

**Date Received:**

**Control No:**

## **Field Office Checklist and TSP Certification Sample Plan Review**

### **Conservation Plan Supporting Organic Transition Practice Activity Code (138)**

**(Refer to National Bulletin 450-12-2 for a complete listing of CAP Criteria)**

**Purpose:** The purpose of the checklist is to provide guidance for elements that need to be addressed or included in the Conservation Activity Plan (CAP). This checklist is designed for use by NRCS staff and Technical Service Providers. NRCS staff should use the checklist for technical review of the sample plans submitted as part of the certification process as well as for administrative review upon completion of all other plans submitted. It is the TSP's responsibility to follow the CAP Plan Development Criteria for specific elements and the detail of each element to be included in the plan.

**Instructions:** The checklist should be completed and submitted with the sample plan or the hardcopy of the client's plan as described below:

- **Prospective TSP's** should submit the completed checklist and sample plan by mail or email (complete plans should be sent as a single electronic file for example pdf, word or scanned file) to the appropriate State TSP Coordinator for technical review to become a certified TSP. A list of State TSP Coordinators can be found at: <http://www.nrcs.usda.gov/wps/portal/nrcs/detail/national/programs/technical/tsp/?cid=stelprdb1043101>.
- **Certified TSP's** should submit the completed checklist, hardcopy and electronic copy of the client's plan to the local NRCS Field Office or appropriate State TSP Coordinator for administrative review.
- **NRCS Staff** should complete the checklist for administrative review and place the completed checklist in the client's file. Administrative review involves a review of the content of the plan to ensure all required elements are present, but does not involve technical review for correctness. (Please Note: If technical review is needed, the completed checklist and client plan should be forwarded to the appropriate State Office staff or NHQ for technical review.)

Please Note: Should a State not have the technical specialist to conduct the technical review, requests can be submitted (by the State Office) to NHQ for review. For NHQ review please submit the complete plan and checklist by mail or email to the TSP Team. See below for address information.

## Conservation Plan Supporting Organic Transition

<b>State/County:</b>	<b>Date Plan Submitted:</b>
<b>Producer/Owner:</b>	<b>Technical Service Provider:</b>
<p><b>A Transition to Organic System Plan</b> is a conservation activity plan documenting decisions by producers who agree to implement a system of conservation practices which assist the producer to transition from conventional farming or ranching systems to an organic production system.</p> <p>Technical Guidance, Criteria and Content for the Conservation Plan Supporting Organic Transition plan is in the NRCS State Field Office Technical Guide (FOTG) <a href="http://efotg.sc.egov.usda.gov/efotg_locator.aspx">http://efotg.sc.egov.usda.gov/efotg_locator.aspx</a>. Select a state/county, go to Section IV Conservation Practices. Additional information can be found at USDA National Organic Program (<a href="http://www.ams.usda.gov/nop">www.ams.usda.gov/nop</a>), California Certified Organic Farmers (<a href="http://www.ccof.org">www.ccof.org</a>) and ATTRA Organic Documentation Forms, Organic Crop and Livestock Workbooks (<a href="http://www.attra.org/">http://www.attra.org/</a>).</p> <p><b>Minimum components of a Conservation Plan Supporting Organic Transition (138) shall include:</b></p>	

<b>1.</b>	<b>Background and Site Information</b>
<input type="checkbox"/>	<ul style="list-style-type: none"> <li>a. Name of owner/operator;</li> <li>b. Farm location and mailing address;</li> <li>c. Soils Map and soil map units descriptions using the Web Soil Survey as a minimum printout;</li> <li>d. Conservation plan map:               <ul style="list-style-type: none"> <li>1. Map of streams surface waters/drainage and wetland on/adjacent to site;</li> <li>2. Property lines and required setbacks;</li> <li>3. Field boundaries, name/number/acres/landuse;</li> <li>4. Map scale and legend;</li> <li>5. Structural practices located on the map;</li> <li>6. Grower name/county/state.</li> </ul> </li> <li>e. Total acres of the plan;</li> <li>f. Producer's Objectives and Goals;</li> <li>g. Resource evaluation for soil erosion, soil quality, water quality, plant condition and other local concerns identified;</li> <li>h. Planned conservation practices to address soil erosion, soil quality, water quality, plant condition and other local resource or human concerns.</li> </ul>
<b>2.</b>	<b>Planning Considerations-The following should be considered during the conservation plan development process for organic operations or those operations transitioning to organic:</b>
<input type="checkbox"/>	<ul style="list-style-type: none"> <li>a. Identification of natural resource concerns to be addressed;</li> <li>b. Producer's objectives and goals related to organic production;</li> <li>c. Fertility, soil quality and erosion control (NOP Part 205.203 and 205.205);</li> <li>d. Cover crops and cover crop management, hedgerows, and/or artificial structures for beneficial insects, pollinators, bats, and raptors or other diversified plantings in annual and perennial crops;</li> <li>e. Consideration of wildlife-friendly cover crops;</li> </ul>

	<ul style="list-style-type: none"> <li>f. List of planned nutrient applications (incorporated, foliar, soil inoculants, compost);</li> <li>g. Results (as appropriate) for: soil tests, tissue tests, microbiological tests, crop quality testing;</li> <li>h. Method and frequency of fertility management monitoring;</li> <li>i. Methods of erosion control and documentation;</li> <li>j. Erosion prediction printouts for before/after the plan system using approved erosion prediction tools such as RUSLE2 and/or WEPS, when applicable;</li> <li>k. Crop rotation (NOP Part 205.205): <ul style="list-style-type: none"> <li>1. Practices to maintain or improve soil organic matter content;</li> <li>2. Practices to manage deficient or excess nutrients and support nutrient cycling;</li> <li>3. Provide for pest management in annual and perennial crops;</li> <li>4. Address erosion control.</li> </ul> </li> <li>l. Pest Management (NOP Part 205.206): <ul style="list-style-type: none"> <li>1. Substances used for controlling insects and disease;</li> <li>2. Biological controls (including encouraging and managing bats and raptors);</li> <li>3. Pest control materials and reason for use;</li> <li>4. Synthetic pesticides used in or around facilities where organic products are stored;</li> <li>5. Beneficial predators and parasites;</li> <li>6. Pollinator habitat and pollinator protection.</li> </ul> </li> <li>m. Location of sensitive resource areas to include: <ul style="list-style-type: none"> <li>1. Rivers, streams, drains, surface waters, coastal waters, wetlands, wells, groundwater, drains, grassed waterways and buffers;</li> <li>2. Sensitive plant species and/or essential fish and wildlife (including invertebrates) habitat (on and off site) and food plots;</li> <li>3. Drinking water sources.</li> </ul> </li> <li>n. Livestock (NOP Part 205.236 and 205.239): <ul style="list-style-type: none"> <li>1. Livestock, poultry, breeds, gender, numbers, hatch or purchase dates;</li> <li>2. Crops grown for organic livestock feed;</li> <li>3. Livestock feed-access to pasture for all ruminants;</li> <li>4. Drinking water sources;</li> <li>5. Operations producing both Organic and non-organic livestock. Separation between organic and non-organic livestock;</li> <li>6. Manure Management-Storage and application techniques, application rates, number of acres manure applied to and when applied.</li> </ul> </li> <li>o. Biodiversity-conservation plans, habitat for birds, pollinators, bats, beneficial insects, natural areas restored or protected, and wildlife friendly farm practices.</li> </ul>
<p>3.</p>	<p><b>Typical Conservation Practice Standards to Transition to Support Organic Transition Plan (138) Include references to NOP for each planned practice-see NRCS Practice and NOP Reference Table in CAP 138 Plan Development Criteria</b></p>
<p><input type="checkbox"/></p>	<ul style="list-style-type: none"> <li>a. Document the planned conservation practices. When practices listed in CAP 138 Plan Development Criteria are used in the plan, the site specific specifications shall be attached to the CAP 138 Template, in a NRCS Jobsheet or in a separate plan.</li> <li>b. For all other practices include documentation on the planned amount, fields to be applied and planned year of application.</li> </ul>

4.	Deliverables
<input type="checkbox"/>	<p>a. Complete hardcopy of the plan for the Client:</p> <ol style="list-style-type: none"> <li>1. Completed the appropriate templates “CAP_138_Cropland_Template.dotx” provided for Cropland acres and the “CAP_138_Grazing_Template.dotx” provided for the Grazing acres;</li> <li>2. Soils Map and soil map unit descriptions using the Web Soil Survey as a minimum printout;</li> <li>3. Resource assessment results-complete in the template or add printouts from assessment tools (RUSLE2 or WEPS);</li> <li>4. Management Practices should include the site specific specifications on how, when and extent (acres/number) each will be applied;</li> <li>5. Other practices include when, extent, field number for each practice applied and locate each on the Conservation Plan Map;</li> <li>6. Digital Conservation Plan Map:               <ol style="list-style-type: none"> <li>1. Stream, surface water/drainage and wetlands on or adjacent to site;</li> <li>2. Property lines;</li> <li>3. Field boundaries, name/number, acres and landuse;</li> <li>4. Map scale and legend;</li> <li>5. Structural practices located on map;</li> <li>6. Grower name/county/state.</li> </ol> </li> </ol> <p>b. Complete hardcopy and electronic copy of the client’s plan as outline above for NRCS.</p> <p><b>Optional</b>-Use of the Plan Template developed for this CAP is optional, but recommended. If the Conservation Plug-In/CPlanner is used for plan development and Conservation Plan Map, Soils Map and planned/structural practices are developed from use of this program, these do not need to be included again in Plan Template.</p>

Yes	No	Checklist Approval
<input type="radio"/>	<input type="radio"/>	I have administratively reviewed this Conservation Plan Supporting Organic Transition and it meets all the criteria of the Conservation Activity Plan (138) in accordance with Section 2508 of the Food, Conservation and Energy Act of 2008.
NRCS Representative Name and Title (print or type):		
NRCS Representative Signature		Date:

Notes (If “No” is checked, include reasons for denial, comments, missing items that need to be added, etc.):

**Email:** [tsp@wdc.usda.gov](mailto:tsp@wdc.usda.gov).

**Mailing Address:** **Technical Service Provider Team**  
USDA - Natural Resources Conservation Service  
1400 Independence Ave SW, Room 6016  
Washington, DC 20250