
Title 180 – Conservation Planning and Application
**PART 399 – Conservation Planner Role
Documentation and Approval Process**
February 2024

399.0 Purpose

- A. This Iowa instruction provides additional guidance on policy provided in Title 180 General Manual, “Conservation Planning and Application,” Part 409 “Conservation Planning Policy” (180 GM 409) and Iowa Title 180 General Manual, “Conservation Planning and Application,” Part 409 “Conservation Planning Policy” (IA 180 GM 409).
- B. This instruction outlines the process to document and approve conservation planner roles. This instruction also explains the responsibilities of the state resource conservationist, area staff, supervisors, and employees.
- C. This instruction will be followed by all Iowa NRCS employees and partner employees in USDA Service Centers with conservation planning responsibilities.

399.1 References

- A. 180 GM 409 Conservation Planning Policy (1st Ed., Amend. 46, July 2021)
- B. 180 GM 409.3 Requirements for Providing Conservation Planning Assistance
- C. 180 GM 409.9 Criteria to Achieve an NRCS Conservation Planner Role Designation
- D. 180 GM 409.10 National Level 2 Conservation Planner Designations
- E. 180 GM 409.15 Exhibit 3 – Core Competencies and Course Requirements for Level 1, 2, 3, and 4 Conservation Planner Designations
- F. IA 180 GM 409 (2nd Edition, amended October 2023)

399.2 Background

180 GM 409 establishes national NRCS policy on requirements for providing conservation planning assistance, criteria to achieve an NRCS conservation planner role designation, national level 2 conservation planner designations, and core competencies and course requirements for Level 1, 2, 3, and 4 conservation planner designations.

IA 180 GM 409 2nd edition was issued in October 2023 to align with 180 GM 409, 1st Edition, Amendment 46. IA 180 GM 409 2nd edition establishes minimum conservation planner roles for Iowa NRCS and partner employees, designates authority, and establishes timeframes to achieve conservation planner roles. IA 180 GM 409 1st edition was superseded by IA 180 GM 409 2nd edition, cancelling the associated Iowa Exhibit 3, a worksheet used to document completed courses and approval for conservation planner roles.

Iowa will follow the conservation planner core competencies and course requirements outlined in 180 GM 409.15 Exhibit 3. Course requirements and certification will be documented in AgLearn. Employees must follow the conservation planner role approval process outlined in this instruction.

399.3 Roles and Responsibilities

- A. NRCS employees and partner employees in USDA Service Centers with conservation planning responsibilities are responsible to:
1. Work with their supervisor, or partner employees' day to day NRCS manager (herein referred to as supervisor), to achieve the appropriate conservation planner role.
 - a. Determine the appropriate conservation planning role (see IA 180 GM 409.3 A. 5.).
 - b. Develop a training plan with their supervisor and request required training.
 - c. Work to complete the requirements within the appropriate timeframe (see IA 180 GM 409.9 D. 3.).
 - d. Review their conservation planner role requirements at a minimum during quarter 2 and 4 conversations.
 2. Maintain the appropriate conservation planner role (see 180 GM 409.9 E.).
 - a. Work to complete the renewal requirements.
 - b. Review training progress, knowledge, skills, and abilities at a minimum during annual performance reviews.
 3. Document and maintain records of training, experience, and knowledge.
 4. Maintain a copy of their conservation planner role records and certificates.
- B. Supervisors are responsible to:
1. Work with their employee(s) to determine the appropriate conservation planner role (see IA 180 GM 409.3 A. 5.).
 2. Work with their employee(s) to maintain the appropriate conservation planner role (see 180 GM 409.9 E.).
 3. Develop a training plan with their employee(s) and allow time for training.
 4. Review the conservation planner role requirements with employees.
 - a. Employees working to achieve the required planner role will review requirements at a minimum during quarter 2 and 4 conversations.

- b. Employees who have achieved the required planner role will review renewal requirements at a minimum during annual performance reviews.
- 5. Coordinate with the Area Resource Conservationist (ARC) to determine if field office employees meet and maintain the requirements for the specific conservation planner role and certify employee's appropriate planner role.
- 6. Notify the ARC when field office employee's requirements for Levels 1, 2, and 3 conservation planner roles are met.
- 7. Coordinate with the State Resource Conservationist (SRC) to determine if area and state office employees meet conservation planner role requirements and certify employee's appropriate planner role.
- 8. Coordinate with the ARC to determine if field office employees relocated from another state meet the appropriate planner designation for Iowa.
- 9. Enter completion dates for completed courses, as applicable.
- C. Assistant State Conservationist – Field Operations (ASTC(FO)) is responsible to:
 - 1. Determine if field office employees meet and maintain the requirements for the specific conservation planner role.
 - a. The ASTC(FO) designates the field office employee's supervisor, in coordination with the ARC, this responsibility.
 - 2. Accompany the conservation planner and the decision maker in the field for Conservation Planning Course, Part 3, Module 9.
 - a. The ASTC(FO) designates the ARC this responsibility.
 - 3. Approve the field-reviewed plans for Conservation Planning Course, Part 3, Module 9.
 - a. The ASTC(FO) designates the ARC this responsibility.
 - 4. Notify the field office employee's supervisor and the SRC when all requirements for Level 3 conservation planner roles are met.
 - a. The ASTC(FO) designates the ARC this responsibility.
 - 5. Determine when field office employees relocated from another state meet the appropriate planner designation for Iowa.
 - a. The ASTC(FO) designates the field office employee's supervisor, in coordination with the ARC, this responsibility.
- D. The ARC is responsible to:
 - 1. Coordinate with field office employee's supervisor to determine if field office employees meet and maintain the requirements for the specific conservation planner role.
 - 2. Accompany the conservation planner and the decision maker in the field for Conservation Planning Course, Part 3, Module 9.

3. Approve the field-reviewed plans for Conservation Planning Course, Part 3, Module 9.
 4. Notify the field office employee's supervisor when all requirements for Level 3 conservation planner roles are met.
 5. Notify the SRC when field office employee's requirements for Levels 1, 2, and 3 conservation planner roles are met.
 6. Coordinate with field office employee's supervisor to determine when field office employees relocated from another state meet the appropriate planner designation for Iowa.
- E. State Resource Conservationist (SRC) is responsible to:
1. Maintain and update the national conservation planner registry.
 2. Coordinate with area staff and state office staff supervisors to determine if area and state staff meet and maintain the requirements for the specific conservation planner role.
 3. Coordinate with area staff and state office staff supervisors to determine when area and state staff relocated from another state meet the appropriate planner designation for Iowa.

399.4 Conservation Planner Course Requirement Documentation

Iowa will follow the conservation planner core competencies and course requirements outlined in 180 GM 409.15 Exhibit 3. Course requirements and certification will be documented in AgLearn by adding the appropriate Conservation Planner Program. Instructions to add the Conservation Planner Program are in Exhibit 1. Instructions to access the Conservation Planner Program and courses are in Exhibit 2. Instructions for instances when a course was completed but AgLearn does not show completion are in Exhibit 3. Instructions for supervisors to certify the conservation planner role are in Exhibit 4.

399.5 Approval Process for Conservation Planner Role

- A. Once all requirements are complete for a conservation planner role, the following steps will be taken.
- B. Level 1 Conservation Planner
 1. The employee will review the completed courses with their supervisor.
 2. The supervisor will certify the employee has achieved Level 1 Conservation Planner role in AgLearn (see Exhibit 4), print the Level 1 Conservation Planner Certificate, and present the certificate to the employee.
 3. The field office employee's supervisor will provide the AgLearn certificate to the Area Resource Conservationist (ARC) and the Assistant State

Conservationist – Field Operations (ASTC(FO)), certifying the employee has met the requirements.

4. The ARC will provide the AgLearn certificate to the State Resource Conservationist (SRC), certifying the employee has achieved Level 1 Conservation Planner.
 5. The area office and state office employee's supervisor will provide the AgLearn certificate to the SRC, certifying the employee has met the requirements.
 6. The SRC will update the National Conservation Planner Database.
- C. Level 2 Conservation Planner – Technical Specialist Planner
1. The employee will review the completed courses with their supervisor.
 - a. Area of Expertise Specific Requirements (180 GM 409.15) – the employee will work with their supervisor and area staff to complete this requirement.
 2. The supervisor will certify the employee has achieved the designated role in AgLearn (see Exhibit 4).
 3. The field office employee's supervisor will provide the AgLearn certificate to the ARC and the ASTC(FO), certifying the employee has met the requirements.
 4. The ARC will provide the AgLearn certificate to the SRC, certifying the employee has achieved Level 2 Conservation Planner – Technical Specialist Planner.
 5. The area office and state office employee's supervisor will provide the AgLearn certificate to the SRC, certifying the employee has met the requirements.
 6. The SRC will sign a Level 2 Conservation Planner Certificate and will update the National Conservation Planner Database.
 - a. The SRC will send the field office employee's certificate to the ARC and ASTC(FO).
 - b. The ARC will send the field office employee's certificate to the employee and supervisor.
 - c. The SRC will send the area office and state office employee's certificate to the employee and supervisor.
- D. Level 2 Conservation Planner – Comprehensive Nutrient Management Planner
1. The employee will review completed courses with their supervisor.
 - a. Comprehensive Nutrient Management Planners must also be a Level 3 or 4 Certified Conservation Planner (IA 180 GM 409.3 A. 5.).
 - b. Demonstrated Competence - employee must provide two completed CNMPs for review and approval that meets all criteria in 190 GM 405

(180 GM 409.15). The employee will work with their supervisor and the area staff to complete this requirement.

c. Area of Expertise Specific Requirements (180 GM 409.15) – the employee will work with their supervisor and the area staff to complete this requirement.

2. The supervisor will certify the employee has achieved the designated role in AgLearn (see Exhibit 4).
 3. The field office employee’s supervisor will provide the AgLearn certificate to the ARC and the ASTC(FO), certifying the employee has met the requirements.
 4. The ARC will provide the AgLearn certificate to the SRC, certifying the employee has achieved Level 2 Conservation Planner – Comprehensive Nutrient Management Planner.
 5. The area office and state office employee’s supervisor will provide the AgLearn certificate to the SRC, certifying the employee has met the requirements.
 6. The SRC will sign a Level 2 Conservation Planner Certificate and will update the National Conservation Planner Database.
 - a. The SRC will send the field office employee’s certificate to the ARC and ASTC(FO).
 - b. The ARC will send the field office employee’s certificate to the employee and supervisor.
 - c. The SRC will send the area office and state office employee’s certificate to the employee and supervisor.
- E. Level 3 Conservation Planner
1. The employee will review completed courses with their supervisor.
 - a. Conservation Planning Course, Part 3, Module 9 - The ARC will accompany the conservation planner and the decision maker in the field. The conservation plan will be reviewed and approved by the ARC.
 2. The supervisor will certify the employee has achieved the designated role in AgLearn (see Exhibit 4).
 3. The field office employee’s supervisor will provide the AgLearn certificate to the ARC and the ASTC(FO), certifying the employee has met the requirements.
 4. The ARC will provide the AgLearn certificate to the SRC, certifying the employee has achieved Level 3 Conservation Planner.
 5. The area office and state office employee’s supervisor will provide the AgLearn certificate to the SRC, certifying the employee has met the requirements.

6. The SRC will sign a Level 3 Conservation Planner Certificate and will update the National Conservation Planner Database.
 - a. The SRC will send the field office employee's certificate to the ARC and ASTC(FO).
 - b. The ARC will send the field office employee's certificate to the employee and supervisor.
 - c. The SRC will send the area office and state office employee's certificate to the employee and supervisor.

F. Level 4 Conservation Planner

1. Contact the SRC.

399.6 Process for Maintaining Conservation Planner Role

Once an employee achieves a conservation planner role, they are responsible to maintain the planner role (see 180 GM 409.9 E. for requirements, including continuing education). Planner roles will be reviewed at least once every three years.

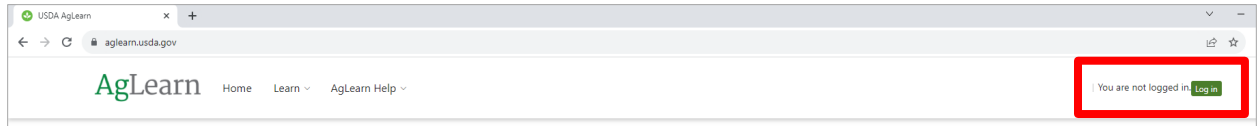
Recertification and continuing education will be documented in AgLearn. Conservation planners will be automatically assigned Conservation Planner Role Recertification upon completion of a conservation planner program. Recertification requires completion of the Conservation Planner Continuing Education Contact Hours course. A continuing education tracker should be downloaded from this AgLearn course for documentation. After completing the continuing education requirements, the tracker and supporting documentation will be uploaded to AgLearn. Planners are responsible to maintain records used to support claimed credits.

Field office employee's recertification course completion certificate will be sent to the ARC and the ASTC(FO). The ARC will send the recertification certificate to the SRC. Area office and state office employee's supervisor will send the recertification certificate to the SRC. The SRC will update the National Conservation Planner Database.

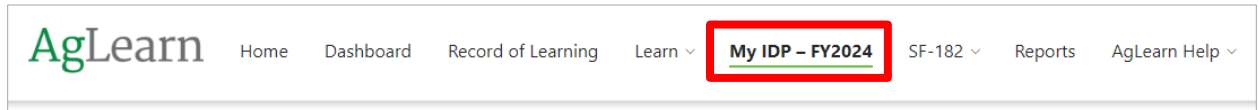
Exhibit 1. Adding a Conservation Planner Program in AgLearn.

The appropriate Conservation Planner Program must be added to an Individual Development Plan (IDP) or an Assignment Plan to access, track, and document required training.

1. Navigate to AgLearn (<https://aglearn.usda.gov>) in web browser.
2. Log in to AgLearn (top right of window).



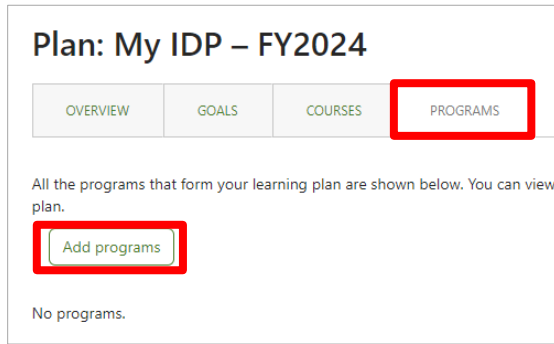
3. Under the main menu at the top, select “My IDP – FY20XX”.



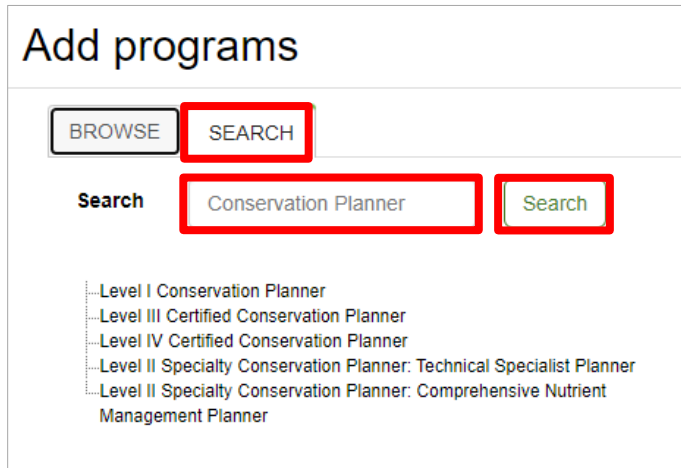
4. Select either “Assignment Plans” or the current year “My IDP”.



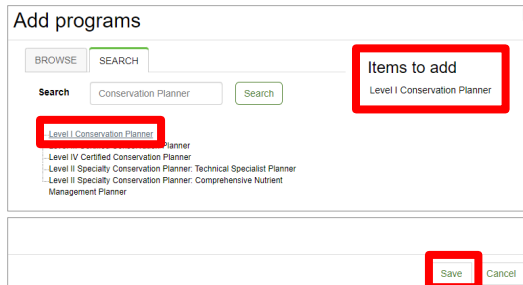
5. Select the “Programs” tab and select “Add programs”.



6. Select the “SEARCH” tab. In the Search box, enter “Conservation Planner”. Select the “Search” button.



7. Left click once on the appropriate Conservation Planner program. The program should appear on the right side of the window. Select “Save”.



8. The Conservation Planner program should appear. Completed courses should automatically populate. Enter the “Priority” and “Due date” as appropriate.

Plan: My IDP – FY2024

OVERVIEW GOALS COURSES PROGRAMS

All the programs that form your learning plan are shown below. You can view any program by clicking the program title. Clicking "Add programs" will add a program.

Add programs

Program Name ▲	Progress	Evidence	Priority	Due date
Level I Conservation Planner	71%	0	None ▼	09/30/2024

9. IDP only: Once the IDP is updated and complete, the supervisor will need to approve. Select “Send approval request” at the top of the IDP.

This plan has not yet been approved. Send approval request

Plan: My IDP – FY2024

OVERVIEW GOALS COURSES PROGRAMS

All the programs that form your learning plan are shown below. You can view any program by clicking the program title.

Add programs

Program Name ▲	Progress	Evidence	Priority
Level I Conservation Planner	71%	0	None ▼

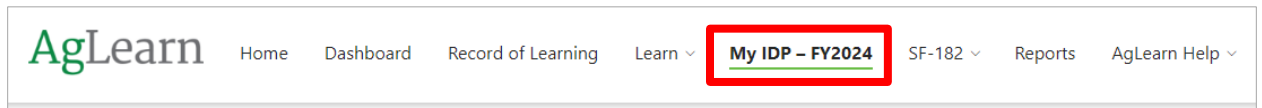
10. IDP only: Instructions on completing and approving IDPs are available through the AgLearn Help on the main menu.

AgLearn Home Dashboard Record of Learning Learn ▼ My IDP – FY2024 SF-182 ▼ Reports AgLearn Help ▼

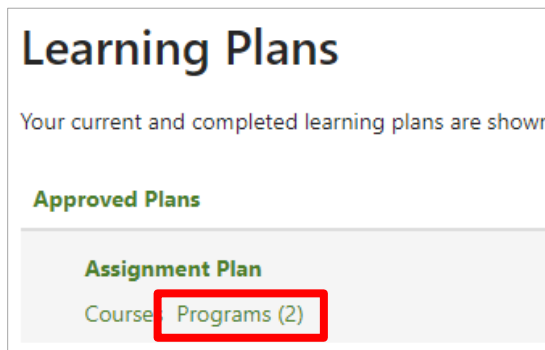
Exhibit 2. Accessing Conservation Planner Program.

Once the Conservation Planner Program has been added to the Individual Development Plan (IDP) or Assignment Plan, the Program and associated courses can be accessed multiple ways. Below is the main way to access the Program.

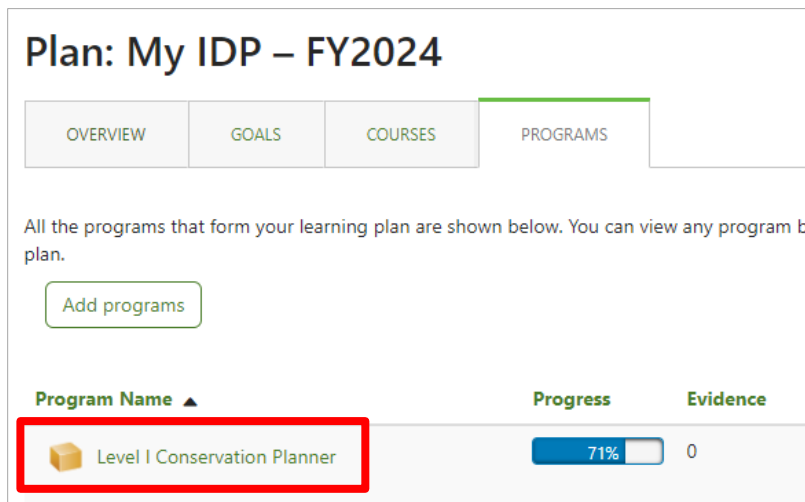
1. Log in to AgLearn.
2. Under the main menu at the top, select “My IDP – FY20XX”.



3. Under “Learning Plans”, select “Programs”.



4. Select the appropriate Conservation Planner Program.



- This opens a screen listing the required courses. Completed courses will show a Status of 100%. Incomplete courses will show a Status of <100% (0% shown below).

Course name	Actions	Status
Introduction to the Field Office Technical Guide	Launch course	100%
Cultural Resources Training Series, Part 1	Launch course	100%
Environmental Evaluation Webinar Series No. 1: Primer on NRCS Environmental Compliance	Launch course	100%
Environmental Evaluation Webinar Series No. 2: Documenting the Environmental Evaluation	Launch course	100%
Overview of Water Quality for Conservation Planners	Launch course	100%
Nitrogen Management and Concerns - No. 2	Launch course	100%
Sediment Management for Water Quality - No. 4	Launch course	100%
Water Bodies - No. 5	Launch course	0%

- Carefully review all sections to determine which courses are required. Complete requirements.

AND

Basic Soil Survey Training - At least one must be completed
Any one course in this set must be completed.

Course name

Using Basic Soil Survey Information in Conservation Planning

Basic Soils & Web Soil Survey to Interpret Land Capabilities & Limitations (State Instructor led)

- To take a course, select “Launch course”.

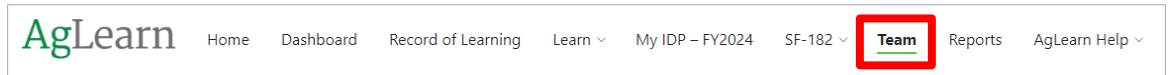
Sediment Management for Water Quality - No. 4	Launch course	100%
Water Bodies - No. 5	Launch course	0%

Exhibit 3. Entering a completion date for completed courses.

These instructions are only to be followed when the course or course equivalent was completed by the employee and AgLearn does not show the course complete. Contact the ARC with questions on course equivalency.

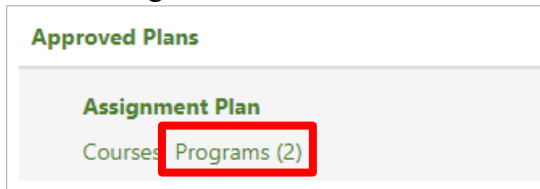
Supervisors are able to certify courses as complete in AgLearn. The course must be in the employee’s IDP or Assignment Plan. Once a course is in either plan, the supervisor will complete the following steps.

1. Select the "Team" tab on the top menu.

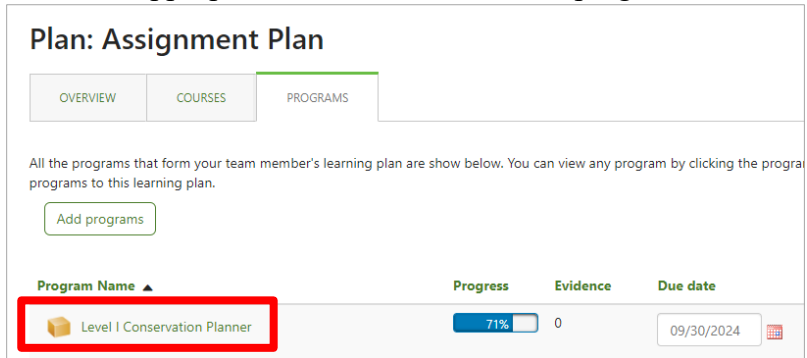


2. Select "Plans" beneath the team member's name.
3. Find the course to grant credit.

- Select “Programs”.



- Select the appropriate Conservation Planner program.



- Scroll to appropriate course.

Course name	Actions	Status	Mark complete
Introduction to the Field Office Technical Guide	Launch course	100%	<input checked="" type="checkbox"/>
Cultural Resources Training Series, Part 1	Launch course	100%	<input checked="" type="checkbox"/>
Environmental Evaluation Webinar Series No. 1: Primer on NRCS Environmental Compliance	Launch course	100%	<input checked="" type="checkbox"/>
Environmental Evaluation Webinar Series No. 2: Documenting the Environmental Evaluation	Launch course	100%	<input checked="" type="checkbox"/>
Overview of Water Quality for Conservation Planners	Launch course	100%	<input checked="" type="checkbox"/>
Nitrogen Management and Concerns - No. 2	Launch course	100%	<input checked="" type="checkbox"/>
Sediment Management for Water Quality - No. 4	Launch course	100%	<input checked="" type="checkbox"/>
Water Bodies - No. 5	Launch course	0%	<input type="checkbox"/>
State-Specific Training & Required Deliverables - Level I Conservation Planner	Launch course	0%	<input type="checkbox"/>

4. In the “Mark complete” column at the far right, click in the box.

Course name	Actions	Status	Mark complete
State-Specific Training & Required Deliverables - Level I Conservation Planner	Launch course	0%	<input type="checkbox"/>

5. Under “Course completion”, enter the date the course or course equivalent was completed and comments to document the reason for approval. Select “Save changes”.
 - For courses previously completed, enter January 1, 2020, or another date after the course was completed. Example for January 1, 2020, shown below.

1. Enter January 1, 2020, in “Date completed.”
2. Type “Completed prior to 1/1/20” in “Comments”.

Course completion

Date completed January 1 2020

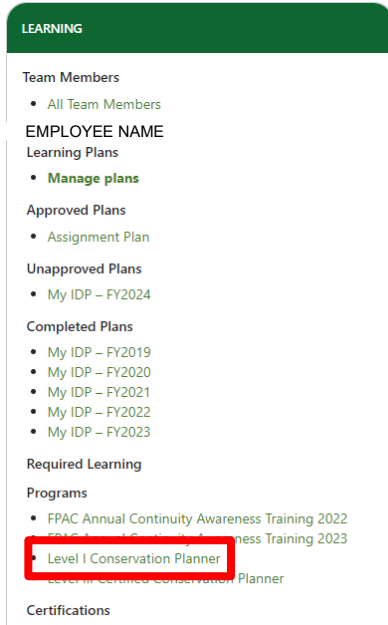
Grade

Comments Completed prior to 1/1/20

Save changes

6. To confirm course completion, open the appropriate Conservation Planner program.

- Select the program on the left side of the screen under “Learning.”



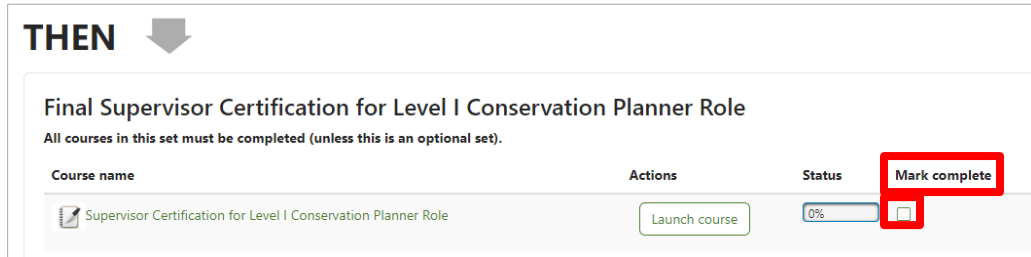
- Scroll to the course and confirm the status shows 100%.

The image shows a table titled "Required training for Level I Conservation Planner" with the subtitle "All courses in this set must be completed (unless this is an optional set)." The table has four columns: "Course name", "Actions", "Status", and "Mark complete". The "Status" column shows progress bars and percentages. The "Mark complete" column has checkboxes. The last row, "State-Specific Training & Required Deliverables - Level I Conservation Planner", is highlighted with a red box and shows a 100% status and a checked checkbox.

Course name	Actions	Status	Mark complete
Introduction to the Field Office Technical Guide	Launch course	100%	<input checked="" type="checkbox"/>
Cultural Resources Training Series, Part 1	Launch course	100%	<input checked="" type="checkbox"/>
Environmental Evaluation Webinar Series No. 1: Primer on NRCS Environmental Compliance	Launch course	100%	<input checked="" type="checkbox"/>
Environmental Evaluation Webinar Series No. 2: Documenting the Environmental Evaluation	Launch course	100%	<input checked="" type="checkbox"/>
Overview of Water Quality for Conservation Planners	Launch course	100%	<input checked="" type="checkbox"/>
Nitrogen Management and Concerns - No. 2	Launch course	100%	<input checked="" type="checkbox"/>
Sediment Management for Water Quality - No. 4	Launch course	100%	<input checked="" type="checkbox"/>
Water Bodies - No. 5	Launch course	0%	<input type="checkbox"/>
State-Specific Training & Required Deliverables - Level I Conservation Planner	Launch course	100%	<input checked="" type="checkbox"/>

Exhibit 4. Final supervisor certification for conservation planner role.

1. Supervisors will open the employee’s appropriate conservation planner program following steps 1-3 in Exhibit 3.
2. Scroll to the bottom to “Final Supervisor Certification for Level X Conservation Planner Role.” In the “Mark complete” column at the far right, click in the box.



3. Enter the completed date and save.
4. Note: The employee will automatically be enrolled in “Conservation Planner Role Recertification” course.