CONSERVATION PLANNING ACTIVITY

Forest Management Plan

DEFINITION

A site specific conservation plan that contains planned forest related conservation treatment activities for one or more resource concerns.

CRITERIA

General Requirements

The Conservation Planning Activity (CPA) documents client objectives, benchmark (current) conditions, resource concerns, alternative actions, the evaluation of alternative actions, and the client's preferred alternative.

Applicable land uses for this CPA are provided in the **DELIVERABLES** section.

The TSP will complete conservation planning steps 1 through portions of 7 of the NRCS 9 step conservation planning process as outlined in the NRCS National Planning Procedures Handbook (NPPH). The steps include identify problems and opportunities (step 1), determine objectives (step 2), inventory and analyze resources (steps 3 and 4), formulate and evaluate alternatives (steps 5 and 6) and document client's preferred alternative(s) (step 7).

The TSP will maintain an ongoing record of CPA related discussions with the client. The TSP will document on a conservation assistance notes form (CPA-6) or other format that includes all components of the CPA-6 (client objectives, dates of assistance, all parties present, notes of significant assistance provided, alternatives considered, and decisions reached). Any correspondence between the TSP and the client related to the development of the CPA will be included in the record.

1. IDENTIFY PROBLEMS AND OPPORTUNITIES (Step 1)

   Visit with the client to identify and document existing, potential, and perceived natural resource problems, opportunities, and concerns in the planning area. The identified problems and opportunities as well as the client objectives guide the remainder of the planning process and are the basis for the purpose and need for action that are documented in NRCS Environmental Evaluation.

2. DETERMINE OBJECTIVES (Step 2)

   Determine the client's planning objectives by developing an understanding with the client of the desired future condition for the planning area, as compared to the existing conditions. This is the purpose for the client to take action. It includes the desired resource uses, resource problem reductions, onsite and offsite ecological protection, and production concerns. As resources are inventoried, their interactions are analyzed, and alternatives formulated, objectives may need to be reviewed and modified.

3. INVENTORY RESOURCES (Step 3)

The resource inventory documents benchmark (current) conditions of natural resources in the CPA planning area. The specific inventory documentation requirements and resource concerns to be evaluated are provided in the **DELIVERABLES** section. Inventory documentation required may include such items as:

- Current agricultural or forestry practices and management activities,
- Environmentally sensitive areas (e.g., wetlands, sinkholes, wellheads, gullies, ditches, etc.),
- Soils, climate, topography,
- Equipment and technology currently being used by the landowner,
- Highly erodible land or wetland compliance determinations associated to the planning land unit,
- Pertinent Federal, State, Tribal, and local laws, regulations and policy, and
- Special Environmental Concerns that may be applicable on, or in the vicinity of the planning area. The special environmental concerns to be inventoried include, at a minimum, the following:
    - Clean Air Act
    - Clean Water Act / Waters of the U.S.
    - Coastal Zone Management
    - Coral Reefs
    - Cultural Resources / Historic Properties
    - Endangered and Threatened Species
    - Environmental Justice
    - Essential Fish Habitat
    - Floodplain Management
    - Invasive Species
    - Migratory Birds / Bald and Golden Eagle Protection Act
    - Natural Areas
    - Prime and Unique Farmlands
    - Riparian Area
    - Scenic Beauty
    - Wetlands
    - Wild and Scenic Rivers

  NRCS state offices may identify additional state, tribal, or local laws, regulations or ordinances that must routinely be evaluated.

Use NRCS data available in the Field Office Technical Guide (FOTG) Sections 1 and 2, plus Web Soil Survey (WSS) and other helpful resources to support the inventory.

Document any previously installed or implemented conservation practice(s) and indicate whether the existing practice(s) is currently accomplishing the conservation practice purpose indicated in the NRCS conservation practice standard in the state's FOTG, Section 4.

4. ANALYZE RESOURCE DATA (Step 4)

Analysis of a resource inventory will document benchmark (current) conditions of natural resources in the CPA planning area. A comparison between benchmark (current) conditions and planning criteria/quality criteria (desired future conditions) will help identify resource concerns. Analysis and documentation requirements are provided in the **DELIVERABLES** section.

Analysis documentation will include at a minimum:

- NRCS resource concerns identified,
- Benchmark conditions,
- (as applicable) Results of assessment tools, and
- A description of the need for conservation actions.

5. FORMULATE ALTERNATIVES (Step 5)

At a minimum two alternatives will be developed. The first will be a no-action alternative in which current management activities are assumed to continue. The second will be an action alternative identifying a conservation practice or a system of conservation practices and management activities to address CPA identified resource concern(s). Additional action alternatives may be developed to identify different ways of achieving client objectives. Alternatives may include an appropriate mix of structural conservation practices, such as terraces, dams, and waterways; nonstructural conservation practices, such as crop residue management, or livestock exclusion. Each action alternative must meet the client's objectives and comply with Federal, State, Tribal, and local laws, regulations, and policies.

When providing technical assistance to existing organic operations, ensure recommended conservation practices and management activities are consistent with the client's Organic System Plan (OSP) and the National Organic Program (NOP) regulations. If client's objective is to transition to organic production, use CPA 138 – Conservation Plan Supporting Organic Transition.

6. EVALUATE ALTERNATIVES (Step 6)

The TSP will evaluate the alternatives and describe the environmental effects associated with each alternative. The analysis will be reviewed with the client. The analysis should provide the client with the information needed to select their preferred alternative.

When evaluating the no-action alternative, the TSP will provide information to the client on what will occur if current management activities continue and no new practices are implemented.

When evaluating conservation practice effects, the short and long-term effect on natural resources and the applicability and effect on special environmental concerns identified in Step-3 (Resource Inventory) must be documented. Include recommendations that will avoid or mitigate any adverse effects on soil, water, air, plants, animals (including livestock, fish, and wildlife), energy, or human concerns, as well as on special environmental concerns.

After analyzing the proposed alternatives, prepare the following documentation, at a minimum:

- Documentation of alternatives discussed (CPA-6, correspondence), (as applicable)
- Results of assessment tools,
- Considerations to avoid or mitigate any adverse effects on those unique resources and other soil, water, air, plants, animals (including livestock, fish, and wildlife), energy, or human concerns, as well as on special environmental considerations, and

- An evaluation of the alternative's effects on the client's land use, capital, labor, management, risk, profitability, and public health and safety.

7. CLIENT'S PREFERRED ALTERNATIVES (Step 7)

   The TSP will present all alternatives to the client and document the client's preferred alternative.

DELIVERABLES

Two copies (hardcopy or electronic) of the plan must be developed—one for the client and one for the NRCS field office. At the client's request, Technical Service Provider (TSP) can deliver NRCS's copy to the NRCS Field Office. The client's copy must include the maps and preferred alternative, unless the client requests other documents from this section. The NRCS copy must include all items identified herein. An additional electronic copy of the plan should also be uploaded on NRCS Registry.

The plan is developed at a property level, for all forested parcels on a property where forestry-related conservation activities are being considered to address resource concerns. The plan includes planned combinations of structural practices, management activities, and/or land management practices for a client to address one or more resource concerns on nonindustrial private forestland where forestry-related conservation activities or practices will be planned and applied. The plan documents long-term goals (Desired Future Condition, DFC), practices, alternatives, and strategies for forest development to provide for intended future uses.

This conservation planning activity applies to nonindustrial private forest land, and in some cases other land uses where conversion to forestry is being considered, or where agroforestry practices are used. Associated agricultural land may be included when forestry activities are being considered.

The plan must meet the Natural Resource Conservation Service (NRCS) planning criteria for one or more of the following resource concerns:

- Wildlife and aquatic species
- Soil erosion
- Soil condition
- Water quality
- Plant condition

The plan may include as appropriate, but is not limited to, the conservation practices listed below:

Code	Practice Name
311	Alley Cropping
379	Multi-Story Cropping
380	Windbreak/Shelterbelt Establishment
381	Silvopasture
383	Fuel Break
384	Woody Residue Treatment
391	Riparian Forest Buffer
394	Firebreak

472	Access Control
490	Tree/Shrub Site Preparation
612	Tree/Shrub Establishment
650	Windbreak/Shelterbelt Renovation
654	Road/Trail/Landing Closure and Treatment
655	Forest Trails and Landings
660	Tree/Shrub Pruning
666	Forest Stand Improvement

The practices listed above are the primary NRCS forestry and agroforestry practices, but additional conservation practices may be needed to meet all the client's objectives. For all other practices, the practice shall be documented for the planned amount, the fields (or stands) where the practice is to be applied, and the planned year of application. Below are examples of additional conservation practices that may be planned on forestland:

Code	Practice name
314	Brush Management
315	Herbaceous Weed Treatment
327	Conservation Cover
338	Prescribed Burning
342	Critical Area Planting
382	Fence
395	Stream Habitat Improvement and Management
560	Access Road
578	Stream Crossing
580	Streambank and Shoreline Protection
595	Integrated Pest Management
643	Restoration of Rare or Declining Natural Communities
644	Wetland Wildlife Habitat Management
645	Upland Wildlife Habitat Management
647	Early Successional Habitat Development/Management

Practices beyond the basic forestry/agroforestry practices may be included in a plan but the design and implementation of these will be conducted by an appropriately certified TSP for those practices.

1. Cover Page

Cover page reporting the technical services provided by the TSP. Cover page(s) must include the following:

a. Client information: Name, farm bill program, contract number, and contract item number.
b. TSP information: name, address, phone number, email, TSP number, TSP expiration date; and county of service.
c. CPA information: CPA name, land use(s), units, and amount.
d. Statement by TSP that services provided:
    i. Comply with all applicable Federal, State, Tribal, and local laws and requirements.

   ii. Meet applicable program requirements and recommended planned practices are based on NRCS conservation practice standards and specifications.
   iii. Are consistent with and meet the conservation program goals and objectives for which the program contract was entered into by the client.
   iv. Incorporate alternatives that are both cost effective and appropriate to address the resource issues.

e. TSP certification statement: signature and date.
f. Client confirmation: signature and date.
g. Block for NRCS reviewer acceptance (to be completed by NRCS): signature and date.

2. Conservation Assistance Notes and Correspondence

a. Conservation Assistance Notes (NRCS-CPA-6) or other format that includes all components of the CPA-6.
   i. Document the client’s objectives, which may include these considerations and others:
      1. Forest stand improvement
      2. Wildlife habitat/riparian areas
      3. Recreation
      4. Agroforestry
      5. Expected income
      6. Pollinator habitat and protection
   ii. Document each interaction with the client, include notes and results of that interaction, date, and initials of the TSP.
   iii. Document each site visit, activity in the field, results of each site visit, all parties present, date, and initials of the TSP.

b. Any correspondence between the TSP and the client relating to the development of the CPA.

3. Maps

a. Maps to include, but not be limited to:
   i. General location map of the planning area showing access roads to the location.
   ii. Forest management plan base map (this may consist of several maps to account for the entire planning area). This map will specifically include:
      - Boundary lines for the Planning Land Units (PLUs) with labels (name, number, or both). A PLU is a unique geographic area, defined by a polygon, which has common land use and is owned, operated, or managed by the same client or clients. The PLU is the minimum unit for planning.
      - Acreage for each PLU.
      - Forest stand boundaries
      - Unique identifying code for each forest stand.
      - Location of sensitive resources and setbacks, if applicable.
      - Location of planned and applied conservation practices.
      - If the planning area includes nonprivate lands, such as Federal or Tribal lands, a land status map must be included to display land ownership categories (Private, State Trust, BLM, Tribal, and Territorial, etc.)

iii. Resource maps of the PLU
   - Soils maps, and other resource maps as applicable.
   - An existing Wetland delineation map, if any.

b. At a minimum, all maps developed for the CPA will include:
   i. Title block showing:
      - Map title.
      - Client's name (individual or business).
      - Prepared with assistance from USDA – Natural Resources Conservation Service.
      - Assisted By [TSP planner's name].
      - Name of applicable conservation district, county, and State.
      - Date prepared.
   ii. Map scale.
   iii. Information needed to locate the planning area, such as geographic coordinates, public land survey coordinates, etc.
   iv. North arrow.
   v. Appropriate map symbols and a map symbol legend on the map or as an attachment.

4. Conservation Plan

A record of the client's forest management goals, which includes:
   i. PLU label (name, number, or both).
   ii. Forest stands, including client objectives and desired future condition for each stand.
   iii. NRCS conservation practice name and code for applied and planned practices required for the system.
   iv. Estimated amount planned or applied.
   v. Brief description of the planned conservation practices (practice narratives).
   vi. Dates the planned practices are scheduled to be implemented. As needed, applicable "Conservation Practice Overview" sheets or other prepared material.
   vii. Recommended forest management activities, including practice implementation, maintenance, and/or monitoring for each forest stand, with a brief description of each.
   viii. Recommended date (year) to implement the practice(s), and/or to conduct maintenance/monitoring activities.

5. Resource Inventory and Assessment Documentation

a. Inventory information or descriptive material will be used to complete property-level Template sections for the following elements, where applicable—
   i. Property description
   ii. Property history
   iii. Special sites and social considerations
   iv. Air, water, and soil protection
   v. Fish, wildlife, and biodiversity
   vi. Protected animal and plant species
   vii. Forest products

- viii. Recreational uses
- ix. Aesthetic quality
- x. Grazing practices
- xi. Agroforestry
- xii. Forest health, including invasive plant species
- xiii. Archeological, cultural, and historic sites
- xiv. Wildfire risk reduction
- xv. Prescribed fire
- xvi. Carbon sequestration
- xvii. Forests of Recognized Importance (where landowners wish to align with American Tree Farm standards)
- xviii. Management of forest resources

b. A basic stand-level summary, for each stand, will include:
- i. Forest type
- ii. Dominant and codominant tree species
- iii. Basal area
- iv. Stocking
- v. Description of stand health where observations indicate concerns for insects, disease, fire fuels, invasive plants, mortality, poor crown ratios, impacts of past management (e.g. high-grading), etc.
- vi. Tree growth potential based on existing information such as soil interpretations or site index
- vii. Regeneration, if pertinent to management recommendations
- viii. Other important stand attributes as determined by the TSP

c. If conditions at the stand level warrant a more detailed description than appears in the property-level assessment, due to significant resource concerns or because they affect stand management recommendations, include the information in the Stand Level Information section of the "Managing Your Woodlands" Template. Describe benchmark (existing) conditions, past conditions, and any resource concerns or limitations, if relevant, associated with:
- i. Protected species and cultural resources
- ii. Adjacent stand or ownerships that present opportunities or limitations to management options
- iii. Recreation uses by the landowner, if any
- iv. Access to the stand and conditions of roads, trails, landings, and stream crossings, and their condition
- v. Soil descriptions including relevant soil interpretations
- vi. Physiography, including slope, topography, and aspect
- vii. Streams, wetlands, ponds, and lakes
- viii. Past management, harvesting, natural disturbance events, and land use history
- ix. Grazing practices
- x. Potential for carbon sequestration (optional)
- xi. Fish and wildlife species and habitat elements
- xii. Risk of insect and disease infestation
- xiii. Noxious and invasive plant species
- xiv. Reforestation and afforestation opportunities
- xv. Prescribed burning opportunities (optional)
- xvi. Wildfire risk (surface and crown fires)

xvii. Other important features as determined by the TSP

d. For each stand, complete Template sections on Forest Management Activities to include:
   i. Document the Desired Future Condition (DFC) for each stand at maturity, including narrative descriptions of what the stand will look like to the client. Describe the use of natural or artificial regeneration techniques, silvicultural systems, harvesting systems, and future monitoring that will be used to achieve the DFC.
   ii. Alternatives for achieving the DFC. Document the effect of each alternative on resource concerns identified during the resource inventory.
   iii. The no-action alternative, which uses benchmark conditions with projections of stand development and other changes in condition that would occur if management currently practiced by the client continued through the planning period (generally ten years for a forest management plan).

References

USDA Natural Resources Conservation Service. National Planning Procedures Handbook. https://directives.sc.egov.usda.gov/viewerFS.aspx?hid=44407

USDA Natural Resources Conservation Service. Field Office Technical Guide. https://efotg.sc.egov.usda.gov/#/

USDA Natural Resources Conservation Service. National Environmental Compliance Handbook. https://directives.sc.egov.usda.gov/viewerFS.aspx?hid=39467

USDA Natural Resources Conservation Service. Cultural Resources Handbook. https://directives.sc.egov.usda.gov/viewerFS.aspx?hid=42752

USDA Natural Resources Conservation Service. National TSP Website. https://www.nrcs.usda.gov/wps/portal/nrcs/main/national/programs/technical/tsp/

USDA Natural Resources Conservation Service. National TSP Resources. https://www.nrcs.usda.gov/wps/portal/nrcs/detail/national/programs/technical/tsp/?cid=nrcseprd1417414

USDA Natural Resources Conservation Service. Forestry Inventory Methods, Technical Note No. 190-FOR-01.

American Tree Farm System/Forest Stewardship/USDA Natural Resources Conservation Service. “Managing Your Woodlands: A template for your plans for the future” National Joint Management Plan Template. https://www.nrcs.usda.gov/wps/PA_NRCSConsumption/download?cid=nrcseprd1361475&ext=pdf

American Tree Farm System/Forest Stewardship/USDA Natural Resources Conservation Service. “A Guide for Foresters and other Natural Resource Professionals on using: Managing Your Woodlands: A template for your plans for the future”. https://www.nrcs.usda.gov/wps/PA_NRCSConsumption/download?cid=nrcseprd1361473&ext=pdf

American Tree Farm System/Forest Stewardship/USDA Natural Resources Conservation Service. “A Guide for Landowners on using: Managing Your Woodlands: A template for your plans for the future”. https://www.nrcs.usda.gov/wps/PA_NRCSConsumption/download?cid=nrcseprd1361474&ext=pdf