



## Conservation Assistance Notes

### Purpose

This fact sheet provides guidance to Certified Planners in New York State in properly documenting their Comprehensive Nutrient Management Plan (CNMP) activities and client decisions through the use of conservation assistance notes. Conservation assistance notes are an important and required component of a CNMP.

### What form should conservation assistance notes take?

Assistance notes to be included in CNMPs should contain the following (at a minimum):

- the date of assistance provided,
- the initials of who provided assistance, and
- a brief description of assistance provided and/or decisions made.

For example, assistance notes may look like the following.

Date	Initials	Notes
10-14-05	ABC	Farm visit for annual CNMP assessment. Reviewed farmstead area with producer, communicated the need to install silage leachate system by 12-06.
10-20-05	ABC	Visited farm. Took soil and manure samples.
2-28-06	ABC	Developed 2006 NMP with the recent soil test results. Updated farmstead plan in the annual update.
3-7-06	ABC	Delivered/reviewed the 2006 CNMP update with producer (field NMP and farmstead updates). Signed Appendix D and EFARM papers.

As long as the notes contain dates, planner identifications, and descriptions of assistance provided, no single format or medium is solely preferred over others. It is preferred to maintain the original in the CNMP case file and a copy in the CNMP so that regulators, reviewers and associate planners have easy access to these notes while in the field or at the office. Computer-based assistance notes are acceptable as long as they are kept current and a paper copy is included in the CNMP.

### Reasons for keeping accurate and current assistance notes

- CNMP organization – maintains a chronological list to document plan development and maintenance events in a single, organized location within the CNMP. Assistance notes serve as reminders of previous actions and discussions and help the planner and producer pick-up where they leave-off in the on-going planning process.
- CAFO permit requirements – CNMPs are a part of the regulatory process. Having concise information on when and how situations develop and are handled is part of the process and is required by the CAFO General Permit. Accurate and current assistance notes can also resolve questions about prior and on-going planning progress during inspections and compliance activities.
- Funding programs – documentation is required for programs such as EFARM where plans and annual updates are reimbursed based on the dates that services were provided. This information

is easily documented in the assistance notes.

- Record keeping – whether in the public or private sector, having a good handle on the time and effort put into the development, maintenance and annual update of CNMPs is valuable information. It helps in determining costs and setting prices for services rendered and can aid billing and other bookkeeping functions.

## **Background**

The basic concept and earlier example of conservation assistance notes are based on the CNMP Process Guidelines, as follows:

*“Enter all the documentation of the planning process (farm visits, decision making, etc.) on the Conservation Assistance Notes (NRCS-CPA-6/6A or equivalent).”*

The glossary of the NRCS National Planning Procedures Handbook (NPPH) provides further guidance:

*“ASSISTANCE NOTES - Notes maintained by planners in the case file for each individual client receiving planning and implementation assistance. These notes are to be a concise, factual, and chronological narrative of significant conservation activities and may summarize progress in planning and implementation.”*

### **For more information**

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