



Iowa Bulletin: 190-22-1

Date: November 12, 2021

Subject: ECS – Fiscal Year 2022 Conservation Planning

Purpose. To provide guidance on conservation planning for FY2022.

Expiration Date. September 30, 2022

Explanation. This bulletin provides guidance on conservation planning, resource concern selection and evaluation, and conservation planning documentation requirements.

Conservation Planning

The Natural Resources Conservation Service (NRCS) provides conservation planning and technical assistance to individuals, groups, tribes, and units of government to help plan and carry out conservation decisions to meet their objectives. Conservation planning is dynamic, progressive, and adaptive. A client may initially only be interested in a single practice to meet one of their resource concerns, but through the planning process, additional resource concerns and opportunities may be identified and addressed. Including the client during onsite visits provides opportunities to discuss conservation principles. The conservation planning process also develops and builds relationships with clients.

The [National Planning and Procedures Handbook](#) (NPPH) provides guidance on conservation planning and should be referenced to guide planners through the planning process. NPPH states “the planning process used by NRCS is a three-phase, nine-step process. Although the nine steps are shown in sequence, the process is very dynamic. The process could start with any of the first three steps or even step nine. Cycling back to previous steps is often necessary.” The [Conservation Planning Portal](#) is also available as a planning resource and can be accessed through the [Ecological Sciences SharePoint](#) site.

Financial assistance is often part of the discussion when the client is considering alternatives, but conservation planning is program neutral.

Resource Concern Selection and Evaluation

Some resource concerns may be relatively common, but each site and client may have unique resource concerns, site conditions, and situations. During step 4 of the planning process, the planner and client must agree on which resource concerns will be addressed during the remainder of the planning process. This will be based on a combination of resource concerns initially identified by the client and additional resource concerns identified by the planner and discussed during the planning visit. A field visit is critical in understanding the client’s concerns and developing a good inventory of the land.

The client may have both short-term and long-term goals. At a minimum, the resource concerns impacting short-term goals (within three years) must be evaluated, then documented in the Conservation Assessment Ranking Tool (CART). Additional evaluations to address long term goals and to gain a better understanding of the cumulative impacts on the environment may be completed, then documented in CART. CART assessments are not needed on resource concerns that are not present in the planning unit or on resource concerns the client has indicated no interest in addressing.

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It is important to note some programs, such as the Conservation Stewardship Program (CSP), define which resource concerns will be **assessed**. However, just because the resource concern is **assessed** (e.g., evaluated) doesn't mean the resource concern is a priority for the client to be **addressed** (e.g., specifically identified and improved with a conservation practice). Resource concerns will be assessed with the same method for all planning.

The Iowa 2022 CART Assessment Questions Report Tool specifies how the resource concern will be assessed and must be followed. Specific assessment tools will be used to improve the planning process and answer assessment questions in CART. Specific assessment tools are listed in Table 1. If a tool is not listed for a resource concern or a land use, use the CART assessment.

If sheet and rill erosion is a resource concern addressed by the conservation plan on cropland, RUSLE2 will be used for evaluation. If sheet and rill erosion is a resource concern required to be assessed for programmatic purposes, highly erodible land (HEL) will be evaluated with RUSLE2. RUSLE2 is not required for non-highly erodible land (NHEL) for programmatic assessment purposes but may be assessed at the planner's discretion. It is imperative for planners and clients to understand the sheet and rill erosion results. The RUSLE2 results are not entered into the CART Assessment Resource Inventory. Instead, RUSLE2 results will be compared to the CART Assessment Results for Sheet and Rill Erosion for both the existing total and planned total. If the RUSLE2 results do not match the Assessment Results (meeting or not meeting the threshold), the planner must complete an override. Select the reason for the override and provide a comment on why an override was used. The comment must include the RUSLE2 planning soil and resulting soil loss.

Table 1. Specific assessment tools for selected resource concerns to be addressed by the plan.

<u>If the selected Resource Concern is</u>	<u>Land Use</u>	<u>Assessment Tool*</u>
Emissions of airborne reactive nitrogen	Crop Pasture	Nutrient Management Baseline Assessment Checklist
Emissions of greenhouse gases – GHGs	Crop Pasture	Nutrient Management Baseline Assessment Checklist Pasture also requires Pasture Condition Score (PCS)
Emissions of ozone precursors (volatilization)	Crop Pasture	Pest Management Conservation System (PMCS) Implementation Requirements (IR)
Emissions of PM and PM precursors	Crop Pasture	Nutrient Management Baseline Assessment Checklist
Emissions of particulate matter (PM) and PM precursors (drift)	Crop Pasture	PMCS IR
Objectionable Odor	Crop Pasture	Nutrient Management Baseline Assessment Checklist
Bank Erosion from stream, shorelines, or water conveyance channels	Pasture	PCS
Plant Productivity and Health	Pasture	PCS
Plant Structure and Composition	Pasture	PCS
Pesticides transported to groundwater	Crop Pasture	PMCS IR
Pesticides transported to surface water	Crop Pasture	PMCS IR
Nutrients transported to groundwater (field loss)	Crop Pasture	Nutrient Management Baseline Assessment Checklist
Nutrients transported to surface water (field loss)	Crop Pasture	Nutrient Management Baseline Assessment Checklist
Pathogens and chemicals from manure, biosolids or compost applications transported to groundwater	Crop Pasture	Nutrient Management Baseline Assessment Checklist
Pathogens and chemicals from manure, biosolids or compost applications transported to surface water	Crop Pasture	Nutrient Management Baseline Assessment Checklist
Sediment transported to surface water	Pasture	PCS

Livestock Feed and Forage Balance	Pasture	PCS and Inventory of Livestock Forage/Feed is in balance for intended use
Plant Pest Pressure	Pasture	PCS
Aggregate Instability	Crop	Cropland In-Field Soil Health Assessment Guide (IFSHA)
	Pasture	PCS
Compaction	Crop	IFSHA
	Pasture	PCS
Organic Matter Depletion	Crop	IFSHA
	Pasture	PCS
Soil Organism Habitat Loss or Degradation	Crop	IFSHA
	Pasture	PCS
Terrestrial Habitat for Wildlife and Invertebrates	All land uses	Wildlife Habitat Evaluation Guide (WHEG)
Naturally Available Moisture Use	Pasture	PCS
Sheet and Rill Erosion	Crop	RUSLE2
	Pasture	PCS
Wind Erosion	Pasture	PCS

Planning Land Units may be grouped into representative units to increase efficiency for specific assessment tools. See Table 2 for guidance.

Table 2. Assessment Tool Guidance

Assessment Tool	Planning Land Unit Representative Groups*
RUSLE2	Evaluations can be grouped by similar or same crop rotation, tillage, management practices, and slope group (e.g., A-B, C, D, E).** If sheet and rill erosion is addressed by the plan, document baseline system and planned system. If sheet and rill erosion is required to be assessed, document baseline system for HEL fields.
PCS	Evaluations can be grouped by same or similar pasture management. Document baseline system.
Cropland In-Field Soil Health Assessment Guide (IFSHA)	Evaluations can be grouped by similar crop rotation and management first, then by soil type (e.g., loam, clay loam, silty clay loam, etc.). Document baseline system.
Wildlife Habitat Evaluation Guide (WHEG)	Each planning unit must be assessed. If terrestrial habitat is addressed by the plan, document baseline system and planned system. If terrestrial habitat is required to be assessed, document baseline system.
Nutrient Management Baseline Assessment Checklist	Each planning unit must be assessed. Document baseline system.
Pest Management Conservation System Implementation Requirements (IR)	Refer to Pest Management Conservation System Training to group planning units. Document baseline Prevention, Avoidance, Monitoring, and Suppression (PAMS) activities/Integrated Pest Management (IPM) system with the current PMCS IR. Use WIN-PST, Agronomy Tech Note 5: Pest Mgmt in the Conservation Planning Process, and Agronomy Tech Note 9: Pest Mgmt Conservation Strategies to Protect Pollinator Habitat to determine if additional mitigation is required or in place.

* All assessments must clearly label which tracts and fields the assessment represents.

** Additional assessments may be needed on soils that are significantly different (e.g., a D-slope soil with a T factor of 2 and a D-slope soil with a T factor of 5 should be assessed separately).

Conservation Planning Documentation Requirements and Reviews

Financial assistance applications must start with a good plan. Steps 1 through 7 of the planning process must be completed to understand the client's objectives, the baseline system, existing resource concerns, additional conservation opportunities, and potential impacts to special environmental concerns.

To ensure planning is completed, up to 100% of plans will be reviewed. Field offices will document the following information, at a minimum.

1. Client's Objectives.
2. Planning visit. Include the date and location of the visit and participating individuals.
3. Description and Analysis of the Baseline System. Include existing practices and if they are functioning or not, and the environmental evaluation.
4. Identification of the resource concerns, agreed to by the planner and the client, addressed with the conservation plan.
5. Description and Analysis of the Planned System. Include the environmental evaluation, including the Cultural Resources Flowchart for Field Offices and the Threatened and Endangered Species Baseline Assessment.

Several options are available to planners for documentation, including, but not limited to CPA-6 Assistance Notes, CPA-52, planning maps, worksheets, assessment tools as required, CART Field Documentation Record, and CART Assessment Questions.

The environmental evaluation must be completed simultaneously with the planning and will not be considered a separate process or requirement. The special environmental concerns (SEC) must be evaluated for existing conditions and the conservation practice impacts. This includes completing the Threatened and Endangered Species Baseline Assessment and the Cultural Resources Flowchart.

The Threatened and Endangered Species Baseline Assessment will be completed. If there is a potential to affect a threatened or endangered species, field office staff will complete the appropriate assessments. If consultation is needed, field office staff will initiate the process. The consultation process must be complete before financial assistance can be approved.

Field office staff must follow the Iowa NRCS Cultural Resources Methods, which is found in the Field Office Technical Guide (FOTG), Section II, Cultural Resources Information. The Cultural Resources Flowchart will be completed by trained field office staff. If all the conservation practices will have little to no effect on cultural resources (see Appendix A), the process is complete. If any conservation practice has potential to affect cultural resources, Background Research and Field Research for the area of potential effect must be completed. If needed, field office staff will submit Geoportal Cultural Resources Requests to the State Office. The State Archeologist will review the request. If consultation with the state historic preservation officer (SHPO) and/or tribes is needed, the process will be initiated if financial assistance is offered. The entire cultural resources review procedure must be complete before financial assistance can be approved.

If consultation is needed for threatened and endangered species or cultural resources, or if permits are needed for high potential federal program applications, the processes must be initiated by August 1 to avoid year-end obligation issues.

The planner and client must have enough preliminary information to understand what will be expected to meet selected conservation practice standards. The planner needs to provide the client a reasonable cost estimate for engineered practices so the client can make decisions for their operation. The planner must have a reasonable cost estimate (list of practices and estimated planned amounts) for financial assistance program administration.

Resources

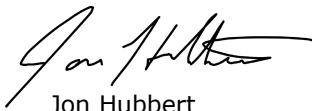
The Ecological Sciences SharePoint site will house documents and links for planners to use and reference in the [Conservation Planning for FY22](#) folder.

This site will include:

- Iowa 2022 CART Assessment Questions Report Tool
- Nutrient Management Baseline Assessment Checklist
- Link to NPPH
- Link to National Resource Concern List and Planning Criteria
- Link to Iowa Conservation Planning Portal

Additional documents or links may be added as needed.

Contact. If you have questions about the contents of this bulletin, please contact Kevin McCall, State Resource Conservationist, at 515-323-2292.



Jon Hubbert
State Conservationist

Attachment: Nine-Step Planning Process