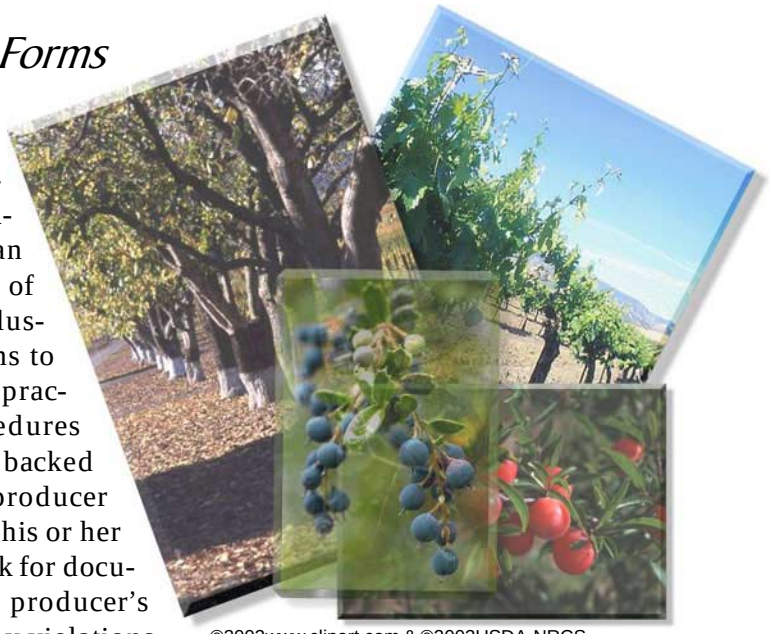
Organic Orchard, Vineyard, and Berry Crop Documentation Forms

By George Kuepper, NCAT Agriculture Specialist and
Lisa Cone, Waterfall Hollow Farm, Berryville, AR
September 2003

The Purpose and Use of These Forms



©2003www.clipart.com & ©2003USDA-NRCS

In order to become certified organic, producers must demonstrate to an accredited certifier that their farm operation complies with National Organic Program regulations. This process is begun by completing an Organic System Plan (OSP) – normally part of the application for certification. The OSP illustrates to the certifier how the producer plans to comply with the regulations by detailing the practices, the inputs, and the monitoring procedures that will be used. The Organic System Plan is backed up by on-site inspection to ensure that the producer is, in fact, farming in the manner outlined in his or her OSP. It is the inspector's responsibility to look for documentation and indicators that bear out the producer's claim to organic status, as well as look for any violations.

The forms in this package are provided as tools that orchardists and viticulturists can use for documenting practices, inputs, and activities that demonstrate compliance with regulations or that assist in other aspects of farm record keeping. The forms can be kept anywhere they make recording easy, such as the tractor, packing area, or machinery shed.

Please note that these are not required forms! Organic fruit and nut producers have more than enough mandatory paperwork to keep them occupied. These forms are merely intended to give you something convenient and organized to record routine things that may be important to document. Use only those forms that fit your operation and recycle the rest.

Acknowledgements

These documentation forms were developed by the National Center for Appropriate Technology (NCAT) with funds provided by the USDA / National Organic Program (NOP) and the USDA / CSREES Sustainable Agriculture Research and Education (SARE) Program. Distribution is provided by NCAT's ATTRA Project, the National Sustainable Agriculture Information Service.

The authors wish to acknowledge the contributions of those in the organic community who contributed to the creation of these documents including:

- Katherine Adam, NCAT, Fayetteville, AR
- Janet Bachmann, NCAT, Fayetteville, AR
- Harriet Behar, farmer, organic inspector, and OMRI, Gays Mills, WI
- Diane Bowen, IFOAM, Milwaukee, WI
- Emily Brown-Rosen, Organic Materials Review Institute, Titusville, NJ
- Rex Dufour, NCAT, Davis, CA
- John Foster, inspector, OMRI, and Seven Spoke Farm, McMinnville, OR
- Lance Gegner, NCAT, Fayetteville, AR

- Gail Hardy, NCAT, Fayetteville, AR
- Keith Jones, Director of Program Development, National Organic Program
- Mark Keating, Agricultural Marketing Service, USDA, Washington, DC
- Rose Koenig, Rosie's Organic Farm and NOSB, Gainesville, FL
- Nick Maravell, Nick's Organic Farm, Potomac, MD
- Nancy Matheson, NCAT, Helena, MT
- Teresa Maurer, NCAT, Fayetteville, AR
- Miles McEvoy, Washington State Department of Agriculture, Olympia, WA
- Jim Riddle, Organic Independents and NOSB, Winona, MN
- Maria Rosmann, Rosmann Family Farms, Harlan, IA
- Kelly Shea, Director of Organic Agriculture, Horizon Organic, Penrose, CO
- Francis Thicke, Radiance Dairy, Fairfield, IA
- Ann Wells, NCAT, Fayetteville, AR

This set of documentation forms contains the following:

A. Orchard / Vineyard Activity Log – use to record all practices and equipment used for each block of perennial fruits, nuts, and berries.

B. Orchard / Vineyard Inputs Log – use to record all materials, cover crop seeds, etc., used for each block of perennial fruits, nuts, and berries.

C. Orchard / Vineyard Establishment Year Log – use to record all activities and inputs during the establishment year for each block of perennial fruits, nuts, and berries.

D. Planting Stock Record – use to document source, treatment, and other information on planting stock used.

E. Cover Crop Seed Record – use to document source, treatment, and other information on cover crop seed used.

F. Organic Planting Stock and Seed Search Record – use to demonstrate attempts made to locate an organic source when non-organic planting stock or seed is used.

G. Fertility / Soil Monitoring Log – use to document monitoring of soil fertility and soil erosion in your orchard or vineyard. Monitoring procedures are required to justify the use of most micronutrient fertilizers.

H. Pest / Weed Monitoring Log – use to document monitoring of insect pests, diseases, and weeds in your orchard or vineyard. Monitoring procedures are required to justify the use of most biological, botanical, and allowed synthetic pesticides.

I. Harvest Record – use to record your organic and buffer zone harvest information.

J. *On-Farm* Cooler / Cold Storage Record for Organic Crops – use to record details of your on-farm refrigerated storage in organic-only farming operations.

K. *On-Farm* Cooler / Cold Storage Record for SPLIT Operations – use to record details of your on-farm refrigerated storage of organic, transitional, and conventional crops.

L. *Off-Farm* Cooler / Cold Storage Record for Organic Crops – use to monitor off-farm refrigerated storage of organic crops.

M. Storage Pest Inputs – use for recording pest control activities and inputs in your crop storage units.

N. Equipment Cleanout Log – use to record cleanout activities of farm equipment.

O. Equipment Settings Record – use to record settings and adjustments for your orchard or vineyard equipment, for your convenience and increased efficiency year to year.

P. Sales Record – use to record sales of farm production.

Q. Compost Production Record – use to document your compost production methods in order to meet National Organic Program regulations.

These forms may be copied and distributed freely. They may be downloaded from the ATTRA website at <http://attra.ncat.org>. Additional hardcopies can also be obtained by writing ATTRA at P.O. Box 3657, Fayetteville, AR 72702, or by calling 1-800-346-9140.

By George Kuepper, NCAT Agriculture Specialist and Lisa Cone, Waterfall Hollow Farm, Berryville, AR

Formatted by Gail M. Hardy

September 2003

The Electronic version of Organic Orchard, Vineyard, and Berry Documentation Forms is located at
PDF
http://attra.ncat.org/attra-pub/PDF/orchardforms.pdf

Orchard /Vineyard/Berry Activity Log

A record of the practices and equipment you use for each block of perennial fruits, nuts, and berries.

Farm Name or Unit: **Block ID:** **Acres:** **Establishment Year:**

DORMANT SEASON ACTIVITIES: Record of spraying, manuring, pruning, etc.

Date	*Activity*	*Date*	*Activity*

RE-PLANTING: Record of replacement plantings.

Date	*Crop / Variety Re-Planted*	*Number of Trees / Bushes / Canes Re-Planted*

Additional notes and observations:

GROWING SEASON ACTIVITIES: Record of mulching, mowing, spraying, fertilization, irrigation, etc.
Describe tree / bush / cane condition as excellent, good, average, or poor.
Record harvest information on a separate Harvest Record form.

Date	*Activity / Equipment*	*Tree / Bush / Cane Condition*

POST-HARVEST FIELD ACTIVITIES: e.g. planting of cover crops, manuring, orchard sanitation, etc.

Date	*Activity*	*Date*	*Activity*

Additional notes and observations:

Orchard /Vineyard/Berry Inputs Log

A record of the materials you use for each block of perennial fruits, nuts, and berries.

Farm Name or Unit: **Block ID:** **Acres:** **Establishment Year:**

DORMANT SEASON INPUTS: Record of pest control materials, manures, cover crop seed, etc.

Date	*Material Applied / Brand or Source*	*Purpose*	*Rate / Amount*	*Method of Application*

Additional notes and observations:

RE-PLANTING INPUTS: Record of fertilizers/soil amendments, pest control treatments, etc.

Date	*Material Applied / Brand or Source*	*Purpose*	*Rate / Amount*	*Method of Application*

Additional notes and observations:

GROWING SEASON INPUTS: Record of fertilizers, pest control materials, etc. Record pest, disease, and weed monitoring results in a separate Pest Monitoring Log.

Date	*Material Applied / Brand or Source*	*Purpose*	*Rate / Amount*	*Method of Application*

Notes and observations:

HARVEST/POST-HARVEST INPUTS:

Date	*Material Applied / Brand or Source*	*Purpose*	*Rate/Amount*	*Method of Application*

Orchard /Vineyard/Berry Establishment Year Log

A record of the practices, equipment, and inputs you use for each block of perennial fruits, nuts, and berries during the establishment year.

Farm Name or Unit: **Block ID:** **Acres:** **Establishment Year:**

PLANTING:

Date	*Crop / Variety Planted*	*Number of Trees / Bushes / Canes Planted*

ACTIVITIES: Record of soil preparation, planting, pruning, etc.

Date	*Activity*	*Date*	*Activity*

INPUTS: Record of fertilizers / soil amendments, pest control materials, manures, cover crop seed, etc.

Date	*Material Applied / Brand or Source*	*Purpose*	*Rate / Amount*	*Method of Application*

Additional notes and observations:

Planting Stock Record

A record of planting stock you purchased for use in organic production.

Space is provided to record whether planting stock is certified organic (O), untreated non-organic (U), or produced on-farm organic (F); to list any treatments* used; and to note non-GMO verification analysis, if available. Remember that if you use non-organic planting stock, you must document your search for the organic equivalent.

Farm Name or Unit: _____ Crop Year: _____

Planting Stock Information				Code	Treatment*	Confirmation of
Plant Type	Variety	Supplier	Lot #	(O,U,F)	Type/Brand	non-GMO status? (non-organic only)

* "Treatment" refers to natural and synthetic substances included on the National List ONLY.

Cover Crop Seed Record

A record of cover crop seed you purchased for use in organic production.

Space is provided to record whether seeds are certified organic (O), untreated non-organic (U), or produced on-farm organic (F); to list seed treatments* used; and to note non-GMO verification analysis, if available. Remember that if you use non-organic seeds, you must document your search for the organic equivalent.

Farm Name or Unit: _____ Crop Year: _____

Seed and Planting Stock Information				Code	Treatment*	Confirmation of non-GMO status?
Crop	Variety	Supplier	Lot #	(O,U,F)	Type/Brand	(non-organic only)

* "Treatment" refers to natural and synthetic substances included on the National List ONLY.

Organic Planting Stock and Seed Search Record

Producers may use non-organic stock and cover crop seed only when the organic equivalent is not commercially available. Use this form to document companies and individuals you contacted in your search for organic stock and seed.

Farm Name or Unit: Crop Year:

Plant Type / Variety Required:

Date	Company Name	Contact Information	Outcome of Inquiry

Plant Type / Variety Required:

Date	Company Name	Contact Information	Outcome of Inquiry

Plant Type / Variety Required:

Date	Company Name	Contact Information	Outcome of Inquiry

Plant Type / Variety Required:

Date	Company Name	Contact Information	Outcome of Inquiry

Plant Type / Variety Required:

Date	Company Name	Contact Information	Outcome of Inquiry

 May be copied and distributed as needed.

Fertility / Soil Monitoring Log					
Farm Name or Unit:		Field ID:	Acres:	Crop:	Year:
Date of most recent soil test:					
When compared with previous soil tests, are your nutrient levels (circle):					
P (phosphorus)	decreasing	stable	increasing	excessive	not tested
K (potassium)	decreasing	stable	increasing	excessive	not tested
Ca (calcium)	decreasing	stable	increasing	excessive	not tested
Mg (magnesium)	decreasing	stable	increasing	excessive	not tested
S (sulfur)	decreasing	stable	increasing	excessive	not tested
Na (sodium)	decreasing	stable	increasing	excessive	not tested
B (boron)	decreasing	stable	increasing	excessive	not tested
Cu (copper)	decreasing	stable	increasing	excessive	not tested
Mo (molybdenum)	decreasing	stable	increasing	excessive	not tested
Zn (zinc)	decreasing	stable	increasing	excessive	not tested
Mn (manganese)	decreasing	stable	increasing	excessive	not tested
Fe (iron)	decreasing	stable	increasing	excessive	not tested
Organic matter / Humus levels	decreasing	stable	increasing	-----	not tested
pH is:		within or approaching desired range		out of or moving away from desired range	
Crop Monitoring:					
Are there visible signs of nutrient stress?			No	Yes	
Erosion Monitoring:					
Is there evidence of wind and/or water erosion?			No	Yes	
Additional Notes on Soil and Crop Monitoring:					

Pest / Weed Monitoring Log

Farm Name or Unit: Block ID: Acres: Crop: Year:

Pest Monitoring: List date, type of insect or pest, and assessment of crop damage you observed.

Date	*Insect/Pest (note monitoring method if desired)*	*Type of crop damage*	*Damage Assessment (Low, Medium, High)*

Disease Monitoring: List date, type or description of disease, and assessment of damage.

Date	*Disease*	*Type of crop damage*	*Damage Assessment (Low, Medium, High)*

Weed Monitoring: List date, name / description of problem weed, and assessment of weed pressure.

Date	*Weed*	*Weed Pressure (Low, Medium, High)*

Harvest Record for Organic Operations

A record of your organic crops harvest for the entire year.

Farm Name or Unit: _____ Crop Year: _____

Harvest Date	*Block I.D.*	*Organic Crop*	*Quantity / Quality*	*Where Stored or Sold*

May be copied and distributed as needed.

Buffer Zone Harvest Record for Organic Operations

A record of your buffer crops harvest for the entire year.

Farm Name or Unit: _____ Crop Year: _____

Harvest Date	*Block I.D.*	*Buffer Crop*	*Quantity / Quality*	*Where Stored/Sold/Used*

_ON_-Farm Cooler / Cold Storage Record for Organic Crops

A record of your on-farm cold storage of organic and buffer zone crops.

Farm Name or Unit:

Cold Storage Unit: **Capacity:** **Crop Year:**

Date	*Quantity In*	*Block I.D.*	*Crop*	*Organic / Buffer*	*Lot # Assigned*	*Quantity Out*	*Cleanout Date*	*Cleanout By**

* Person who conducts the cleanout should sign or initial.

_ON_-Farm Cooler / Cold Storage Record for SPLIT Operations

A record of your on-farm cold storage of Organic, Transitional, and Conventional crops in common areas.

Farm Name or Unit:

Cold Storage Unit: **Capacity:** **Crop Year:**

Date	*Quantity In*	*Block I.D.*	*Crop*	*Organic / Trans. / Conv.*	*Lot # Assigned*	*Quantity Out*	*Cleanout Date*	*Cleanout By**

* Person who conducts the cleanout should sign or initial.

OFF -Farm Cooler / Cold Storage Record for Organic Crops

A record of your off-farm cold storage of organic crops.

Farm Name or Unit:

Storage Facility Name: **Location:** **Certified Organic?**

Cold Storage Unit: **Capacity:** **Crop Year:**

Date	*Quantity In*	*Block I.D.*	*Crop*	*Lot # Assigned*	*Quantity Out*	*Cleanout Date*	*Cleanout By**

* Person who conducts the cleanout should sign or initial.

Pest Control Activities and Inputs for Organic Crop Storage

A record of the actions and materials you use to prevent/control pests in stored organic crops.

Farm Name or Unit: Crop Year:

Storage Unit I.D.: Location (if off-farm):

Date	***Pest Control Activity / Input***	***By Whom****

* Person who conducts the pest control should sign or initial.

May be copied and distributed as needed.

Equipment Cleanout Log

This sheet should be kept on or near the equipment.

Machine or Piece of Equipment: Crop Year:

Cleanout Date	***By***	***Condition of Equipment*** *note any repairs or maintenance needed*	***Cleanout Performed as per Protocols*? Y / N***

* "Protocols" are the routine, step-by-step procedures established to make certain that equipment is properly and completely cleaned each and every time cleaning is required.

Equipment Settings and Adjustments for Orchard /Vineyard/Berry Operations			
Farm Name or Unit:			**Crop Year:**
Machine or Piece of Equipment	***Crop***	***Settings***	***Notes***

Sales Record									
Farm Name or Unit:							**Crop Year:**		
Date of Sale	***Crop Sold***	***Storage Unit I.D.***	***Lot #***	***Sold as Organic or Conv.***	***Buyer***	***Quantity Sold***	***Price per Unit***	***Total Price***	***Balance of Crop Remain-ing***

Compost Production Record

A record of on-farm compost production practices.

Farm Name or Unit: **Production Year:**

Compost Pile, Windrow, or Unit I.D.: **Date Started:**

Compost Production Method Used:

Feedstocks Used (including inoculants): **Estimated C/N Ratio:**

Dates	*Temperature*	*Turned?*