

Iowa Bulletin: 190-24-1**Date:** 11/03/2023**Subject:** ECS – Fiscal Year (FY) 2024 Conservation Planning

Purpose: To provide guidance on conservation planning for FY 2024.

Expiration Date: September 30, 2024

Background: The National Planning Procedures Handbook (NPPH) is the primary resource for guiding the Natural Resources Conservation Service (NRCS) planning process. This bulletin provides guidance on conservation planning, resource concern selection and evaluation, conservation planning documentation requirements, and financial assistance.

Explanation:

Conservation Planning

The 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. The [National Planning Procedures Handbook](#) (NPPH) provides guidance on conservation planning for planners. The [National Resource Concern List and Planning Criteria](#) (found in Section 3 of the Iowa Field Office Technical Guide) is the official list of NRCS resource concerns and planning criteria used to determine resource treatment levels using the conservation planning process. Planning Criteria states the minimum level of treatment required to address a given resource concern.

Conservation planning is dynamic, progressive, and adaptive. Initially, a client may 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. Developing and building relationships through onsite visits is an integral part of conservation planning. These visits and relationships are especially important to fully understand the landscape, resources, and human values involved in the conservation planning process.

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 field visits and conversations with the client, the conservation planner and client determine which resource concerns will be evaluated.

Note: Some programs, such as the Conservation Stewardship Program (CSP) and the Conservation Reserve Program (CRP), define the minimum resource concerns to be evaluated.

Decisions will be based on the client's objectives, observations made on-site during the inventory process, local, state, and national conservation priorities, and conservation program requirements.

A field visit and conversation with the client is critical to developing a good inventory of the land and understanding the client's concerns. Visible soil erosion, poor plant health, nearby water features, or steep unprotected slopes are observations that can guide the planner on potential resource concerns to evaluate. The client came to us with a problem that needs to be solved, so the planner needs to evaluate resource concerns related to that problem. Additional concerns may be revealed to the planner by talking with the client and showing interest in their operation.

At a minimum, the conservation planner and client identified resource concerns must be evaluated. These identified resource concerns will be documented in the Conservation Assessment Ranking Tool (CART) for clients who are applying for federal conservation programs (e.g., CSP, CRP, Environmental Quality Incentives Program (EQIP), Regional Conservation Partnership Program (RCPP)). Additional evaluations may be completed to gain a better understanding of the cumulative impacts on the environment.

Planners must provide accurate data for CART data entry to get accurate answers. CART can only make determinations based on the information entered by the planner. Because written guidance cannot cover every contingency, planners are required to use their knowledge, sound judgment, and the highest ethical standards in their decision making.

Planners evaluate resource conditions to determine if they meet minimum acceptable condition levels as established by the National Resource Concern List and Planning Criteria. To streamline the resource concern assessment process, CART is the primary assessment tool to document planning criteria for conservation program planning purposes. To be consistent, **conservation planners must follow the guidance in the FY24 Iowa CART Assessment Resource Tool (ICART) to evaluate resource conditions.** Specific assessment tools may be required to answer assessment questions in CART.

When using assessment tools outside of CART (e.g., In-Field Soil Health Assessment (IFSHA), Pasture Condition Score (PCS), Wildlife Habitat Evaluation Guide (WHEG), etc.), Planning Land Units (PLUs) with similar characteristics may be evaluated as one representative unit to increase assessment efficiency. PLUs will not be merged in Conservation Desktop (CD), but CART data entry may be the same for multiple PLUs. Planners may group land units with similar characteristics based on best professional judgement. If additional guidance is needed, refer to the Area Resource Conservationist (ARC). Document the decision and reasoning for grouping in the CPA-6 Notes, assessment tool, or ICART documentation.

All CART results must be reviewed by an experienced planner to determine if the results match planner's expectations. If the assessment results (meeting or not meeting the threshold) do not match planner's expectations, the planner may complete an override. If the planner completes an override for a resource concern, documentation of the assessment tool must be included in the justification (e.g., Sheet and Rill Erosion must have RUSLE2 completed for documentation. The override comment must include the planning soil and resulting soil loss).

Conservation Planning and Documentation Requirements

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

At a minimum, field offices will document the following information:

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 the environmental evaluation (including all Special Environmental Concerns (SECs)) and existing practices (functional or non-functional).
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 and all SECs.
 - If Conservation Practice Standard Nutrient Management (Code 590) or 590 enhancements are planned, the Nutrient Management Screening Tool must be completed.

Several options are available to planners for documentation, including, but not limited to, CPA-6 Assistance Notes, CPA-52, planning maps, worksheets, assessment tools, and ICART.

Reminder: Planners must follow the guidance in the FY24 ICART to evaluate resource conditions.

An environmental evaluation is required for all assistance and planning activities provided by NRCS. The environmental evaluation must be started as early in the planning process as possible and will be developed simultaneously with the plan. This can reduce delays in decision making and prevent potential conflict with environmental laws, regulation, and agency policy. The environmental evaluation will be documented on the CPA-52 (dated April 2023) to (1) show existing resource conditions (all assessed resource concerns), no action alternative, preferred alternative, and effects of alternatives (i.e., CPA-52 Sections F, H, and I), and (2) document compliance with the National Environmental Policy Act (NEPA). All SECs must be evaluated for existing conditions, no action impacts, and preferred alternative impacts (i.e., CPA-52 Sections G and J).

Staff must follow [Iowa Instruction 190-397](#) Threatened and Endangered Species Guidance. The Threatened and Endangered Species Baseline Assessment will be completed. If additional assessments are required, field office staff will complete the applicable assessments. If consultation from US Fish and Wildlife Service is needed, field office staff will initiate the process immediately.

Staff must follow the [Iowa NRCS Cultural Resources Methods](#), which is found in the Field Office Technical Guide (FOTG), Section 2, Cultural Resources Information. The Cultural Resources Flowchart will be completed by staff who have the appropriate cultural resources training. If all the conservation practices will have little to no effect on cultural resources per

Appendix A, the process is complete. If any conservation practice has potential to affect cultural resources, background and field investigations for the area of potential effect (APE) must be completed. If indicated through the flow chart process, field office staff will submit Geoportal Cultural Resources Requests to the State Archaeologists. The State Archeologists will review the requests to determine the next steps. When the State Archaeologists determine that consultation with State Historic Preservation Office (SHPO), Office of the State Archaeologist (OSA) and tribes is required, consultation will occur.

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 the planned practices so the client can make informed decisions for their operation.

When the client decides to implement an alternative, the planner will prepare the necessary documentation. Documentation includes preparing the conservation plan (in CD) and obtaining signatures, completing the CPA-52, and completing any necessary consultations or additional NEPA documents.

[Iowa Instruction 180-398](#) Electronic Field Office Business Tools Management provides Iowa policy for using CD and CART, including standard naming conventions for CD Case Files, Practice Schedules (conservation plans), and CART Assessments. Every employee is expected to follow this policy.

Financial Assistance

Financial assistance applications must start with a good conservation plan. After the conservation plan has been developed and the client chooses to implement the plan with financial assistance, the following will be completed.

For state funded applications managed in NRCS offices (e.g., Iowa Financial Incentive Program (IFIP), Resource Enhancement and Protection (REAP), Water Quality Initiative (WQI)), conservation planning must be completed as outlined above. Planned practices will be entered into CD to capture conservation planning efforts, conservation effects, and workload, and report conservation progress. CART data entry is not required.

For CRP applications, conservation planning must be completed as outlined above. Staff will follow [Iowa Instruction 180-397](#) CRP Conservation Plan Documents to complete CRP conservation plans and supporting documents.

For NRCS conservation program applications (e.g., CSP, EQIP, RCPP), specific program guidance (e.g., timelines, payment rates, payment limitations, etc.) is issued separately and must be followed. Conservation planning must be completed as outlined above and as follows:

1. The following must be completed before ranking applications:
 - All SECs must be evaluated for existing conditions, no action impacts, and preferred alternative impacts.

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- All applicable Threatened and Endangered Species assessments must be completed. If consultation from the US Fish and Wildlife Service is needed, field office staff will initiate the process.
 - The cultural resources process will be completed, except consultation (if required).
 - If permits are required but not obtained, the permits must have a high likelihood of approval. List all required permits on the CPA-52 (e.g., U.S. Army Corps of Engineers (USACE) 404 permit, Iowa Department of Natural Resources (IDNR) floodplain permit, and county floodplain permit) in Section K and state the permits must be approved before construction starts.
 - A reasonable financial incentive estimate (list of practices and estimated planned amounts).
2. The following must be completed before obligating applications:
- Consultation for Threatened and Endangered species must be completed.
 - The entire cultural resources review procedures (including consultation) must be completed.
 - The CPA-52 must be completed and signed.

Resources

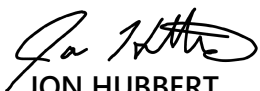
The [Ecological Sciences SharePoint](#) site will house documents and links for planners to use and reference in the FY24 Conservation Planning folder.

This site will include:

- FY24 ICART
- Nutrient Management Screening Tool
- Link to CPA-52 worksheet and instructions
- Link to NPPH
- Link to National Resource Concern List and Planning Criteria

Additional documents or links may be added as needed.

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



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Attachment: FY24 Iowa CART Assessment Resource Tool (ICART)