United States Department of Agriculture

Natural Resources Conservation Service

TSP Orientation and Conservation Planning

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TSP Orientation and Conservation Planning

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Technical Service Provider Orientation

Course Introduction

Welcome to the Technical Service Provider (TSP) Orientation Course. This course consists of three parts.

- Part 1 is an orientation designed to answer your questions regarding the TSP Program, certification process, and basic NRCS business procedures.
- Part 2 covers fundamental NRCS policies that impact TSPs who are awarded contracts with the agency.
- Part 3 reviews the references, tools and training that TSPs will use to accomplish their work.
- Part 4 is designed to provide the TSP with an overview of the NRCS conservation planning process.

Completing the course will familiarize you with providing technical services to producers on behalf of the Natural Resources Conservation Service (NRCS). More importantly, it will point to critical information sources that, along with your skills and experience in practicing resource conservation, will help you succeed. This course has no prerequisites but it does refer to other courses and source materials that you should browse before completing the course. This course will take approximately 3 hours to complete.

The purpose of this training is to provide prospective Technical Service Providers (TSP) with the knowledge of the TSP process to be successful in:

- becoming certified
- knowing how to obtain work
- delivering a quality product
- knowing how payments are made

This program will also serve as a resource for locating individuals and resources when assistance is needed.

In addition to this training, specific certification areas or individual state law will dictate the need for additional training, which may include classroom and/or field training courses.

Course Exam

a. The exam consists of 40 questions, randomly selected from an exam question database.
b. Use a left mouse click to select the best answer.
c. You have only one chance to answer a question. Once you submit an answer, you are taken automatically to the next question. You cannot return to any question once you submit an answer.
d. You must answer 28 out of the 40 questions correctly or 70% to receive credit for the training and a certificate of completion.
e. If you do not receive at least a 70%, then must retake the course and exam in its entirety.

Tips for Success

- Spend adequate time on each slide in order to digest the information and complete all exercises in its entirety.
- Put your total focus on the course and exam questions. Do not try to take the course and exam and respond to other responsibilities.
- Select a time and place that will be free of distractions.

If you have taken the TSP Orientation and Conservation Planning course using the paper version, please send the course answer sheet to Dwayne Howard (Dwayne.Howard@wdc.usda.gov), National TSP Team Leader.

If you have any questions or comments about the course contents, please direct them to Dwayne Howard (Dwayne.Howard@wdc.usda.gov), National TSP Team Leader. Direct any questions that are specific to state policy or operations to the appropriate State TSP Coordinator.

Part One – Overview of TSP Processes and Procedures

Section 1 - Introduction

What is the NRCS Mission and Vision?

NRCS Mission: Helping People Help the Land

NRCS helps land users plan and apply integrated resource management systems that have a positive effect on the quality of the nation's natural resources, are economically and environmentally sustainable, and meet mandated requirements. NRCS helps public officials develop sound policies and plans for natural resource development and protection.

NRCS Vision: Productive Lands, Healthy Environment

NRCS is guided by an enduring vision of a Nation where use of resources is governed by a widely shared and deeply felt stewardship ethic. NRCS believes that good management of natural resources will make possible "a more abundant life for the people of the country, both urban and rural, now and for all time."

Who are TSPs and what technical tasks may they complete?

TSPs are individuals or businesses that are certified to provide conservation technical assistance on behalf of USDA. To qualify, TSPs must have the education, experience, and credentials to ensure that they are prepared to deliver high quality technical assistance in support of conservation practices within an area of expertise.

Technical assistance may include conservation planning, design, installation, and checkout of approved conservation practices which meet specific NRCS standards and specifications for each practice. NRCS provides Statements of Work that assist TSPs in meeting the "deliverables" or work products required by each practice. The TSP Website provides detailed information for the criteria needed to provide technical assistance for conservation work.

Who are the TSPs' customers?

TSP customers are agricultural producers, such as farmers, ranchers, land managers, and American Indian Tribes who are participating in USDA Farm Bill programs. TSP customers can also involve non-profit organizations, and public agencies who have a need for conservation technical assistance through NRCS agreements and contracts.

Where can TSP's locate the rules governing the Technical Service Provider Program?

The TSP Final Rule provides the TSP with the policies, procedures and requirements related to the delivery of technical assistance by individuals and entities other than NRCS. The Final Rule is located under "TSP Resources" on the TSP Website under "TSP Policy, Manuals & Rules." The document provides background and responses to public comment on the TSP Final Rule. The responses provide valuable insight into the development of current TSP policy and procedures. The TSP Final Rule itself begins on page 6845 of the Federal Register/Vol. 75, No. 29/ Friday, February 12, 2010/Rules and Regulations, 7 CFR Part 652.

NRCS strives to maintain uniformity in the application of the policies and procedures; however, state law may dictate deviations from the Final Rule. For example, some states require an

engineering license for certain land management practices. The TSP would be required to hold an engineering license in the State the TSP is practicing in prior to certification for that activity. Contact your TSP Coordinator if you have questions about specific state criteria requirements.

Section 2 – Introduction to the USDA/NRCS TSP Websites/Accessing TechReg

The TSP Website is the primary information source for the TSP Program. The TSP Website provides news releases, training sites, and certification criteria, templates, checklists and examples of conservation plans for use in certification. The site also provides access to the Technical Service Payment Rates (TSPRs) which list rates for TSP services as well as information on the professional organizations that recommend their qualified members as TSPs. The site provides directions for completing the online registration and certification process.

TechReg is the authorized registry of TSPs. Farmers, ranchers as well as the general public can search for certified TSPs on TechReg by State or the category of conservation services TSPs provide. TSPs also use TechReg to apply for certification and manage their profiles.

Explore the TSP Website including where you can access TechReg. Complete the exercise in this section which will familiarize you with information and materials on these websites.

Upon completion of this section, you will be able to:

- Locate the electronic Field Office Technical Guide
- Identify the TSP Coordinator in your state
- Locate training information for TSPs
- Locate certified TSPs
- Locate resources for TSP certification
- Print a copy of the Technical Service Categories and Criteria Options for Certification

What information is on the TSP Website?

The TSP Website provides TSPs access to information relating to the Technical Service Provider Program. It is also the gateway to the TechReg Website. Information found on the site includes:

- Conservation practice categories and eligibility criteria options
- Conservation Activity Plan (CAP) information
- eAuthentication information
- Technical Service Payment Rates (TSPRs)
- TSP Policy, Manual and Rules
- Recommending organizations
- TSP news and events
- State TSP Coordinators
- Business opportunities
- USDA office locator
- Technical resources such as the electronic version of the Field Office Technical Guide (eFOTG)
- Log-in site to TechReg- the official TSP registry

- Step-by-Step Guide for Registering as a TSP *(also see Step-by-Step Guide in the Appendix)*
- Help Desk phone number and email address

What is the TechReg Website?

The TechReg website is the registry and database where TSP candidates apply to become TSPs by listing their credentials in a profile and where NRCS certifies qualified individuals. TechReg also helps farmers, ranchers and the general public locate TSPs in particular States and by the conservation categories and practices a TSP can provide. Information found on the site includes:

- TSP certification categories
- TSP Application (also called the Profile)
- List of Certified TSPs by State

EXAM QUESTIONS

1. The primary source of information about the TSP Program is the TSP Website.
    a. True
    b. False

2. The name of the official registry where TSP candidates apply to become TSPs is called TechReg.
    a. True
    b. False

3. Which of the following cannot be found on the TSP Website?
    a. USDA service center office locator
    b. Location information for State TSP Coordinators
    c. Business Opportunities for Providers
    d. USDA Rural Development Opportunities

4. According to the TSP Website, what is the term for producer reimbursement rates?
    a. NRCS payment provisions
    b. Technical Service Payment Rates (TSPR)
    c. EQIP contract payment
    d. USDA rural assistance payment

<u>Exercise 1</u>: Introduction to the TSP Website and TechReg

This exercise is designed to increase your awareness of where to find the resources available on the TSP Website and TechReg. You will explore only a few references on this site, but are encouraged to go back to these sites at a later time to identify reference and informational materials not covered in this exercise.

Print out this page and then click on the link to be directed to the TSP Website. It is also recommended that you bookmark this site. It is a website that you will use often during your career as a TSP.

Part A- The following information is located in the middle of the TSP Website:

- What is a Technical Service Provider or TSP?
- What kind of work can a TSP do?
- TechReg, NRCS's online TSP Registry
- Conservation Activity Plans (CAPs)
- Conservation Practice Design, Installation and Checkout
- TSP Resources
- What's New?
- Feedback

Part B- The following information is found in the left-hand sidebar of the webpage

- Technical Assistance
- Payment Rates
- TechReg- TSP Registry
  - Find a TSP
  - Log in
  - About TechReg
  - Become a TSP
  - Complete TSP Renewal
  - Register a Business
- Important Contacts

Part C- The following information is at the top of the TSP Website and contains features and links to other NRCS information:

- Search feature
- Browse By Topic
- Browse by Program
- Browse by Newsroom
- Browse by Contact Us

Part A- The following information is located at the middle of the TSP Website:

1. **Locate a USDA Service Center**. Many TSPs work in multiple counties. The USDA Service Center Locator will provide you with the phone number and addresses of USDA Service Centers in each State. This site also provides the option to print out a local street map or driving directions.
   a. Click on "USDA Offices" listed under *TSP Resources* in the middle of the TSP Webpage.
   b. Click on your state
   c. Click on your county
   d. Choose a Service Center. Click on link to "Driving Directions." It is found on the right hand side of the information box.
   e. Close out of the driving directions and use the back button on the browser until returned to the TSP Website Home.

2. **Locate your "State TSP Coordinator"** listed under *TSP Resources* in the middle of the TSP webpage. This is your TSP contact person should you have questions either before or after you complete certification. Some TSPs certify in multiple states. In most cases the state where you reside determines your State TSP Coordinator.
   a. Click on "State TSP Coordinators"
   b. Locate your State Coordinator
   c. Use the back button on the browser until returned to the TSP Website Home.

3. **Locate "Practice Categories and Eligibility Criteria Options"** listed under *Conservation Practice Design, Installation and Checkout* in the middle of the TSP Webpage.
   a. Print this document for use in a later Section. It has approximately 18 pages. You will want to use it as a reference as you determine which TSP categories best suit your training, experience and abilities.
   b. Use the back button on the browser until returned to the TSP Website Home.

4. **Locate "TSP Eligibility Criteria** listed under *Conservation Activity Plan (CAPs)*.
   a. Select a Conservation Activity Plan you are interested in and click on "Eligibility Criteria".
   b. Print this for use in a later Section. You will want to use it as a reference as you determine if this is a Conservation Activity Plan you are qualified to develop.
   c. Use the back button on the browser until returned to the TSP Website Home.

Part B – These resources are found on the left-hand sidebar of the TSP Website under the title "TechReg-TSP Registry":

1. **Locate "Find a TSP"** This is a link to the TSP Registry, TechReg. You can also click on "Find a TSP" in the middle of the webpage under TechReg- NRCS's online TSP Registry.

You will be listed on this site once you complete certification. You can also locate other TSPs in your area and view their credentials.

a. Click on "Find a TSP"
b. Click on your state.
c. Click on your county or choose "All Counties"
d. Select a "Category" and "Service" from the drop down menus at the top of the page. Review the list that is generated from your choices. You can click on any of the headings at the top of the list to rearrange the list. For example, if you only are interested in viewing TSPs in a certain zip code, click on zip code in the list heading and the resulting list will be in numerical order based on zip code.
e. Choose an individual TSP and click on the "Resume" button found at the right hand side of the page. Take a moment to look through the information. This will familiarize you with the information that you will be providing on your TSP profile. Imagine that you are a producer who wants to acquire TSP services. Has the TSP conveyed enough information for the producer to feel confident that the TSP has the knowledge, skills and ability to complete the necessary tasks? Keep this information in mind as you complete your own application.
f. Click on the "Close" button at the bottom of this page to close out of the resume.
g. Close TechReg to return to the TSP Website Home Page.

2. **Finding Help**
Occasionally a TSP needs answers to questions about registration, certification, training requirements, and other topics. Go to the links listed on the left-hand sidebar under "Important Contacts".
   a. Click "National TSP Team".
   General questions about the TSP Program go to the TSP Team in Washington, D.C. based upon the region in which your State is located.
   b. Click on "TechReg Helpdesk."
   Questions about the TechReg Registry go to the TechReg support desk in Fort Collins, Colorado.
   c. Click on "NRCS AgLearn State Coordinators."
   AgLearn is the NRCS on-line training site that TSPs can use to obtain certain coursework related to TSP certification. Locate your State AgLearn Coordinator. Questions on registering for training in AgLearn should be emailed directly to the NRCS TSP AgLearn Coordinator.

Part C- Other Information about NRCS

1. **Find your State NRCS Webpage.**
You can find links to additional technical resources, and information on Farm Bill Programs that would be of use to your clients and other resources to help you in your work as a TSP.
   a. Go to "State Offices" located at the top right-hand corner of the webpage and choose your State from the "States & Offices" list. Look at the home page and see what State related activities and information is listed.

b. Close the State webpage to return to the TSP Website Home.

2. **Locate information about the Farm Bill**
   a. Look under Programs" tab on the top left-hand side of the page.
   b. Click on "Farm Bill" and view the listings for various Conservation programs under the Farm Bill.
   c. Use the back button on the browser until returned to the TSP Website Home.

We will use some of these links in another exercise later in this training.

Congratulations. You now have the background for referencing basic information on the TSP Website home page and TechReg. Minimize the window and return to these sites as needed.

Section 3 – Registration and Certification Process

Introduction

The TSP registration and certification process is designed to verify that TSPs are competent to perform technical services in most aspects of conservation, including conservation planning, design, layout, installation, and the checkout or inspection of conservation practices. These services are defined as follows:

- Conservation Planning: A record of a client's decisions and supporting information, for treatment of a unit of land or water as a result of the planning process, that meets technical quality criteria for each natural resource (soil, water, air, plants, and animals) and takes into account economic and social considerations. The plan involves inventory and evaluation of an exploratory nature and preparation of sound alternative solutions of sufficient intensity for the cooperator to make treatment decisions. It describes the schedule of operations and activities needed to solve identified natural resource problems, and take advantage of opportunities, at a resource management system level. You will learn more about conservation planning in Part Four.

- Design: Designing and checking all aspects of the supporting data, preparing drawings, and specifications to NRCS standards to insure that the planned practice will meet the purpose for which it is installed.

- Installation: Involves construction layout and approval for all aspects of the conservation practice including construction inspection, surveys and construction certification, and preparing as-built drawings and quantities. Implementing a plan is the process of carrying out the conservation treatments that make up the planned conservation system(s) and includes providing technical assistance to the client for obtaining needed permits, funding, land rights, surveys, final designs, and inspections for structural practices. It also includes the operation, maintenance, and management information needed by the client to assure proper functioning of practices following installation. It does NOT pertain to the actual construction of the practice. The Technical Service Payment Rates do not include reimbursement to a client employing a TSP for the physical construction of practices.

- Checkout: Involves routine follow-up with the customer to evaluate the effectiveness of the installed conservation practice and to certify practices including measurement of completed amounts performed, compliance with practice specifications.

Upon completion of this Section, you will be able to:

- Explain the difference between TSP registration and TSP certification
- Identify TSP Categories
- Explain the TSP de-certification, and re-certification processes

What is the difference between TSP registration and TSP certification?

There is a difference between TSP registration and TSP certification. You must complete both processes in order to become a TSP and for your clients to be reimbursed by NRCS for your services.

Registration occurs when you have:

- Obtained your eAuthentication ID and password
- Initiated the application process

Certification occurs when you have:

- Met all required criteria for becoming certified in one or more technical service categories
- Signed a Certification Agreement with NRCS
- Had your qualifications verified by NRCS.

Obtaining Level 1 or Level 2 eAuthentication does not mean that you are a Certified TSP. Also, completing the application does not mean that you are a Certified TSP.

You are not certified until NRCS completes the verification process and you receive an email from NRCS stating that you have been certified as a TSP.

What material is available to guide you in the TSP registration and certification process?

The TSP Website has instructions to assist you during the registration and certification process. A *"Guide for Registering as a TSP"* is a step-by-step aid for registering as a TSP. You may have already printed these instructions out in Exercise 1. They are most useful when reviewed prior to beginning the registration process. Step-by-Step instructions for registering as a TSP are also located in the Appendix of this course.

What are the steps to completing the Registration and Certification process?

A summary of the registration and certification process follows:

Step 1: Review the Certification Terms and Conditions of the TSP Certification Agreement found on the TSP Website, located under *TSP Resources* in the middle of the webpage. This information includes details about compliance with NRCS practice standards and specifications, liability, work quality, compliance with state and federal laws and regulations, reporting, documenting and licensing. When you sign the Certification Agreement, you are agreeing to work within the scope of this document.

Step 2: Review the Civil Rights Responsibilities that TSPs must follow when working with clients and others. These are found on the TSP Website, located under *TSP Resources* in the middle of the webpage.

Step 3: If you have not done so already, print and review the TSP Categories and Criteria Options and the Conservation Activity Plan (CAP) Criteria and Options documents found on the TSP Website, located under *TSP Resources and Conservation Activity Plans* respectively in the middle of the webpage.

Step 4: Choose the certification categories, CAPs and associated practices which best fit your knowledge, skills and ability.

Step 5: Review the required licensing/training criteria including NRCS coursework associated with the conservation categories and practices you will be working with. Each category and CAP will have one or more options that you can choose to demonstrate your qualifications such as:

- Education and Experience
- Accreditation or license with one or more certifying organization
- Knowledge and Training

Step 6: Obtain level 2 eAuthentication by following the Step-by-Step Guide for Registering as a TSP. Register for NRCS required on-line coursework in AgLearn and compete the required training or look for other TSP training offered by NRCS in individual States or by TSP recommending organizations. Look for these training opportunities on the TSP Website under *TSP Resources-Training*

Step 7: Login to TechReg using your eAuthentication ID and password and complete the profile information as directed in the Step-by-Step TSP Guide.

Step 8: Submit the application through TechReg for NRCS verification.

What qualifications must be met for TSP eligibility?

- Technical training, education, certification or experience is needed to perform at the level of technical service for which certification is sought. Members of a recommending organization, such as the Association of Consulting Foresters (ACF), have a streamlined registration and certification process for certain TSP Categories; however, they are not exempt from other coursework required by NRCS to become a TSP. More information on recommending organizations may be found on the TSP Webpage under *TSP Resources* located in the middle of the webpage.
- Meet applicable licensing or similar qualification standards established by State, County, or Tribal law.
- Documentation of training and experience in planning and applying conservation practices and management systems in the area for which certification are sought.
- Meet all the criteria under at least one option for certification in the categories or CAPs selected and,
- Be willing to enter into a Certification Agreement with the NRCS.

Training

The TSP is responsible for obtaining any training needed to become certified. The NRCS will verify an individual's credentials prior to certification. This means NRCS will verify your training, education and experience requirements as well as your references and any required state license or certification.

Certification requirements are listed in the criteria for each certification option. Check with your State TSP Coordinator for further information on training/certification requirements that are

specific for meeting state law requirements. A list of State TSP Coordinators can be found in the middle of the TSP webpage.

NRCS provides TSP's access to The Agriculture Learning Service (AgLearn) network for Technical Service Providers so that they may take online courses needed for certification or recertification. Required courses and available courses, along with upcoming training opportunities, and instructions for registering for course work through AgLearn, are located in the middle of the TSP webpage under "*TSP Resources –Training Opportunities*."

Most of the coursework pertinent to TSP's will be listed in AgLearn under:

*AgLearn Original Courseware Structure>Natural Resources Conservation Service***.**

If you do not have all of the knowledge or experience necessary to certify in a category, you may need to take additional training. Additional training is available from a number of sources, including some Soil and Water Conservation Society chapters, and Cooperative Extension Service and Land Grant Universities. A wide variety of courses are offered directly through the internet. Several universities offer specific training in Comprehensive Nutrient Management Planning and integrated pest, soil and nutrient management courses.

Many professional organizations offer workshops and seminars that can provide the TSP with high quality training. Some of these organizations also offer professional certification programs that will qualify individuals as having the education, training, and experience in specific TSP categories. Refer to the list of recommending organizations located in the middle of the TSP Webpage.

What is the verification process?

Within 60 days of receiving your complete application through TechReg, NRCS will have completed the verification of information on your application and will then make a determination to certify or defer your application. NRCS will verify the following information:

- Training, education, and experience
- Reference information
- Individual State requirements, licensing, etc.
- Familiarity with NRCS guidelines, criteria, standards, and specifications for which certification is sought by reviewing a sample of your work as submitted in the form of a conservation plan or design
- Membership and accreditation in any listed recommending organization
- Your current certification or de-certification status.

The National TSP Team certifier for your State will determine whether you meet the national certification requirements, plus any specific state requirements. Certification for any of the Conservation Activity Plans requires that the TSP submit a sample plan that meets the plan development criteria for the CAP. The State TSP Coordinator in the State where you reside will route the sample plan to either an in-State NRCS technical specialist or to a technical specialist at NRCS Headquarters for verification of quality, completeness and familiarity with NRCS standards and specifications. In the case of multi-state applications, the National TSP Team certifier will coordinate application review with all other States in which the applicant has requested to become certified. If the sample work submitted meets all of the plan development criteria, and all other certification requirements are met, the TSP will be certified by the National

TSP Team within 60 days of receipt of a complete application by the TSP. A complete application includes the TSP application generated through TechReg as well as the submission of a sample plan if required.

If you do not meet all of the certification requirements, your application will be deferred. The National TSP Team will notify all other States where you have requested certification within 60 days of receipt of the complete application. You will then receive an email message notifying you of the suggested remedies which would allow you to meet certification requirements.

How do you know that you are a certified TSP?

NRCS will send you an email through TechReg confirming your certification. This should not be confused with the eAuthentication email which provided you with a TSP number. If you have any question about whether or not you are certified, check the "*Find a TSP*" section of the TechReg Website. Only Certified TSPs are located on this site. You are certified for a three-year period and then must re-certify to maintain your TSP status.

What is re-certification?

TSP certifications are in effect for a period of three years and automatically expire unless renewed by application. A TSP can renew their certification in TechReg by submitting a complete renewal application within 60 days prior to the expiration of the current certification. The TSP will be notified of the status of the certification renewal by NRCS via email within 60 days of receipt of the application.

It is important to keep your email, licensing and accreditation information up to date. The NRCS will again review your application to ensure that you meet current certification requirements. Although it is not necessary to re-take any coursework that was successfully completed and recorded for the original certification (unless directly specified by NRCS), it is important to obtain Continuing Education Units (CEUs) for any conservation category where this is required. This particularly applies to maintaining Certified Conservation Planner status.

If you were certified as a TSP under the option of a licensing or recommending organization, you must maintain the credentials associated with that license or organization including any continuing education credits required.

It is a good idea to periodically review the category requirements to stay current on new criteria that you will be expected to fulfill when you re-certify. These are located on the TSP Website as well as in the electronic Field Office Technical Guide.

What is de-certification?

As a quality assurance measure, NRCS has developed a method to de-certify TSPs. Reasons for de-certification include:

- Failure to meet NRCS standards and specifications while delivering technical services requested by the participant or USDA.
- Violation of the terms of the Certification Agreement which may include a demonstrated lack of understanding of, or an unwillingness or inability to implement NRCS standards and specifications for a practice for which the TSP is certified, or the provision of service for which the TSP is not certified.

- Engagement in a scheme or device including coercion, fraud, misrepresentation or providing incorrect or misleading information
- Any other cause of serious or compelling nature as determined by NRCS that demonstrates the TSP's inability to fulfill the terms of the Certification Agreement in providing the technical service.

What is the process and period of de-certification?

De-certification does not exceed three years. The NRCS State Conservationist, or in some cases, the NRCS Chief, determines the length of de-certification. The State Conservationist will send the TSP a written notice of the proposed decertification action by certified mail with information on the cause(s) for decertification and any supporting documentation. In cases where the TSP has a demonstrated lack of understanding of a technical area, the TSP should obtain training and master competency within one year. Additional information regarding de-certification including contesting and appealing a decertification determination, the period of decertification, and other effects of decertification can be found in the Technical Service Provider Manual located under *TSP Policy, Manual and Rules* in the middle of the TSP webpage under *TSP Resources*.

Do mitigating factors affect de-certification?

In considering whether or not to de-certify an individual, the decertifying official will take into consideration whether or not the TSP worked in a timely manner to correct the deficiencies in a technical service. The decertifying official will also look at what steps have been taken to prevent failures in technical service from occurring in the future.

EXAM QUESTIONS

5. For all the options listed for each category, the TSP must meet:
   a. All of the criteria listed for the specific option chosen by the TSP
   b. Only one of the criteria listed
   c. Only the criteria the applicant meets

6. To apply for certification as a TSP, a person must:
   a. Print the application and take it to the local USDA Service Center
   b. Apply online through the TechReg web page
   c. Apply only through a Recommending Organization
   d. Not be employed by a public agency

7. Professional references should be:
   a. A customer or landowner who can verify your experiences and proficiency for planning and designing the conservation practices you will be providing services for.
   b. People who can verify your employment with a private company or agency
   c. Professors who can verify your educational experience
   d. Your banker or lawyer

8. Which is NOT covered in the Certification Agreement:
   a. Compliance with applicable laws and regulations
   b. Warranty of work quality

c. Reporting and documentation
d. Payment limitations

9. TSP's are certified for a period of:
   a. 5 years
   b. 2 years
   c. 3 years
   d. Indefinitely

10. Which is not true as it relates to training for TSPs:
   a. TSPs are responsible for their own training
   b. TSPs can get training from universities
   c. TSPs can get training from professional organizations
   d. NRCS will pay a TSP for training expenses

Summary

This Section covered the TSP registration and certification process.

Exercise 2: Categories and CAP Criteria – Options

This exercise will use the Categories and Criteria Options and the CAPs Criteria Options documents you printed out in the Introduction to TechReg Section. Allow 15 minutes to complete this exercise.

Introduction

Conservation categories and all the various options for certification are based upon criteria for each natural resource discipline the TSP will be working in. After completion of this Exercise, you will understand the terminology and qualification standards used in the certification process.

Definitions:

Category Distinct classes of occupational fields or natural resource disciplines that you may certify in if you meet the qualifications.

Criteria: Qualifications required to be certified under a specific option. You must satisfy all the criteria for a single option before you will be certified for that respective category.

Options: Method by which you may qualify for certification. One or more options may be offered for each category, but only one option may be selected. The choices may include any combination of:

- Education
- Experience
- Licensing
- Organizational Certification

- Knowledge and training.

Conservation Activity Plan:

A conservation practice involving the development of a resource specific or practice specific conservation plan appropriate for the eligible land of an NRCS program participant. The conservation practice associated with plan development is known as a "conservation activity plan" or CAP.

Conservation Practices:

Numerous NRCS conservation practice names and codes are listed in relation to each Category and CAP. These are the conservation practices that are planned, designed, laid-out or inspected (checked-out) when a TSP is certified in that category. NRCS does not limit the practices a TSP can selected to provide service in, however, very few TSPs are qualified for every practice found in each category. More information about conservation practices are found in NRCS's Field Office Technical Guide (FOTG).

A. TSP " *Practice Categories and Eligibility Criteria Options*" for Certification

In the following exercise you will locate TSP categories, identify the Options and locate the Criteria references. It is important to click on each link.

1. **Go to the TSP Website**
   Click on "Practice Categories and Eligibility Criteria Options" located in the middle of the page under *Conservation Practice Design, Installation and Checkout*. Click Open.
2. **Locate the "Agroforestry" Category**. You will find it at the top of page as the first entry of the "Technical Service Categories and Criteria Options for Certification." Note that three Options are available for this category. Only one of the options is necessary to meet qualifications, however, all the criteria must be met under that option. We will look at each Option and its associated Criteria.

   Option 1. Certification. This option has one criterion. It requires that the TSP applicant possess certification as a Certified Forester **by the Society of American Foresters, (SAF) or Association of Consulting Foresters of America, Inc. (ACF).** Remember how to find these groups? Look for "Recommending Organizations" under *TSP Resources* in the middle of the TSP webpage.

   Option 2. Experience. This Option has two criteria requiring that the TSP applicant possess specific experience and knowledge in Agroforestry planning, design and practices as well as be able to provide two references of work for NRCS to evaluate. Both criteria must be met prior to certification.

   Option 3. Education. This Option has two criteria. The TSP applicant must have the appropriate education as well as experience and references to verify that the TSP is proficient in agroforestry-related work.

3. **Locate the Conservation Practices Associated with Agroforestry Category**. You will find them next to the Category Name at the top of the list. There are 5

practices listed along with the NRCS practice code number. The practice list associated with each category is not all inclusive. There may be other conservation practices that a TSP may need to recommend and associate with a conservation category depending upon specific site conditions and the objectives of the client. In all cases, you should have the qualifications to support the specific conservation practices addressed in your plans and designs.

B. Conservation Activity Plan (CAP) Criteria Options for Certification

a. **Go to the TSP Website**

Go to "Conservation Activity Plans (CAPs)" located in the middle of the page.

b. **Click on "TSP Eligibility Criteria" and open the eligibility criteria for the CAP 106- Forest Management Plan.** Note that two options are available for this CAP. Only one of the options is necessary to meet qualifications, however, all the criteria must be met under that option. We will look at each Option and its associated Criteria.

Option 1. Certification. This option has six criterion.

1) It requires that the TSP applicant possess certification as a Certified Forester by the Society of American Foresters, (SAF) or Association of Consulting Foresters of America, Inc. (ACF).

2) The TSP must have successfully completed basic NRCS conservation planning Modules 1-5

3) The TSP must develop a CAP that meets plan development criteria. The plan may be a sample of actual work accomplished or a plan developed from a fictional scenario as long as it meets the plan development criteria. The CAP plan will be reviewed by a technical specialist and evaluated to see if the TSP has the competency to write a conservation activity plan.

4) The TSP must have a current license to practice Forestry in the State in which they are applying to be a TSP, if a license is required by the State.

5) The TSP must have knowledge of the specific criteria addressed in the development and implementation of a Forest Mgt Plan as listed in the Field Office Technical Guide. This includes knowledge of standards and specifications of the associated practices that may be included in the Forestry plan such as Forest Site Preparation (490) and Forest Slash Treatment (384).

6) The TSP must possess a knowledge and understanding of National Planning Procedures as contained in the NPPH-Title 180, Part 600 This document is available under *TSP Resources- Technical Resources for TSPs*

Option 2. Education and Experience. This option has eight criterion, 4 of which are the same as listed in Option1.

1) The TSP must have successfully completed basic NRCS conservation planning Modules 1-5
2) The TSP must develop a CAP that meets plan development criteria. The plan may be a sample of actual work accomplished or a plan developed from a fictional scenario as long as it meets the plan development criteria. The CAP plan will be reviewed by a technical specialist and evaluated to see if the TSP has the competency to write a conservation activity plan.
3) The TSP must have either a bachelors or higher degree in forestry or related natural resources with a forestry emphasis or a forestry license if required by State law.
4) The TSP must have at least 5 years of experience and knowledge in the planning, designing, layout and inspection of forestry practices associated with the Forestry CAP. This can include volunteer work, or other experience that relates to these practices.
5) The TSP must provide two locations or customer references where technical service in the forestry –related practices has been performed. These references will be used by the NRCS certifiers to confirm the TSP's proficiencies in planning, designing, installing and inspecting the forestry –related practices the TSP will be providing service in. If the TSP lists Forest Site Preparation (490), Forest Stand Improvement (666) and Forest Trails and Landings (655) in the application, then the references and locations listed should reflect the TSPs experience for these specific practices.
6) The TSP must have knowledge of the specific criteria addressed in the development and implementation of a Forest Mgt Plan as listed in the Field Office Technical Guide. This includes knowledge of standards and specifications of the associated practices that may be included in the Forestry plan such as Forest Site Preparation (490) and Forest Slash Treatment (384).
7) The TSP must possess a knowledge and understanding of National Planning Procedures as contained in the NPPH-Title 180, Part 600 This document is available under *TSP Resources- Technical Resources for TSPs*
8) The TSP must provide documentation in the application that he has the knowledge, skills, and abilities to use inventory and planning tools common to forest management.

Summary: Category Criteria, CAP Criteria and Options

- TSP Categories and CAPs may have similar names but different education, experience, or training requirements. Choose the Category and option which best fits your work experience.
- Review all criteria for each Category or CAP. This is particularly true when NRCS policy and manual links are listed in the criteria information. These links may contain additional educational requirements or practice requirements for a specific Category or CAP.
- Specific experience, licenses or former employment does not preclude you from completing other criteria found in a certification category. ALL criteria for a selected option must be met for each Category or CAP the TSP applies for.
- Individual States may have requirements that differ from those found in the CAP options or "Categories and Criteria Options." In most instances this is due to State laws and requirements.
- Check with your State TSP Coordinator prior to application if you have questions about how conservation Categories and CAPs are used in your State.
- TSPs are required to complete all the training specified in the CAP and Category criteria.
- Review the criteria thoroughly to understand the requirements for each CAP and Category. Not every requirement is listed in the criteria section.

You have now completed the training exercise for Section 3.

Section 4 – Technical Service Payment Rates (TSPRs)

Introduction

When funding is available, USDA program participants have the option to select a TSP to perform conservation technical assistance. They may be reimbursed for TSP services based on the Technical Service Payment Rate (TSPRs) found on the TSP Website.

Reimbursements of TSP services are private arrangements made between the TSP and the client. Here is a list of points regarding payments:

- TSPRs may not reflect how much you may actually charge for your services.
- You do not necessarily have to wait until the producer is reimbursed through their NRCS contract before receiving payment for your services from the client. A client can chose to directly assign his contract payment to a TSP.
- Reimbursement payments by NRCS contract to the client are also based in part on the receipts or invoices the TSP provides to the producer but in all cases will not exceed the maximum TSPR for the practice.

This Section will provide you with the opportunity to complete a short exercise which will familiarize you with where to find specific TSPR rates.

At the end of this Section you will be able to:

- Define what a "TSPR" is.
- Describe the basis for establishing TSPRs
- Locate the TSPRs on the TSPR Website
- List the steps to determine TSPRs for a specific practice

How are TSPRs determined?

TSPRs for individual conservation practices or practice components are determined in part by the equivalent cost for NRCS to provide the same service to the producer. TSPRs, as specified in an NRCS contract, are the maximum dollar amounts that the producer will be reimbursed for utilizing the services of a certified TSP. The rates are based on NRCS costs incurred during the planning, design, layout, and inspection or checkout of conservation practices. TSPRs do not apply when the NRCS directly obtains TSP services through a contract, cooperative agreement, grant or other acquisition method. Factors included in determining TSPRs include:

- Estimated time required to complete conservation practice planning, design, layout and inspection or checkout of practices.
- Number and kind of NRCS staff needed to complete the task.
- Cost per hour, plus overhead for each needed activity, to derive the estimates of the total technical assistance cost for a typically sized task.

Technical Service Payment Rates (TSPRs) are determined by the State Conservationists.

The determination to make a practice or component TSPR rate available for reimbursement to producers is made on a regional basis. Producer and State resource needs are considered when determining how to best utilize conservation program funding. A TSP may find that a producer is reimbursed for an Environmental Quality Incentive Program (EQIP) practice in one region but another producer, in another region, may not be reimbursed for the same practice. A map of the TSPR regions based upon USDA Farm Production Regions is located in the Appendix.

How are practice tasks tied to TSPRs?

TSPRs are established for each of the four major conservation practice tasks –

- Planning
- Design
- Installation (layout of practices)
- Inspection or check-out

What are some examples of practice tasks?

- Planning
  - Determine landowner needs
  - Evaluate data
  - Conduct Resource Assessments
  - Apply for Permits
  - Develop Alternatives

    - Formulate Solutions
    - Conduct Inventories
- Design
    - Complete site surveys
    - Conduct interviews
    - Prepare design computations
    - Plan preparation
    - Prepare drawings, specifications, job sheets
    - certification of plans
    - Solicit necessary reviews
- Installation
    - Conduct concrete tests
    - Conduct compaction tests
    - Obtain photographs to document steel placement, mulch cover, and other pre-construction conditions
    - Conduct surveys and measurements for construction layout
    - Gather load tickets and certifications
    - Conduct pre-construction conferences
    - Conduct tests and measurements during construction
    - Layout or stake out practices
    - Complete the oversight and monitoring of installation tasks
- Inspection or Check-out
    - Complete surveys
    - Document measurements
    - Make observations in order to document that the completed practice complies with approved plans. Includes job sheets, photos, and job diaries, material certifications, weigh tickets, etc., that document installation.
    - Complete "As built" plans
    - Prepare certificates of completion, acceptance letters or other necessary approvals from regulatory authorities

Occasionally travel costs or "other" costs are also listed with a TSPR. The reimbursement rate for each task is usually different. Not all conservation practices have a TSPR listed for every task.

- Travel
    - Time going to and from the site to implement the selected practice
    - Does not reflect mileage, vehicle, or transportation related costs, meals or lodging. These are not included in the TSPRs.
- Other

  Includes activities that do not clearly fit the application steps for conservation practices. In some cases, state or local municipalities have requirements that must be fulfilled before work can proceed. One example is the need to contact a utility company before digging can start.

TSPs may perform one or more conservation tasks as part of their contract with the producer. Depending on the situation, the producer may be reimbursed separately for each task completed. *TSPs should itemize their bill to include only goods and services that were required to*

accomplish the practice. TSPs should check with the local service center if there are questions about additional job related tasks.

What are the TSPR options if the conservation practice involves an atypical situation?

TSPR rates are based on the time estimates for the most "typical" situations. Whenever there is an unusual situation, the producer may request an "exception" to the TSPR rate. The producer will work with the local Field Office to submit the request to the State Conservationist. The State Conservationist makes the determination to grant an exception to the TSPR rates. Exception rates are considered a one time, specific need when unique environmental or other conditions exist. Examples of these conditions include:

- Existence of Threatened or Endangered species on or near the site
- Difficult access to site
- Urban site requiring special design skill
- When an out-of-area expert must be brought in to work on the project
- When highly technical skills are required
- A serious threat exists to the environment or human health

What if a practice is not installed in the year that it was scheduled in the conservation contract?

If a practice task component is scheduled to be completed in a particular year, but is not actually completed until a later year, the producer may be reimbursed for the *scheduled* year rate and not the *completed* year rate. In any case, the practice needs to have been commenced in the year it was scheduled. The producer may require a contract modification. Producer reimbursement will be dependent upon available program funding.

EXAM QUESTIONS

11. The TSPR determines how much the TSP may charge for his services.
    a. True
    b. False

12. TSPRs can vary by:
    a. State
    b. Geographic Region
    c. Conservation Practice
    d. Land use
    e. All of the above

13. Two examples of tasks performed during installation of a practice would be:
    a. Pre-construction conferences
    b. Traveling to the site
    c. Plan preparation
    d. Taking photographs of construction conditions
    e. a&d
    f. b&c

14. TSPRs are equally divided between each practice task.
    a. True
    b. False

15. TSPRs are based on:
    a. Typical situations
    b. What it would cost NRCS to provide the same service
    c. Information based on local conditions
    d. a&c
    e. All of the above

16. Exceptions to the TSPR rate are granted by the:
    a. Local NRCS Field Office
    b. The NRCS State Conservationist
    c. The producer
    d. The TSP

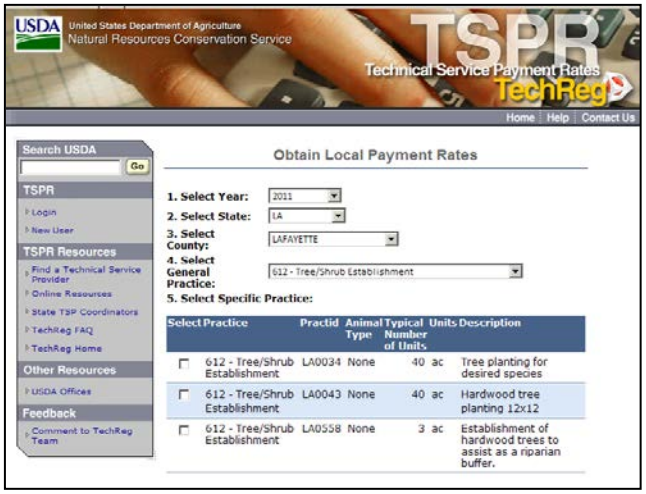
<u>Exercise 3</u>: Technical Service Payment Rates (TSPR)

This exercise is designed to increase your awareness of Technical Service Payment Rates (TSPRs). You will not explore every TSPR found on the site; however, you are encouraged to go back to the site at a later time to identify rates and information that may apply to your specific area of interest.

If you are planning on working in multiple counties or states you may want to take the time now to look at the different rates in those areas. You will notice differences in the reimbursement rates across state and county lines. You will also want to keep in mind that just because a practice is listed, it does not mean that funds are available for producer reimbursement.

This exercise is easiest to complete if you print a copy of the exercise to reference as you move through the exercise. Allow 15 minutes to complete this exercise.

Part A – Find a TSPR for a Conservation Practice



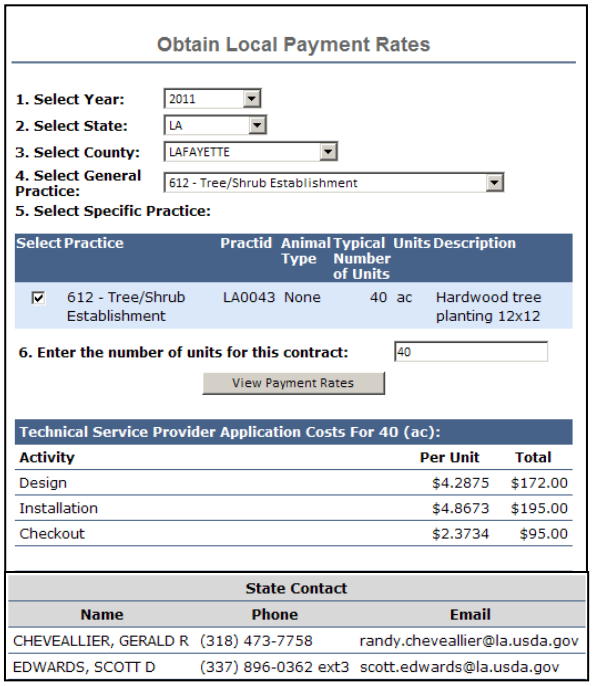
1. Locate ***"Technical Service Payment Rates (TSPRs)"*** from the TSP Website under *Conservation Practice Design, Installation and Checkout.*
2. Click on the link to the TSPR webpage.
3. Click on ***"Obtain Local Payment Rate Prices"*** located in the grey bar at the bottom of the page
    a. ***Select the current year***. TSPRs are stored on the TSPR site since 2009.
    b. ***Select your own state*** from drop down list.
    c. ***Select a county in the state*** from drop down list
    d. ***Select a general practice*** from the drop down list associated with your area of expertise, e.g., 612 – Tree/Shrub Establishment

e. ***Select Specific Practice*** - Once a general practice is selected, the screen will display a table that relates to a typical practice scenario and size or units for the conservation practice selected. It is important to note the units when selecting a specific practice. Units may be expressed in acres (ac), feet (ft), number (no), acre-feet (ac-ft) or animal unit (ani unt). For this exercise, ***select a practice in the table by clicking on the small box*** to the left of the practice number and name if not already checked. This will open up a new line on the screen that asks for the number of units for the practice a TSP would be working on.

f. ***Enter the number of units*** for this Contract: For this exercise, enter the same number as shown in the Typical Number of Units shown in the table.

g. Click on the ***"View Payment Rates"*** button.

Part B - Technical Service Provider Application Costs



Obtain Local Payment Rates

1. Select Year: 2011
2. Select State: LA
3. Select County: LAFAYETTE
4. Select General Practice: 612 - Tree/Shrub Establishment
5. Select Specific Practice:

Select	Practice	Practid	Animal Type	Typical Number of Units	Units	Description
☑	612 - Tree/Shrub Establishment	LA0043	None	40	ac	Hardwood tree planting 12x12

6. Enter the number of units for this contract: 40

View Payment Rates

Technical Service Provider Application Costs For 40 (ac):

Activity	Per Unit	Total
Design	$4.2875	$172.00
Installation	$4.8673	$195.00
Checkout	$2.3734	$95.00

State Contact

Name	Phone	Email
CHEVEALLIER, GERALD R	(318) 473-7758	randy.cheveallier@la.usda.gov
EDWARDS, SCOTT D	(337) 896-0362 ext3	scott.edwards@la.usda.gov

The screen will show a table with the TSPR for the practice with the number of units you specified. Note that the application rates are divided by activity and include design, installation, and checkout and describe a "Per Unit" and "Total" value. Directly below this table is a link to the contact information for the State TSP Coordinator.

Now, uncheck the box next to the practice code you chose. This will take you back to the table from Step 5. Select a different practice, which generally has a different typical unit size. Enter a number relating to unit size. Click on the "View Payment Rates" button to see the breakdown of practice application costs by design, installation and checkout.

Economy of size is often represented in the TSPRs. In many cases you will find that numbers for the smaller sized typical unit will result in a larger dollar amount per unit. Numbers larger than the typical sized unit generally result in a smaller dollar amount per unit.

Back out of the TSPR Website by using the back arrows on your browser to return to the TSP Website.

Section 5 – Hiring the TSP

Introduction

The TSP Program provides the producer with two ways to acquire technical assistance. The NRCS refers to these acquisition methods as:

- "NRCS Acquired Services"
- "Producer Acquired Services."

Your role and responsibilities, as well as how you are paid, is determined by the acquisition method used to contract your services. This Section will explain both acquisition methods; however, more time will be spent discussing "Producer Acquired Services." Additional information regarding "NRCS Acquired Services" may be found on the TSP Website under *TSP Resources-Business Opportunities.*

NRCS Acquired Services

When the NRCS acquires technical services, the financial and technical contractual relationship is between NRCS and the individual TSP or TSP entity. In this case, the contracted individual or entity works as an agent of the NRCS. When the NRCS enters into an agreement for technical services, the individual or entity is not required to register as a TSP on TechReg. Qualification and performance criteria, payment terms, rates, deliverables and specifications are determined within the contractual agreement. Payments are usually made within 30 days of the NRCS receipt of payment request.

Producer Acquired Services

When the producer acquires technical services from a TSP, the financial and technical contractual relationship is between the TSP and the producer. The producer works with the NRCS to develop a conservation program contract. The producer may request the services of a TSP at that time or may later request a program contract modification to add technical services to his/her existing contract. The contract may contain a combination of conservation practices or a Conservation Activity Plan (CAP) that addresses the natural resource concerns or opportunities of the producer. Funding for CAPs is currently derived from the Environmental Quality Incentives Program (EQIP). Rules and references regarding the EQIP Program can be found on the NRCS Website at Environmental Quality Incentive Program

What is a Conservation Activity Plan?

A Conservation Activity Plan, (CAP) is a site specific conservation plan developed by a TSP for the producer. The producer must hold an approved Environmental Quality Incentives Program contract in order to engage or be re-reimbursed for TSP services since funding comes from this program. Some of the Conservation Activity Plans that TSPs can help develop include:

- Agricultural Energy Management Plans
- Comprehensive Nutrient Management Plans
- Comprehensive Air Quality Management Plans
- Organic and Transitioning to Organic Agriculture Plans
- Drainage Water Management
- Fish and Wildlife Habitat Plans
- Forest Management Plans
- Grazing Management Plans
- Integrated Pest Management
- Irrigation Water Management
- Nutrient Management
- Pollinator Habitat Plans
- Spill Prevention, Control and Countermeasure Plans
- Transition from Irrigated to Dryland Farming Plans

States may not offer every CAP available. Check on the eFOTG for your State under Section 3, Conservation Activity Plans for those offered. A complete list of Conservation Activity Plans is located on the TSP Website under *Conservation Activity Plans*.

The producer will not be reimbursed unless the following conditions have been met:

- The producer must have signed a conservation program contract prior to hiring the TSP
- Conservation program funding must be available for the specific conservation practices and/or Conservation Activity Plan found in the producer's contract.

Objectives

Upon completion of this Section, you will be able to:

- Name the different ways available for the NRCS to acquire TSP services
- Describe how a producer may acquire TSP services

How does NRCS acquire technical services?

Grants, contracts and cooperative agreements are used frequently by NRCS to accomplish the mission of conserving, maintaining, and improving natural resources. NRCS acquisition methods fall into two major categories: competitive and non-competitive.

Competitive

- Contracts
- Cooperative Agreements

Non-Competitive

- Contribution Agreements

When an agreement is open for competition, a solicitation is posted on Federal Business Opportunities which provides information on who can participate. Competitive agreements under $25,000 are not required to be advertised. Contact your state TSP Coordinator for details on how your state solicits contractors for agreements under $25,000.

Contribution Agreements

A contribution agreement serves the mutual interest of the parties associated with the agreement. These agreements are similar to business partnerships where each partner contributes to a common enterprise. In the case of TSP assistance, this is to provide technical assistance for the application of NRCS conservation practices. Contribution agreements are not advertised.

Cooperative Agreements

Cooperative agreements are defined as a transfer of money, property, services, or anything of value to a recipient in order to accomplish a public purpose through support or stimulation that is authorized by federal statute. The NRCS uses cooperative agreements for the support or stimulation of TSP assistance. Cooperative agreements are used when federal involvement in the project is anticipated. These agreements may be funded up to 100 percent by the NRCS. A grant agreement is similar to a cooperative agreement with the exception that substantial federal involvement is not anticipated in grant agreements. Grants and Cooperative agreements are advertised.

How does a producer hire a TSP and how does the TSP find out about it?

When a producer signs a conservation program contract and elects to use the services of a Technical Service Provider, they will use the TSP Registry under "Find a TSP" found on the TSP website to locate a certified TSP, or through TSP advertisements found in trade journals and local media, to identify TSPs certified for the practices and Conservation Activity Plans specified in their contract. Some local NRCS field offices may offer producers a comprehensive list of TSPs certified for the technical work needed. The producer will then contact and interview one or more TSPs. *When contacted by a producer, the TSP should verify that he/she is certified in the State and for the conservation practice(s) required in the producer's contract.*

Where Does the Funding Come From?

Funding for the Technical Service Provider Program can come from two sources: Financial Assistance funds (FA) and Technical Assistance funds (TA). The source of funding for Conservation Activity Plans (CAPS) comes from FA dollars in the Environmental Quality Incentives Program (EQIP). With the exception of Comprehensive Nutrient Management Plan (CNMP) CAPs, the use of TA funds for TSP planning services for a CAP is not permitted. Producers can only receive reimbursement for TSP assistance for CAPs that are contracted through EQIP. TA funds for TSP services may be used for development of CNMP plans and other authorized services (i.e., planning, practice design, implementation, and checkout services). These requirements do not preclude States from the use of cooperative or contribution agreements using TA for other services, but not for the development of EQIP CAPs other than a CNMP.

Other programs also fund TSP contracts with individual producers. Financial assistance funds for TSP work must be arranged through a contract with a producer and is apportioned out of each State's program budget.

Technical assistance funds can be allocated by the State Conservationist out of discretionary monies to hire TSPs through agreements, and other contracts in order to meet resource goals in the state. These contracts and agreements are generally not with individual producers but can benefit producers within the area of resource concern. Many Comprehensive Nutrient Management Plans (CNMPs), Nutrient Management Plans, Pest Management Plans, and CRP Conservation Plans have been completed through the TSP Program under agreements with Conservation Districts and others to meet the resource needs of producers within the District.

What questions should a TSP be prepared to answer during an interview?

A producer should use the same care in selecting TSP services as in choosing any other contractor. Ideally, the producer will review the qualifications of two or more TSPs and then have a personal interview with each one prior to making a selection. During the interview process, a TSP should be prepared to answer the following questions:

- Have you successfully planned, designed, installed and/or inspected this conservation practice in the past?
- What qualifies you to understand the local conditions and concerns?
- Do you have the proper licenses and permits to comply with federal, tribal, state and/or local laws?
- Do you carry an "Errors and Omissions" insurance policy?

- Do you provide any type of warranty or certification for the technical services that you provide?
- Can you provide two local references?
- How have you resolved project problems in the past?
- Which services will you provide and which services will need to be provided by others?
- Who will coordinate service schedules in order to complete practices in a timely manner?
- Will you be available to assist in obtaining any permits that may be required?
- What will be the cost of the project?
- What payment terms can be negotiated?

How does the TSP get paid?

A TSP contract or agreement with his client is a separate and private business arrangement from the producer's conservation program contract with the NRCS.

The producer is responsible for the payment of technical services to the TSP. Like any business transaction, the TSP and the producer should agree to payment terms prior to commencement of work activities. There is no requirement for a TSP to delay a payment requirement until the producer has been reimbursed by the NRCS. Payment arrangements should always be determined prior to commencement of work activities.

There is an option for a producer to give permission to NRCS to make an assignment of payment through the program contract directly to the TSP once the work has been completed and inspected. In this case, the producer and the TSP will complete, sign and submit the original of form NRCS-CPA-1236, Assignment of Payment to the NRCS office in the county where the program contract is administratively located. The payment will then be assigned to the TSP through direct deposit. ***This arrangement requires additional steps by the TSP to become registered with NRCS to receive the direct deposit***. The TSP will need to contact the NRCS field office to complete these steps:

The TSP will need to provide the producer with the following information upon completion of services:

- TSP Warranty of Services
- Accurate and detailed invoice
- All deliverables per a Statement of Work

How will the producer be reimbursed for TSP service?

If the producer has hired a TSP to complete work that qualifies for whole or partial reimbursement by NRCS, the producer will be reimbursed by NRCS for the technical services rendered based on the NRCS Technical Service Provider Rates (TSPR). ***TSP rates limit what a producer is reimbursed, but do not limit what a TSP may charge for services.***

Conservation Activity Plan payment rates are located on the TSP Website.

EXERCISE 4: **CAP Payment Rates**

Look at the payment schedules for a Forest Management Plan Conservation Activity Plan by going to the TSP Website – *Conservation Activity Plans (CAPs)* and click on *CAP Payment Rates* for the current year. Not all CAP Payment Rates are differentiated by geographical region.

What work products must be supplied to the NRCS and the producer when the work is completed?

The TSP is required to supply the NRCS and the producer with copies of work products developed during the project. This may include, but is not limited to, surveys, inventories, plans, engineering designs, soil analyses, and project reports. Deliverable work products are defined in a "Statement of Work, (SOW)" for each conservation practice and Conservation Activity Plan.

Work Products Required for Individual Conservation Practices

The work products required when a TSP designs, installs or checks out a conservation practice are established by the conservation practices standards and specifications for the State in which the practice will be applied. These "Statements of Work" provide the details of what must be delivered for each practice. These are found in Section IV in the Field Office Technical Guide (FOTG) for each State where the work will be performed.

Work Products Required for Conservation Activity Plans (CAPs)

Each Conservation Activity Plan establishes the minimum criteria to be addressed in the plan as well as a list of work products called "deliverables" that are distinguished between what is required to be delivered to the TSP client and what is required to be delivered to the NRCS. CAP plan criteria are listed in each State's Field Office Technical Guide (FOTG) located in "Section III.

Work Product Formats

Work product deliverables may be requested in either hardcopy or electronic formats. The CAP criteria or Statement of Work for individual practices will indicate which format is required. For example, the Forest Management Conservation Activity Plan is developed using a national forest management plan template that guides the content of the Forest Management CAP. A copy of the National Forest Management Plan Template and accompanying guides are provided on the TSP Website under *Conservation Activity Plans-Templates/Sample Plans*. This common template is recognized by the U.S. Forest Service, American Tree Farm System, and NRCS. Each state may modify the template slightly to fit state needs.

EXERCISE 5: **Deliverable Work Products**

Part A-Find the deliverable work products required for a Brush Management Plan in Colorado.

1. Go to the eFOTG and click on Colorado.
2. Click on any county in Colorado.
3. Click on the down arrow box on the left side bar and select Section IV.
4. Open the file "Standards and Specifications".
5. Locate the file Brush Mgt (AC) 314 and open it.
6. Locate and open the file titled Brush Management (314) Statement of Work.

What is the first deliverable for design listed in the Statement of Work for the Brush Management practice?

Part B-Find the deliverable work products required for a Missouri Forestry Management CAP.

1. Go to the eFOTG and click on Missouri.
2. Click on any county in Missouri.
3. Click on the down arrow box on the left side bar and select Section III.
4. Open the file "Technical Criteria-Conservation Activity Plans
5. Open the file for "CAPs"
6. Open the file Forest Management Plan (106)
7. Open the file Forest Management Plan CAP (106) Statement of Work (SOW)
8. Click Open.

What are the requirements listed under Deliverables-Installation for submitting an electronic copy of the plan?

Quality assurance certification for the technical services that you provide

The TSP Final Rule requires that a TSP assumes responsibility in writing for the technical services provided to their clients. The Technical Service Provider Certification form signed by both the TSP and landowner declares that installed practices must meet NRCS Standards and Specifications.

What quality review processes will be used to inspect your work?

NRCS performs quality assurance reviews to ascertain that practices have been properly designed. The TSP is responsible for providing technical services that meet NRCS standards and specifications. The NRCS will only reimburse a participant for technical services provided in accordance with established NRCS standards, specifications, and requirements, so it is important that a TSP understand those requirements before work commences.

The NRCS may choose to review TSP work as part of regular quality assurance activities. TSP work will be evaluated in accordance with the NRCS General Manual 340, part 404 and General Manual 450, part 407. The documentation supplied by the TSP upon completion of the technical service may be used as part of the evaluation process. Check with your State TSP Coordinator for specific information about the Quality Assurance review process for a particular state.

How do I obtain a producer's case file information?

When the producer contracts for your services, there are three ways for a TSP to receive producer file information:

- The producer requests a hard copy of pertinent file information directly from the NRCS field office and provides those copies to the TSP.
- The producer signs a written release giving NRCS permission to copy the file information and NRCS gives a hard copy to the TSP. Both the producer and TSP need to complete and submit Form NRCS-CPA-70 "Permission To Access Program Participant NRCS National Conservation Planning (NCP) Database Information For Technical Service Providers (TSP)" to the NRCS. This form is available on the TSP Website under *TSP Resources-TSP Forms*

General Etiquette for Handling Producer Files

- Do not request information beyond what is needed to compl*ete the practice(s) for* which you have been contracted.
- Treat the producer's business records with confidentiality.

Note: Freedom of Information Act (FOIA) requests are not required to request information in a producer file if that producer has given permission to the TSP to access this information. (See Part 2 of this course for more information on FOIA).

EXAM QUESTIONS

17. Grants, contracts, and cooperative agreements are used frequently by the NRCS to accomplish the mission of conserving, maintaining, and improving our natural resources.
    a. True
    b. False

18. A producer may use a TSP only if NRCS gives the producer permission to do so.
    a. True
    b. False

19. When a landowner acquires the services of a TSP, the TSP enters into a contract with the NRCS.
    a. True
    b. False

20. The TSP must turn over copies of all work products to the NRCS and the producer upon completion of the practice.
    a. True
    b. False

Summary

This section provided you with some general information about how the NRCS acquires technical services, as well as more detailed information about producer acquisition of technical services. You also were given some information about what to expect during the interview process, the payment process and what your responsibilities are in regards to quality control procedures. A producer has a choice to hire a TSP or wait for NRCS assistance. NRCS conservation program funding availability determines whether a producer will receive reimbursement. TSPR rates do not reflect the amount that you should charge for your services.

Part Two – Policies

Section 1 – Roles and Responsibilities

Introduction

This section will concentrate on describing the roles and responsibilities of NRCS, the producer and the TSP when hired to complete a conservation practice or plan.

Upon completion of this Section you will be able to:

- Explain the roles and responsibilities of NRCS, the producer and the TSP
- Identify opportunities for clarifying roles and responsibilities prior to the start of a conservation project

What are the roles and responsibilities of the producer when hiring a TSP?

The producer becomes, in essence, the general contractor for the conservation project. The producer is ultimately responsible for the planning, installation and checkout of the conservation practice that occurs on the land he controls. A producer may hire a TSP's services whether or not they have a USDA-NRCS conservation contract in place. However, as learned in Part 1 – Hiring the TSP, the producer will not be reimbursed by NRCS for conservation practices designed or laid-out if a conservation contract has not been signed between NRCS and the producer. Understanding the roles and responsibilities of each entity is essential. The producer's responsibilities include, but are not limited to:

- Notifying NRCS that they wish to utilize the services of a TSP.
- Understanding the payment process authorized through the TSP Initiative.
- Signing the USDA contract or agreement prior to the commencement of work activities listed in the contract.
- Interviewing and hiring a TSP certified in the appropriate category and practice.
- Providing the TSP with their current conservation plan or providing NRCS with a signed release of information.
- Complying with the terms and conditions of the program contract or written agreement.
- Meeting regulatory requirements, obtaining necessary records and securing approvals, authorities, rights, permits and easements.
- Coordinating and prioritizing multiple and/or overlapping job tasks between TSPs, contractors and NRCS.
- Ensuring that the completed work meets the NRCS standards and practice specifications.
- Providing NRCS with required documentation and invoices when the technical services have been completed.
- Paying the TSP for the technical services that have been provided independent of delays in the NRCS reimbursement process.
- Requesting an assignment of payment from NRCS if you wish NRCS to pay the TSP directly from your reimbursed contract funds.

What are the TSP's roles and responsibilities in completing a conservation practice?

The TSP is responsible for the design, installation (lay-out) and/or checkout of the practice(s) as outlined in the Statement of Work. Some TSP responsibilities will overlap with NRCS responsibilities. Ultimately, the TSP, the producer and NRCS all work toward the same goal – more conservation on the ground built to quality standards and specifications.

TSP major responsibilities are:

- Being certified for the conservation practices and CAPs for the work being undertaken.
- Having a contractual relationship with the landowner/producer. If a TSP is under contract directly with NRCS, there may be slightly different responsibilities. In that case, the TSP is a private contractor for the agency and the NRCS contract or agreement will outline the roles and responsibilities.
- Obtain necessary training needed to become certified. Establish and maintain training records, and provide training documentation to NRCS or to recommending organizations if requested.
- Utilize the services of certified subcontractors, as provided by NRCS policy.
- Collecting or assessing data to support processing program applications for the producer if requested. Administrative and program responsibility still remains with NRCS, including determining eligibility, ranking applications, approving contracts, practice payments, etc.
- Provide technical assistance that is in compliance with appropriate statutory and regulatory requirements.
- Work with producers to help ensure that all approvals, authorities, rights, permits, and easements necessary for the implementation, operation, and maintenance of conservation practices have been obtained prior to conservation practice installation when the scope of services agreed upon includes check-out.
- Assume responsibility for the technical services provided, including any costs, damages, claims, liabilities, and judgments arising from past, present, and future negligent or wrongful acts or omissions of the TSP in connection with the technical service provided.
- Accept responsibility in writing for the particular technical services provided. NRCS state offices may require the completion of a TSP Certification form
- Provide copies of all the work products and deliverables as required in the Statement of Work or Conservation Activity Plan criteria for the work performed to both NRCS and the producer.

What is the role of NRCS when a TSP provides technical service to a Producer?

The NRCS provides the producer and the TSP with the guidelines and information necessary to meet the standards and specifications for conservation work. The NRCS will also provide regulatory and quality assurance information to the TSP and the producer. NRCS responsibilities include:

- Establish the certification, certification renewal, decertification, and recertification processes for TSPs.
- Ensure that participants receive a choice in obtaining technical assistance from NRCS or from a TSP.

- Reimburse participants or make direct payment to TSPs upon receipt of an assignment of payment.
- Establish and publish technical service payment rates (TSPRs) annually for conservation work and ensure that the process to make payments for TSP services is in accordance with the policy specific to the conservation program being utilized.
- Implement an accountability system to measure and monitor progress, use, performance, and accomplishments of certified TSPs.
- Make conservation planning and application technology and technological tools available for use by TSPs, reserving the option to apply fees to specific technology and tools.
- Retain responsibility for all decision-making and consultation required by federal agencies related to compliance with resource protection laws.
- Use NRCS appeals and mediation policy to resolve disputes regarding technical services acquired from TSPs in contract directly with NRCS.
- Incorporate appropriate bonding and insurance requirements in any contract or agreement entered into between NRCS and a TSP.
- Encourage participants to address bonding, insurance and liability issues in any contract or agreement they enter into with a TSP.
- Establish policy and procedures regarding technical assistance waste, fraud, and abuse and reporting mechanisms.
- Conduct quality assurance reviews of TSP work in accordance with State Quality Assurance Plans.

The value of pre-planning conferences

Knowing and understanding the roles and responsibilities of the NRCS, the TSP and the producer is important in order to successfully coordinate conservation work. A pre-planning meeting with NRCS, the producer, and the TSP is a good way to review each role and responsibility. Discussion topics can include:

- The objective of the conservation work to be performed
- The conservation practice being installed
- Timelines
- NRCS standards and specifications for the practice(s)
- Other contractor involvement in completing the project
- Quality Assurance procedures
- Regulatory requirements, obtaining necessary records and securing approvals, authorities, rights, permits and easements.
- NRCS producer file access requirements and forms
- Plan information and formatting requirements
- Technical tools or specialized knowledge needed to complete the plan or project
- NRCS reporting and documentation requirements
- Producer reimbursement procedures

EXAM QUESTIONS

21. Who is responsible for making sure that you are properly certified for the work you are contracted to perform?
    a. Producer
    b. You
    c. NRCS
    d. a and b
    e. a, b and c

22. Who is responsible for paying you after your work is completed? (Unless a payment has been assigned)
    a. Producer
    b. You
    c. NRCS

23. Who is responsible for ensuring your work meets NRCS standards and specifications?
    a. Producer
    b. You
    c. NRCS
    d. a and b
    e. a, b, and c

24. Who is responsible for requesting that a program contract be modified to add TSPR rates for utilizing a TSP?
    a. Producer
    b. You
    c. NRCS

Section 2 – Planning and Technical Policies

Basic information regarding NRCS planning and technical policy is provided in this Section. More complete information may be obtained by clicking on the links provided.

What are the NRCS planning policies related to TSPs and where are they located?

Policies set the parameters for TSP work. They are the result of legislation, departmental regulations, or agency rules. Policies dictate acceptable practices or performance. Handbooks or bulletins give advice and suggest a course of action in the way policy is implemented. Typically, guidance is flexible, policy is not.

Some NRCS policy, such as the Privacy Act, is only applicable to TSPs if they are under contract to NRCS. TSPs under contract directly with the producer/landowner are not obligated to follow this policy. However, many of the policies introduced here, such as Cultural Resource policy, are important to TSP clients, who are under contractual obligation to follow the policy. For that reason, it is important for the TSP to have an understanding of federal policy.

The following is a brief overview of some of the most significant policies that affect conservation planning:

- The use of a three phased, nine step planning process called the NRCS Conservation Planning process is used to accomplish natural resource management.
- Conservation planning will have an objective to help the client bring about the sound use and management of all the natural resources on the farm or ranch unit in order to prevent their degradation and assure their sustained use and productivity. These resources are specifically: soil, water, air, plant, and animal resources.
- Resource management systems are the means to accomplish natural resource objectives.
- The NRCS Conservation Planning process will encompass development of resource management systems. In the case of specific purpose programs, the client may only be required to select and implement management systems that address certain resources and certain resource considerations.
- Human considerations (economic and social), related to the resources, will be addressed.
- All TSPs as well as NRCS conservation planners will be certified.
- All plans developed by a TSP will be approved by an NRCS or partner certified planner.
- State Conservationists will establish and implement a process to ensure training is provided to NRCS employees and Technical Service Providers.

The following references provide additional information about conservation planning policy:

- Conservation Planning Policy (General Manual 180, Part 409): This document establishes Natural Resources Conservation Service (NRCS) policy for providing conservation planning assistance to clients.
- Planning procedures and methodology are contained in the National Planning Procedures Handbook (H-180-600, Part 600). The handbook provides a connection between General Manual Policies and Field Office Technical Guides. It is important that TSPs understand these policies and procedures and are familiar with where to locate them.

Is there an online location for NRCS technical policy manuals?

TSPs can locate National NRCS technical policies including manuals, e.g., the National Forestry Manual, Biology Manual, etc. from the electronic eDirectives System. This information helps support and guide conservation work in addition to the conservation practice standards and specifications. States may also post manuals and handbooks on the eFOTG under Section I.

Exercise 6: Using eDirectives System

Find the National Forestry Manual

- Go to NRCS eDirectives System home page
- Click on "Manuals" on the left side-bar
- Click on "Title 190 – Ecological Sciences" to expand the folder.
- Click on "National Forestry Manual" to expand the folder.
  - Click on [view all] for "Part 536 – Conservation Planning" to view the forestry planning policy
  - Close the "Part 536 – Conservation Planning" window and return the eDirectives page and explore technical manuals.

Other Reference Materials and Resources

The following list is provided as reference material. The manuals and handbooks contain information about policy and conservation planning and practices that may be valuable to the TSP in designing, installing or checking out conservation work. Consider bookmarking pertinent policy documents for future reference. The following documents are available online:

- Cultural Resources (GM_420_401 - Part 401 - Cultural Resources (Archeological and Historic Properties): Guidance to NRCS policy and procedures for cultural resources during the planning and implementation of NRCS practices. The NRCS National Cultural Resources Procedures Handbook (H_190_601- Part 601) is also provided as a reference tool for TSPs. However, the Advisory Council on Historic Preservation's web page, Working with Section 106, may be more appropriate reference material for most TSPs needing guidance on cultural resources.

- National Agronomy Manual (M_190_NAM): This manual gives the policy and requirements for providing technical assistance in agronomic activities. Pest Management policy can be found in the General Manual (GM_190_404-Part 404).

- Comprehensive Nutrient Management Plan Policy (H_190_620 -Part 620 Comprehensive Nutrient Management Planning): This technical reference is used to assist individuals in the development of Comprehensive Nutrient Management Plans.

- Nutrient Management Policy (GM_190_402- Part 402): This reference provides guidance and procedures to be followed when providing assistance involving nutrient management.

- National Biology Manual Biology Policy (Title 190): This reference gives the requirements for providing assistance in activities pertaining to wildlife and other biological resources.

- National Engineering Manual (M_ 210_NEM) and National Engineering Handbook (H_210_NEH): Both references outline guidance to NRCS policy and procedures for providing technical assistance involving engineering practices.

- National Environmental Policy (GM_190_410 - Part 410 - Compliance with NEPA): Describes procedures by which NRCS is to implement the provisions of National Environmental Policy Act.

- National Forestry Manual (M_190_NFM): This reference establishes NRCS policy for forestry and agro-forestry activities.

- National Plant Materials Manual (M_190_539): Establishes the policy for the NRCS Plant Materials Program who is charged with developing, testing, and transferring plant science technology to meet customer and natural resource needs.

- National Range and Pasture Handbook (H_190_NRPH): This reference provides information about the policy and procedures for providing conservation technical assistance on range and pastureland.

- NRCS General Manual: The General Manual is the primary policy document for the agency. It is located on the eDirectives webpage. State Supplements to the General Manual are located at the bottom of this page. State Supplements contain specific state requirements related to conservation planning, technology, quality assurance and other topics that will be useful to TSPs working in a specific State.

Where can a TSP find NRCS Program policy and information?

NRCS organizes and prioritizes work through programs. This exercise will introduce the TSP to programs that their client may be working with or interested in applying for in the future.

- The NRCS Farm Bill Conservation Programs Web page provides descriptions of the various conservation programs which NRCS administers or assists with. Click on one of the program names. Note that NRCS may not be the primary agency responsible for all the programs in which it is involved, such as the Conservation Reserve Program (CRP).
- The National Conservation Programs Manual is located on the e-directives webpage under Manuals - Title 440 Programs – Parts 500-527 and provides the guidance and policy for all the financial assistance programs. The TSP Manual is located here in Part 504- Technical Service Provider

Are there additional NRCS polices and federal laws that will affect TSPs?

Civil Rights

Civil rights laws, statutes, and regulations require that all federal programs and services be delivered in a nondiscriminatory manner. This includes the TSP Program where a third party provider receives funding from the USDA-NRCS either directly or from a producer enrolled in a conservation contract. Also included in this section is information on conservation planning policy. Regardless of whether you are hired by the TSP or the NRCS, it is important for the TSP to know where to locate these resources.

As you discovered in Part 1, NRCS or the producer may choose to contract TSP services. When hired directly by the producer, certain laws and policies may not apply to you, although it is still a good idea to be familiar with the policies.

If you are hired by NRCS to provide technical services, you are expected to abide by federal policy in addition to other stipulations which may be dictated in the contract. TSPs receiving payment from NRCS must comply with Title VI of the Civil Rights Act of 1964, Title IX of the Education Amendments of 1972, Section 504 of the Rehabilitation Act of 1973, and the Age Discrimination Act.

Freedom of Information Act and Privacy Act

Freedom of Information Act (FOIA) and Privacy Act (PA) - The Freedom of Information Act (FOIA) is a federal statute which allows any person the right to obtain federal agency records unless the records (or part of the records) are protected from disclosure by any of the nine exemptions contained in the law. FOIA is particularly of interest to TSPs because it has an impact on your ability to obtain producer records under Conservation Program Contracts (CPC).

Information about Conservation Program Contract (CPC) applicants is generally not released to the public because individual privacy rights must be protected. Non-releasable information regarding CPC applicants include:

- Names
- Addresses
- Telephone Numbers
- Social Security or Tax Identification Numbers
- Amount of federal funds requested

However, once the applicant has signed a Program Contract, NRCS can release the following information:

- Names
- Limited Address information (state, city, and/or county*)
- Amount of federal funds requested

**Additional restrictions about the release of address information apply to some corporate and nonprofit Businesses. Consult an NRCS State FOIA Officer for more guidance.*

A TSP may make a FOIA request to obtain this information. One use for this type of information would be to establish a mailing list for marketing TSP services.

Examples of information that may be routinely provided without a FOIA request are:

- Publications, soil surveys, brochures
- Job sheets
- Press releases
- Permanent directives (including manuals, handbooks, General Manual parts, technical notes, technical releases, and material from the Field Office Technical Guide such as standards and specifications, soil data, resource management systems, cost-return data, and no copyrighted references. You will be advised if the request is for materials normally sold to the public through the National Technical Information Service (NTIS) or the Government Printing Office (GPO) as listed in National Engineering Manual 210-545.14.)

If NRCS contracts TSP services, you should take particular care in protecting privacy matters pertaining to:

- A producer's commercial and/or financial matters.
- Information that could cause substantial harm to the producer's competitive position.
- Information which might impair the ability of the government to obtain necessary information from this producer in the future.

You, and your employees, are prohibited from discussing a producer's NRCS file information with anyone outside the scope of the practice or project that you are working on at the time.

EXAM QUESTIONS

25. What is an example of information that may be routinely provided without a FOIA request?
    a. Names
    b. Addresses
    c. Publications
    d. Telephone numbers

26. Freedom of Information Act (FOIA) is an act that:
    a. Provides public access to records of the Executive Branch
    b. Regulates the collection, maintenance and use of personal information
    c. Protects persons from discrimination based on race, color or national origin
    d. Protects individuals from employment discrimination

Summary

This completes Part 2 of this course. Part 2 provided basic information and access to various conservation planning and administrative policies that are of particular interest to TSPs. Should you enter into a contract with NRCS, please refer back to this section. You may also ask an NRCS contracting official about policies that may apply to you when performing services for NRCS.

Part Three – Technical References, Tools and Training

Section 1 - Technical References

Introduction

When a TSP is certified, the certification includes a confirmation that the TSP understands how to use certain NRCS technology tools. Most government program information and technical references that a TSP will use are found on the Internet. NRCS Staff and the NRCS State TSP Coordinators are available to assist the TSP in locating NRCS technical reference and conservation tools. This section will provide the TSP with information for finding most NRCS technical references and tools. The information found in this section is provided as reference material only. The TSP should be able to reference information needed to meet NRCS standards and specifications for the practice work being performed. Follow the links and bookmark the appropriate technical materials as needed. The primary technical NRCS resource for the conservation of soil, water, air, plant and animal resources is called the Electronic Field Office Technical Guide (eFOTG). It is available on-line and is customized and maintained by each State in order to address the unique resources of that State.

Upon completion of this Section you will be able to:

- Locate references and tools
- Identify training resources
- Describe and find the Electronic Field Office Technical Guide (eFOTG)
- Locate general resource information
- Contact USDA state and local personnel
- List the most important technical references that you will use to complete a practice

Why is it important to use the Field Office Technical Guide when completing practices?

The Electronic Field Office Technical Guide is the primary resource for all conservation practices. It contains technical information that a TSP will be required to understand prior to becoming certified. TSPs are required to use and understand NRCS technical guides to apply practices according to the geographic area where conservation work is being performed.

Because standards and specifications for practices are periodically updated to reflect new technology and other changes, it is recommended that the practice specification on the eFOTG website be reviewed prior to starting a practice.

Where is information filed in eFOTG?

Information in eFOTG is listed in five sections:

Section I: General References

This section contains general state maps, watershed information, and links to NRCS reference manuals and handbooks. It also includes the conservation cost data, e.g., cost of conservation practice application.

Section II: Soil and Site Information

This section contains detailed information about soil, water, air, plant, animal and human resources. Soil Surveys, Hydric Soil Interpretations, Ecological Site Descriptions, Forage

Suitability Groups, Cropland Production Tables, Wildlife Habitat Evaluation Guides, Water Quality Guides, and other related information can be found here as it becomes available

Section III: Conservation Management Systems

This section contains information on NRCS Resource Quality Criteria, which establish the standards for resource conditions that help provide for sustained use. It also lists the specific criteria for completing Conservation Activity Plans.

Section IV: Practice Standards and Specifications

This section contains the standards and specifications for NRCS Conservation Practices. Practice Standards define a practice along with the purpose and land type where it applies. Practice specifications are detailed requirements for designing and installing a practice in the State. Statements of Work for each practice standard, including required deliverables, are included in this section. Job sheets, worksheets and other supporting documents for recording information about a practice can also be found in this section.

Section V: Conservation Effects

Background information on how conservation practices affect each identified resource concern in a State is located in this section.

EXERCISE 7: Field Office Technical Guide

This exercise will increase your awareness of the resources available on the eFOTG website.

This exercise is easiest to complete if you print a copy of the exercise to reference as you move through the exercise. Allow 15 minutes to complete this exercise.

Locate the "Field Office Technical Guide (eFOTG) from the TSP Website

- Open the TSP webpage
- Click on "Technical Resources for TSPs" under TSP Resources located in the middle of the page.
- Scroll to the bottom of the page and click on "Field Office Technical Guides (eFOTG)."
- Click on View FOTG Application on the left-hand sidebar to get to the FOTG County Locator
- Click on your state.
- Click on your county.
- Read the information found on the page. Pay particular attention to the "What's Changed Recently" section of the page. Before starting work on a practice, check the eFOTG to see if the practice standard and specification has been updated.
- Click on the drop down box at the upper left hand side bar. Select "Section IV."
- Open the file "Conservation Practices". Some States may have slightly different wording and arrangement of information within this file. Spend a few minutes exploring the different reference materials found here.
- Close out of eFOTG, the eFOTG locator and eFOTG Webpage

What are Standards and Specifications?

The NRCS refers to the specific requirements for designing, installing, and maintaining conservation practices as "Standards and Specifications." You may also hear these requirements simply referred to as "Standards and Specs". Section IV of the FOTG is dedicated to practice standards and specifications and the Statements of Work. TSPs must meet or exceed these specifications when installing conservation practices.

Standards and Specifications are specific by state. The National Conservation Practices Standards are released through the National Handbook of Conservation Practices (NHCP). Each NRCS State Conservationist then determines which national conservation practice standards are applicable in their state. States add the technical detail needed to effectively use the standards at the Field Office level, and issue them as state conservation practice standards.

TSPs may find unfamiliar terms and concepts outlined in eFOTG. When in doubt, contact the local NRCS for clarification. TSPs are responsible for understanding the regulations in each state where certified as a TSP.

EXAM QUESTIONS

27. What is the name of the primary technical reference for the planning, installation, and checkout of NRCS practices?
    a. The National Agronomy Manual
    b. The Field Office Technical Guide
    c. The NRCS General Manual
    d. NRCS National Directives

28. What part of the eFOTG contains practice standards and specifications?
    a. Section I
    b. Section II
    c. Section IV
    d. Section V

Section 2 - Technical Tools and Training

What is the Customer Service Toolkit and how does it relate to TSP work?

Customer Service Toolkit:

The Customer Service Toolkit software facilitates the electronic development, presentation, and dissemination of information by NRCS field staff working with customers. Toolkit enables field staff to display and share agency program and technical information with USDA customers, such as conservation plans, soil interpretations, and conservation programs. Toolkit is used to develop and provide this information as custom products for customers. Toolkit uses customer data such as land unit boundary data, digital ortho-photography, soils, and other geospatial data, and

provides support for file management of work sheet or job sheets for specific conservation practices. Toolkit also allows for the exchange and sharing of information among partner agencies and customers.

EXERCISE 8: Find Additional Tools and References Online

- Go to TSP Website.
- Open Technical Resources for TSPs.
- Open Tools and Applications.
- View the list of resources available online.
- Go back to Technical Resources for TSPs.
- Open the link to one of the Wind Erosion Prediction Tools.
- Locate where the tool can be downloaded.
- Close the Wind Erosion Prediction Tool application and return to the lesson.

What additional tools and references are available online?

What additional tools and references are available online?

The following are some but not all of the web-based tools available for use by Technical Service Providers. Other resource technology tools can be located on the NRCS Website under Technical Resources-Tools and Applications:

- CanVis -Image Editing for Resource Planning: The kit includes the basic elements needed to create photo-realistic visual simulations including CanVis training CD, and Visual Simulation Guide.
- Water Erosion Prediction Tools (RUSLE2): This site contains the official NRCS version of RUSLE2. It is the only version of RUSLE2 to be used for official purposes by NRCS field offices. The NRCS developed and maintains the database components on this site.
- Wind Erosion Prediction Tools –Wind Erosion Prediction System (WEPS) and the Wind Erosion Equation (WEQ): An erosion model designed to predict long-term average annual soil losses from a field having specific characteristics.
- Ecological Site Information System (ESIS): ESIS is the NRCS repository for ecological site descriptions and for information associated with the collection of forestland and rangeland plot data. ESIS is organized into two applications and associated databases; the Ecological Site Description (ESD) application and the Ecological Site Inventory (ESI) application. This section also provides access to technical resources and technical guidance for developing and understanding ecological sites.
- Forage Suitability Group Descriptions (FSGD): FSGDs are interpretive reports which provide a soil and plant science basis for conservation planning where forage crops are grown. FSGDs identify adapted forage species, yearly forage production estimates, and distribution of production during the growing season.
- Manure Management Planner (MMP): A manure utilization planning tool developed at Purdue University to help develop nutrient management plans.
- Spatial Nutrient Management Planner (SNMP) is a decision-support tool that facilitates the collection, analysis, and presentation of spatial information related to nutrient

management planning. The SNMP interface simplifies the GIS program ArcMap for nutrient management planners, and simplifies the creation of maps required for NRCS comprehensive nutrient management plans. SNMP data can be imported and exported from MMP.

- PLANTS: The PLANTS Database provides standardized information about the vascular plants, mosses, liverworts, hornworts, and lichens of the U.S. and its territories. It includes names, plant symbols, checklists, distributional data, species abstracts, characteristics, images, crop information, automated tools, Web links, and references.
- WinPST: Windows Pesticide Screening Tool (WIN-PST 3.1) is a simple pesticide screening tool used to evaluate the potential environmental risks for pesticides. NRCS conservationists, TSPs, extension agents, crop consultants, pesticide dealers and producers can use this tool to evaluate the potential for pesticides to move with water and eroded soil/organic matter and affect non-target organisms.
- Web Soil Survey: Web Soil Survey (WSS) provides soil data and information produced by the National Cooperative Soil Survey. It is operated by NRCS and provides on-line access to soil maps, soil descriptive reports and other data.

Other Resources: National Handbooks

NRCS national handbooks generally provide "how-to" information and procedures for implementing certain types of conservation activities and practices. The Appendix contains links to NRCS Handbooks and other technical references

Training

Responsibility for obtaining training needed to become certified as a TSP was reviewed in PART 1, Section 3 under Registration and Certification Process. Training to maintain certification in certain TSP categories and CAPs may be required on a regular basis. In addition to professional organizations, universities and conservation organizations, the TSP Website will list some training opportunities for TSPs.

Summary

This Section provided references to some of the basic tools, and guides for planning, designing and installing conservation practices and plans. To the extent practical, NRCS will make technology and technological tools available for use by TSPs, through the use of Web- and software-based technology, and training opportunities. Examples include conservation practice standards, electronic Field Office Technical Guide (eFOTG), ecological science and engineering software, and numerous other technical tools and references for conservation application, design, evaluation, inventory, planning and reporting of natural resources conservation practices and systems. Refer to the State(s) you are providing assistance in for more information on other available reference documents and tools available to TSPs.

Part Four – Conservation Planning for TSPs

Course Introduction

The goal of Part Four is to introduce the TSP to the concepts, philosophy, and process of conservation planning.

Conservation Planning for TSPs contains Modules 1 - 5, which cover the background and framework for conservation planning. These modules are:

- **Module One –Background to Conservation Planning:** Sets the stage for the course by providing the background for conservation planning and the conservation partnership, the relationship of the TSP with the NRCS and describes how to do business in the conservation planning arena.
- **Module Two - Planning Policy and Guidance:** Provides highlights of conservation planning and related policy, as well as information on programs and how they relate to the planning process.
- **Module Three - Key Elements of Conservation Planning:** Covers the key elements of conservation planning and an introduction to the three-phase, nine-step planning process.
- **Module Four - Conservation Planning Environment Components and Interrelationships:** Covers the conservation planning environment, including the components and relationships of natural resources, cultural resources, economic considerations, social considerations, and policy issues.
- **Module Five - Resource Management Systems:** Covers Resource Management Systems (RMS) and the tools used to develop RMSs.

As you go through the Conservation Planning modules, please make note of any questions or comments that you have on the material. If you have any questions or comments about the course content please direct them to Dwayne Howard (Dwayne.Howard@wdc.usda.gov), National TSP Team Leader in the Conservation Technical Assistance Division of NRCS. Please direct questions that are specific to state policy or operations to the appropriate personnel in your state.

Conservation Planning for TSPs: Module 1

Background to Conservation Planning

NRCS Mission: Helping People Help the Land

NRCS Vision: Productive Lands, Healthy Environment

The NRCS-TSP Relationship in Conservation Planning

NRCS helps land users plan and apply conservation systems that have a positive effect on the quality of the nation's natural resources, are economically and environmentally sustainable, and meet mandated requirements. Technical Service Providers support the NRCS mission in their work with land managers and thereby extend the reach of conservation applied to the land.

A history of how third party vendors became associated with NRCS can be found in *"Third Party Vendors in Conservation"* D. Helms, et. al. and explains how Hugh Hammond Bennett, the first Chief of the Soil Conservation Service from 1935- 1952 (SCS; predecessor to NRCS), emphasized that soil conservation would require the efforts of many and various sciences and technical disciplines. Many decades later, public and private interest is increasing in engaging third party vendors in providing technical services for a wide variety of natural resource disciplines.

Historically, NRCS has used outside contractors in order to implement elements of its programs. In the 1950's, contracting with groups or organizations at State and local levels was used to accomplish a variety of tasks from complex engineering design and highly specialized surveys to site appraisals and easement recordation.

The conservation movement in the United States, fueled by federal programs and supported by the increasing environmental awareness of the public at large, also contributed to a growth in specialized technical service providers and contractors.

The 1996 Farm Bill broadened the availability of technical and planning assistance to eligible participants in USDA programs and provided a basis for formalizing a process for recognizing third party vendors—individuals with appropriate training and certification to provide

conservation technical services. The 1996 Act stated:

The Secretary shall permit persons to secure technical assistance from approved sources as determined by the Secretary, other than the Natural Resources Conservation Service. (*Federal Agriculture Improvement and Reform Act of 1996* (P.L.104-127) Subtitle E, Sec.1243 (d), April 4, 1996, 110 STAT 1009.)

NRCS continues to work with third party vendors to increase technical services available to private landowners and operators. The certification criteria established for TSPs help ensure that all providers of technical services meet the same level of competency in order to protect the public and ensure quality technical services. Maintaining the agency infrastructure that supports its technical capacity will be fundamental to working with third party vendors in the conservation workforce.

The TSP-Client Relationship in Conservation Planning

The conservation planning process is based on the premise that clients will make and implement sound decisions if they understand their resources, associated resource problems and opportunities, and the effects of their decisions on the land, their neighbors, and themselves. The conservation planning process is most successful when clients gain knowledge that allows them to address resource problems and opportunities.

All TSPs will utilize a conservation planning process when providing technical assistance. Although this course provides the TSP with an overview of the conservation planning process, additional planning courses are required to become a certified conservation planner.

At the end of this section you will be able to:

- Describe the importance of the conservation partnership.
- Discuss the relationship between "providing technical assistance" and "conservation planning."
- Define the achievements of conservation planning.
- Explain why conservation planning should be done in the field with the decision maker.

Of primary importance in these principles is that conservation planning should be done with the decision maker out on the land.

Planning involves a focused approach to working with the ecological processes that sustain natural resources and the human interactions (economic, social, and policy) with those resources. Natural resources and human considerations are considered and integrated during the planning process. All plans consider on-site and off-site effects and long-term effects and impacts of planned actions. Conservation planning is a nine step process that integrates ecological, economic, and social considerations to meet private and public needs. The same process is used in all planning activities undertaken by NRCS and TSPs.

A TSP Conservation Planner should...

- Be qualified to provide technical assistance on the natural resource management systems that are common in the area where you will be providing work.
- Use the nine step planning process as a systematic approach to assisting the client.

- Involve the client throughout the planning process.
- Lead, guide, and assist clients in recognizing resource problems and opportunities relating to soil, water, air, plant, animal and cultural resources; the ecological interactions that occur among these resources, and the social, economic, and policy issues that affect resource use.
- Assist clients in resource inventories and developing realistic objectives.
- Progressively plan as much needed conservation treatment as clients are willing and able to attain.
- Work toward a plan with clients that will address all resource concerns.
- Help clients choose conservation treatments that are appropriate for their situation, implement treatments, and evaluate results.
- Interact with the client as a professional.
- Listen and learn from the client.

Conservation Planning for TSPs: Module 2

Planning Policy, Programs and Guidance

Basic information regarding NRCS planning policy was provided in Part 2 or Section 2, *Planning and Technical Policies*. This module will help the TSP:

- Find various policies relating to conservation planning.
- Understand how policy, procedures, technical guidance, and programs fit together.
- Understand how programs support implementation of conservation plans.

Policy

Conservation Program Policy provides the platform for providing conservation planning assistance to clients. Go through the following exercises to gain a more thorough understanding of how TSPs will provide conservation planning assistance to their clients.

Procedures

Planning procedures and methodology are contained in the National Planning Procedures Handbook. The handbook provides a solid connection between General Manual Policies and Field Office Technical Guides.

EXERCISE 9: Conservation Planning Policy/Procedures

Part A- Go to the conservation planning policy located in the General Manual, Section 180, Part 409 and view the sections listed.

- Click on the following link: Conservation Planning Policy
- Scroll down to Section 409.3 (e) *Requirements for Providing Conservation Planning Assistance*.

- Can a State Conservationist directly certify qualified third party providers as conservation planners contingent upon these individuals satisfying NRCS requirements?

Part B-Go to the National Planning Procedures Handbook, (H_180_600-Part 600)

- Scroll down to Subpart A- Framework for Planning, Section 600.13 *Preplanning Activities*
- Name three activities a TSP should do before working with a client on a conservation plan or practice.

Field Office Technical Guide

Technical guides are the primary scientific references for NRCS. They contain technical information about the conservation of soil, water, air, and related plant and animal resources. Technical guides also contain cultural, social, and economic information related to human considerations. Field Office Technical guide policy is found in the GM Section 450, Part 401. This policy guides the development and contents of the FOTG.

As reviewed in Part Three, Section 1-Technical References, the electronic Field Office Technical Guide provides localized technical information that apply specifically to the geographic area for which they are prepared.

In a previous exercise, you located the eFOTG for your State and County. Complete the following exercise to obtain a better understanding of where to find practice specific information on the eFOTG:

EXAM QUESTIONS

29. The decision maker during conservation planning is:

    a. The TSP
    b. The Landowner
    c. The NRCS
    d. The Conservation District

30. The Field Office Technical Guide is used for what purpose in the conservation planning process?

    a. To provide general guidance on conservation planning
    b. To provide scientific reference for conservation planning
    c. To provide conservation program guidance
    d. To provide electronic facilitation for development of conservation plans.

31. Conservation Planning Policy is located in which of the following?

    a. National Planning Procedures Handbook
    b. General Manual, Section 180, Part 409
    c. Field Office Technical Guide
    d. National Food Security Act Manual

32. Technical guides used in each field office are localized so that they apply specifically to the geographic area for which they are prepared.

    a. True
    b. False

EXERCISE 10: **Standards and Specifications**

Find the standards and specification for designing a brush management plan in your State.

- Open the TSP Webpage.
- Click on "Technical Resources for TSPs.
- Scroll down to bottom of the page and click on "Field Office Technical Guides (eFOTG)."
- Click on "View FOTG Application" on the left-hand sidebar to get to the FOTG County Locator.
- Click on your state.
- Click on your county.
- Use the drop down box in the left side-bar under FOTG and choose, Section IV
- Click to open the file "Conservation Practices."
- Scroll down through the list to the file labeled Residue and Tillage Management-No Till/Strip Till/Direct Seed (AC).
- Review the documents in this file. They will include a document that outlines the standard for this practice as well as other information and tools such as job-sheets or worksheets, planning and implementation guides, as well as a Statement of Work
- Click to open the document "Residue and Tillage Management, No-Till/Strip Till/Direct Seed (AC) (329) Standard."
- Scroll down to page 4 to find Plans and Specifications
- Name the 5 specifications that need to be recorded.

Planning Tools

Conservation planning software is used by NRCS service center staff, conservation district employees and TSPs to facilitate the electronic documentation of conservation planning activities and the development of products such as a practice schedule of operations and maps for the client. Conservation planning software can be more beneficial to the planner when used with mobile devices such as laptop computers or tablets for documenting conservation planning in the

field with the client. Planning software utilizes USDA customer data, FSA common land unit data, digital ortho-photography, soils and other geospatial data to bring information about a planning land unit together for conservation planning purposes.

Documenting planning data electronically allows NRCS to easily share information with other agencies, TSPs and clients when appropriate.

Other Related Policies

In addition to the policies reviewed in Section Two, Part 2 the references below are policies/laws/issues that impact conservation planning in the NRCS. A brief description of the policy/law/issue is presented.

Endangered Species Act (ESA): Two sections of the ESA are particularly relevant to NRCS planners and their clients. Section 7 directs Federal agencies to (1) use their programs and authorities to promote the conservation of T&E species and (2) insure that their funds and actions do not jeopardize the continued existence of T&E species or adversely modify designated critical habitat. NRCS employees are charged with conserving both plants and wildlife. Section 9 of the Act applies to all clients as well as NRCS planners. This section prohibits "taking" of T&E wildlife, but does not afford protection to T&E plants on private lands. The definition of "take" includes "harm" which has been defined as habitat modifications that kill or injure wildlife by significantly impairing essential behavioral patterns, including breeding, feeding or sheltering.

Equal Opportunity in Program Delivery - It is the policy of NRCS that all federally assisted and federally conducted programs will be administered in accordance with requirements of Title VI of the Civil Rights Act of 1964, Title IX of the Education Amendments of 1972, Section 504 of the Rehabilitation Act of 1973, the Age Discrimination Act of 1975, the Equal Credit Opportunity Act, Executive Orders, U.S. Department of Justice (DOJ) regulations enforcing nondiscrimination requirements, and Departmental rules and regulations. Compliance ensures access in all aspects of delivery of program benefits and services to the public without regard to race, color, national origin, religion, sex, age, or handicap.

Wetlands Conservation Technical Assistance (GM_190_Part 410.26) - It is the policy of NRCS to aid in protecting, maintaining, managing, and restoring wetlands to ensure continued realization of their beneficial values while protecting the soil and water resource base for a viable economic agricultural enterprise.

Migratory Birds/Bald and Golden Eagle Protection Act

Conservation Program Appeals - Any person that receives an adverse technical determination or decision from NRCS must be given rights to appeal the decision.

Programs

NRCS organizes and prioritizes its work through programs. Programs are the way in which government agencies define what they do.

NRCS, being part of the executive branch of the federal government, does not have the authority to begin new programs or appropriate funds to operate programs. First the Legislative Branch must enact enabling laws that provide the authority for a particular program and the funds to support the program. These broad powers are defined in the Constitution.

In the early years the programs managed by the NRCS were general in nature and relatively few in number. As the agency matured and as Congress became more familiar with natural resource problems, the laws enacted became more specific and defined. Also, the responsibilities of the NRCS expanded.

The difference between programs and activities is explained below:

- **Programs** are authorized and defined by Congress for NRCS to administer. For instance Public Law - 566 established the Small Watershed Program.
- **Activities** are the tasks performed to accomplish the programs. For example, conservation planning, watershed planning and engineering design are all activities that are carried on to accomplish the objectives of the Small Watershed Program.

EXERCISE 11: **Farm Bill Programs**

Go to the NRCS Conservation Programs web page which contains descriptions of the various programs in which NRCS is involved. In Exercise 1, you looked at the Farm Bill Programs that NRCS and other agencies administer. The NRCS Conservation Programs webpage lists those programs administered by NRCS. Name two of these programs.

Periodically, Congress passes overarching legislation that impacts all the programs of the USDA. The title of the most recent bill is the Farm Security and Rural Investment Act of 2002. This legislation is normally passed every five years and is commonly known as the Farm Bill.

EXAM QUESTION

33. NRCS organizes and prioritizes its work through:

a. Programs
b. Activities

This completes Module 2. You are prepared to:

- Find and list various policies relating to conservation planning.
- Explain how policy, procedures, technical guidance, and programs fit together.
- Explain how programs support implementation of conservation plans.

Please direct questions that are specific to state policy or operations to the State TSP Coordinator in your state.

Conservation Planning for TSPs: Module 3

Key Elements of Conservation Planning

Introduction

At the end of this section you should be able to:

- List several key elements of conservation planning.
- Describe several characteristics of an effective conservation planner.
- Discuss the importance of salesmanship in the conservation planning process.
- Differentiate the client's role from the planner's role in conservation planning.
- Explain how conservation planning serves as both a teaching and a learning process.
- Discuss the importance of developing long term relationships with clients, and the role progressive planning plays in developing such relationships.
- Diagram the relationship of the planning steps.

Overview of Key Elements

The ultimate goal of the conservation partnership is to get conservation on the ground. Conservation planning is the foundation for all technical assistance provided by NRCS and TSPs. The **key elements** are:

- The Planner
- The Client
- The Process
- The Plan
- The Partnership

The TSP Planner

TSPs need to effectively communicate and work with their clients because:

- The client will help define their own problems, opportunities, and objectives - or the desired future conditions they wish to obtain.
- The client will make the decisions.

- The client will carry out the plan.

It is important for TSPs to have good listening skills when planning because:

- Listening provides the planner with information about the client and their operation. The Art of Communication may be a useful reference as you work with clients.
- The client knows their operation better than anyone else.
- The client is the decision maker.
- The client will express their wants, needs and interests.
- What the client says is important to them.
- Sometimes what the client doesn't say may be as important as what they do say.

Respect private property rights:

- Keep the client informed when you will be on the property
- Leave all gates as they were found
- Remove any trash produced on the visit
- Drive cautiously and with discretion
- Show respect for cultural values
- Walk the land, as appropriate, as opposed to driving

The TSP will guide their clients through the planning process in order to:

- Inventory and analyze their resources
- Help identify problems, concerns, opportunities, and client objectives
- Develop and consider alternatives for making decisions
- Implement their plan and evaluate progress

The Client

The client is the second key element of conservation planning. Two important components include:

- Client's current understanding of the planning process
- Confidentially of client information

The client will need to understand several aspects relating to conservation planning as it applies to their operation. They include:

- The planning process
- The client's role
- The TSP's role
- Plans are developed on-site
- Plans can initiate a long-term relationship
- Plans are flexible
- Client information is confidential and not shared without permission

The client needs to know four basics about their natural resources:

- Where are they now?
- Where do they want to be?

- How can they get there?
- How can they measure change?

The Process - The planning process is used to develop a conservation plan effectively and efficiently.

Several important factors relating to the process are:

- Participation in NRCS programs is voluntary.
- The Planning process is on-going.

> ***The planning process does not stop with development of the plan document. Continued service and follow-up on the part of the planner and others is needed to keep the process going.***

- Ecological and Human Concerns are interconnected and considered.
- Resource Management Systems is a desired goal.

> A resource management system (RMS) is a combination of conservation practices and activities for the treatment of all identified resource concerns for soil, water, air, plants, animals, and humans that meets or exceeds the quality criteria in the Field Office Technical Guide (eFOTG) for resource sustainability. Not all TSP plans are required to be developed to a RMS level, but consideration should still be made in planning to meet resource needs.

- The process considers on-site and off-site impacts of the plan.

> An example of a problem caused by conditions off-site:
>
> A saline seep may be caused by resource conditions and the resource management practiced on a neighbor's land. Treatment of the saline seep may be quite limited on-site. Solving the problem may rest entirely on how the resources are handled on the neighbor's land.
>
> An example of off-site effects and impacts of proposed treatment:
>
> Construction of an impoundment and the diversion of water for irrigation purposes on the planning unit, on-site, may affect stream flows, riparian habitat, and wildlife species downstream of the planning unit, or off-site. Considerations of those off-site effects and impacts need to be a part of evaluating proposed treatment alternatives.

The Plan

The plan document is a key element or portion of the planning process; however, it is not an end in itself. The plan helps get conservation on the ground, thus the planning process does not stop when the client makes decisions, but continues with implementation and evaluation.

TSPs may become involved in any of the different types of conservation plans:

- Conservation Activity Plans (CAPs)
- Individual Conservation Plans
- Area-wide Conservation Plans or Area-wide Conservation Assessments
- Comprehensive Plans with a unit of government

Conservation Activity Plans-CAPs are usually developed as a "component" plan that address a particular agricultural practice or land use, such as a Forest Management Conservation Activity Plan. A CAP may become part of a more comprehensive conservation plan.

Individual Conservation Plans - Conservation plans that are developed with individuals, or with groups where the group acts as an individual and has decision making authority for specific land units. They are voluntary, site-specific, comprehensive, and action oriented. Comprehensive means that a complete job of planning is done whether the planning unit is a field, a series of fields, or the entire unit.

Area wide Conservation Plans or Area wide Conservation Assessments – Area wide Conservation Plans are voluntary, comprehensive plans for a watershed or other defined boundary. They may be developed with formal or informal groups.

Comprehensive Plans With a Unit of Government – These plans are developed with a unit of government that has jurisdiction over an area.

Nine-Step Planning Process

NRCS uses a three-phase, nine-step conservation planning process. TSPs should to follow this same process when developing conservation plans:

Phase I - Collection and Analysis (Understanding the Problems and Opportunities)

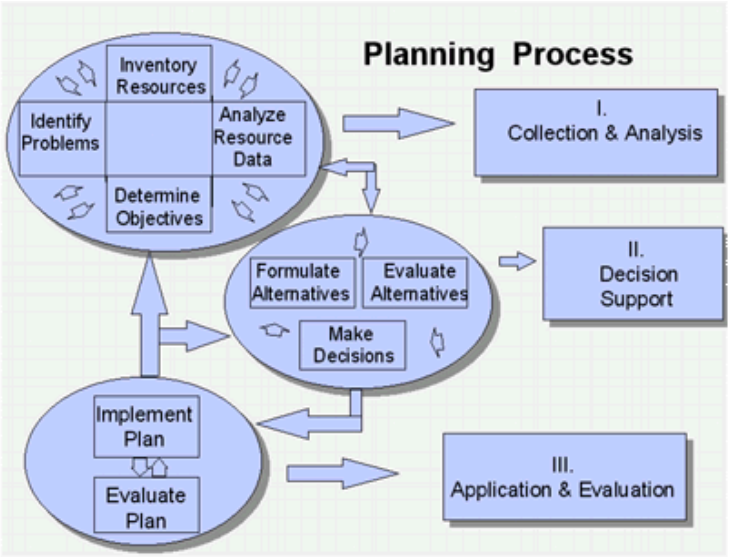
1. Identify Problems
2. Determine Objectives
3. Inventory Resources
4. Analyze Resource Data

Phase II - Decision Support (Understanding the Solutions)

5. Formulate Alternatives
6. Evaluate Alternatives
7. Make Decisions

Phase III - Application and Evaluation (Understanding the Results)

8. Implement the Plan
9. Evaluate the Plan



Planning Process is Dynamic

The planning process is a cyclic process - repetitive - there is a need to cycle back as planning progresses through the three phases. All three phases and all nine steps are vital for successful conservation planning.

Points to Remember:

- The planning process may start with any of the first three planning steps or planning step nine.
- There may be a need to cycle back to step three (inventory resources), while working on step four (analyze resource data), if more inventory information is needed.
- Step one (identify problems) and step two (determine objectives) will not be finalized until step four (analyze resource data) is completed. The analysis in step four will, require a brief review of problem identification and objective determination to make sure they are okay.
- There may also be a need for the client to revise his objectives as alternatives are formulated and evaluated.
- Once the plan is developed, there may be a need to go back through the entire planning process and revise the plan, as it is being implemented and evaluated. A revision may be necessary due to changes in objectives, size of the unit, livestock numbers, economics, weather, etc.
- Based on the results of implementation, there may be a need to look at additional alternatives if the results of plan implementation are not solving the identified problems or meeting the client's objectives.

The Client's Role - The client plays the central role in the planning process. The client:

- Must be involved throughout the planning process.
- Is the decision maker.
- Assists in developing the plan.
- Implements the plan.
- Owns the plan.

The TSP provides technical information, resource information, analysis, alternatives, suggestions, projections, encouragement, and pros and cons; however, the bottom line is that the client is the decision maker and must be actively engaged in the planning process.

TSPs provide planning assistance with the client to develop the plan. The client implements the plan. The plan belongs to the client.

The TSP's Role as a Planner

The TSP planner:

- Provides technical assistance.
- Helps guide the planning process.
- Helps inventory and analyze the resources.
- Assists with developing the plan.
- Helps the client implement the plan and determine the impacts.

Client: TSP Partnership

Plans are developed on-site - Conservation planning requires the client's and the TSP planner's presence on the land. This can only be done on-site. It is an opportunity to:

- Work together in a cooperative effort as a team.
- Teach conservation principles such as grazing techniques, proper plant utilization, etc.
- Observe runoff, erosion, sedimentation, eutrophication, etc.
- Evaluate results of current practices and systems.
- Learn from the client and the application of the plan.

Plans are Flexible - Plans need to be flexible, to allow for adjustments in implementation and management, as conditions change, due to weather, prices, family conditions, or other circumstances. Adaptive management plays a key role in flexibility. It is the process of using monitoring, evaluation, and experimentation to provide information to adjust resource management decisions as needed.

Client and TSP Confidentiality Relationship -TSP's understand the importance of confidentiality in the business relationship they have with the client and keep information confidential, or ask the client if he or she minds if you share particular information with others.

Remember the following key factors:

- **Voluntary -** Participation in NRCS programs on the part of the client is voluntary. Clients hire TSPs voluntarily to help them accomplish their conservation goals.
- **On-Going -** The planning process does not stop with development of the plan document. Continued service and follow-up on the part of the TSP and others is needed to keep the process going.
- **Ecological and Human Concerns -** Conservation Planning looks at the ecological factors (soil, water, air, plants, and animals) and the human factors (economic and social). All these factors are interconnected.
- **Formulate Alternatives -** The planner will understand that alternatives must be cost effective, compatible with the farming or ranching enterprise and the community, and, if possible, provide additional income.
- **Resource Management Systems (RMS)** –Not all conservation plans prepared by a TSP are required to be developed to a RMS level, but consideration should still be made in the planning process to address all resource needs.
- **Consideration of On-Site and Off-Site Effects and Impacts -** The TSP planner and the client not only look within the immediate planning unit boundary, but beyond the planning unit, at interrelated geographical areas, during the planning process.

EXAM QUESTIONS

34. The key elements of a conservation plan include the:
    a. Planner, Client, Process, Plan, Partnership
    b. Planner, Client, NRCS, Partnership
    c. Client, Process, Funding, Plan, Farm Bill

35. Which of the following does NOT show a respect for private property rights?
    a. Keep the client informed when you will be on the property
    b. Leave all gates open when you drive through them
    c. Show respect for cultural values
    d. Walk the land, as appropriate, as opposed to driving

This completes Module 3.

Conservation Planning: Module 4

Conservation Planning Environment Components and Interrelationships

Introduction

At the end of this module you will be able to:

- Understand the "conservation planning environment" and list the components of this environment.
- Describe typical planning environment components of a farm or ranch.
- Explain why data analysis should not just focus on individual components, but should also include analysis of interactions between components.
- Describe key resource, social, economic, and policy components that must be considered to develop a comprehensive, integrated conservation plan.
- Describe the use of economic and social information to increase understanding of a client's interest in conservation and ability to implement the planned resource management system.
- Evaluate whether the presence of a cultural resource creates a need to modify the conservation plan.
- Explain the SWAPA considerations included in the Field Office Technical Guide.

Overview

This module describes a more integrated, systems view of the resources a TSP may work with and the economic, social, and policy environments in which your clients live and work. This module builds on what you know about soil, water, air, plants, animals, and humans (SWAPA+H), and organizes this knowledge into an integrated, systems framework.

"Conservation planning" is a very adequate phrase to describe the integrated, systems nature of TSP work. The three-phase, nine-step conservation planning process is the approach. We call

this the **conservation planning environment** which is the sum of all factors and issues that influence the content of a conservation plan.

The concept is used to define:

- The variables which may have an effect on a client's decisions - resource problems and opportunities, economic opportunities and constraints, social issues and concerns, and legal and policy requirements, and
- The interactions among these variables.

All of these categories are part of a complex whole that composes the conservation planning environment in which a plan is developed and implemented. To isolate one part of the conservation planning environment may result in overlooking problems and opportunities, the identification of symptoms or effects rather than the cause of problems, or the suggestion of conservation practices and systems that do not address important problems and opportunities.

The conservation planning environment is divided into four components:

- **Resources** - natural and cultural resource issues, problems, concerns, and opportunities.
- **Economic** - those factors that deal with the client's business - opportunities, constraints, and management.
- **Social** - issues and concerns of importance to the client's family, neighbors, and community.
- **Policy** - local, state, and federal laws and regulations that affect how a client can use and manage resources.

EXAM QUESTION

36. The **conservation planning environment** is defined as the sum of all factors and issues that influence the content of a conservation plan.

    a. True
    b. False

Describing the Farm or Ranch

TSPs face a variety of complicated social and economic situations when working with clients. The situation of absentee owners and renters complicate who makes on-farm conservation decisions. Other situations include joint ownership, families working together as decision makers, limited resource and minority producers, corporate farms, contract farming, vertical integration of production, cooperatives, etc. Each situation needs to be treated somewhat differently. Below is an example list of common things about a family farm or ranch that are linked - business to family; family to community; and business, family, and community to environment. None of these items listed in a category exist independent of the others.

Use the worksheet below to help address and capture the economic, social, and resource issues of the client farms or ranches you may be working with.

Ideas on the Family Farm or Ranch Worksheet

Some examples of how things can be linked are:

- Pesticides as a business cost and as an environmental regulation,
- Predators as an environmental issue, a business cost and a policy issue, and
- Money for home, college, and retirement as a family issue and paying the farm loan and operating costs as a business item.

Because the client is concerned with both economic and social issues that will influence conservation decisions, TSPs should be concerned about them as well. Conservation planning and technical assistance are some of the ways that clients deal with some of the economic, social, cultural, and policy issues that are important to them. TSPs will work with the client to identify those social and business issues that may be an opportunity, constraint, or problem relative to achieving natural resource conservation.

Following are four examples of ways to think about the family farm or farm family:

- The clients want to minimize the cost of handling manure and want their stream and well water to be clean so the family is healthy. The conservation plan you help the client develop must address proper application of the manure, proper management of the pasture or field where the manure is applied, any uncapped or abandoned wells, and ground water quality.
- The clients want to sustain current production from the cropland and they want to pass a productive farm on to the kids. The conservation plan you help the client develop must address current productivity and long-term sustainability.

- The clients want to reduce wind erosion and want to send their child to college. There is not enough money to purchase new equipment to implement a crop residue program and pay for college. The conservation plan you help the client develop must allow the client to use existing equipment to meet soil erosion goals.
- The clients want to water their cattle from the stream and want to fish in the stream. There is no other water on the place for the cattle, but fish habitat - and fishing - has declined. The conservation plan you help the client develop must address grazing management, livestock water, and fish habitat.

  Use the following worksheet to help identify and capture the client's concepts of the farm business and farm family.

  Contrasting the farm family and the family farm

Economic and Social Issues

Economic Issues

Economic issues must be considered when TSPs help a client develop a conservation plan. Conservation is an investment. Just like other investments, if conservation is done wisely, the costs are manageable. There are a number of economic issues that influence a client's interest in conservation.

1. Factors that discourage conservation:

- Higher interest rates.
- Lower income.
- Heavy indebtedness.
- Greater uncertainty about future costs and prices.
- An outlook for commodity prices and programs.
- Indefinite rights to use resources (ground water, grazing permits).
- Price supports.
- Insecure tenure.
- Wavering of public conservation policy.

2. Factors that encourage conservation:

- Lower interest rates.
- Flexible amortization and interest payments.
- Better markets for assets.
- An outlook for commodity prices and programs.
- More definite rights to use resources (ground water, grazing permits).
- Conservation provisions in leases.
- Financial assistance payments for conservation practices when the public receives some of the benefits.

- Steadiness of public conservation policy.
- Zoning ordinances.
- Land use regulations by self-governing districts.

It is important to note that financial assistance payments should not drive the planning process. Financial assistance is one tool to help a land owner implement a good plan. A comprehensive, cost-effective conservation plan should be developed before financial assistance programs are considered.

Although a conservation planner should not directly inquire about how these conditions may affect the client, you need to know how these issues may relate to a client. A TSP should develop and use interviewing, observation, and other skills that help gain economic and social information that may affect a client's interest in and ability to implement a conservation plan. Listening and observing are essential skills for the conservation planner.

Following are examples of potentially important economic issues that you should be aware of as you help a client develop a conservation plan. You should interpret these as to whether they may encourage or discourage a client to consider a resource management practice, system, or program.

- **Land** - What is the current land use? Does the proposed conservation plan depend on or require the client to change a land use? Do aspects of the plan reduce land available for agricultural production? Does the client have to get approval from a landlord or lender to implement a resource management system?
- **Labor** - Is there an adequate supply of permanent and part time labor available to implement, manage, and maintain the conservation plan? Does off-farm employment limit the availability of family labor for on-farm work?
- **Capital** - Does the client have the money to make the required investment in the resource management system? Does the client have the cash flow to finance annual operation and maintenance costs of conservation practices that will exceed benefits during the first years of operation? Is off-farm employment a required source of income for the family?
- **Risks** - Is the client willing to take risks, or are they for any reason risk adverse? Are yields highly variable because of climate or other factors beyond the control of the client? Are SWAPA resources difficult to manage because of inherent characteristics (shallow soil, deep sand, steep slopes, intensive rainfall, high winds)? Will disruptions in cash flow make it difficult for the client to maintain the viability of the business? Does the plan maintain or increase the client's eligibility for government agricultural programs?
- **Management Level** - Does the client have the knowledge to manage the resource management system? Is the client willing to learn? Will the client make the effort to effectively implement and maintain a resource management system? Is the client available to make critical management decisions at appropriate times during the production cycle?
- **Profitability** - What level of profitability does the client want to achieve from the farm? How much of the client's income is from off-farm employment of one or more family members?

- **Sustainability** - How important is it that the property remain productive, profitable, and owned or managed by the client?

Social Issues

Understanding individual and community beliefs, opinions, attitudes and values helps you understand why a client may or may not be interested in a conservation plan. Resource conservation should generally be of benefit to the client as well as to the public.

Social issues may influence a client's decision to work with a TSP and choose a resource management system appropriate for the property. Social information is important to a conservation planner.

A new resource management system represents change for a farmer. Sociologists suggest that there are six stages that people frequently go through when deciding to accept or reject innovation. These stages are:

- Awareness
- Interest
- Trial
- Analysis
- Adoption, and
- Evaluation

They are depicted in the image below.

Awareness - learning of the existence and possible application of an innovation.

Interest - if people perceive that the innovation will fill a need they will take time to gather more information. When clients approach us to help solve problems or take advantage of an opportunity they have identified a need. They may or may not have an innovation in mind to fill this need.

Trial - during this stage the innovation is carefully compared with existing practices. This stage relies on observing and assessing the results of the experience of those that have already adopted the innovation. These experiences help clients compare new innovations with their existing practices. Developing and comparing several alternative resource management systems can be considered part of the trial stage. An important role for the TSP is to lead the client through the trial stage.

Analysis - during this stage the costs, benefits, applicability, and other characteristics of the favored innovations are considered. The result of this analysis will be a decision to proceed or not to proceed.

Adoption - at this stage, a commitment is made and resources are allocated to implement the innovation. One role for NRCS and partnership staff is to help the client develop the necessary management skills and obtain needed resources. TSPs can assist in this area by being knowledgeable in what programs and trainings are available for their clients to consider. Cost share assistance should never be the reason an innovation is adopted, but cost share may be the difference between adoption and rejection (the client wants to adopt but just does not have the resources to do so).

Evaluation - during this stage the client seeks confirmation that the decision to adopt was correct. Follow-up assistance is important in order to help the client adopt the innovation. Assistance during the evaluation stage gives the TSP an opportunity to learn more about how the innovation may benefit other clients.

EXAM QUESTION

37. Of the four factors listed below which generally discourages conservation?

a. Lower interest rates
b. Land use regulations by self-governing districts
c. Price supports
d. Conservation provisions in leases

Consideration of Cultural Resources

Cultural resources are features of the land just like soil, water, air, plants, and animals. Examples of cultural resources, which a conservation planner may have to help a client evaluate, include archeological sites, historical sites or buildings, and landscape features with religious or other cultural significance. There are legal mandates that apply to cultural resources that a TSP must consider in order to follow all applicable laws.

Cultural resources are all the past activities and accomplishments of people. The resources are usually over 50 years old.

There are many reasons why we need to consider and protect cultural resources:

- **Cultural resources can help you understand the relationship between people and the environment.** They are important as clues to the history of those who have previously lived and worked in the conservation planning environment. By carefully studying and recording these clues we can learn how people lived in the environment, where they lived, what they did to survive or succeed, and what environmental factors they had to deal with. Often these are the same environmental factors that people have to deal with today - flood, drought, wildfire, soil erosion, and habitat depletion. Understanding the response of people, who inhabited the land many years ago, to these factors may help you plan responses to them today.
- **Cultural resources are nonrenewable.** There is no way to "grow" the same archeological site or historical building once it has been destroyed. Even the act of excavating an archeological site and recording its information is ultimately destructive. That is why detailed record keeping is such an important part of archeological excavations and our main reason for avoiding sites where possible.
- **Cultural resources provide information on conservation problems.** By studying resource use in the past, you can learn which practices led to sustained use and which were destructive and resulted in the depletion of the resources. Using this information, you can develop better conservation practices today.
- **Cultural resources provide information on environmental fluctuations.** Archeological sites provide us a much longer record of past climatic variations than do historical records. Information on rainfall and water flow fluctuations, and from pollen, plant, animal, and sediment studies, can assist planners in designing irrigation systems, soil conservation treatments, and flood control structures.

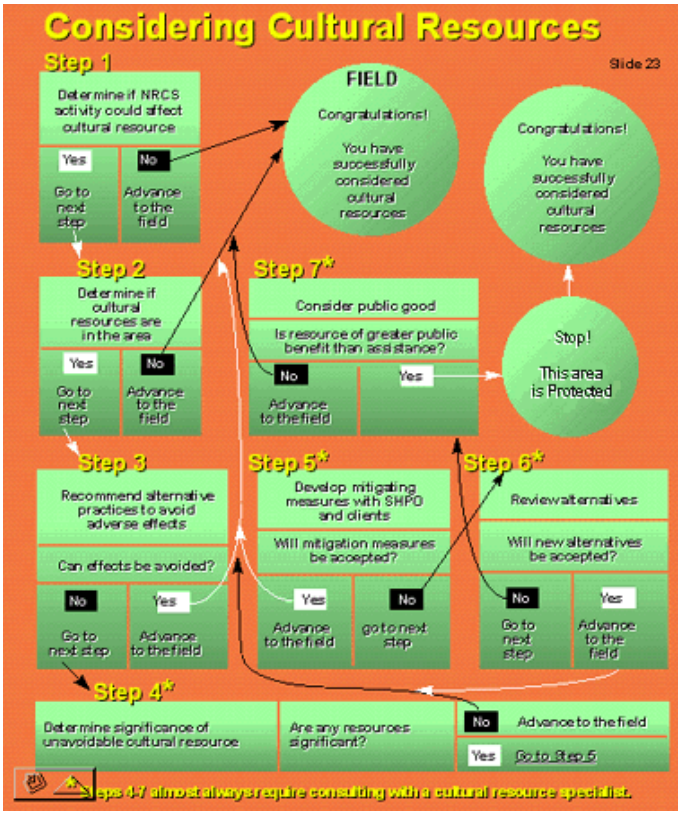
TSPs have a responsibility to:

- Inform clients about the importance of the cultural environment.
- Identify cultural resources and make plans to protect them early in the planning process in all assistance activities.
- Conserve resources in the original place to the fullest extent possible, and, if necessary, develop feasible alternatives to reduce impacts that might be harmful**.**

A good way to summarize our responsibility is if:

- Cultural resources are located on federal or Indian lands, or if
- Federal assistance is provided, or if
- In any way the federal government is involved in any activity which may affect a cultural resource, ***then cultural resource protection procedures must be followed***.

NRCS has developed a model to help us consider cultural resources. This model is presented in detail in the NRCS Cultural Resource Training materials. TSPs are encouraged to complete this training.



Step 1 - Determine if the activity could affect cultural resources. If it is likely that the conservation practice or resource management system will not affect cultural resources, then proceed with the project. Aerial spraying of brush or weeds is an example of a practice that probably would not affect cultural resources. If it is likely that the resource management system will negatively affect the cultural resources, then do Step 2 to determine if cultural resources are present. Plowing to control brush or weeds is an example of a practice that could affect cultural resources.

Step 2 - If the action will affect cultural resources, but such resources are not present, then the planning and implementation process can continue. If cultural resources are present, then the TSP and client should proceed to Step 3 and consider an alternative resource management system.

Step 3 - If an alternative resource management system, that will not affect the cultural resources, is available and acceptable to the client, then planning and implementation of the alternative should proceed.

Step 4 - If an acceptable resource management system cannot be developed then the planner must determine the significance of the cultural resources. The planner should consult with the State Cultural Resource Specialist. If the determination concludes that the cultural resources are not significant, then planning and implementation can continue.

Step 5 - If the cultural resources are significant, then the client, TSP, and other specialists should determine whether negative affects of the resource management system need to be mitigated. If the affects can be mitigated, planning and implementation can continue. These decisions must be well documented.

Step 6 - If the affects cannot be mitigated, then other alternatives should be considered. If a resource management system that is acceptable to the client can be developed, then planning and implementation can continue.

Step 7 - If a resource management system that is acceptable to the client cannot be developed, then the NRCS State Conservationist, with the advice from Cultural Resource Specialists, must make the decision whether the public good is better served by continuing assistance and disturbing the cultural resources, or ending assistance.

Note that the result of following this model is the successful consideration of cultural resources. Note also there are numerous ways that negative affects can be avoided and an acceptable resource management system can be implemented.

EXAMPLE: Consider some possible conservation treatments that might be part of a resource management system for a pasture. Assume that significant prehistoric Native American home sites are known to be in the area.

1. Pasture fertilization and liming. Since this practice does not require disturbance of the soil surface, the evaluation would likely stop at Step 1 with a determination that the activity would not affect cultural resources. If the evaluation should conclude that if the practice may result in a chemical change in the soil that would damage cultural resources, then further analysis should be conducted.

2. Pasture water development including buried pipeline. Since this practice requires digging a trench and burying pipe, it would disturb the soil and artifacts (Step 1). You will need to survey the desired layout of the pipeline for evidence of artifacts (Step 2). If artifacts are found then you need to work with the client to relocate the pipeline (Step 3). If the client agrees with the realignment of the pipeline you can proceed with planning. NOTE: Since you know that artifacts are present in the area, you should ask the client and those that will install the pipeline to watch for evidence of artifacts that may be observed during installation. If such artifacts are found, the client should stop construction and notify the TSP. The TSP should then work with the client to deal with mitigation (Step 5) of the disturbed site, and to see if another alternative route is possible for the pipeline. NOTE: In a situation like this you should consult with the NRCS state staff assigned as the Cultural Resource Specialist.

3. Pasture weed control with herbicides or mowing. Since this practice does not require disturbance of the soil surface, the evaluation would likely stop at Step 1 with a determination that the activity would not affect cultural resources. However, chemicals may damage some cultural resources, and mowing may destroy ceremonial plants on a sacred site.

4. Pasture brush control with individual tree removal with a crawler tractor. Since this practice involves soil and subsurface disturbance around individual trees, the site will have to be investigated. Each tree slated for removal should be inspected. If artifacts are found around some trees slated for removal (Step 2), then you must determine if you can avoid disturbance to the site by leaving those plants or by controlling them with herbicides which will not disturb the soil (Step 3). If the client accepts one, or a combination of these alternatives, then the practice can be applied. If the client does not want to take either of these alternatives and no other alternative can be found, then you must decline giving any further assistance.

5. Pasture brush control with root plowing. Since this practice involves soil disturbance over a large area (Step 1), there should be a thorough inspection for artifacts across the entire treatment area (Step 2). If artifacts are found, then plans to exclude treatment of some areas should be proposed to the landowner (Step 3). If this alternative is acceptable, the project can proceed. If this alternative is not acceptable, then the planner and client should work through Steps 4, 5, 6 and 7. If artifacts are found during implementation, then work should stop. Further planning to implement a workable project should proceed as should work to mitigate the area where the artifacts were found.

NOTE: If suitable alternatives are not found or some mitigation becomes required, the TSP should consult with the NRCS State staff assigned as the Cultural Resource Specialist.

The examples on the previous page provide ideas about how you can work with a client to successfully consider cultural resources during the conservation planning process. Cultural resources need not stop implementation of conservation plans, but they may cause a modification of plans to be more compatible with the resource.

EXAM QUESTION

38. Which of the following statements best describes why we need to consider and protect cultural resources?

    a. Cultural resources can help you understand the relationship between people and the environment.
    b. Cultural resources are nonrenewable.
    c. Cultural resources provide information on conservation problems.
    d. Cultural resources provide information on environmental fluctuations.
    e. All of the above

Consideration of SWAPA Resources

This section will cover the non-human resources that are considered in conservation planning:

- Soil,
- Water,
- Air,
- Plants, and
- Animals.

These are generally referred to a SWAPA. What are the conservation considerations and problems that you normally think about when you think about soil, water, air, plants and animals? The worksheet links below can be used to record your ideas and observations for each resource.

Soil

This document requires Adobe Acrobat.

Soil Considerations

Water

This document requires Adobe Acrobat.

Water Considerations

Air

This document requires Adobe Acrobat.

Air Considerations

Plants

This document requires Adobe Acrobat.

Plant Considerations

Animals

This document requires Adobe Acrobat.

Animal Considerations

Below is an example of a reference of SWAPA considerations.

The Environmental Effects Evaluation

Compliance with the National Environmental Policy Act (NEPA) applies to all actions over which a federal agency has control or responsibility. This includes NRCS clients who will be using Federal financial resources to implement conservation practices. Go to the Environmental Compliance webpage located on the NRCS website under Technical Resources for more information about the relationship of NEPA, NRCS and environmental compliance.

NRCS uses the NRCS-CPA-52 Environmental Evaluation Worksheet in order to evaluate the effects of actions in the adoption of conservation practices. Each State varies in the requirements of TSPs to complete this worksheet when working with clients involved in NRCS conservation programs. For instance, the NRCS has the responsibility to complete the NRCS-CPA-52 for all Conservation Activity Plans (CAPs), however, a TSP may be required to complete a part of the worksheet for another particular program or practice. Contact the State TSP Coordinator for individual State requirements relating to completing the Environmental Evaluations for NEPA compliance.

This completes Module 4. Having carefully studied the materials in this module, you are prepared to:

- Explain what is meant by the phrase "conservation planning environment" and list the components of this environment.
- Describe typical planning environment components of a farm or ranch, and categorize the components as relating to either the "family farm" or the "farm family."

- Identify components of a farm or ranch that are related or linked and explain why data analysis should not just focus on individual components, but should also include analysis of interactions between components.
- Describe key resource, social, economic, and policy components that must be considered to develop a comprehensive, integrated conservation plan.
- Describe the use of economic and social information to increase understanding of a client's interest in conservation and ability to implement the planned resource management system.
- Describe the use of the cultural resources model to evaluate whether the presence of a cultural resource creates a need to modify the conservation plan.
- Explain the SWAPA considerations included in the Field Office Technical Guide.

Conservation Planning-Part 1: Module 5

Resource Management Systems

Introduction

At the end of this module you will be able to:

- Describe the Resource Management System (RMS) process.
- Locate resource quality criteria for a natural resource
- Identify the RMS tools and their relationship to the three-phase, nine-step conservation planning process.

Overview

This module consists of an introduction and overview of the Resource Management System (RMS) process.

You can receive additional training on Resource Management Systems by participating in Conservation Planning Part 2, Modules 6-9 of the training program through an NRCS sponsored training program or other conservation professional development programs. Go to the TSP Website to locate NRCS sponsored trainings.

The RMS Process - Key Points

The key points in the RMS process are:

- The RMS process is embedded in the NRCS three-phase, nine-step planning process. It is a thought process within a process.
- The primary purpose of the RMS process is to develop sound resource management system alternatives without creating new problems. The process is applicable in the

formulation of RMS alternatives for specific fields, conservation management units, or other planning areas.

Relationship of the Planning Process and RMS Tools

Conservation Practice Physical Effects (CPPE)

TSPs can find a matrix of conservation practice physical affects in Section V of the Field Office Technical Guide (FOTG). The CPPE displays in subjective detail the physical effects that conservation practices have on the natural resources. The CPPE covers all natural resources, the broad resource considerations, and the problems associated with those resource considerations. The CPPE was developed nationally for a number of conservation practices to provide an example of how to display the effects on defined resource problems. Each state has developed effects for additional practices applicable to their needs.

A sample CPPE is linked below.

Sample CPPE

Site Specific Practice Effects Worksheet (SSPEW)

This worksheet uses the practices in the CPPE to develop a list of the most applicable conservation practices to address identified or predictable site specific resource problems while considering the client's objectives. It displays effects for only the identified resource problems that exist, are predicted in the planning area, or have influence off-site. This array of practices lends itself to a quick comparison of the relative value of each practice including both positive and negative effects on the resource problems identified.

A sample SSPEW is linked below.

Sample SSPEW

Resource Management System Options Worksheet (RMS Options)

This worksheet is used to group individual practices into combinations of practices that have the potential to solve the resource problems that were listed on the SSPEW. The different combinations of practices become RMS options when the quality criteria in the FOTG have been achieved for all of the identified and predictable resource problems.

A sample RMS Options Worksheet is linked below. It is not intended that this worksheet be completed for every plan.

Sample RMS Options Worksheet

Conservation Effects Worksheet - Conservation Effects for Decision Making (CED)

The Conservation Effects Worksheet provides a logical way to present, compare, and discuss the effects of the benchmark situation to any proposed RMS options. The worksheet displays (1) the current treatment and practices, and their effects (benchmark conditions); (2) alternative treatment and practices, and the expected effects; and (3) the impacts of the alternative treatment and practices. The impacts are the differences between the effects of the current treatment and the effects of the proposed treatment.

A sample CED is linked below.

Sample Conservation Effects for Decision Making Worksheet

Relationship of the Planning Process and RMS Tools

The RMS process is a thought process that should be used in all planning situations. The worksheets are not required for each conservation plan. Their use depends on the experience of the planner and the complexity of the planning situation. Once the RMS process is fully understood, only unique or complex situations warrant documentation of the complete process.

Summary of the RMS Process:

- The RMS worksheets help carry out the three-phase, nine-step planning process.
- The CPPE helps identify (1) resource considerations, (2) resource problems, (3) potential conservation practices, and (4) the effects of those practices if they are installed according to standards and specifications.
- The SSPEW helps document (1) existing and predictable resource problems, (2) conservation practices that could be used to treat those problems, and (3) the site specific effects of installing the practices.
- The RMS Options Worksheet helps group individual practices into combinations of practices that meet quality criteria for all of the resources at the RMS level.
- The Conservation Effects Worksheet displays (1) the benchmark conditions and effects, (2) the proposed treatment alternatives, and (3) the expected effects and impacts of the proposed treatment.

Resource Quality Criteria

Resource Quality Criteria establishes the minimum treatment level necessary to adequately address the resource concerns that are identified during the planning process for development of a RMS. The RMS criteria are met when treatment has been planned that, when applied, will resolve all of the identified resource problems according to the Quality Criteria. The RMS will be considered applied when all of the conservation practices that make up the system have been installed according to Conservation Practice Standards in Section IV, FOTG.

Resource Quality Criteria serves as the standard by which the adequacy of planned treatment and management may be compared. Policy concerning this subject is found in NRCS GM 450, Part 401, Technical Guides, Resource Management System Quality Criteria and Guidance Documents.

The use and implementation of the quality criteria must be consistent with federal, state, tribal, and local laws and regulations.

EXERCISE 12: **Quality Criteria**

Locate the quality criteria for managing soil erosion in your State:

- Go to the eFOTG
- Click on your State
- Click on your county
- Click on the drop down box in the left sidebar and select Section III
- Open the file "Resource Quality Criteria"
- Locate the quality criteria for the resource concern "Soil Erosion-Wind"
- Observe that the maximum soil loss tolerance for the State shall not exceed the Soil Loss Tolerance "T"

Note: States may display Resource Quality Criteria slightly differently in Section III than listed in the steps above. Other resource guidance material specific to the State may be included in this Section.

EXAM QUESTIONS

39. The primary purpose of the RMS process is to develop sound resource management system alternatives without creating new problems.

    a. True
    b. False

40. Resource Quality Criteria serves as the standard by which the adequacy of planned treatment and management may be compared.

    a. True
    b. False

41. How many steps are there in the NRCS Conservation Planning process?

    a. One
    b. Three
    c. Five
    d. Nine

This completes Module 5. Having carefully studied the materials in this module, you are prepared to:

- Describe the Resource Management System (RMS) process.
- Locate the Quality Criteria for managing a natural resource
- Identify the RMS tools and their relationship to the three-phase, nine-step conservation planning process.

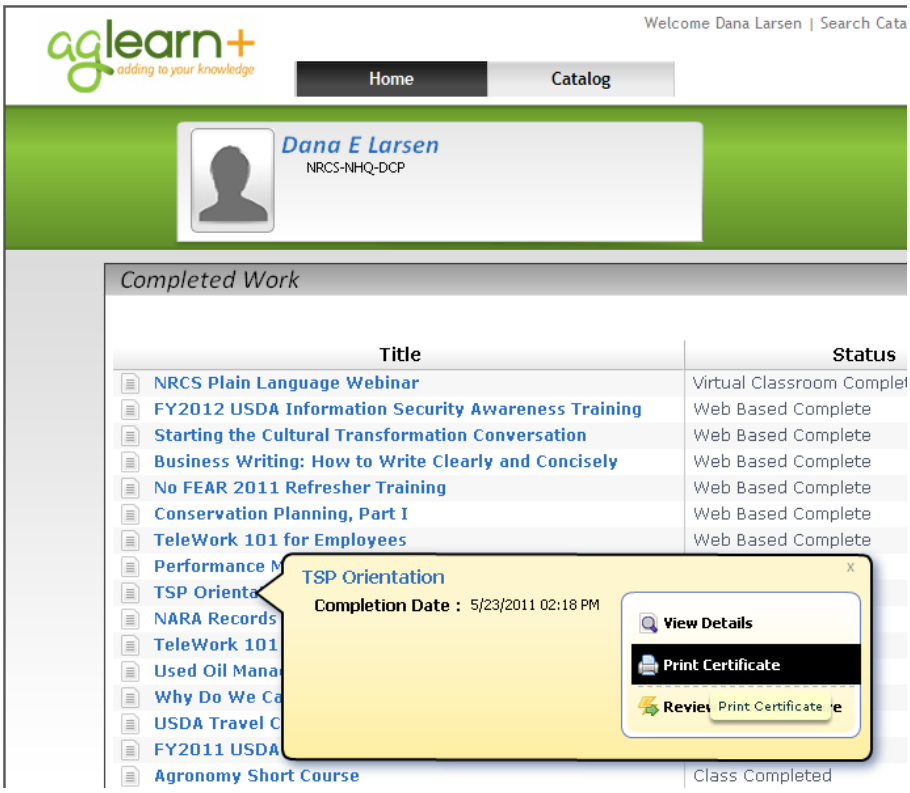
Congratulations! You have completed the TSP Orientation and Conservation Planning course. The final slide of this course provides you a summary of your exam scores and a total score. You must receive at least a 70% in order to pass this course. Please take the time to print the Course Summary sheet and keep it for your records.

In the event that you did not receive a 70%, you must retake the course and exam.

Certificate of Completion

A certificate of completion is available upon successfully completing the course and exam. It is your responsibility to retain a copy of your successful completion of the training.

If you have taken the TSP Orientation and Conservation Planning course from the AgLearn program, you can print your certificate by going to the AgLearn website, and click on Completed Work. Put the cursor over the title *TSP Orientation and Conservation Planning* in the Completed Work course list to view the pop-up block that contains a choice for “Print Certificate”.



If you have taken the TSP Orientation and Conservation Planning course using the paper version, please send the **course answer sheet** to Dwayne Howard (Dwayne.Howard@wdc.usda.gov), National TSP Team Leader.

After successful completion of the training program, the TSP will indicate that they have successfully completed the TSP Orientation and Conservation Planning on their profile in TechReg.

If you need assistance

Contact the AgLearn Webmaster if you experience difficulties with the course, exam or accessing your Certificate of Completion.

APPENDIX

Step-by-Step TSP Application Process

You may access your application as soon as you obtain your eAuthentication ID and password. Completing the TSP application is easier if you have completed your educational and licensing requirements for each category prior to beginning the application process.

Once you are ready to complete the application, print out the Step-by-Step Guide for Registering as a TSP" found on the TSP Website. This document will guide you through the application process. Print out this page to follow these tips when completing your application:

Detailed Instructions for Completing TSP Profile Parts 1 and 2

Login to TechReg:

1. Click "Log Into TechReg from the TSP Website".
2. On the USDA eAuthentication Login screen, enter your eAuthentication User ID and password and click "login."
3. An "Apply Online" page will be displayed.
4. Please enter your preferred contact method – "Email" or "Mail."
5. Check the "yes" block if you can speak Spanish.
6. Indicate if you are registering as "myself (an individual)" or as an "Individual with a Public Agency (An Employee of a Public Agency)."
7. Review the terms and conditions of the Certification Agreement. You must agree to the terms and conditions of the agreement in order to be certified. Click "agree" to move into Profile Part 1 of your Technical Service Provider profile. The date associated with this agreement is the computed date for certification expiration.

Complete Profile Part 1 - Background

Please fill out all relevant sections of the profile in order to become a certified TSP. ***Inadequate information will delay approval of your application to become a TSP***.

If you have entered the system in order to create a **business or public agency**, and do not plan to become a certified TSP yourself, then **only fill out Section B**, Associated Companies/Agencies. The rest of the profile is not necessary.

Use the "update…" and "add…" buttons to add records. Use the "edit" button to edit previously entered records.

Steps to Complete Profile Part 1:

1. **Complete Section A. Contact Information**: This information is automatically generated from the information that you supplied when you obtained your eAuthentication. You may modify some of this information directly on the profile, such as a change in phone number or email address. Click the "Add/Update Contact Info" button to add new or edit existing contact information. *If your email or address changes after certification, you must update this information. Failure to update this information may mean delays in recertification and/or being dropped from the eligible TSP listing*.

2. **Complete Section B, Associated Companies/Agencies**, only if the application for certification is for a business or public agency and only if you are the official representative of that business or public agency and have the authority to sign the Certification Agreement on behalf of that business or public agency. Official representatives are not required to be certified TSPs. Creation of a business or public agency will require that at least one individual associated with the business or public agency be certified as a TSP. To proceed:

   a. Click the "Business/Agency Profile" button to access a Business/Agency screen.

   b. Click the "Add Business/Agency" button to add a business or agency. Enter the business name and contact information. Click Save. Enter phone numbers without parentheses or dashes. The new business information will be displayed.

   c. Click the Add/Update Contact Info button associated with the business to add new information to or edit existing for the business.

   d. Click on "update employees" to associate certified TSPs with the business or agency.

   e. Click "Sign Agreement" to electronically sign a certification agreement and complete the business or agency application for certification. NOTE: Do not sign the agreement at this time if you are also applying as an individual and will be the only "certified TSP" associated with the business. Wait until you have become certified as an individual and have updated the business's certified employees ("e" above) before signing.

Do not close out of this screen after you print the agreement. Use the back arrow on the browser to return to the Business/Agency profile screen to continue.

THE REMAINDER OF THE CERTIFICATION APPLICATION PERTAINS TO CERTIFICATION OF AN INDIVIDUAL.

3. **Complete Section C, Relevant Accreditations/Licenses**

   Enter the licenses or certifications that are required to satisfy the criteria for certification in the categories of technical service you wish to provide. Include any state required licenses, license numbers, and expiration dates. This information is critical in order to remain on active status once certified. As information changes, you must return to this page to update your certification.

   The specific conservation practice services you chose as a TSP may also require specific training or certification in order to become qualified to deliver these practices. For example, the prescribed burning practice requires specific training in order to consider prescribed burning even during the planning process, including the selection of alternatives. Check each of the practice standards to see if specific training is required in the State you will be providing service in.

   If the accreditation or license is expired, NRCS will defer your application and you may be delayed 60 or more days in obtaining your TSP Certification.

   Add a Certification

   a. Click on the "Add Certification/License" button.

   b. Select a certifying organization.

c. Indicate the organization type by clicking on the appropriate button.

d. If this is a state certification or license, select the state from the dropdown list.

e. Enter the license number, if applicable.

f. Enter the license expiration date directly or use the popup calendar.

g. Click "Save."

Edit or Delete a Certification

a. Click "Edit" in the row you wish to update.

b. Change the information as needed.

c. Click "Save" or "Delete."

To add another certification, license, or registration, Click on "Add Certification/Licenses/Registration" located at the top of the section. These credentials will be added to a drop-down list in Part 2 of the Profile and may be required before you can complete that section.

4. Complete Section C2- Organic Qualification

Indicate organic qualification by selecting **YES** or **NO** from the options.

By clicking YES, you are certifying that you are Organic Qualified through one of the following:

a. Passed Organic Inspector Training
b. Certified Organic
c. University Degree in Organic
d. Letter of Reference from Organic Organization

Indicate Organic Qualification

a. Click "Yes" in the options if organically qualified.
b. Click "No" in the options if **NOT** organically qualified.
c. Click "Save" to save this information to your profile.

5. Complete Section D, Education and Training

Enter any Bachelors or Graduate degrees, additional NRCS training, or other training required to satisfy the criteria for certification. NOTE: NRCS training would be listed under the heading of "Institution" name. Type the course name under "Area of Study". For NRCS training, do not list anything in the area labeled "Degree."

Add Education and Training

a. Click the "Add Education" button.
b. Enter degree received, i.e. Bachelors, Masters, Doctorate, etc. Do not use quotation marks.
c. Enter the name of the institution.
d. Select the area of study.
e. Enter the completion date directly or use the popup calendar, if completed in 1986 or later.

f. Click “Save.”

Edit or Delete Education and Training

a. Click “Edit” in the row you wish to update.
b. Change the information as needed.
c. Click “Save,” “Delete,” or “Close.”

6. Complete Section E, Relevant Work Experience

List verifiable information regarding your work experience as it relates to your technical skills and abilities as it relates to providing technical services. You can copy text from a word document and insert into this section.

Add Relevant Work Experience

a. Click the “Add Work Experience” button.
b. Enter the completion date directly or use the popup calendar, if completed in 1986 or later.
c. Enter the description and location of the work performed in the comments box.
d. Enter start and end dates if applicable.
e. Click “Save.”

Edit or Delete Relevant Work Experience

a. Click “Edit” in the row you wish to update.
b. Change the information as needed.
c. Click “Save,” “Delete,” or “Close.”

7. Complete Section E1, Professional References

Provide at least two non-USDA references that can verify your experience and qualifications (this is not a recommendation for certification). The purpose of this section is to provide references as to who can verify your work. Always fill this section out.

Your references should include at least one professional who can verify your experience and proficiency for conservation planning and/or design, layout, installation, and checkout of the conservation practices for which you will be providing technical service. Your second reference should be a customer to whom technical service has been provided in the area you are applying to become a TSP. USDA staff cannot be used as reference for this purpose. Please provide the names of the references, addresses, phone numbers, and email addresses as available. The references will only be used by USDA personnel and will not be published in the résumé available from the TSP Locator in TechReg.

Certification criteria for some conservation activities or practices require references specific to the practice you want certification in (indicated by a checked box in Section G). In such cases your application will not be processed if Section E1 is not completed. Additionally, NRCS staff will be looking at this section carefully for all categories.

8. Complete Section F, Familiarity with NRCS Guidelines, Criteria, Standards, and Specifications

Enter a brief description of your familiarity with these items. Your knowledge of the criteria, standards, specifications and guidelines in NRCS conservation planning and practice work is

important in order to comply with national rules and requirements for work performed under the Technical Service Provider Program. Point out any experience you have had in developing conservation plans that conform to NRCS guidelines, as well as planning or designing conservation practices to NRCS specifications. Describe how you obtained your expertise in this area.

NOTE: When you sign your Certification Agreement, you are certifying that you are already familiar with NRCS standards and specifications – <u>not that you intend to get the experience after you obtain TSP Certification.</u>

Your description here will help determine if your knowledge also extends beyond a general familiarity of the written standards found in the Field Office Technical Guides. If any of this information changes, you can return to this page to update your certification.

<u>Add Familiarity with NRCS Guidelines, Criteria, Standards, and Specifications</u>

a. Click the "Add NRCS Familiarity" button.

b. Describe your familiarity with NRCS guidelines, criteria, standards, and specifications and click "Save." Each entry is limited to 255 characters.

9. **Complete Section F1, NRCS Conservation Planning Training Requirement**.

   a. Click on "Add NRCS Training".

   b. If you have completed the "TSP Orientation and Conservation Planning" or have taken the Conservation Planning Sections 1 – 5 or equivalent, click the box in front of "I have received NRCS Training Sections or equivalent" and "Save." If you have not had the training, register for the course through the AgLearn link provided. You should print out the certificate of completion from AgLearn and retain in your records. If you received training on conservation planning through an NRCS workshop or through an NRCS sponsored course, you should still obtain a copy of a course completion certificate from the instructor for your records.

10. **Complete Section F2, NRCS TSP Orientation**.

    a. Click on the Add NRCS Orientation.

    b. If you have taken the TSP Orientation course or TSP Orientation and Conservation Planning or equivalent, click the box in front of "I have received the NRCS Sections and Exam" and "Save." If you have not had the training, register for the course through the AgLearn link provided.

CLICK "CONTINUE TO PROFILE PART 2."

Complete Profile Part 2 (Technical Services)

Please fill out all relevant sections of the profile in order to become certified TSP. ***Inadequate information will delay approval of your application to become a TSP***.

<u>Steps to complete Profile Part 2:</u>

1. **Complete Section G1, Certification Categories,** by clicking on "Add Category" and selecting a state/category (or categories) combination and then click the "Confirm Qualifications" button to complete the certification criteria portion. The Update Criteria

table must be filled out in this section before you can submit the application for review and certification.

After signing the agreement in Section J, Section G should show a “Submitted” status (as in submitted for review). If you miss something your application will show “incomplete” and you won’t be allowed to sign your certification agreement. The only status you ultimately want to see is “Submitted.” This indicates your application has been submitted for review.

Many mistakes are made in this section. Some candidates fail to select or toggle an “Option.” Others fail to check at least one or more “How Criteria Were Met” boxes within each of the criteria for the Option selected. Failure to do so will make the application “Incomplete” and delay certification. Others fail to provide professional references when references are mandatory.

<u>To select a State and Categories</u>

a. Click “Add Category” to select a state and the technical service categories you desire to provide.
b. Select a state from the drop-down box.
c. The “Category Available” section will be populated with the choices available for the selected state.
d. Click on the "Click to go to Category Detail Page" to open another page with a comprehensive report of the categories and associated technical services. Close this page to return to the “Add Category” page.
e. Select a category for which you desire certification and then click the >>> box to move the category to the “Category Selected” list. (You can select more than one category at a time by holding down the control key on your keyboard and clicking on each category that you desire to move to the “Category Selected” list. Then click >>> to move all of the items at once.)
f. To remove items from the “Category Selected” list, click the items in the “Category Selected” box, then click the <<< box.
g. Save your selection.
h. Since the certification process is specific to individual states, you must repeat this process for each state in which you desire to provide technical services.

NOTE: After selecting the categories, you must match your qualifications entered in Profile Part 1 to the categories selected.

<u>To enter qualifications for categories</u>

a. Click the “Confirm Qualifications” button in the category row for which you need to enter qualifications.
b. Select ONE certification option from the certification option or options listed. You must meet ALL of the certification criteria in the selected certification option. Selecting the wrong option will cause your application to be deferred and you will need to correct deficiencies before approval.
c. If the selected certification option requires a license or certification, select a license or certification from the drop-down choice list. You will need to return to Section C, Profile, and Part 1 if you neglected to add a required license or certification.

d. For each criteria item within your selected certification option, place a check mark in each box, Education, Work Experience, or NRCS familiarity that satisfies the criteria. For example, if the criteria require a degree in a particular field, and you listed your degree under Profile Part 1, Section D, Education and Training, you should check the box for that row under Education. Failure to check appropriate boxes based on experience and training will delay approval of your application to become a TSP.
e. When you have confirmed your qualifications, click "Save." After saving, you will be returned to the Profile Part 2 screen.
f. Once all the criteria for certification have been met, the status of the category will be set to "Ready to Sign." ("Ready to Sign" means ready to be submitted for review once you have signed your certification agreement at the end of Profile Part 2.) Incomplete items will not be submitted for review.
g. Complete the certification qualifications for all the services you have selected before you electronically sign the certification agreement by clicking "Sign Agreement" at the bottom of page two of your TSP profile.

2. **Complete Section G2, Conservation Activity Plans,** by selecting "Add Activity". Select the state/CAP combinations and then click the "Confirm Qualifications" button to complete the certification criteria portion. Follow the same steps as listed for G1.

3. **Complete Section H, Services to be Provided.**

   Each category or Conservation Activity Plan entered in Section G1 or G2 defaults to All Services (all technical services) within Section H. You may not wish to provide all of the technical services in the category or may not be able to because of State requirements or need for a specific license. If that is the case, you can limit the list of services by using the "edit" button to select only those services you wish to provide. Click "Save" when you have selected all the practices you wish to have listed. You may need to use eFOTG to research NRCS practice standards and specifications to determine eligibility to provide the service.

   NOTE: If you are certifying in multiple states, check with the TSP Coordinator for requirements unique to that state. You must meet the requirements for all the states where you apply or your entire application will be deferred.

   <u>To select services for a category or CAP</u>

   a. Click "Edit" on the row in Section H, "Services to be Provided."
   b. Make selections in the "Service Available" list, then click the >>> box to move items to "Services Selected" list.
   c. To remove items from the "Services Selected" list, click the selections in the "Services Selected" box, then click the <<< box.
   d. Save your selection.

4. **Complete Section I, Servicing Areas.**

   The states listed are those you entered in Section G. You may not wish to provide technical services in all of the counties in the state. If that is the case, you can limit the list of counties by using the edit button and then selecting only those counties in which you desire to provide technical services.

   Click the "Edit" button to display a data entry form for completing information about the Servicing Area for which you wish to be certified. By default, you are requesting

certification for every county within a state. If you wish to serve only selected counties, you must specify those counties. If any information changes, you can return to this page to update your certification.

To select servicing counties, if other than the entire state

a. Click the "Edit" button for a particular state.
b. Click the appropriate counties in the "Counties Available" list, then click the >>> box to move the counties to the "Counties Selected" list.
c. To remove counties from the "Counties Selected" list, click the selections in the "Services Selected" box, then click the <<< box.
d. Save your selection.

5. **Review Section J, Certification Agreement History.**

This section will show the date that you were certified originally, as well as any subsequent certification requests. Your renewal date is based on the FIRST certification date. Review the Certification Agreement containing the terms and conditions of your certification. When you click "Sign Agreement" you are signing the agreement electronically. It is recommended that you print out a copy for your records.

Click on the "Submit" button to forward your application to NRCS. This will generate an email to the NRCS State Conservationist and the TSP Coordinator. NRCS will then review your application for certification. If you are qualified to provide the service you selected, you will be certified as a TSP for those services.

The business certification agreement will contain the name of the individual(s) certified, the date certified, and the categories and states where the individuals are certified. After certification, the individual TSP will appear on the approved list of Technical Service Providers accessible through the TSP Locator on the TechReg home page. If you have applied for a business TSP certification and you have indicated in your business profile that you want your employees listed on the TSP registry, individual TSPs associated with your certified business will be listed on the registry. If you indicate on the business profile that you do not want the business certified TSP employees listed, only the business will be listed on the TSP business registry.

Each time you change your certification categories, and confirm your qualifications to provide TSP services, you will be asked to submit another application for certification by clicking the Sign Agreement button. Each certification agreement is saved and can be displayed by using the view button.

The Certification Agreement History tracks your original certification and all updates to your Technical Service Provider Certification.

Contact the TechReg Help desk if you have any questions regarding these instructions at: tsp@wdc.usda.gov

Technical Service Provider
Certification of Services Provided

Please submit the completed worksheet to your customer who will provide it to the local NRCS field office. Your input declares that installed practices meet NRCS Standards and Specifications and improves the accuracy of the NRCS reporting system. Any supporting data needs to be attached i.e. as builts, photos, etc.

CLIENT INFORMATION

Name: _____ **Farm Bill Program:** _____

Contract Number: _____ **Contract Item Number(s):** _____

TECHNICAL SERVICE PROVIDER INFORMATION

Name: _____ **TSP Number:** _____

Address: _____ **TSP Expiration Date:** _____

City, State, Zip Code: _____ **County of Service:** _____

Phone: _____

PRACTICES INSTALLED / COMPLETED

Practice Information			TSP Costs		
Practice Name	**Units**	**Amount**	**Design**	**Installation**	**Checkout**

I hereby certify that the technical services I provided as a Technical Service Provider:

1. **Comply with all applicable Federal, State, Tribal, and Local laws and requirements,**
2. **Meet applicable USDA-NRCS conservation practice standards, specifications, and program requirements,**
3. **Are consistent with and meet the particular conservation program goals and objectives,**
4. **Incorporate, where appropriate, low-cost alternatives that address the resource issues.**

_____ _____

Technical Service Provider Signature *Date*

To Be Completed By Landowner

I confirm that the practice(s) above have been installed for the identified contract and farm bill program with the assistance of this Technical Service Provider.

_____ _____

Landowner Signature *Date*

Technical Tools and References:

- National Biology Handbook (Title 190 Part 600)
- National Handbook of Conservation Practices
- National Cultural Resources Procedures Handbook (Title 190 Part 601) The NRCS National Cultural Resources Procedures Handbook link is provided as a reference tool for TSPs. However, the Advisory Council on Historic Preservation's web page, Working with Section 106, may be more appropriate reference material for most TSPs needing guidance on cultural resources.
- National Engineering Handbook (Title 210 Part 500)
- National Environmental Compliance Handbook (Title 190 Part 610)
- National Forestry Handbook: The National Forestry Handbook (NFH) provides informational material to assist NRCS personnel in the planning and application of forestry and agroforestry practices on nonfederal forestland throughout the United States.
- National Range and Pasture Handbook (Title 190-vi Part 600)
- Soils Data Mart: This website is used to download soil tabular and spatial data and can also be used to generate a variety of soil reports.
- National Water Quality Handbook (Title 450 Part 600)