

Oregon Appendix 3 - OR RMS Plan Requirements and Roles & Responsibilities

RMS Plan Requirements:

In Oregon, to meet the requirements of “Conservation Planning Course Part 3: Module 9” planners shall independently complete and submit a conservation plan to SRC or Designee, that meets [NPPH Part 600.31](#) and the following requirements:

- ☐ At least two land uses
 - ☐ At least one field per land use.
- ☐ Any items evaluated by *Exhibit 5 – OR Worksheet to Evaluate Conservation Plans* that are not included in above description.
- ☐ Any items on Oregon’s 6-part case file checklist pertaining to conservation planning.

Roles & Responsibilities:

1. Planner shall:
 - a. Work with supervisor to determine client and land uses for RMS plan.
 - b. Work with assigned mentor for scheduling site visits and client discussions as needed to ensure mentor can assess communication and planning skills.
 - c. Independently complete RMS plan that meets the requirements in this Exhibit.
 - d. If you don’t have I&E JAA for the practices, review RMS plan with mentor or BRC before it is presented to the client so that I&E for included practices can be documented.
 - e. Submit the following documents to the SRC or their designee:
 - i. Completed RMS plan
 - ii. Oregon Exhibit 5 – OR Worksheet to Evaluate Conservation Plans, signed by mentor.
 - iii. Completion certificates from AgLearn for Level 1 and Level 2
 - iv. Level 3 Certified Conservation Planner Verification with all portions completed except Items No 2 and 10
 - f. Make it a priority to resubmit the plan with corrections if submitted RMS plan does not meet policy. If the resubmitted plan does not meet requirements, the planner will be required to submit a new RMS plan to obtain certification.
 - g. Once all criteria for Level 3 certification have been met and supervisor has verified NRCS-NHQ-00023 in AgLearn email SRC or designee Level 3 completion certificate and excel version of “Record of Learning” from AgLearn.
2. Supervisor shall:
 - a. Work with planner to determine client and land uses for RMS plan.
 - b. Work with aspiring planner and BRC-T to assign a mentor with minimum level 3 planner designation.
 - c. Verify and confirm all training requirements have been marked complete in AgLearn for all levels of conservation planner and ensure planner knows how to upload Supervisor Certification to AgLearn.
 - d. Be responsible for following up with planner on any concerns or additional training needs.
3. Mentor shall:
 - a. Work with planner to attend site visits, as appropriate, and client discussions to assess communication and planning skills. At a minimum, attend the site visit where the alternatives analysis is discussed with the client.

- b. Review RMS plan with planner to ensure all documents are present and meet policy requirements.
 - c. Be an active Level 3 or 4 planner.
 - d. Obtain their supervisor's approval to act in this role.
 - e. Provide planner with ongoing feedback and support during NRCS 9-steps of conservation.
 - f. Accompany planner to the planning site to meet with client and to field-review RMS plan to ensure all components of Oregon Exhibit 5 match the resources of the evaluated site and meet client objectives.
 - g. Sign Oregon Exhibit 5, certifying the planner has demonstrated a sound knowledge of NRCS conservation planning procedures and the knowledge and communication skills required to independently develop RMS conservation plans.
4. BRC shall:
- a. Work with supervisor and aspiring planner to obtain a mentor, at the discretion of the Basin Team Leader.
 - b. Support planner towards completion of training and RMS plan.
 - c. Provide planner with ongoing feedback and support during NRCS 9-steps of conservation planning.
 - d. Potentially be a mentor at the discretion of the Basin Team Leader and Supervisor.
5. SRC or Designee shall:
- a. Receive completed RMS plan and review for adherence to Oregon Exhibit 5 and planning policy. Assessment will be documented on Oregon Exhibit 5.
 - b. Review all documentation and provide written feedback and next steps to planner, BRC, and supervisor.
 - c. Coordinate directly with BRC and BTL on trends or individual conversations, as needed.
 - d. Enter planner into national conservation planner database upon receipt of level 3 certificate and excel version of "Record of Learning" from AgLearn.
 - e. Send planner certificate and notify BRC and Supervisor.