United States Department of Agriculture
Natural Resources Conservation Service

Kansas
Resource Conservation Staff

Toolkit

Task Guide #16

Toolkit Guidance for the Conservation Stewardship Program

June 29, 2010

Abstract

Per guidance from national and state level Conservation Stewardship Program (CSP) staff, the following information will be used for all planning in CSP. Departure from the standard planning process within Toolkit will be required.

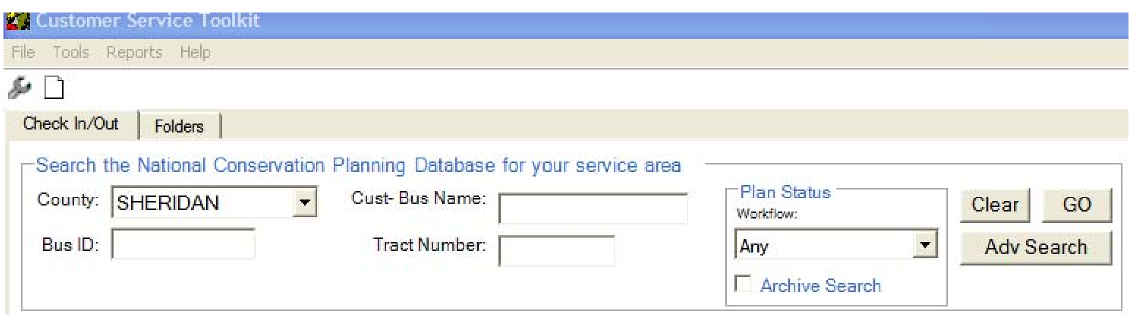
Guidance

- There are two distinct sets of instructions for the development of a CSP plan. These instructions are summarized below and are used with the following section in this task guide.
- **Kansas will no longer create a separate customer folder for CSP.**
- All CSP planning data will be stored in the primary customer folder for the contract holder. **A second separate consplan will be developed specifically for CSP and will be named CSP_2010.**
- Conservation practices previously applied shall **not** be scheduled in the CSP plan.
    - Example: Applicant had terraces applied in 1989 will not be documented in CSP plan.
- Toolkit Plan Wizard will be used to develop the plan for CSP.
- **Toolkit Contract Wizard will not be used.** Do not generate a Form NRCS-CPA-1155 from Toolkit.
- **Do not merge land units.**

Instructions

Search Toolkit for the Existence of a Customer Folder

1. Open Toolkit to the Check In/Out screen
2. Enter all or a portion of the contract holder’s name in the Cust-Bus Name box
3. Click the **Go** button
4. If one or more customer folders are returned for this customer, select the primary customer folder, check it out, and use **Summary Steps if One or More Customer Folders Exist**
5. If no customer folders are returned, use **Summary Steps if No Customer Folder Exists**



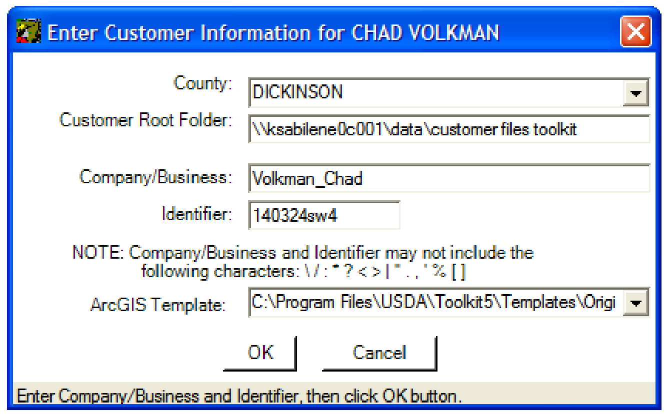
Summary Steps if No Customer Folder Exists

1. Creating a New CSP Customer Folder
2. Importing Common Land Unit (CLU) Field Boundaries
3. Importing Land Unit Boundaries From Another Existing Conservation Plan (optional)
4. Creating Tract Boundary Layer (optional)
5. Creating the CSP Subfolder for Data Storage

Summary Steps if One or More Customer Folders Exist

1. Importing CLU Field Boundaries
2. Importing Land Unit Boundaries From Another Existing Conservation Plan (optional)
3. Creating Tract Boundary Layer (optional)
4. Creating the CSP Subfolder for Data Storage

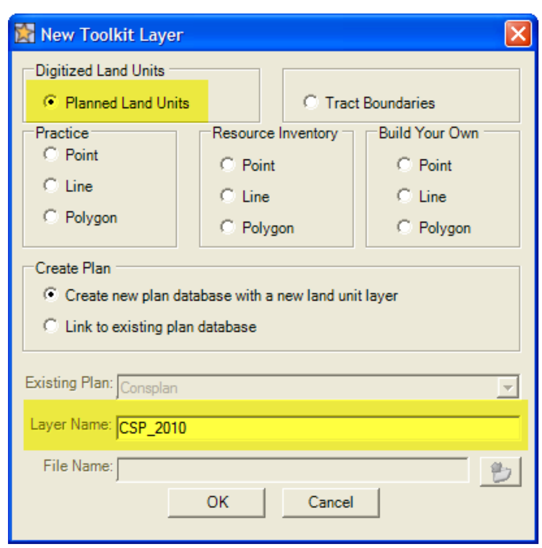
Creating a New Customer Folder



1. Open Toolkit
2. Click **Create New Customer Folder**  with the customer selected being the Decision Maker/Primary Participant
   a. Set County to administering county
   b. Set Company/Business name
   c. Enter the standard Toolkit Identifier of T-R-S Legal Description (Maximum 12 characters do not include “CSP” as in previous signups)

Importing CLU Field Boundaries

1. Open the customer folderand then open the ArcGIS Map Document (MXD) from the Customer Files Tab
2. Import fields from the CLU layer using one of the following options
   a. Manually select with the Select Features button 
      1. Make the CLU layer visible (i.e., check the box by the layer name in the Table of Contents [TOC])
      2. Click **Select Features** button , in the Data View select fields from the CLU
      3. Click the **New Toolkit Layer** button 
      4. Click the **Planned Land Units** radio button
      5. Rename the Layer Name to CSP_2010
      6. Click **OK**
      7. Click **YES** when asked - **Use features from a source layer?**
      8. Source Layer is the county CLU layer (i.e., clu_a_copy_ks<fips>)
      9. Select the option to Use Selected Features and Click **OK**
   b. Tract number query
      1. Click the **New Toolkit Layer** button 
      2. Click the **Planned Land Units** radio button
      3. Rename the Layer Name to CSP_2010



        4. Click **OK**
        5. Click **YES** when asked - **Use features from a source layer?**
        6. Source Layer is the county CLU layer (i.e., clu_a_copy_ks<fips>)
        7. Select the option to Query By and select Tract Number from list box
        8. Type Tract Number in **Search for Item** box
        9. Click **Search**
        10. Repeat steps 6 and 7 for each additional tract
        11. Click **OK** when all tracts are selected
        12. Verify tract list in message – click **OK** to continue, click **Cancel** to return to previous screen
    c. Farm number query
       Follow steps provided above for tract number query substituting Farm Number for Tract Number
3. When a new consplan layer is created, it is by default in edit mode - to stop editing, click **Land Unit Editor** toolbar – **Editor Menu** - **Stop Editing**

<u>Importing Land Unit Boundaries From Another Existing Conservation Plan (optional)</u>

Note – these steps only import the land unit boundaries from the existing conservation plan, not the attributes such as land unit number or NRCS land use.

1. Make a copy of the existing land units
    a. Open Toolkit and ArcMap for the customer currently containing the land unit boundaries
    b. Click the **Select a Plan** button
    c. Select the appropriate conservation plan containing the land unit boundaries to be copied
    d. Click **OK** – *the consplan is now available in the TOC*
    e. Right click the consplan layer name in the TOC
    f. From the menu, click **Data** then click **Export Data**
    g. On the Export Data dialog option for output shapefile or feature class, navigate to C:\temp\ using the browse button and provide a recognizable filename
       Note – Remember this location and filename for later use
    h. When asked, **Do you want to add the exported data to the map as a layer?,** answer **NO**
    i. Close ArcMap and the current customer file
2. Paste the existing land units into the CSP consplan
    a. Open Toolkit and ArcMap containing the existing CSP consplan
       *Note - if a consplan does not exist for CSP then instead of doing steps b-d below, use the **New Toolkit Layer** button to create a blank consplan*
    b. Click the **Select a Plan** button
    c. Select the CSP_2010 plan
    d. Click **OK** – *the consplan is now available in the TOC*
    e. Click the **Add Data** button and load the file created in step 1g above
    f. Start the **Toolkit Digitizer** for the consplan layer
    g. At the bottom of the TOC, click the **Selection** tab
    h. Check the box next to the layer loaded in step 2e
       Note – this will make the layer selectable so the features can be selected
    i. At the bottom of the TOC, click the **Display** tab
    j. In the TOC, select or highlight the layer loaded in step 2e
    k. Use one of the zoom functions of ArcMap to find the layer
    l. Use the **Select Features** button to select the land units to be copied to the CSP consplan
       *Note – this is the **Select Features** button from the **Tools** toolbar, not the **Select Field** button from the **Toolkit Digitizer** toolbar*

m. Now that the layer is selected in the TOC and some features are selected, the **Copy**  button on the **Toolkit Digitizer** toolbar will be enabled **-** click the **Copy** button to copy the features to the clipboard

n. Once the copy button has been used, the **Paste**  button on the **Toolkit Digitizer** toolbar will be enabled - click the **Paste** button and the features will be pasted in to the CSP consplan layer

o. On the **Toolkit Digitizer** toolbar, click **Editor** then **Stop Editing** and save your edits

Creating Tract Boundary Layer (Optional)

1. Consplan layer must be available in the TOC; if not, follow steps a-c

   a. Click the **Select a Plan**  button
   b. Select the appropriate CSP consplan from the drop-down list
   c. Click **OK** – *the consplan is now available in the TOC*

2. Click the **New Toolkit Layer**  button
3. Select the Tract Boundaries option in the upper right of the New Toolkit Layer dialog window
4. Click **OK**
5. A new Tract Boundaries layer is added to the top of the TOC

Creating the CSP Subfolder for Data Storage

1. Open Windows Explorer or My Computer
2. Navigate to C:\Documents and Settings\<USER NAME>\My Customer Files Toolkit\<CUSTOMER FOLDER NAME>\
3. Click **File Menu**
4. Click **New Menu Item**
5. Click **Folder Option**
6. Rename this new folder to CSP

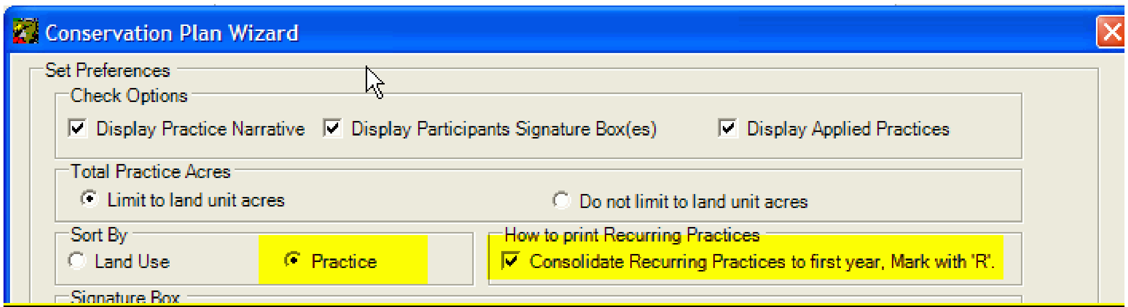
Additional Notes

CSP Subfolder for Data Storage

- The additional subfolder for data storage can be used to place all supporting documentation for CSP. These documents could include but are not limited to shapefiles, Excel documents, and pictures.
- Toolkit tools default to a pre-defined location, and in many cases the Browse button will need to be used to navigate to the CSP subfolder prior to saving data.
- Date can be placed in the CSP subfolder by using Windows Explorer or My Computer and navigating to the subfolder at C:\Documents and Settings\<USER NAME>\My Customer Files Toolkit\<CUSTOMER FOLDER NAME>\.

Plan Wizard and Excel Document of Stewardship Plan

- The Toolkit Plan Wizard has many options for formatting the plan. The **Sort By Practice** option and the **Consolidate Recurring Practices** option will considerably decrease the number of pages in the stewardship plan.



- If the **Consolidate Recurring Practices** option is used, only the first year of the recurring practices followed by an "R" will appear in the Excel Stewardship Plan. If recurring practices are consistent throughout the entire document, the **Find & Replace** functionality of Excel can be used to quickly change values such as "2010R" to "2010-2014."

<u>Scheduling Practices</u>

- Occasionally there may be practices required in the Toolkit CSP Plan that will not be listed on the Conservation Measurement Tool (CMT) report. These practices are a requirement of the contract and must be included in the Toolkit CSP Plan.
- For practices in the Toolkit CSP Plan that appear on the CMT report, the Toolkit Program Code will be CSP.
- For practices in the Toolkit CSP Plan that do not appear on the CMT report, the Toolkit Program Code will be CTA.

<u>Scheduling Enhancements and Bundles</u>

- Use the national narrative for all enhancement activities. Do not modify the narrative.
- Enhancement bundles will be displayed as a distinct item to select in the Toolkit Practice Schedule screen. Do not select individual enhancement items in Toolkit to create an enhancement bundle.

<u>Reporting Progress</u>

- Progress shall be reported for all scheduled practices.
- Do not report progress on scheduled enhancements.