
Oregon Instruction for - Title 180 – General Manual
PART 409 – Conservation Planning Policy
Subpart B – Conservation Planner Designation Levels
June 2025

409.10 Conservation Planner Designation Levels and Authorities

A. Level 1 Conservation Planner

1. The level 1 conservation planner has completed the required courses to meet the following core competencies:
 - a. Conservation Planning Basics
 - For partners that do not have or need Business Tool access, Field Office Supervisor shall send email to partner and Oregon AgLearn Coordinator stating they do not have or need access to Business Tools. Upload email to AgLearn as "Other evidence."
 - b. Field Office Technical Guide Basics
 - c. Conservation Communication Basics
 - d. Cultural Resources Basics
 - e. Environmental Evaluations Basics
 - f. Soils Basics
 - g. Water Quality Basics
 - h. State-Specific Requirements
 - Oregon AgLearn Coordinator shall mark this complete after planner attends and participates in at least **one** Inventory and Assessment Training delivered by the SRC or their designee(s).
 - i. Verification
2. **Appendix 1**, Figure 409E-1 lists the required **courses** to meet these core competencies.
3. The level 1 conservation planner can determine client objectives, conduct resource inventories, run assessment tools, and develop alternative solutions to address resource concerns for planning areas.
4. The level 1 conservation planner's work must be reviewed and approved by a level 3 or 4 conservation planner before the final discussion of

alternatives with the client.

5. The level 1 conservation planner may add their validation to the planner finalization section of environmental evaluations they help prepare. However, a level 3 or 4 conservation planner must also validate the planner finalization section to indicate concurrence.
 - Consult 190 GM Part 410, Subpart A, for agency policy on who should approve the environmental evaluation as the responsible federal official.

[Oregon Supplement 190 GM Part 410-A](#): The Oregon STC delegates the following conservationists as RFOs for compliance with the provisions of NEPA: All of Oregon's NRCS Certified Conservation Planners that are in good standing, Basin Team Leaders, and Assistant State Conservationists.

B. Level 2 Conservation Planner

1. Level 1 conservation planner designation is a prerequisite to achieving the level 2 conservation planner designation.
2. The level 2 conservation planner has completed the required courses to meet the following core competencies:
 - a. Conservation Planning Procedures
 - b. Water Quality Fundamentals
 - c. State-Specific Requirements
 - The Oregon AgLearn Coordinator shall mark this complete after the planner attends and participates in at least **two** Inventory and Assessment Training delivered by the SRC or their designee(s).
 - d. Verification
3. **Appendix 1** figure 409E-2 lists the required **courses** to meet these core competencies.
4. The level 2 conservation planner can provide planning assistance and attain national or state level specializations.
5. Level 2 conservation planners with a specialization can sign component plans as per their specialization (i.e., Comprehensive Nutrient Management Plan).
6. Level 2 conservation planners may add their validation to the planner finalization section of environmental evaluations they help prepare. However, a level 3 or 4 conservation planner must also validate the planner finalization section to indicate concurrence.
 - a. Consult 190 GM Part 410, Subpart A, for agency policy on who should approve the environmental evaluation as the responsible federal official.
 - [Oregon Supplement 190 GM Part 410-A](#): The Oregon STC delegates the following conservationists as RFOs for compliance

with the provisions of NEPA: All of Oregon's NRCS Certified Conservation Planners that are in good standing, Basin Team Leaders, and Assistant State Conservationists.

C. Level 3 Certified Conservation Planner

1. The level 2 conservation planner designation is a prerequisite to achieving level 3 certified conservation planner designation.
2. The level 3 certified conservation planner has completed the required courses to meet the following core competencies:
 - a. Conservation Planning Procedures
In Oregon, the planner shall submit one Resource Management System (RMS) level conservation plan that meets conservation plan criteria in 180 H § 600.31 and Appendix 3 and successfully demonstrates their knowledge, skills and abilities. Successful completion of this item will be recorded in AgLearn by the State AgLearn Coordinator.
 - b. Cultural Resources Evaluation Fundamentals
The Oregon AgLearn Coordinator shall mark this complete after:
 - Planner attends an in-state course, OR
 - Watches CR Part 2 recording: AND accompanies and participates in a field survey alongside a Cultural Resource Specialist.
 - Environmental Evaluation Fundamentals
 - c. Conservation Compliance Fundamentals
 - d. Conservation Communication Fundamentals
In Oregon this course will not be required to obtain Level 3 Certified Conservation Planner but is highly encouraged.
 - e. Soil Health Fundamentals
 - f. Conservation Economics Fundamentals
 - g. Air Quality Fundamentals
 - h. State-Specific Requirements
The Oregon AgLearn Coordinator shall mark this complete after the planner attends and participates in at least three Inventory and Assessment Trainings delivered by the SRC or their designee(s). (Inventory and Assessment Training completed for Level 1 and Level 2 certification count towards meeting this requirement.)
 - i. Verification
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.
3. **Appendix 1** Figure 409E-3 lists the required **courses** to meet these core competencies.
4. The level 3 certified conservation planner designation is the primary role for those regularly delivering conservation planning assistance to clients.
5. Level 3 certified conservation planners may conduct all steps of the conservation planning process without supervision for progressive

and resource management system level plans for all land uses and resource concerns common to their work area.

6. Level 3 certified conservation planners may attain a national or approved state specialization and sign component plans as per their specialization.
7. The level 3 certified conservation planner may approve or disapprove level 1 and 2 conservation planners' work and sign conservation plans to certify the plan meets client objectives and applicable NRCS policy, procedures, and conservation practice standards.
8. The level 3 certified conservation planner may validate the planner finalization section of an environmental evaluation.
 - a. NRCS-employed level 3 certified conservation planners must validate the planner finalization section of an environmental evaluation prepared by a level 1 or 2 conservation planner or non-NRCS planner to indicate their concurrence.
 - b. Consult 190 GM Part 410, Subpart A, for agency policy on who should approve the environmental evaluation as the responsible federal official.
 - [Oregon Supplement 190 GM Part 410-A](#): The Oregon STC delegates the following conservationists as RFOs for compliance with the provisions of NEPA: All of Oregon's NRCS Certified Conservation Planners that are in good standing, Basin Team Leaders, and Assistant State Conservationists.

D. Level 4 Certified Conservation Planner

1. The level 3 certified conservation planner designation is a prerequisite to achieving level 4 certified conservation planner designation.
 2. The level 4 certified conservation planner has completed the required courses to achieve the following core competencies:
 - a. Conservation Planning Procedures
 - Oregon planners can mark this complete after serving on the training cadre and successfully participating in delivering Conservation Planning, Part 2, or assisting with delivery of Inventory and Assessment Training.
 - b. Advanced Conservation Communication
 - c. Advanced Conservation Economics
 - d. Advanced Resource Concerns and Discipline Knowledge
 - Oregon planners shall email list of completed courses that include course name, source of content, date taken, and course completion certificates.
 - e. State-Specific Requirements
 - Assisting SRC or designee with reviewing two RMS conservation plans for conservation planner Level 3 certification.
- OR

- Attend and participate in Areawide Conservation Planning and submit an Areawide Conservation Plan to SRC or designee that meets the requirements of Exhibit 6.

OR

- Other Special Assignments as approved by SRC or designee.

f. Verification

3. **Appendix 1** Figure 409E-4 lists the required **courses** to meet these core competencies.
4. The level 4 certified conservation planner designation is an advanced role for those planners having the experience, knowledge, skill, and ability to address complex planning situations, train others in the conservation planning process and conduct state-level reviews of conservation plans.
5. Level 4 certified conservation planners may conduct all steps of the conservation planning process without supervision for progressive and resource management system level plans for all land uses and resource concerns common to their state.
6. Level 4 certified conservation planners may attain a national or approved state specialization and sign component plans as per their specialization.
7. The level 4 certified conservation planner may approve or disapprove level 1 and 2 planners' work and sign conservation plans to certify the plan meets client objectives and applicable NRCS policy, procedures, and conservation practice standards.
8. The level 4 certified conservation planner may validate the planner finalization section of an environmental evaluation.
 - a. NRCS-employed level 4 certified conservation planners must validate the planner finalization section of an environmental evaluation prepared by a level 1 or 2 planner or non-NRCS planner to indicate concurrence.
 - b. Consult 190 GM Part 410, Subpart A, for agency policy on who should approve the environmental evaluation as the responsible federal official.
 - **Oregon Supplement 190 GM Part 410-A: The Oregon STC delegates the following conservationists as RFOs for compliance with the provisions of NEPA: All of Oregon's NRCS Certified Conservation Planners that are in good standing, Basin Team Leaders, and Assistant State Conservationists.**

409.11 Achieving Designation

A. General

1. The State Conservationist certifies individual conservation planner designations and specializations in their state in accordance with this policy.
2. States must follow all national minimum training requirements for conservation planner designation and specializations.
 - a. Additional state requirements may be added to comply with state laws or meet special circumstances.

- b. State requirements must be included in the state's supplement to this policy.
- 3. State Conservationists may set time periods for individuals to achieve conservation planner designation roles.
 - a. For example: A Soil Conservationist will achieve the level 1 conservation planner role within 12 months, the level 2 conservation planner role within 18 months, and the level 3 certified conservation planner role within 2 years of the effective date of employment in the position. An Area Resource Conservationist will achieve the level 4 certified conservation planner role within 18 months of the effective date of employment in the position.
 - b. Supervisors shall determine appropriate timelines for planners to achieve any planner level designations based on the individual's position, duties and local conservation needs. The supervisor shall work with the employee to ensure appropriate Planning Level Program(s) is/are entered into their Individual Development Plans (IDP's).

B. Training

- 1. The State Conservationist must ensure training is provided to NRCS staff, partner employees, and technical service providers (TSP) delivering conservation planning services for the agency. This includes the following actions:
 - a. Develop a state training plan and budget for conservation planning training.
 - (1) Oregon will utilize its Training Needs Assessment process, AgLearn information, and IDPs to analyze training needs.
 - (2) The supervisor retains the primary responsibility for developing the planner's training plan and AgLearn IDP to meet the requirements of the conservation planner role they are seeking.
 - b. Ensure state training opportunities are available to all existing designated and candidate conservation planners (including partner employees, other agency employees, tribal entities, TSPs, and other private sector planners), particularly the NRCS Conservation Planning: Part 2 course.
- 2. Develop and keep current the state-specific TSP training module for conservation planning designation and recertification of TSPs (available at [TSP State-Specific Training Modules](#)).
- 3. All individuals seeking an NRCS conservation planner designation must complete the core competency training requirements in subpart E corresponding to the desired designation level.
 - a. An individual with proof of course completion as part of the national requirements for any role will not have to take the course again unless retraining is identified as an appropriate response to a deficiency. See section 409.12(C) for more guidance.
- 4. National proficiency exams listed in subpart E may be used to meet

certain course requirements for the conservation planner designations.

5. The TSP Branch chief or designee is responsible for coordinating and communicating TSP training opportunities and requirements.

C. Training Course Equivalency Requests

1. Using equivalent training courses in place of any required NRCS training courses in subpart E must be approved by the Conservation Planning Branch Chief.
2. States may request a training course equivalency approval by submitting the following information to the Conservation Planning Branch Chief:
 - a. Rationale for requesting a course equivalency.
 - b. If the course approval is for past delivered courses, future delivered courses, or both (include dates of past delivery, when available).
 - c. The agenda or curriculum of the training course.
 - d. Credentials and expertise of the course instructors or vendors.
 - e. A description of relevant materials and environments used for the requested course.
3. Upon receiving a request, the Conservation Planning Branch Chief will consult with appropriate subject matter experts to evaluate the merits of the course for conservation planner designation.
4. If the course equivalency request is approved, the Conservation Planning Branch Chief will provide a written response to the requesting state.
 - a. The requesting state must include the approved course equivalency in the state supplement under Subpart D, Section 409.30, "Reserved for State Equivalency Course List." Credit will not be granted in AgLearn until the state supplement that includes the course equivalency has been published on eDirectives.
 - b. A substitute AgLearn item may be created and used for the original course.
 - c. The requesting state must ensure that individuals who complete the training course receive credit in AgLearn using the substitute AgLearn item.
5. If the course equivalency request is not approved:
 - a. The Conservation Planning Branch Chief will collaborate with subject matter experts to provide the requesting state a written explanation of the deficiencies in the training course.
 - b. The requesting state may submit an updated course equivalency request for reconsideration to the Conservation Planning Branch Chief. This request must include an explanation of how identified

deficiencies have been addressed. The request will follow the same procedure as a new course equivalency request.

D. Recordkeeping

1. Individuals are responsible for keeping their own individual development plan or partner assignment plan updated in AgLearn to reflect conservation planning training needed and completed to maintain or increase their skill level.
 - a. The Conservation Planner Programs in AgLearn can be added to individual development plans or assignment plans and used to track trainings needed and completed for the national conservation planner designations.
2. The National Conservation Planner Database is the official record of non-TSP planners' designation levels and expiration dates.

The State Conservationist is responsible for keeping the National Conservation Planner Database updated with current conservation planner information for the state, including NRCS employees, volunteers, conservation district employees, participating state agency employees, and other partner organizations.

- (1) Updates will take place whenever changes in personnel or planner status takes place.
 - (2) Basin Team Leaders (BTLs) are responsible for informing SRC or designee of changes on a quarterly basis.
 - (3) SRC or designee will update the registry or National Conservation Planner Database on a quarterly basis.
3. When individuals have planner designations in multiple states, The NRCS Registry serves as the official record of TSP certification and expiration dates each state will manage separate records.

E. Privileges when Relocating or Working Across Multiple States

1. Although individuals designated as any of the four conservation planner roles retain their designation when relocating to another state, they may not immediately have full privileges in that state.
2. State Conservationists must establish a procedure for reviewing and assigning state conservation planner designations for individuals relocating to their state.
 - a. Oregon will honor planner roles delegated from other states and areas within the state at supervisory discretion. Planners that have fully achieved planner roles in another state will maintain roles and will be reviewed in their first year utilizing the procedures in Oregon's Quality Assurance Plan.
3. When level 3 and 4 certified conservation planners are relocated or detailed to a state where they have not yet been assigned a planner designation, their work must be reviewed by level 3 or 4 certified conservation planners who are designated in that state. The planner may need to work several months in the state before being assigned the planner designation. Once the state conservationist is satisfied that the relocated planner has sufficient

knowledge of the state to independently provide planning assistance, the planner may be assigned the full designation.

- a. Supervisors shall review planner roles delegated to employees incoming from other states within 90 days of onboarding and email the SRC or designee their concurrence of planner receiving designation in Oregon, along with employee's name, planning level and previous state. SRC or designee will update the registry or the National Conservation Planner Database accordingly.
 - b. Oregon highly encourages planners who obtained their certifications in another state to attend applicable Oregon Inventory and Assessment Trainings and Oregon-specific Cultural Resources Training.
4. Submission and review of conservation plans produced at the former duty station may be used to demonstrate qualifications at the discretion of the state conservationist.
 5. For states with training requirements that surpass national minimum requirements, conservation planners must complete those state requirements before being assigned the planner designation for that state.
 6. Individuals working in multiple states as a conservation planner must be assigned planner role designations by each State Conservationist.

409.12 Maintaining Designation

A. General

1. Levels 2, 3, and 4 conservation planners must pass a quality assurance review during a repeating 3-year period (known as the recertification cycle) to maintain their current highest conservation planner designation.
 - a. The 3-year recertification cycle starts when an individual achieves a level 2, 3, or 4 conservation planner designation.
 - b. If a planner achieves a higher-level conservation planner designation within a recertification cycle, the cycle starts over from the new designation date.
 - c. The last day of the 3-year recertification cycle is the expiration date for the planner's current highest designation. See section 409.12(C) on recertifying or suspending a planner's designation.

B. Quality Assurance Review for Planner Designations

1. The State Conservationist must establish a procedure (which may be within the state quality assurance plan) to review the conservation plans of each level 2, 3, and 4 planners at least once every 3 years.
 - a. Refer to Oregon's Quality Assurance Plan procedure.
2. Enough conservation plans must be reviewed to determine that the conservation planner has developed conservation plans that meet the NRCS planning policy and follow the procedures and guidelines listed in the National Planning Procedures Handbook (NPPH).

- a. Exhibits 5 and 6 contain sample plan evaluation worksheets for individual and areawide conservation plans, respectively. States may use these or create their own plan evaluation worksheet.
 - (1) Exhibit 5 will be utilized for evaluation of RMS Plans.
 - (2) Appendix 3 lists the requirements for meeting Oregon Conservation Planning Course Part 3.
- b. If the conservation planner's conservation plan does not adhere to the policy and guidelines in NPPH, see section 409.12(C) for guidance on suspending the conservation planner's designation.
- 3. RCS quality assurance policy and guidance can be found in 340 GM Part 404 and 450 GM Part 407.
- 4. NRCS is responsible for TSP quality assurance as found in 440 M § 504.24.
- C. Determining Recertification or Suspension of Conservation Planner Designation
 - 1. The State Conservationist is responsible for reviewing each planner's current highest designation in the state to determine if the planner's designation will be recertified or suspended.
 - a. Refer to Oregon's Quality Assurance Plan.
 - 2. Recertification
 - a. A planner will be recertified at the end of the 3-year recertification cycle if the planner demonstrates the knowledge, skills, and abilities needed to maintain the designation and any specializations by passing the conservation plan quality assurance review.
 - b. Because a Conservation Implementation Strategy or Areawide plan is a conservation plan, those may also be considered for recertification, although this option should be used sparingly and at the discretion of the SRC.
 - c. Refer to Oregon's Quality Assurance Plan.
 - 3. Suspension
 - a. A planner's designation (or specialization, if applicable) will be immediately suspended if the planner fails to pass the conservation plan quality assurance review.
 - (1) An individual may have a higher planner designation suspended while keeping a lower designation and specialization. For instance, a level 3 certified planner could have that designation suspended but maintain a level 2 conservation planner designation with a specialization if the specialization passed the quality assurance review.
 - b. Findings, corrective actions, and instructions for recertification will be documented in writing.
 - (1) The state conservationist must develop a training plan before the individual is recertified and provides conservation planning

assistance.

4. After completing the conservation plan quality assurance review, the state conservationist must update the planner's designation record in the National Conservation Planner Database to reflect the review outcome.
 - a. Planners whose designation is recertified should have their designation expiration date updated to expire at the end of the next 3-year recertification cycle.
 - b. Planners whose designation is suspended should be marked "inactive" in the database.
5. NRCS will manage TSP recertification in NRCS Registry.