be rounded **down** to the nearest whole number when the system meets the producer’s objectives, provided there is no evidence of rills in the field at any time of year and throughout the rotation, and the planner has confidence that erosion is at or below T.

**Note – If RUSLE2 soil loss calculations document that the preplanning rotation meets the Tolerable (T) soil loss level and no management change is being agreed to, no ‘after’ soil loss calculation is required.

- Management of near stream area(s) is described.** – Refer to the “Planning Guidance for Treating Near Stream Cropland Areas” for additional information about planning these areas.

- Gully erosion** has been evaluated and (if existing) treatment alternatives have been presented to customer.

- Conservation Crop Rotation (328)**

This practice applies when crops are grown in the same field in a recurring sequence.

It does not apply when the predominant use of the field is for the production of hay, vineyard, orchard, or nursery crops.

- When planning 328, **crop rotation (sequence and years) including cover crops, residue and tillage management for each crop, and soil loss is documented in the narrative or job sheet.**

Land Use Requirements- Crop (continued)

This rotation and management should be the most restrictive option (highest predicted erosion) that meets the customer's objective. Customers may decrease tillage, substitute less erosion-prone crops or add cover crops without requiring a plan revision. Soil loss calculations for the planned crop rotation(s) are included in the file.

- Pennsylvania Wildlife Habitat Evaluation for Cropland** – The form and form instructions are located in Section III of the Pennsylvania Field Office Technical Guide (FOTG).

Land Use Requirements- Hay

Hay – Land which is predominantly planted in perennial* plants and managed for hay or harvested forage. These fields may be renovated with 1 or 2 years of annual crops before being re-established to a long term perennial crop.

*Note - Land predominantly planted to an annual for hay or forage crop is considered cropland.

- Pasture and Hayland Planting (512)** (formally Pasture and Hayland Planting)
 - When planning 512, identify species, seeding rate, and establishment method.
- Management of near stream area(s) is described.** – Refer to the Planning Guidance for Treating Near Stream Cropland Areas for additional information about planning these areas.
- Gully erosion has been evaluated and (if existing) treatment alternatives have been presented to customer.
- Pennsylvania Wildlife Habitat Evaluation for Pasture & Hayland** - The form and form instructions are located in Section III of the Pennsylvania Field Office Technical Guide (FOTG).

Land Use Requirements- Pasture

Pasture – Grazing lands permanently producing introduced or domesticated native forage species that are used primarily for the production of domestic livestock. They receive periodic renovation and/or cultural treatments, such as tillage, fertilization, mowing, weed control, to enhance forage quality and yields. The area is primarily harvested by grazing animals. Permanent pastureland in this context means the present operator has no desire to change the land use or rotate crops in the field.

- Prescribed Grazing (528)**- applies when grazing and/or browsing animals are used primarily to harvest vegetation. When planning 528, the following information* must be included in the plan:
 - Forage Inventory detailing quality, quantity, and species of forage
 - Seasonal availability, quality, and stability of watering locations
 - Livestock Inventory detailing number, kind, and class of livestock, estimated forage demand, and length of grazing season
 - Forage Balance Calculation – Equation and supplemental information can be found in the PA 528 Job Sheet.
 - Period of grazing, deferment, rest, stockpiling and other management activities for each unit
 - Contingency plan explicitly states the management of the pasture and animals during periods of drought and extreme precipitation, including winter. This plan identifies areas in which animals will be located during specific field conditions (drought, extreme precipitation, winter). It also clearly identifies sensitive areas from which livestock should be excluded or flash grazed and details the management of the confinement area following livestock occupation.
 - Monitoring plan with record keeping requirements
 - Paddock layout maps (if applicable)

*Note – For more information about 528 requirements refer to the 528 Standard and Specification.

Land Use Requirements- Pasture (Continued)

- Areas of Animal Concentration have been evaluated and (if existing) treatment alternatives have been presented to the customer. Refer to the “Planning Guidance for Treating Areas of Animal Concentration” for additional information about planning these areas.
- Gully erosion** has been evaluated and (if existing) treatment alternatives have been presented to customer.
- Pennsylvania Wildlife Habitat Evaluation for Pasture & Hayland** - The form and form instructions are located in Section III of the Pennsylvania Field Office Technical Guide (FOTG).

Land Use Requirements- Headquarters

Headquarters – Land used for dwellings, barns, pens, corrals, or other facilities used in connection with farm operations. This land use is associated with a variety of operation types, most commonly crop production and/or livestock production facilities.

For more information regarding the evaluation and planning of this land use when animals are associated with the operation, refer to the guidance developed for the ‘Manure and Wastewater Handling and Storage’ element of the PA CNMP.

- Areas of Animal Concentration have been evaluated and (if existing) treatment alternatives have been presented to the customer. Refer to the “Planning Guidance for Treating Areas of Animal Concentration” for additional information about planning these areas.
- Gully erosion** has been evaluated and (if existing) treatment alternatives have been presented to customer.
- Comprehensive Nutrient Management Plan (CNMP)** – Required when providing assistance to an AFO or CAFO to address manure or wastewater handling and storage/treatment/ and/or when providing assistance for nutrient management that involves the application of manure and wastewater.

Environmental Compliance*

Refer to Pennsylvania FOTG, Section III or the PA NRCS Environmental Compliance webpage for more information about Environmental Compliance.

***Note:** Environmental compliance activities must be coordinated with the NRCS designated agency representative since all findings and interagency consultation are the responsibility of the lead Federal agency.

Environmental Evaluation (NRCS-CPA-52)

- The CPA-52 form is completed for all land uses within the Conservation Plan document.
- Conservation practices identified in the Conservation Plan address corresponding resource concerns identified in the CPA-52 form*.
- The benchmark conditions are comprehensively inventoried for land being addressed by the Conservation Plan. The resource concerns identified should be comprehensive, and are not limited to those the customer has agreed to address, nor are they limited to those being addressed in a financial assistance contract.
- The effect(s) of all planned practices and proposed alternatives are documented.
- Compliance with NRCS Wetland Protection Policy is documented in the Special Environmental Concerns – Wetlands section of the CPA-52 form. The NRCS guidance for Wetland Protection Policies is located in Section III of PA FOTG.

***Note** - Inventory and evaluation documentation must be adequate to support the information recorded in the CPA-52 form and all decisions regarding Quality Criteria.

Environmental Compliance (Continued)

- Cultural Resources Review Worksheet** and email verification of review by the NRCS Cultural Resources Coordinator (if applicable*).

*Note – This form is required when any practice is rated G or PG-intrusive as per Conservation Practice or CSP Enhancement ratings. For more information refer to the PA Cultural Resources webpage.

- PNDI Project Environmental Review Receipt** with appropriate sections completed.

The Pennsylvania Natural Heritage Program, PNDI Project Planning Environmental Review can be accessed at: <http://www.naturalheritage.state.pa.us/>

National Food Security Act Compliance (if applicable)

This is applicable to all customers who are currently participating in certain USDA programs or are applying for participation in certain USDA programs.

- 'Highly Erodible Land Compliance' / 'Wetland Compliance'
 - AD-1026 (referral from FSA)
 - Farm Producer Data Report (list of customer tracts from FSA) – documents if producer is currently in compliance with HEL/Wetlands
 - NRCS CPA-026E – highly erodible land determination
 - NRCS CPA-027 – NRCS notification of conservation plan revision (given to FSA)

Standard Statement

- Standard Statement** – printed above signature blocks includes additional information for customer regarding clarity on conservation goals or to “contain limitations of objectives.”

Signature Block

- Customer Information:**
 - Name
 - Signature
 - Date
- Certified Planner**
 - Name
 - Signature
 - Date
- Conservation District** (if applicable)
 - Name
 - Signature
 - Date

This planning guidance is not part of the official NRCS Case File and is not an official NRCS document.

Supporting Documentation

Job Sheets (As Needed)

PA Wildlife Habitat Evaluations

(By Land Use)

Assistance Notes (NRCS-CPA-6)

Environmental Compliance

- *Environmental Evaluation (NRCS-CPA-52)*
- *Cultural Resources Review Worksheet with E-Mail Verification*
- *PNDI Project Environmental Review Receipt*

National Food Security Act

Compliance (If Applicable)

(‘Highly Erodible Land Compliance’/‘Wetland Compliance’)

- AD-1026
- Farm Producer Data Report
- NRCS-CPA-026E
- NRCS-CPA-027

More Information

For questions regarding conservation planning or required documentation, please contact your local NRCS office.



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Pennsylvania NRCS Conservation Plan Folder Requirements



Black – Include in NRCS Case File and Customer Folder

Green – Include in NRCS Case File ONLY

Conservation Plan Document

Business/Customer Information

- Owner/Operator Name
- Mailing Address
- Telephone Number

Objective Statement

Record of Customer's Decision

- Implementation Schedule
- Narrative Statements
- Operation and Maintenance Statements

Standard Statement

Signature Block

- Customer
- Certified Planner
- Conservation District (If Applicable)

Mapping Requirements

All Maps Contain:

- Title Block Showing:
 - Map Title
 - Name of Conservation District, County, and State
 - Customer's Name
 - Date Map Prepared
 - FSA Farm and Tract number
 - Planner's Name (Optional)
- Scale Bar
- Map Legend

Required Maps

- **Location Map** (If Applicable)
- **Conservation Plan Map Showing:**
 - Field and Tract Boundaries
 - Field Labels
 - Field Numbers
 - NRCS Land Use Designation
 - Field Acreage
 - HEL Determination
 - Road Names
 - Waters of the Commonwealth
 - Location of all Known Utilities
 - Conservation Practices (Existing and Planned)
- **Detail Maps** (As Needed)
- **Soils Map Showing:**
 - Field and Tract Boundaries
 - Soil Polygons
 - Map Unit Symbols
- **Topographic Map**

Land Use Requirements

All Land Uses

- Identify Treatment and Management of:
 - Gully Erosion
 - Near-Stream Areas
 - Areas of Animal Concentration

Cropland/Hayland

- 328, 512, or other management practices
- **RUSLE 2 Calculations** (Cropland Only)
 - Plan View Printout
 - Management View Printout

Pasture

- 528
- Prescribed Grazing Documentation

Headquarters

- CNMP (if applicable)