

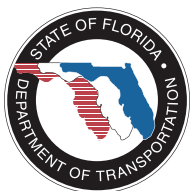
etdm

Efficient Transportation Decision Making

Florida's ETDM Process Progress Report #4



Efficient Transportation Decision Making
...While Protecting Florida's Environment



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Executive Summary

This report provides an update for Florida's Efficient Transportation Decision Making (ETDM) Process covering the period from October 2006 through June 2009 (also referred to as the "reporting period"). The report documents major accomplishments and issues during that period. It also includes a discussion of the path forward for the ETDM Process in Florida.

The ETDM Process affords participating Environmental Technical Advisory Team (ETAT) agencies, other participants, and the public the opportunity to provide early input to the Florida Department of Transportation (FDOT) and Metropolitan Planning Organization (MPO) Boards on a transportation project's potential effects to the natural, cultural and built environments through a series of "screening" events. These screening events occur at the Long Range Transportation Plan development stage and just prior to a project entering the FDOT Five-Year Work Program. They are completed on the Environmental Screening Tool (EST) where ETAT agencies can provide comments on 18 different issues such as air quality, wetlands and historic and archaeological sites. Agency and public involvement continues throughout project development and delivery.

The ETDM Process began as a joint effort among FDOT, Federal Highway Administration (FHWA), and other state, federal, and local governments to reexamine the entire transportation planning and project development processes in response to Congress's environmental streamlining initiative. Ultimately, 23 federal, state and regional agencies helped to develop this process and the supporting technology system from 2000 through 2004. Since the ETDM Process became operational, there have been training opportunities offered in each FDOT District office. FDOT has continued to work with its partners to refine and improve the process since its implementation. Significant accomplishments during the reporting period from October 2006 through June 2009 include the following (see Chapter 2 – Accomplishments for more details on each accomplishment):

- **District Accomplishments** - FDOT Districts have identified improvements in planning transportation projects, conducting environmental reviews, and developing projects for NEPA and permitting compliance.
- **Agency Participation** – The ETDM Process has fostered a partnership environment among the ETAT agencies and FDOT Districts. Specific ETDM agency accomplishments during the reporting period include:
 - **Agency Participation through ETDM Agreements**

The Agency ETDM Agreements (Master, Agency Operating and Funding Agreements) continue to provide the catalyst for participation in the ETDM Process and have been renewed continually. These agreements detail the partnering relationships between the agencies and FDOT throughout the ETDM Process from project planning, through compliance with NEPA and subsequent reevaluation phases.
 - **Adjustments to Agency Funding Agreements**

In 2007 and 2008 the Environmental Management Office (EMO) worked closely with ETAT agencies to reduce funding and personnel resource needs related to participation in the ETDM Process due to the statewide budget shortfall. As an outcome of this review and by mutual agreement with each agency, the resource funding needs of the ETAT agencies were decreased by \$5,256,468.50 and the level of staffing needs was decreased from 36 to 22. Recent surveys and discussions with the ETAT agencies and FDOT Districts have confirmed that these reductions have not negatively impacted agency participation and the ETDM program continues to function well.
- **Environmental Screening Tool** – During this reporting period the Environmental Screening Tool (EST) enhancements completed all of the major requirements previously identified by the ETDM Task Work Groups. Some of the major enhancements to the EST during this time are listed below:

- **Integration of ETDM and Advanced Notification (AN) / Federal Consistency Reviews** – The Advance Notification is now part of the EST's Programming Screen. The AN Package informs agencies to begin their project review and notifies other interested parties that FDOT intends to proceed with a particular project and initiates the Federal Consistency Review Process.
- **Agency On-line Invoicing and Reporting** – EMO has developed an enhancement to the EST that now allows agencies to submit their invoices on-line. Agency representatives and EMO representatives are able to review these invoices and process them on-line. This innovative process reduces review, processing time and invoicing errors.
- **Public Access Site** – This Web site assists in the distribution of ETDM project information to the public and their review of that information.
- **Community Characteristics Inventory (CCI) enhancements** – The CCI enables community analysts to draw a community boundary on a map and review analysis results showing the community demographics, land use, and features within the boundary.
- **New and updated EST data sets** – During this reporting period, information from resource agencies was added and updated (146 new data sets were added and 643 existing data sets were updated).
- **Support of eliminated alternative protocols** – This enhancement provides ETDM Coordinators and Project Managers a method to document the decision about a project not moving forward for further evaluation in subsequent phases.
- **Update of Expected versus Optional Issues** – This enhancement tailors the EST to meet the needs of the ETAT agencies with respect to their jurisdictional responsibilities. This allows the tool to provide more accurate participation statistics with regards to ETAT comments expected on transportation projects.
- **Community Resources** – Community Resources covers sociocultural effects, the management of cultural resources, indirect and cumulative effects, and public involvement. A brief update on each of these is presented below:
 - **Sociocultural Effects** – During this reporting period, the FDOT Cultural Resources Section focused on improving tools and guidance needed to evaluate and address effects of a transportation action on a community and its quality of life.
 - **Cultural Resources Management** – During the reporting period of Progress Report No. 4, EMO began updating the PD&E Manual Part 2, Chapter 12 – Archaeological and Historical Resources to reflect recent changes in legislation. Several tools were also added to the EST to support the evaluation of cultural resources. These tools include the National Register Sites, Video Log Viewer, and Project Attachments map tools.
 - **Indirect and Cumulative Effects** – A 2006 Indirect and Cumulative Effects Task Work Group was formed with the purpose of providing further detail on how indirect and cumulative effects evaluations would be accomplished within the ETDM Process. These recommendations were drafted into a white paper, which was published in 2008 and is currently being reviewed by FDOT management.
 - **Public Involvement** – EMO has provided general public involvement training to the FDOT Districts and MPOs five times since February 2008. An ETDM Public Access Site is available on the Internet. This Web site provides information to the general public about the ETDM Process and about projects currently in the ETDM Process.

- **Process and Performance Management** – The ETDM Performance Management Program (PMP) was developed to meet the performance requirements of the Safe, Accountable, Flexible, Efficient Transportation Equity Act: A Legacy for Users (SAFETEA-LU). The PMP monitors, evaluates and documents the activities of the ETDM Process and its effectiveness in meeting the established performance goals.
 - **Biennial Agency Survey and Reports** – As part of the ETDM PMP, a Biennial Agency Survey is administered via the EST with the purpose of capturing the experiences and ideas of the agencies and FDOT Districts regarding the ETDM Process. This information is then used by EMO to recognize the ETDM Process successes, implement process improvements (if necessary), and facilitate communication between the ETAT agencies and the FDOT Districts.
 - **Quality Assessment / Quality Control Program** – The ETDM PMP has been integrated with the FDOT Quality Assurance Program. It is the policy of FDOT to use a systematic but flexible approach to Quality Assurance (QA) and Quality Control (QC) to monitor work processes to implement laws, rules, procedures, policies and standards.

Section 1 Introduction

1.1 Purpose

This report provides an update on the progress made by the Florida Department of Transportation (FDOT) Efficient Transportation Decision Making (ETDM) Process. This document is the fourth in a series of progress reports and covers the period from October 2006 through June 2009 (referred to as “reporting period”). It documents major accomplishments, achievements and issues during that time as well as a discussion of the “path forward” for the ETDM Process in Florida. Previous ETDM Progress Reports are available on the ETDM Public Access Site at <http://etdmpub.fl.a-etat.org>.

1.2 Efficient Transportation Decision Making Process

1.2.1 Background

Florida’s ETDM Process was developed by FDOT in partnership with the Federal Highway Administration (FHWA) in response to the Congress’s “Environmental Streamlining” initiatives as embodied in two pieces of federal legislation: the Intermodal Systems and Surface Transportation Efficiency Act (ISTEA) and the Transportation Equity Act for the 21st Century (TEA-21).

ETDM is the result of FDOT reexamining the entire environmental review process for transportation projects from the very early stages of planning through project development and permitting. Working in partnership with the FHWA, FDOT invited federal and state agency heads to come together in a “summit” in February 2000 to ask for their support in reexamining the transportation planning and environmental review process in Florida. By use of a collaborative multi-agency working group FDOT redefined how transportation projects would be planned, reviewed, and subsequently permitted. Ultimately, 23 federal, state, and regional agencies helped to develop and, by mutual agreement, actively participate in the ETDM Process and its supporting technology system. The ETDM Process meets the streamlining objectives Congress outlined in ISTEA and TEA-21. The following are some key features of this process:

- Effective and timely decision making without compromising environmental quality
- Early National Environmental Policy Act (NEPA) reviews/approvals

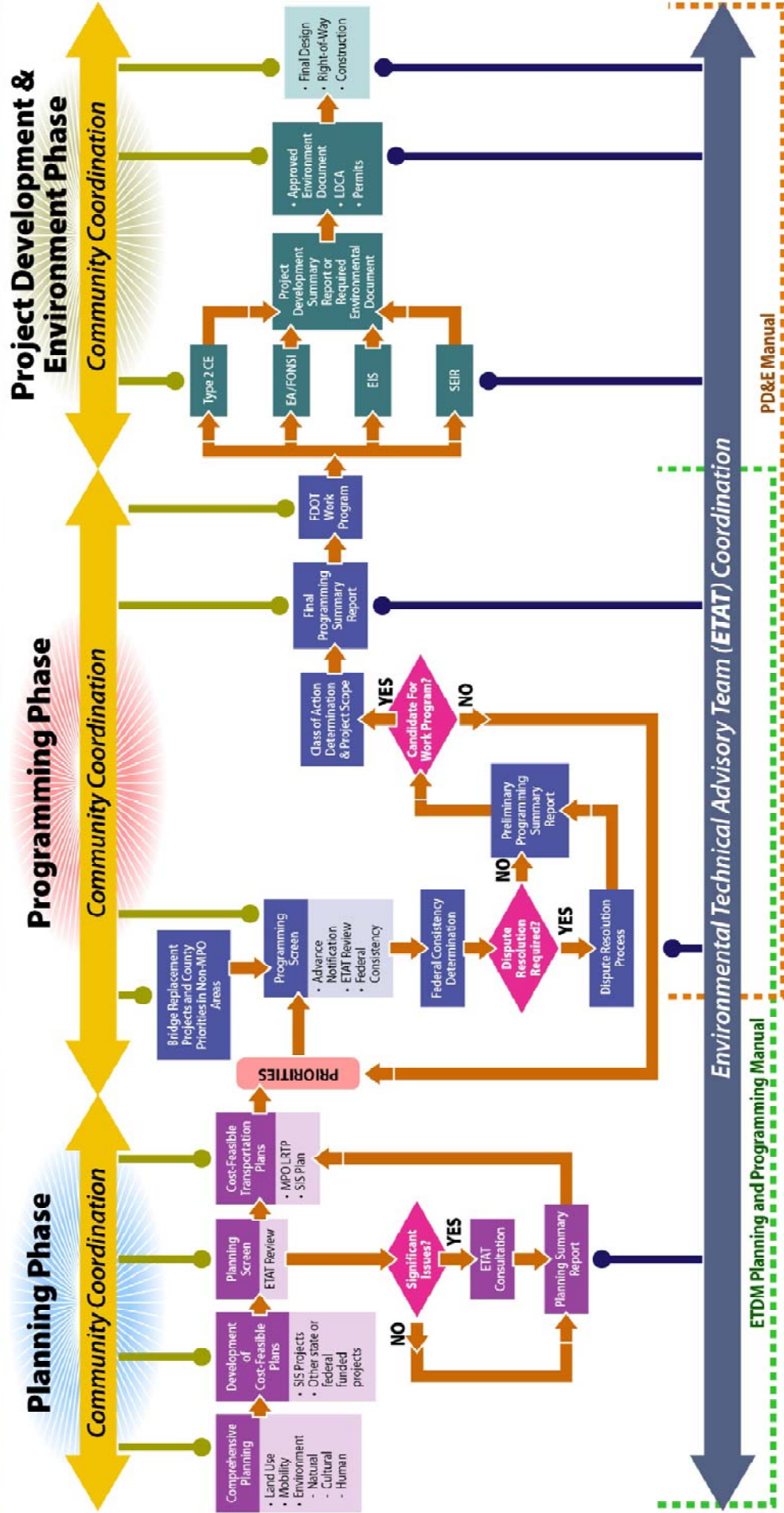
ETDM Participants

- Advisory Council on Historic Preservation
- Federal Highway Administration
- Federal Transit Administration
- Florida Department of Agriculture and Consumer Services
- Florida Department of Community Affairs
- Florida Department of Environmental Protection
- Florida Department of State
- Florida Department of Transportation
- Florida Fish and Wildlife Conservation Commission
- Florida Metropolitan Planning Organization Advisory Council
- The Miccosukee Tribe of Indians of Florida
- National Marine Fisheries Service
- National Park Service
- Natural Resources Conservation Service
- Northwest Florida Water Management District
- The Seminole Tribe of Florida
- South Florida Water Management District
- Southwest Florida Water Management District
- St. Johns River Water Management District
- Suwannee River Water Management District
- U.S. Army Corps of Engineers
- U.S. Coast Guard
- U.S. Environmental Protection Agency
- U.S. Fish and Wildlife Service
- U.S. Forest Service

- Integrating the NEPA environmental review with permitting considerations
- Integrating land use, resource and transportation planning
- Early and continuous agency and public participation
- Meaningful dispute resolution mechanisms
- Problem solving and collaborative decision making at the project level
- Updated Geographic Information Systems (GIS) data to assist transportation and environmental reviews and decisions
- Project comments and decision-making history contained in a Project Diary
- Performance measures
- Project solutions accepted by the resource agencies and the public

Ultimately, the fundamental goal of the ETDM Process is to improve transportation decision making in a way that preserves and protects the natural, cultural, and built environments in Florida. **Figure 1-1** explains the flow of the ETDM Process. The ETDM Process includes the following three phases:

- Planning Phase
- Programming Phase
- Project Development and Environment Phase



In December 2005, FHWA determined that Florida’s ETDM program is consistent with federal legislation pursuant to the Safe, Accountable, Flexible, Efficient Transportation Equity Act: A Legacy for Users (SAFETEA-LU) and grandfathered Florida’s process. Florida remains the only state in the union to have a “grandfathered” program that satisfies SAFETEA-LU.

The primary environmental requirements identified under Section 6002 of SAFETEA-LU and the core elements of ETDM that satisfy these requirements are identified in **Table 1-1**.

Table 1—1: SAFETEA-LU Requirements and ETDM Process Components

SAFETEA-LU Requirement	ETDM Process Components
Identification of the Project Lead Agency and Participating Agencies and definition of agency roles in the process	ETDM Agreements, ETDM Planning and Programming Manual, and Environmental Screening Tool (EST) Programming Summary Report
Participating Agency Invitation and review deadlines	ETDM Agreements and EST Planning and Programming screening events
Cooperating Agencies	ETDM Agreements, ETDM Planning and Programming Manual, and EST Programming Summary Report
Project Initiation	ETDM Planning and Programming Manual, and EST Programming Screen Summary Report
Administrative and Policy Procedures	ETDM Planning and Programming Manual and Project Development and Environment (PD&E) Manual
Purpose and Need	EST Planning and Programming screening events
Range of Alternatives	EST Planning and Programming screening events
Comment Deadlines	ETDM Agreements, and ETDM Planning and Programming Manual, and PD&E Manual
Coordination and Scheduling	ETDM Agreements and PD&E Manual
Methodologies and Level of Detail	PD&E Manual and technical studies
Performance Measurement	ETDM Agreements and ETDM Planning and Programming Manual
Issue Resolution	ETDM Agreements and ETDM Planning and Programming Manual
Assistance to State Agencies	ETDM Agreements and agency funding
Limitation on Claims	PD&E Manual

1.2.2 The Environmental Screening Tool

Environmental reviews and communication among the agency participants and with the public is assisted through the Environmental Screening Tool (EST). The EST is an Internet-accessible interactive database and mapping application. The EST integrates resource and project data from multiple sources into one standard format and provides quick and standardized analyses of the effects of a proposed project on natural, cultural, and community resources. It provides utilities to input and update information about transportation projects and community characteristics, perform standardized analyses, report comments by the Environmental

Technical Advisory Team (ETAT¹) representatives, and provide read-only information to the public. Its database maintains the project record throughout the life of the project.

1.2.3 Benefits of ETDM Process

Many program benefits have been realized since the initiation of the ETDM Process. These benefits have resulted in reduction of costs and time. A survey conducted in April 2007 of FDOT Districts indicated that the ETDM Process has resulted in an estimated cost savings of approximately \$15.2 million and a cumulative time savings of more than 38 years.² Some major benefits, which are discussed in more detail in **Chapter 3 – ETDM Benefits Realized**, are listed below:

- Improved agency coordination and consultation
 - The ETDM Process is a voluntary program. Agencies view themselves as partners and team members who are seeking to resolve project issues early and meet mutual interagency goals and objectives.
 - Early interagency coordination has reduced the number of reasonable project alternatives being carried forward for study. The reduction in project alternatives translates to reduction in overall cost of the project.
 - Instances of partnering agencies raising new issues late in project development have been reduced.
 - ETDM allows for early mitigation opportunities; early Purpose and Need Statements; and early identification of a range of alternatives to be developed, reviewed, and accepted prior to project development.
 - Availability and access to agency technical experts, when needed, at FDOT's request is a major benefit of ETDM.
 - Interagency relationships, communication and trust have greatly improved.
- Improved long-range transportation planning
 - The ETDM Process facilitates linking transportation planning and NEPA.
- Focused evaluations during project development
 - Better project scopes of services have resulted, where unnecessary technical studies are eliminated, thereby saving time and money.
 - Early screening of projects has identified and eliminated projects that are “fatally flawed.”
 - Project permitting has been enhanced.
- Improved dispute resolution process
 - Communication among partnering agencies is generally collaborative and non-adversarial; however, if a dispute arises, the mutually designed dispute resolution process provides a positive and collaborative approach. For more information on dispute resolution, please refer to the EMO Web site (<http://www.dot.state.fl.us/emo/>) and click on the link titled “ETDM Dispute Resolution Brochure” under the “Publications” section.

¹An ETAT, consists of planning, regulatory and resource agencies, and has been established for each of the seven geographic FDOT Districts. ETATs ensure that transportation decisions are balanced with effects on natural, cultural and community resources; land use decisions; and other agency goals or objectives.

²The FDOT Districts were asked to provide these numbers on short notice. The instructions were to provide conservative estimates that they felt comfortable with. The Cost Savings estimates may or may not have a direct correlation to the estimated Time Savings. The information provided here is an excerpt from a report submitted to the Executive Board in July 2007 detailing the District responses identifying project screening benefits realized from engaging in the ETDM Process.

- Less costly environmental studies and documentation
 - Better selection of a project's Class of Action to satisfy NEPA has resulted, thus saving time and money (**Chapter 3 - ETDM Benefits Realized** provides examples where FDOT Districts have saved money by using ETDM).
 - Increased knowledge of each agency's mission and jurisdictional requirements has improved the overall environmental review process for FDOT projects.
- Shortened project delivery
 - ETDM screenings are accomplished in 45 days, which allows FDOT to maintain project schedules.
 - The frequency of Requests for Additional Information (RAIs) has been reduced.
 - Interagency conflicts on issues have been reduced.
- Better access to information
 - The EST facilitates an open and transparent process.
 - The EST provides project details, GIS analyses, agency comments, commitments, recommendations, project summaries, decision history, and other project-specific information, all of which is stored, tracked, and managed electronically, leading to a substantial reduction in paperwork.
 - The public has continuous input throughout the ETDM Process through public outreach initiatives and an ETDM public access Web site.
- Enhanced coordination within FDOT
 - The ETDM Process, through the EST, provides a tool for coordinating across FDOT District boundaries.
 - The process has also improved coordination between organizational units within FDOT.
- Improved exchange of best practices
 - The ETDM Process has resulted in an exchange of best practices between FDOT Districts, counties, MPOs and resource agencies.

1.2.4 ETDM Process Awards

The success of Florida's ETDM Process has been recognized with the following awards:

- Florida's Davis Productivity Award (2005)
- American Council of Engineering Companies (ACEC) Engineering Excellence, National Finalist (March 2006)
- Federal Highway Administration Award (July 19, 2006)
- Florida Institute of Consulting Engineers (FICE) 2006 Excellence in Engineering Award
- 2008 Exemplary Ecosystem Initiatives Award (FHWA)
- 2008 Exemplary Human Environment Initiatives Award (FHWA)

Section 2 Accomplishments

Since the last reporting period, significant progress has been made in the further development and application of the ETDM Process.

2.1 District Accomplishments

2.1.1 Districts Recognize Benefits of ETDM Process

The FDOT Districts have reported improvements in planning transportation projects, conducting environmental reviews, and developing projects for NEPA and permitting compliance. These accomplishments are noted in the Quarterly District Status Reports reviewed during the reporting period. In general these improvements include the following:

- Improved coordination and consultation between FDOT Districts and the agencies
- Improved long-range transportation planning
- Focused evaluations during project development
- Improved Dispute Resolution Process
- Less costly environmental studies and documentation
- Shortened project delivery
- Better access to information
- Enhanced coordination within FDOT
- Improved exchange of Best Practices

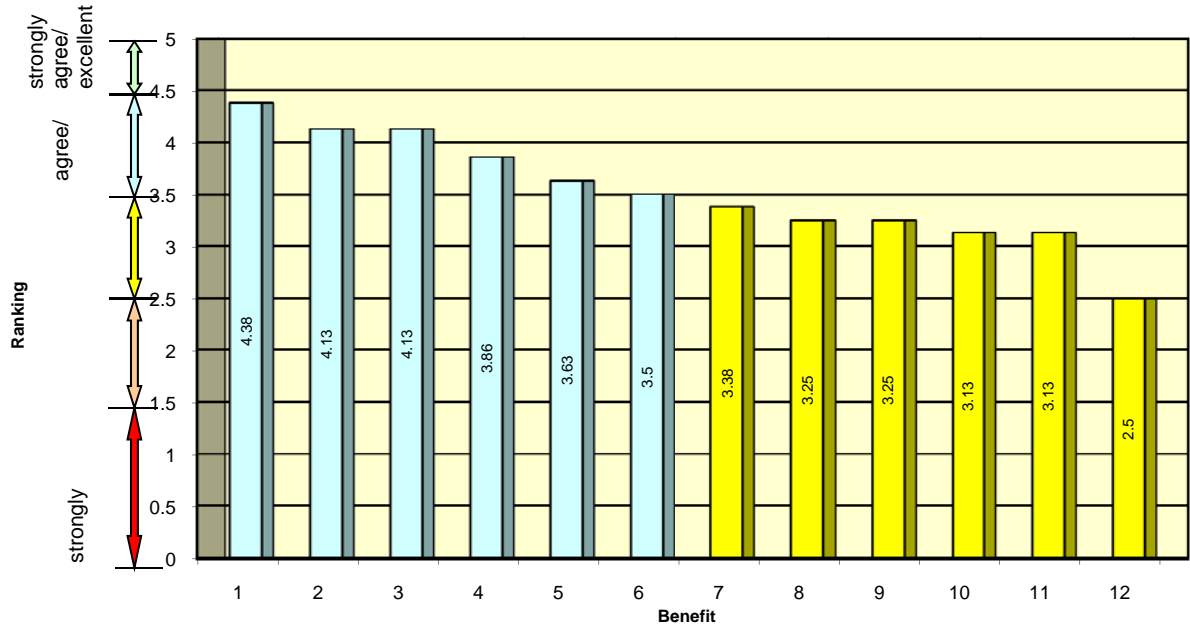
Refer to **Chapter 3, ETDM Benefits Realized** of this report for specific examples of FDOT District accomplishments within each of these categories.

2.1.2 District ETDM Survey Results

In January 2008, the ETDM Biennial Survey (District Survey) was administered via the EST. The administering of the District Survey represents a significant milestone in the implementation of the ETDM Performance Management Program. Each of the seven FDOT Districts and Florida's Turnpike Enterprise were asked to provide feedback, assess, and rate the ETDM Process, its administration, and the participation of resource agencies, using the District Survey.

The primary purpose of this District Survey is to capture the experiences and ideas of the District ETDM Coordinators regarding the ETDM Process. This information is used by the ETDM Management Team and the FHWA to recognize ETDM Process successes, implement process improvements where necessary, and facilitate communication with the participating agencies. **Figure 2-1** is a graphical display of the average ranking of the responses to selected questions (relating to ETDM Process benefits) asked of the FDOT Districts and Florida's Turnpike Enterprise.

Figure 2—1: Averages of District Survey Results - ETDM Process Benefits



Benefits (1-6): FDOT Districts & Turnpike Enterprise to rank the ETDM Process on the following:

- (1) ETDM has strengthened interagency coordination and communication
- (2) ETDM has increased the awareness of environmental resources
- (3) ETDM has increased public accessibility to project

Benefits (6-12): FDOT Districts & Turnpike Enterprise to rank the ETDM Process on the following:

- (7) ETDM has established lasting efficiencies to the environmental review process
- (8) ETDM has reduced interagency conflicts

Likert Scale Used in District ETDM Survey

Ranking(1)	Excellent	Very Good	Good	Fair	Poor
Agreement Rating(2)	Strongly Agree	Agree	Neutral	Disagree	Strongly Disagree
Numeric Equivalent	5	4	3	2	1
Ranges used in Averages	4.5 - 5.00	3.5 - 4.49	2.5 - 3.49	1.5 - 2.49	Below 1.5

2.2 Agency Participation

Early and continuous agency involvement is a key component to the success of the ETDM Process. Through the ETAT, the ETDM Process fosters a team approach to identifying transportation solutions that are responsive to environmental and cultural preservation goals and to community livability objectives. Early coordination and consultation among the FDOT, MPOs, and ETAT agencies improve the mutual awareness and understanding of mobility needs and environmental protection, which continues through each phase of the ETDM Process.

It is important to note that every agency, as well as FDOT, adjusted their business practices to accommodate the new ETDM Process and the workload requirements to support the new process. FDOT reorganized staff and management positions to accommodate the responsibilities, while other agencies opted to create new positions or sections within their existing structure.

2.2.1 Agency Agreements

Implementation of the ETDM Process is supported by three types of agency agreements: the Master Agreement, which describes the overall ETDM Process; the Agency Operating Agreement, which documents agency-specific requirements; and the Funding Agreement, which documents interagency funding by the FDOT to assist in an agency's participation in the ETDM Process. Each agreement contributes to the success of the program by delineating roles and priorities, establishing dispute resolution procedures, and establishing performance measures. **Table 2-1** details the agreements between the agencies and FDOT and the status of those agreements. These agreements are reviewed and renewed as necessary.

Table 2—1: Agreements between Agencies and FDOT

Agency Name	Agency Operating Agreement	Master Agreement	Funding Agreement
Federal Highway Administration and Federal Transit Administration (FHWA/FTA)	02/12/03 – 02/11/10 New AOA in progress	Not Required	Not Required
Florida Department of State, State Historic Preservation Officer (SHPO) and Advisory Council on Historic Preservation	10/20/03 – 11/30/11	10/20/03 – 11/30/11	10/20/03 – 11/30/11
Florida Department of Environmental Protection (FDEP)	11/17/04 – 12/31/11	11/17/04 – 12/31/11	Cancelled
Florida Department of Community Affairs (FDCA)	12/18/03 – 10/31/10	12/18/03 – 10/31/10	12/18/03 – 10/31/10
Florida Department of Agriculture & Consumer Services (FDACS)	05/14/04 – 09/19/11	05/14/04 – 09/19/11	05/14/04 – 9/19/11
Florida Fish & Wildlife Conservation Commission (FWC)	6/1/09 – 10/31/10	6/1/09 – 10/31/10	6/1/09 – 10/31/10
National Marine Fisheries Service (NMFS)	06/28/04 – 07/24/11	06/28/04 – 07/24/11	06/28/04 – 7/24/11
National Park Service (NPS)	08/11/05 – indefinite	08/11/05 – indefinite	08/11/05 – 08/11/08 No new Funding Agreement required
Natural Resources Conservation Service (NRCS)	1/15/03 – indefinite	1/15/03 – indefinite	Not Required
Northwest Florida Water Management District (NFWWMD)	07/11/03 – Indefinite*	07/11/03 – Indefinite*	07/11/03 – 06/30/14
Southwest Florida Water Management District (SWFWMD)	09/29/04 – 9/30/11	09/29/04 – 9/30/11	09/29/04 – 09/30/11
South Florida Water Management District (SFWMD)	09/29/04 – 5/14/12	09/29/04 – 5/14/12	10/01/04 – 05/14/12
St. Johns River Water Management District (SJRWMD)	Agreement cancelled, continued participation	Agreement cancelled, continued participation	Agreement cancelled, continued participation
Suwannee River Water Management District (SRWMD)	09/29/04 – 09/30/11	09/29/04 – 09/30/11	10/01/04 – 09/30/11
U.S. Army Corps of Engineers (USACOE)	12/09/04 – 12/09/09 New AOA in progress	12/09/04 – 12/09/09 New MA in progress	12/09/04 – 12/31/09 New FA in progress
U.S. Fish and Wildlife Service (USFWS)	04/18/03 – 11/23/13	4/18/03 – 11/23/13	04/18/03 – 11/23/13
U.S. Environmental Protection Agency (USEPA)	10/20/03 – 01/22/14*	10/20/03 – 01/22/14*	10/20/03 – 01/22/14
U.S. Forest Service (USFS)	05/24/04 – 08/07/11	05/24/04 – 08/07/11	05/24/04 – 08/07/11
U.S. Coast Guard (USCG)	06/08/09 – Indefinite	Not Required	Not Required

* This agency currently holds a merged Agency Operating Agreement and Master Agreement called an Agency Operating Agreement.

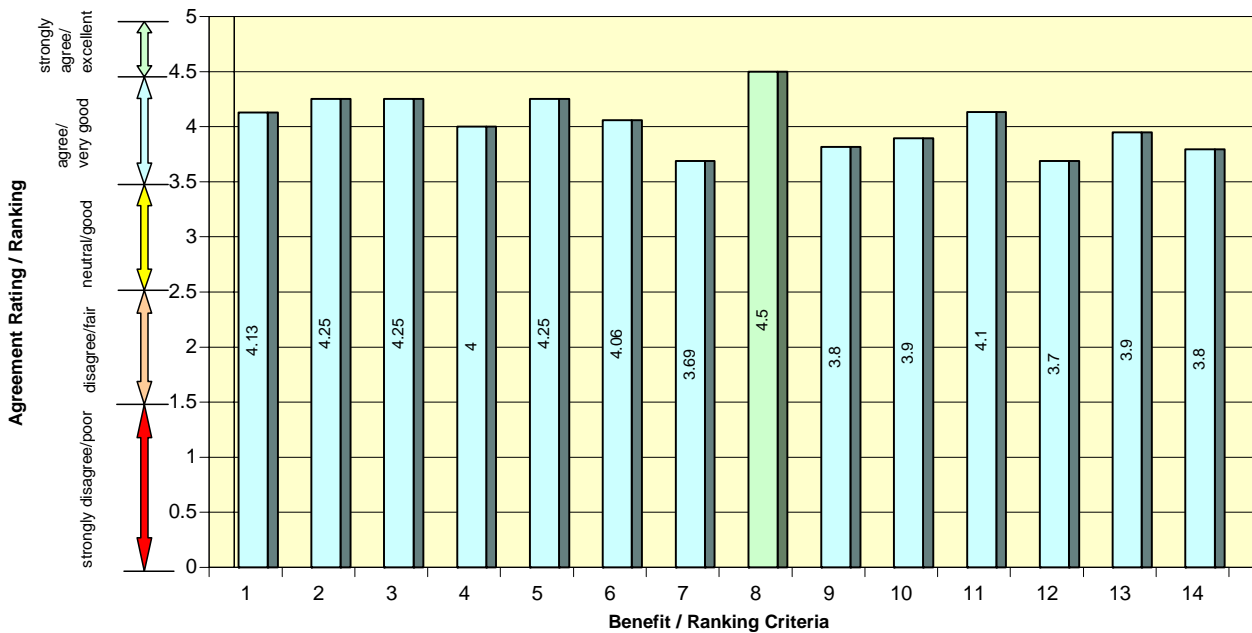
2.2.2 Agency ETDM Survey

In January 2008, the ETDM Biennial Agency Survey (Agency Survey) was administered via the EST. Like the District Survey, the main purpose of the Agency Surveys is to capture experiences and ideas (of the agencies) regarding the ETDM Process.

Seventeen of the ETAT agencies were asked to provide feedback, and assess and rate the ETDM Process, its administration, and the participation of resource agencies using the Agency Survey. Sixteen of the seventeen agencies responded.

The survey contained 39 questions relating to many aspects of the ETDM Process, including the effectiveness of their relationships with the FDOT Districts. Of these 39 questions, several were selected to be summarized in this Progress Report. **Figure 2-2** is a graphical display of the average ranking of the responses to these selected questions. Items 1 through 8 shown on **Figure 2-2** are related to potential benefits of the ETDM Process, in which the agencies were asked to comment on whether they agree or disagree. Items 9 through 14 describe some qualities that the agencies were asked to use to rank the FDOT Districts. The figure also includes the Likert Scale rating values, which were used to rank the agency responses.

Figure 2—2: Averages of Agency Survey Results – ETDM Process Benefits



List of Benefits-Agencies to Agree/Disagree on the following:

- (1) Enhanced problem solving on transportation projects
- (2) Established efficiencies in the environmental review process
- (3) Increased the awareness of environmental resources
- (4) Increased the protection of environmental resources
- (5) Promoted better decision making for transportation projects
- (6) Reduced interagency conflicts
- (7) Shortened project delivery time (amount of time to get a road constructed)
- (8) Strengthened interagency coordination and communication

List of Ranking Criteria-Agencies to rank the quality of the District on the following:

- (9) Consultation and coordination in project decision making with your Agency
- (10) Working relationship with your Agency
- (11) Level of assistance in problem solving
- (12) Willingness to share information with your Agency
- (13) Responsiveness to your Agency
- (14) Accessibility and availability to your Agency

Likert Scale Used in ETDM Biennial Agency Survey

Ranking(1)	Excellent	Very Good	Good	Fair	Poor
Agreement Rating(2)	Strongly Agree	Agree	Neutral	Disagree	Strongly Disagree
Numeric Equivalent	5	4	3	2	1
Ranges used in Averages	4.5 - 5.00	3.5 - 4.49	2.5 - 3.49	1.5 - 2.49	Below 1.5

Notes:

- (1) *Ranking* applies to Items 9 through 14 on Figure 2-2 and reflects the agencies' ranking of various qualities.
- (2) *Agreement Rating* applies to Items 1 through 8 on Figure 2-2, where the agencies were asked about various benefits of the ETDM Process, and whether they agreed or disagreed (and varying degrees of each).

Some of the results from the 2008 Biennial Agency Survey are summarized, as follows:

- Agencies rated the quality of project information provided by all FDOT Districts for decision making as Good or better, with information from two FDOT Districts rated Very Good.
- Agencies consistently rated the various ETDM trainings as Good or better. Most agencies did not rate PD&E, Project Management and SCE training, indicating they had not taken advantage of the training opportunities.
- Agencies on average strongly agreed that ETDM has strengthened interagency coordination and communication.
- Agencies on average agreed that ETDM has met the following goals (over 80% of the agency ratings were Agree or Strongly Agree and the remainder were Neutral):
 - Increased the awareness of environmental resources
 - Increased the protection of environmental resources
 - Established efficiencies in the environmental review process
 - Shortened project delivery time (amount of time to get a road constructed)
 - Promoted better decision making for transportation projects
 - Enhanced problem solving on transportation projects
 - Strengthened interagency coordination and communication
 - Reduced interagency conflicts
- Agencies rated FDOT Districts on nine different aspects of their relationships from availability and accessibility to communication and coordination.
 - The majority of ratings were Very Good or Excellent
 - Nine agencies did not find any of the performance measures difficult
- Agencies rated several ETDM publications. All averaged Good or better rankings.
 - Four publications were rated by only one or two agencies: *Public Involvement Handbook*, *Cultural Resource Management Handbook*, *Sociocultural Effects Handbook*, and *Performance Management Guidance Handbook*. The *Performance Management Guidance Handbook* has not been widely distributed yet. The other three publications are mainly of value to FDOT District personnel rather than ETAT members.
- Agencies indicated that FDOT is Very Good at responding to questions and requests for information within 30 days.

2.3 Environmental Screening Tool

The EST is a fundamental component of the ETDM Process. It provides tools to input and update information about transportation projects, performs standardized analyses, gathers and reports comments about potential project effects, and provides information to the public. It brings together information about a project and provides analytical and visualization tools that help synthesize and communicate that information. It is used throughout the ETDM Process to:

- Integrate data from multiple sources into an easy to use, standard format

- Analyze the effects of proposed projects on the natural, cultural, and sociocultural environments
- Communicate information effectively among ETAT representatives and to the public
- Store and report results of ETAT reviews effectively and efficiently
- Maintain project records, including commitments and responses, throughout the project life cycle

The EST has been used to support the ETDM Process since March 2003. The user community includes staff from seven FDOT Districts and Florida's Turnpike Enterprise, 26 MPOs, 24 resource agencies, 2 tribal governments, and the public. There are two production Web sites: a read-only public information site and a secure data-entry site. The secure site alone has 723 active users. Through June 2009, there have been a total of 371 projects for which Planning and/or Programming Screens have been completed. The EST is also used by the FDOT and MPOs for other planning activities such as feasibility studies, and to support PD&E activities for non-ETDM projects, bringing the total number of projects in the database to 1,629.

Since implementation, EST maintenance and support have been instrumental to the success of the ETDM Process. Help Desk staff provide user support during business hours. Enhancements have been made to the application in response to user feedback and refinements to the ETDM Process. These activities are described in detail below.

2.3.1 EST Enhancements

During the reporting period, there have been a number of enhancements to the EST. A brief description of each enhancement is listed below:

- **Integration of ETDM and Advanced Notification (AN) / Federal Consistency Reviews** – Improves efficiencies in Florida's environmental review process by enabling agencies to respond to ETDM Programming Screens, Advance Notifications, and Coastal Zone Management Act compliance during one review period. These reviews are initiated with the ETDM Programming Screen notification. The AN Package is now part of the email notification sent by the ETDM Coordinator to the ETAT members via the EST to begin their Programming Screen review. This notification constitutes the Advance Notification, and initiates the Federal Consistency Review if the project is federally funded or requires a federal permit or federal action. The AN Package provides a consistent, comprehensive project record to agencies and interested parties. It is a means of informing them of FDOT's intent to proceed with a project.
- **New Summary Report interface** – Improves the creation and printing of the summary reports prepared at the end of each ETDM screening event.
- **Agency On-line invoicing** – Provides tools and reports to improve the efficiency of submitting and processing invoices for agencies that receive funding to support the ETDM tasks.
- **Public Access Site** – Assists in the distribution of ETDM project information to the public and their review of that information.
- **Electronic Document Management System integration** – Automatically archives project records from the EST into the official FDOT electronic document archive.
- **Update of Expected versus Optional Issues** – ETAT agencies were asked to update their list of Expected and Optional issues for the EST. This ensures that the EST has a complete record for the screening event and lets the ETDM Coordinators know that the agency has considered all of the issues under its jurisdiction. This tailoring of the screening tool ensures that agencies are commenting for all issues under their jurisdiction.

- **Performance Management tools and reports** – Provides data entry tools and performance monitoring reports to monitor performance of the ETDM Process and ETDM participants.
- **Community Characteristics Inventory (CCI) enhancements** – Enables community analysts to draw a community boundary on a map and review analysis results showing the community demographics, land use, and features within the boundary.
- **Integrated Map Viewer** – Improves the user interface of the map viewer and enables the users to view, query, and edit map features on a single integrated mapping tool. Previously, the users needed to learn three different mapping interfaces to view features, enter ETDM projects, and enter community boundaries. The new mapping interface makes these tasks more efficient and the application easier to maintain. The map viewer and community boundary edit capabilities are complete. The updates to the project feature editor are underway.
- **Support of eliminated alternative protocols** – Provides ETDM Coordinators and Project Managers a method to document the decision about a project alternative not moving forward for further evaluation in subsequent phases.
- **Cumulative Effects Evaluation (CEE) prototype** – Supported a pilot project to evaluate recommendations from the Indirect and Cumulative Effects Task Work Group regarding the evaluation of cumulative effects.
- **Automated Generation of Hardcopy Maps** – Creates standard base maps and resource maps of ETDM project alternatives for printing, electronic distribution, and incorporation into presentations.
- **New and Updated EST Data Sets** – During this reporting period, information from resource agencies was added and updated (146 new data sets were added and 643 existing data sets were updated).

2.4 Community Resources

2.4.1 Sociocultural Effects

During this reporting period, the FDOT Community Resources Section focused on improving tools and guidance needed to evaluate and address the effects of a transportation action on a community and its quality of life.

Part 2, Chapter 9 of the PD&E Manual is being updated substantially. This chapter describes procedures for evaluating Sociocultural Effects (also known as Community Impacts). The updates reflect recent advances and legal requirements for evaluating these effects. Most notably, these changes incorporate references to Florida's ETDM Process, revised steps for Sociocultural Effects Evaluations (SCEs), and updated legal references. A preliminary draft was prepared and circulated to the District Community Liaison Coordinators for their input on additional changes. The primary recommendation was to reorganize the chapter to clarify differences between evaluations on projects previously evaluated using ETDM and those not evaluated using ETDM. These modifications were incorporated into the chapter. Subsequently, the chapter was distributed to FDOT staff for official review prior to approval.

Subsequently, classroom training for SCE is being redesigned to incorporate recent changes to Part 2, Chapter 9 of the PD&E Manual. The duration of the training is also being reduced. The original SCE training was conducted in four days. The revised training class has been shortened to 1.5 days. Materials are currently being updated to reflect updates to Part 2, Chapter 9 and new practical applications. Case study fact sheets have been drafted in coordination with the appropriate FDOT project managers. Revisions to the SCE Process diagram have also been made. Training will be scheduled after Part 2, Chapter 9 of the PD&E Manual is approved, in order to ensure consistency with chapter updates. In addition, the training will be updated so that it can be delivered via video conference rather than face to face. It will remain instructor-led, but due to travel constraints, it needs to be offered remotely.

In addition to classroom training, the Community Resources Section is developing a new multi-media computer-based training opportunity. This is a self-guided training course to be made available through the EMO Web site. The course consists of six modules, following the SCE Process outlined in Part 2, Chapter 9 of the PD&E Manual. The main components of the content have been developed, along with a 10-slide prototype. Following adoption of the updated Part 2, Chapter 9, detailed instructions will be added.

The Community Characteristics Inventory (CCI) is a vital element of Sociocultural Effects Evaluation. As discussed previously, this module has been updated on the EST to improve the ability to draw community boundaries on the interactive map, and improve the reporting capabilities. These enhancements were rolled out with the new Integrated Map Viewer in October 2008.

2.4.2 Cultural Resources Management

During this reporting period, several tools were added to the EST to support the evaluation of cultural resources. These included the following:



The National Register Sites map tool allows users to access the Florida Department of State, State Historic Preservation Officer (SHPO) site files for National Register of Historic Places sites, using the EST Integrated Map Viewer. With this tool, the user may click on a National Register site on the map and view the scanned site file directly from the SHPO Web site.



The Video Log Viewer map tool allows users to access FDOT's Video Log Viewer application via the EST. FDOT's Video Log Viewer contains video records of major roadways in the state of Florida. This tool allows the user to click on a roadway feature on the EST Integrated Map Viewer and view the video log, if available.



The Project Attachments map tool allows users to view documents that have been added to a project record, using the EST Integrated Map Viewer.

In addition to these tools, EMO began updating the PD&E Manual Part 2, Chapter 12 – Archaeological and Historical Resources to reflect recent changes in legislation.

2.4.3 Indirect and Cumulative Effects

The Council on Environmental Quality (CEQ) regulations for implementing the procedural provisions of NEPA of 1969 require that indirect and cumulative effects be evaluated for proposed transportation and other federal projects. In their environmental analyses, federal and state agencies have successfully evaluated and determined potential direct and indirect effects of proposed transportation actions. However, evaluating the cumulative effects of past, present, and foreseeable actions has been difficult to accomplish within existing planning processes.

The Indirect and Cumulative Effects Task Work Group consists of representatives from FDOT, FHWA, federal and state resource agencies, and MPOs tasked with determining a method for evaluating indirect and cumulative effects within Florida's ETDM Process. The initial Indirect and Cumulative Effects Task Work Group was formed in March 2001 to define a process for evaluating indirect and cumulative effects, with a structure that could be incorporated into ETAT reviews utilizing the EST.

The Indirect and Cumulative Effects Task Work Group convened again in January 2004 to further evaluate methods for conducting indirect and cumulative effects evaluations in response to comments received from participants in the statewide ETDM training classes.

In 2006 the Indirect and Cumulative Effects Task Work Group reconvened to further detail how indirect and cumulative effects evaluations would be accomplished within the ETDM Process. The 2006 Indirect and Cumulative Effects Task Work Group used the recommendations made by the two previous Task Work Group efforts as the basis for beginning their discussions. The 2006 Indirect and Cumulative Effects Task Work Group reviewed and agreed with the conclusions from the second Indirect and Cumulative Effects Task Work Group that indirect effects evaluations can and should be conducted for individual transportation projects. Since the implementation of the ETDM Process, several resource agencies have provided useful commentary

within the EST about potential indirect effects resulting from proposed transportation improvements. The resource agencies suggested that the current process for evaluating potential indirect effects works well and does not need much refinement. However, the 2006 Indirect and Cumulative Effects Task Work Group, like the second Indirect and Cumulative Effects Task Work Group, recognized that cumulative effects need to be evaluated separately from indirect effects, and they made a number of recommendations about how to conduct these evaluations. They discussed process modifications, data needs, and modifications to the standard analyses provided by the EST. These recommendations were drafted in a white paper, which was published in December 2008. The recommendations and conceptual process developed by the Indirect and Cumulative Effects Task Work Group were tested in a pilot study and refined for inclusion in the ETDM Process. These recommendations are currently being reviewed by FDOT management.

2.4.4 Public Involvement

EMO has provided general public involvement training to the FDOT Districts and MPOs five times since February 2008, including a pilot class. This training includes information about ETDM, as well as defining contexts, identifying interested and affected parties, using appropriate tools and techniques, and understanding laws and regulations governing public involvement.

In 2006, the Center for Urban Transportation Research (CUTR) at the University of South Florida conducted, on FDOT's behalf, a statewide survey to assess the state of public involvement practice in Florida. Recommendations from this assessment led to a new contract with CUTR to develop public involvement performance measures. This 2007-2008 project included a national scan, a literature review, and a survey of Florida's MPOs, as well as a Statewide Task Team, which developed public involvement goals, objectives, indicators and targets.

An ETDM Public Access Site is currently available on the Internet. The ETDM Public Access Site provides information to the general public about the ETDM Process and about projects currently in the ETDM Process. Information about a project is copied to the Public Access Site when the project is released for ETAT review. Summary reports are provided on the site as they are published. Project updates are released after the draft information has been reviewed by the ETDM Coordinator and re-released for the next review cycle. When the project moves beyond the Programming Screen, the project information is updated at the end of subsequent phases.

Prior to the current design, a prototype public information site was made available when the EST became operational. Based on feedback received through public workshops and from the Public Involvement Task Work Group, the Web site was updated to improve navigation and organization. The Web site is also compliant with the Americans with Disabilities Act (ADA) to the extent practical and feasible. Subsequent to release, Community Liaison Coordinators (CLCs) and ETDM Coordinators have been trained on the use and content of the Web site, so that they can begin reaching out to the community and informing the public about the site. A flyer describing the site was also produced. These activities have resulted in improved access to information for the public, while providing an improved mechanism for the public to become involved in transportation decision making.

2.5 ETDM Process and Performance Management

2.5.1 Process Management

The FDOT Environmental Management Office (EMO) leads the ETDM Process management effort by supporting process improvements, policy development, training, and performance monitoring. Process refinements and improvements have been ongoing since the beginning of the ETDM Process and will continue through the following activities:

- Regularly scheduled ETDM Coordinator meetings are conducted to identify and address issues arising during ETDM implementation. If necessary, special task teams are formed to address these issues.

- The ETDM Process is part of FDOT's Tier 1, Tier 2, and Tier 3 Business Plans and EMO's Strategic Plan. FDOT maintains and adopts policies and procedures to support and monitor the ETDM Process.
- The ETDM Planning and Programming Manual was adopted as FDOT policy in March 2006. In addition, the following handbooks have been published to provide further guidance in ETDM Process implementation:
 - Cultural Resources Management Handbook
 - Public Involvement Handbook
 - Sociocultural Effects Evaluation Handbook
- EMO has also developed an annual training program to support the ETDM Process. The ETDM Overview course and EST hands-on workshops are conducted on an as-needed basis. The EST training is supplemented by monthly Web-based presentations and demonstrations.
- Other process management tools include annual agency reviews and quarterly District ETDM Status Reports.

During the Progress Report No. 4 reporting period, EMO has led a number of initiatives to support the management of the ETDM Process. These activities provide standards, training, coordination, and process improvements to ensure that the program meets its goals.

The following is a list of regularly scheduled meetings to support the coordination and integration of the ETDM Process into project delivery:

- **FDOT Coordination Meetings / Teleconferences** – Periodic meetings are held with the District ETDM Coordinators, Environmental Administrators, and CLCs to discuss issues encountered in integrating and implementing ETDM into the ongoing processes of project development and delivery, and to discuss solutions. If necessary, special task teams are formed to address issues in more detail and develop recommendations for implementation. In addition, in order to track progress made and issues encountered by the FDOT Districts as they implement the ETDM Process, each FDOT District prepares a quarterly District ETDM Status Report.
- **District ETAT Meetings** – The FDOT Districts conduct periodic meetings with their ETAT members. At these meetings, information about District-specific initiatives, overviews of upcoming projects, and updates to ETDM activities are provided. Some meetings are held semi-annually and others on an annual basis.
- **ETDM Activities Meetings** – EMO managers, legal counsel, and FHWA representatives meet as needed to discuss progress and provide direction regarding issues encountered in ETDM Process implementation.
- **ETDM Program Team Meetings** – The ETDM Program Manager, staff, and consultant team meet monthly to discuss all agreements, funding, invoicing, reporting, ongoing program support Task Work Orders (TWOs), and anticipated program needs.
- **Quarterly FDOT/FHWA Video Conference** – On a quarterly basis a video conference is held between the FHWA and FDOT Districts on current and future issues related to program and production activities.
- **Monthly ISD Managers Meeting** – The purpose of this meeting is to brief FDOT District Management on current issues of importance.

2.5.2 Training

Training for ETDM participants has been integral to the successful implementation of the ETDM Process. Through regular training events, ETDM participants are taught about the ETDM Process, use of the EST, and how to accomplish various reviews and tasks within the ETDM Process. These training opportunities are also used to inform participants of best practices used throughout Florida. The ETDM training program includes the following courses: ETDM Process Overview, Overview of Sociocultural Effects Evaluations and Public Involvement, PD&E Manual Process Training, and Using the Environmental Screening Tool. Training is provided through a number of innovative mediums, including hands-on workshops, Web-based conferences, a staffed ETDM Help Desk, and training conferences. On-line materials, including documents in the ETDM Library, are accessible from the Help menu on the EST. The ETDM Library includes manuals, handouts, and other documentation supporting the ETDM Process.

Through June 2009, over 750 ETDM practitioners have participated in training for the ETDM Process and/or the EST. ETDM Process training continues to be offered on an annual basis, as part of the EMO Training Plan. The 2008 - 2009 EMO training schedule is shown in **Table 2-2**.

Table 2—2: EMO 2008 – 2009 Course Schedule

Date	Course Number	Course Title
2008		
February 26-28	BT-19-0034	PD&E Manual Process Training
April 14-16	BT-19-0034	PD&E Manual Process Training
November 6	AT-19-0002	Landscape Architecture & Open Data Acquisition (ODA) Laws and Rule
December 1-3	BT-19-0034	PD&E Manual Process Training
2009		
February	BT-19-0018	Cultural Resource Management
March	BT-19-0044	Overview of Public Involvement
May	BT-19-0002	Environmental Contamination Problem Identification
June	BT-19-0034	PD&E Manual Process Training

Web-based EST training classes are scheduled on a monthly basis. Courses offered by the EST Web-based training include:

- ETDM Introduction and Overview
- Invoicing – Off-Line Activities Log
- Project Input Utilities
- Project Manager Module
- Sociocultural Effects Module
- ETAT Review Screens

Follow-up hands-on EST training is scheduled on an as-needed basis in the FDOT District offices, Central Office, or ETAT agency office. Participants register for EST training through the on-line training calendar available on the EST Web site.

2.5.3 Performance Management

The Safe, Accountable, Flexible, Efficient Transportation Equity Act: A Legacy for Users (SAFETEA-LU), adopted August 25, 2005 (23 USC), requires performance measures to be developed for transportation environmental review processes.

To meet SAFETEA-LU requirements for performance monitoring, the ETDM Performance Management Program (PMP) has been developed to monitor, evaluate and document the activities of the ETDM participants, and the ETDM Process itself, and their effectiveness in meeting the established performance goals. The performance goals and measures are used to evaluate the level of efficiency and effectiveness of the ETDM Process activities undertaken by FDOT and the ETAT agencies. In addition, the PMP helps identify deficiencies within the ETDM Process that can be modified to improve and further streamline environmental review of transportation projects, while enhancing both accountability and transparency.

The PMP helps provide a basis for the following:

- Enhancing communication between FDOT and ETAT agencies regarding meeting performance targets
- Identifying performance quality issues
- Continuously monitoring program performance
- Identifying performance issues and developing efficient and effective solutions
- Improving overall program performance
- Recognizing and promoting the successes of the ETDM Process
- Informing investment decisions made in funding the ETDM Process

The PMP consists of three major elements: measuring, monitoring and steering. The first element is “measuring” through a series of periodic performance reviews conducted throughout the year. One review mechanism is the biennial survey of the Districts and ETAT agencies. The second element is “monitoring” which is conducted through quarterly ETAT participation, summary report status, and semi-annual feedback reports. These reports provide feedback to participants and FDOT. The third element is “steering,” which consists of problem identification and rapid problem solving through communication between all parties to ultimately meet mutually defined goals of the ETDM Process.

The following list summarizes the reports and tools used to support the PMP:

- **Biennial ETAT Agency and District Survey and Reports** – Meetings are conducted on a biennial basis (in conjunction with the biennial survey reports) with each ETAT agency and FDOT District to discuss how the ETDM Program is working and any outstanding issues. A report is produced for each ETAT agency and FDOT District to capture the survey and meeting results, and is posted in the ETDM Library portion of the EST.
- **Agency Feedback Reports** – The following reports are generated and emailed directly to ETDM personnel within FDOT and the ETAT agencies to provide updates on their performance in the ETDM Planning and Programming Screens conducted during the indicated period. This allows for corrective action if poor performance is indicated.
 - **Quarterly ETAT Participation Report** – Provides a summary of information describing an individual agency’s participation in the ETDM Planning and Programming Screens.
 - **Semi-Annual Agency Feedback Report** – Provides individual agencies with semi-annual performance information regarding their ETDM activities. These reports summarize performance results associated with agency-related performance measures. The report

includes performance results for agency participation in ETDM Planning and Programming Screens and statistics about participation in other related activities, as well as the status of issues and action items identified in the annual reports and invoices.

- **Issue Tracking System** – This system is an on-line database used when an issue relating to ETDM cannot be resolved quickly. The issue is recorded and assigned to appropriate personnel for action. ETDM Program support personnel record and update the status of the action items in the database. The status of action items is included in the Semi-Annual Agency Feedback Report for the agency that reported the problem.
- **ETDM Progress Report** – FDOT has issued four ETDM Progress Reports, including this report (ETDM Progress Report No. 4). These reports are produced on an as-needed basis.
- **ETDM Coordinator Quarterly Report** – Each quarter, ETDM Coordinators provide an updated report to EMO on their ongoing activities, issues, successes, and benefits, for program monitoring purposes. Their report findings are posted, and any issues are discussed with the FDOT District and at subsequent ETDM Coordinator meetings.

2.5.4 Quality Assessment/Quality Control Program

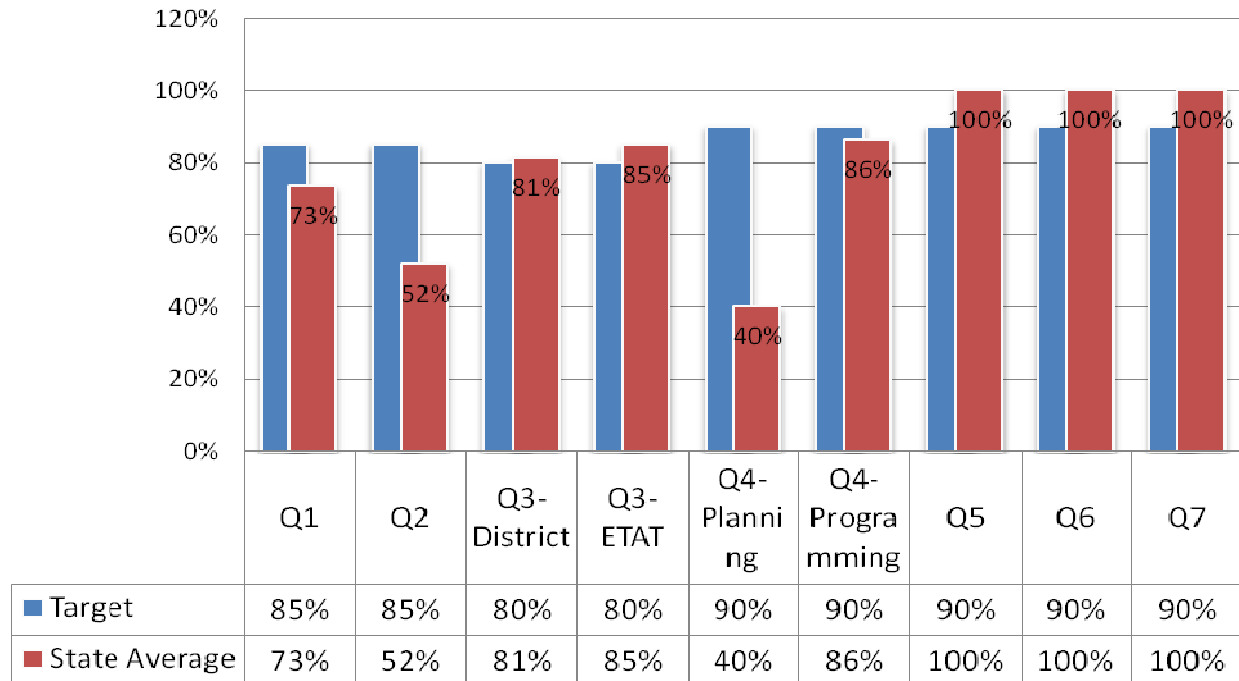
The ETDM Performance Management Program has been integrated with the FDOT Quality Assurance Program. It is the policy of FDOT to use a systematic but flexible approach to Quality Assurance (QA) and Quality Control (QC) to monitor work processes to implement laws, rules, procedures, policies and standards. Each year, EMO submits an annual Quality Assurance Plan that identifies key processes, customer and regulator requirements, review teams, measures, performance targets and review schedules. Every three years, this plan addresses the ETDM Program, incorporating elements from the ETDM Performance Management Program.

The 2008/09 Quality Assurance Plan can be accessed on the EST Public Access Web site at <http://etdmpub.fla-etat.org/> and then selecting “ETDM Library” under the General Information tab.

The 2008 ETDM Process Quality Assurance Review (QAR) Summary Results include a graphic display of various quality measures (see **Figure 2-3**). These measures were used to evaluate the seven FDOT Districts and Florida’s Turnpike Enterprise, for the 2007 calendar year. The graph displays the average results for all seven FDOT Districts and Florida’s Turnpike Enterprise. The target values are also indicated on the graph.

Figure 2—3: 2007 Quality Assurance Review Results

ETDM Process District Quality Assurance Review 1/1/2007-12/31/2007



Q-1 Measure = Percentage of Planning Screen Summary Reports published within 60 days of comment deadline
 Q-2 Measure = Percentage of Preliminary Programming Screen Summary Reports published within 60 days of comment deadline
 Q-3 District Measure = Percentage of accurate and complete ETDM project information for decision making – FDOT District responses
 Q-3 ETAT Measure = Percentage of accurate and complete ETDM project information for decision making – ETAT Member responses
 Q-4 Planning Measure = Percentage of projects with completed Summary of Public Comments on Planning Phase
 Q-4 Programming Measure = Percentage of projects with completed Summary of Public Comments on Programming Phase
 Q-5 Measure = Percentage of project stakeholders notified for project review
 Q-6 Measure = Percentage of project stakeholders notified when Summary Reports are published
 Q-7 Measure = Percentage of projects with Class of Action (COA) Determination obtained from Lead Agency consistent with submitted COA

The Quality Assurance review of the ETDM Process revealed some common issues from the District perspective:

Q1 measured the percent of Planning Screen Summary reports published within 60 days of comment deadline. Although the state average for Q1 was 73% (with a target at 80%), many of the Districts identified opportunities to improve communication and coordination with the MPOs/MTPOs. Through enhanced coordination and communication with the MPOs/MTPOs, the Districts mentioned that planning screen summary reports would be completed within the required 60 days

Q2 measured the percent of preliminary Programming Screen Summary reports published within 60 days of comment deadline. The statewide average for Q2 was 52% (with at target at 85%) for this measure. Many of the Districts stated this measure could be improved upon by simply being more aware of the Programming Screen Summary due date. The EST has been enhanced to remind ETDM Coordinators of this deadline.

Q3 measured the percent of accurate and complete ETDM project information for decision making from the District and Agency perspectives. Although the targets were met for Q3, many of the Districts stated they could improve their coordination and communication with the ETAT agencies. This enhanced communication with the resource agencies would be beneficial throughout the life of the project.

Q4 measured the percent of projects with completed summary of public comments on planning phase. The statewide average for Q4 was 40% for Planning Screen and 86% for Programming Screen (with a target of 90% for the measure). To improve on this parameter, the Districts will be working on improving strategies to gather more public comment during screening events.

Q5 measured the percent of project stakeholders notified for project review. The statewide average for this measure was 100% and well exceeded the target; therefore improvement strategies were not identified.

Q6 measured the percent of project stakeholders notified when Summary Reports are published. The statewide average for this measure was 100% and well exceeded the target; therefore improvement strategies were not identified.

Q7 measured the percent of projects with COA obtained from Lead consistent with submitted COA. The statewide average for this measure was 100% and well exceeded the target; therefore improvement strategies were not identified.

Section 3 ETDM Benefits Realized

3.1 Improved Agency Coordination and Consultation

Improved agency coordination and consultation is one of the most recognized benefits of the ETDM Process. In response to environmental and cultural preservation goals and community livability objectives, the ETDM Process has fostered an inter-agency, team approach to identifying transportation solutions. The ETDM Process is voluntary, and agencies view themselves as partners and team members who are seeking to resolve project issues early and meet mutual interagency goals and objectives. Early coordination among the FDOT, MPOs, and environmental resource agencies has improved the mutual awareness and understanding of mobility needs and environmental preservation.

The clear definition of transportation project Purpose and Need Statements early in the planning process has facilitated understanding by non-transportation professionals. More attention is given to fully describing transportation projects, including their context within the natural, cultural, and sociocultural environments, so that the ETAT, with its diverse disciplines, missions, and perspectives, can be more effective in assessing potential project effects. This improved understanding has led to early acknowledgement of project Purpose and Need Statements and has minimized contention about the need for transportation projects, which sometimes occurred before the ETDM Process was implemented.

For example, In FDOT District 3, the Purpose and Need Statement review by FHWA for the SR 123 PD&E provided early comments that allowed the statement to be further developed; this resulted in FHWA acceptance of the project. The FHWA having the opportunity to review the Purpose and Need Statement and provide comments was beneficial to ensuring the needs of the agency were met, at an early stage in project development. For this same project (SR 123 PD&E), the ETDM Process resulted in an expedited Class of Action approval from the FHWA. This resulted in an accelerated project schedule and reduction of costs. Another example where the ETDM Process benefit of improved interagency coordination and consultation resulted in an expedited project schedule and reduction of costs is indicated in the quote below from FDOT District 1.

“We were able to reduce the US 41 PD&E (#3254) Class of Action from Environmental Assessment (EA) to Categorical Exclusion (CE) as a direct result of the coordination initiated in the Programming Screen between FDOT and USFWS. This resulted in an acceleration of the project and reduction of overall cost to the Department.”

**District 1
January - March 2007 District ETDM Status Report**

There are other examples where coordination between FDOT, MPOs and the ETAT agencies resulted in an accelerated project schedule and a reduction of costs to FDOT. In FDOT District 4 on the Flagler Bridge project, the U.S. Army Corps of Engineers and National Marine Fisheries Service ETAT representatives are working together to expedite permit processing. In FDOT District 5, on the 1-95 Interchange from I-4 to U.S. 92 project in Volusia County, the SHPO ETAT representatives noted that a Cultural Resource Assessment Survey (CRAS) was not required, because one had previously been completed. This early coordination saved potential time and money that may have been used in conducting a subsequent CRAS, when it was not required.

In addition to expedited project schedules and cost benefits resulting from improved agency coordination, there are other examples where ETDM financial assistance has enabled other cooperating agencies to participate and be more involved in the PD&E Phase. This has made these agencies aware of potential project issues early in the process. In District 5, ETDM has enabled the United States Forest Service to be

more fully engaged in project development meetings, improving the communication of issues and concerns, which then can be addressed by PD&E staff.

Most of the examples and quotes noted above are benefits noted by the FDOT Districts, and taken from the District ETDM Status Reports conducted during the reporting period. The following examples and quotes are from the responses of various agencies to qualitative questions asked in the January 2008 ETDM Agency Annual Survey. This survey is administered by EMO via the EST.

The following quote from the Suwannee River Water Management District (SRWMD) demonstrates some of the benefits of improved agency coordination and consultation:

“1. Up front coordination has provided the Suwannee River Water Management District the ability to provide meaningful and cost saving comments to the FDOT. 2. The EST has provided another tool for the District to use in all permit reviews. 3. Providing opportunities to see these potential projects very early in the process will save a lot of review time during the permitting process. Understanding that permitting can affect the outcome of design concepts, letting dates and production completion dates, this process should be invaluable for FDOT and the SRWMD.”

**Suwannee River Water Management District
January 2008, ETDM Agency Annual Survey**

As reflected in the next quote, the Florida Fish and Wildlife Conservation Commission (FWC) noted the benefit of agency involvement and reviews early in the Planning Phase of projects to avoid future problems. This early involvement of the ETAT agencies continues to be a major benefit of the ETDM Process.

“ETDM has improved the environmental review process for transportation in FWC in the following ways: reviews now done concurrently with other agencies, which results in more cooperation and hopefully, value added decisions. Resource information readily available to all agencies on the EST, and the data is highly accurate, up to date, and accessible. Reviews start very early in Planning Phase where significant changes can be made to avoid worst case scenario.”

**Florida Fish & Wildlife Conservation Commission
January 2008, ETDM Agency Annual Survey**

3.2 Improved Long Range Transportation Planning

The ETDM Process has provided improved information about potential effects of proposed transportation projects included in MPO Long Range Transportation Plans (LRTPs) to environmental, cultural, and community resources, and has subsequently improved transportation decision making during the plan development process. This awareness of potential project effects to important natural, cultural, and community resources has resulted in modification of project proposals or removal of projects from consideration. It has also resulted in improved long-range cost estimates for transportation projects that respond to potential environmental mitigation requirements.

An example of how awareness of potential project environmental effects is being considered in LRTPs was noted by District 1. In Highlands County, an environmental resource methodology was developed to assess projects included in the LRTP Needs Assessment and their potential environmental effects. This methodology has supported the decision-making and project prioritization process and will help result in a Cost Feasible Plan that achieves environmental preservation, mobility and quality of life goals. Another example from District 1 on how the ETDM Process has improved long range transportation planning and decision-making is provided in the quote below.

“Highlands County is using the results of an environmental resource evaluation of projects included in their LRTP Needs Assessment to inform the decision-making and project prioritization process. It is anticipated that this methodology can be used to support other MPOs and rural counties with transportation planning and environmental preservation. It also furthers the national policy intent to link planning and NEPA.”

**District 1
July – September 2008 District ETDM Status Report**

3.3 Focused Evaluations during Project Development

ETDM screen and ETAT comments are used for tailoring consultant scopes of service to each specific and unique project. Early identification of issues allows more focus on priority areas of importance.

**District 4
January – March 2008 District ETDM Status Report**

Project screening events conducted in the ETDM Process have facilitated the identification of key project issues early in the planning process. This has allowed the FDOT to develop more focused scopes of work and allocate staff and consultant resources to the issues that warrant further evaluation

during subsequent project development (see quotes from FDOT District 4 and National Marine Fisheries Service). Time and cost savings have been realized from eliminating or reducing the scope of technical studies where ETAT members have indicated there are minimal or no potential effects to resources. For example, in FDOT District 3, a Planning Screen Review of the SR 292 widening project facilitated a collaborative approach for study of potential impact minimization methods for endangered species.

“Having people dedicated to the review of FDOT projects via ETDM simplifies the permitting process by allowing a more thorough project review early on. This results in time savings, and benefits aquatic resources through the development of well thought out avoidance and minimization strategies, as well as mitigation plans. The ETDM Process saves money by making modifications in the early stages of a project, as opposed to making them later when they are more difficult and more costly to implement.”

**National Marine Fisheries Service
January 2008, ETDM Agency Annual Survey**

3.4 Defined Dispute Resolution Process

Through the ETDM Dispute Resolution Process, the FDOT, MPOs, and resource agencies have successfully identified solutions to potential disputes early in the transportation planning process. This has eliminated unnecessary study of project alternatives during project development that are not consistent with resource protection plans. In one scenario, the Dispute Resolution Process was used to address the disputed issues of the Third East-West St. Lucie River Crossing. This was accomplished by bringing concerns to the table of the interested parties and through coordination with the lead agencies. These successes have resulted in time and cost savings during project development.

“Obtained a successful completion on long-standing dispute resolution with the USFWS on SR 29. This resulted in a better definition of scope of services and estimated level of effort.”

**District 1
January – March 2007 District ETDM Status Report**

3.5 Less Costly Environmental Studies and Documentation

The ETDM Process has proven to be beneficial in saving time and costs by ensuring the appropriate Class of Action is assigned to a project. The Class of Action for several projects has been reduced, resulting in a significant reduction in the scope and budget. For example, for a project in FDOT District 1, the Class of Action was reduced from Environmental Assessment (EA) to Categorical Exclusion (CE). This resulted in a reduction of man-hours and budget in the required levels of environmental documentation and engineering. It also reduced the time required for alternative public workshops and public hearings.

“Changed COA for #8668 from EA to CE, resulting in a reduction of scope and budget.”

**District 1
July – September 2007 District ETDM Status Report**

In FDOT District 4, the Class of Action for the Flagler Bridge PD&E Study was reduced from a potential Environmental Impact Statement (EIS) to a Type 2 CE. As noted in the quote below, this resulted in significant cost savings and an estimated three years of time savings.

“Flagler Bridge PD&E completed on schedule as a CE II with estimated savings of \$637,000 and 36 months over potential EIS Class of Action.”

**District 4
January – March 2008 District ETDM Status Report**

“Reduced Class of Action on the Sunrise Key Bridge replacement (#9891) to a Programmatic CE from a potential Type 2 CE, saving at least \$250,000.”

**District 4
July – September 2008 District ETDM Status Report**

3.6 Shortened Project Delivery

The ETDM Process has enabled FDOT Districts to move projects forward more quickly. For example, as noted by FDOT District 4, the ETDM Process allowed the SR 70 PD&E Study to be completed eight months ahead of schedule, with an estimated savings of \$500,000. Another example of shortened project delivery is from FDOT District 6, where a project was on an accelerated schedule and was processed quickly, with information obtained through the EST. The PD&E Phase (Type 2 CE) was completed in 114 days.

“The ETDM Process allowed the SR 70 PD&E Study to be completed 8 months ahead of schedule and with an estimated savings of \$500,000 compared to the traditional PD&E process”

**District 4
October – December 2006 District ETDM Status Report**

3.7 Better Access to Information

As planners and environmental scientists have become proficient in the use of the EST to conduct project evaluations, they have also discovered other useful applications of the EST. Some agencies in Florida are using the data sets and GIS analyses conducted within the EST for corridor studies, community plans, and other planning initiatives. The point-and-click simplicity of the EST allows powerful GIS analyses to be performed without each user needing costly technology systems or technical specialists.

“Data sets on prescribed burn areas are being uploaded onto the EST and quantitative analyses are being used to assist Highlands County to plan for new transportation investment in areas that minimize encroachment on prescribed burn areas, particularly for new alignments.”

**District 1
July – September 2008 District ETDM Status Report**

3.8 Enhanced Coordination within FDOT

A number of ETDM Coordinators have noted that the ETDM Process has improved coordination between organizational units within FDOT. In particular, it has enhanced project-related communication between the PD&E and Planning units. The EST also provides a tool for coordinating across FDOT District boundaries. FDOT District planning staff have also benefited from ETDM.

“The District planning staff attended our last ETAT meeting and came away with a new appreciation of the process, seeing where it would benefit them and their work load. They have stepped up their level of involvement and are providing much more useful interaction with our MPOs.”

**District 1
October – December 2006 District ETDM Status Report**

3.9 Improved Exchange of Best Practices

The ETDM Process has resulted in an exchange of best practices between FDOT Districts, counties, MPOs and resource agencies. Sharing of best practices has resulted in a greater understanding of the phases of the ETDM Process, from project identification to PD&E Studies, for all the various entities involved.

“The ETAT Workshop held in October 2008 provided an opportunity for the ETAT to share best practices. Resource agencies heard how the ETDM Process is serving to assist counties and MPOs to develop plans that fully consider effects to environmental assets and comply with SAFETEA-LU planning provisions.”

**District 1
October – December 2008 District ETDM Status Report**

Section 4 Path Forward

The ETDM Process is in a continual state of refinement based on information and recommendations resulting from close communication and coordination between the FDOT Environmental Management Office, FDOT Districts, FHWA, and the ETAT. These refinements are identified by all ETDM Process participants, the ETDM technology team, and by Task Work Groups formed to discuss and recommend improvements for a specific issue. In addition to improving ongoing processes, the ETDM Process refinements are also about developing new initiatives. Anticipated future refinements to the ETDM Process are discussed below.

4.1 Cumulative Effects Evaluations

The Indirect and Cumulative Effects Task Work Group is currently seeking approval of recommendations regarding Cumulative Effects Evaluations (CEE). These recommendations have been presented to the FDOT Assistant Secretary of Intermodal Systems Development and to FDOT General Counsel. Briefings will be conducted with management and other agencies upon authorization.

Following these briefings, the CEE Handbook and the EST will be updated, as needed. Subsequently, the ETDM Planning and Programming Manual and PD&E Manual will be updated, and training will be provided to FDOT District staff and agency staff.

4.2 Performance Monitoring

Performance monitoring of the ETDM Process will continue on a regular basis. This performance monitoring includes a series of reviews for assessing the performance of agencies, FDOT, and the ETDM Process as a whole. These periodic reviews consist of regularly scheduled reports and communication about performance management results, such as:

- **Quarterly Agency Participation Report** – Provides a summary of information describing an individual agency's participation in the ETDM Planning and Programming Screens.
- **Quarterly Summary Report Status** – Monitors performance by providing information on how many summary reports were published or republished, as well as how many were not published within 60 days.
- **Semi-Annual Agency Feedback Report** – Provides individual agencies with semi-annual performance information regarding their ETDM activities. These reports summarize performance results associated with agency-related performance measures. The report includes performance results for agency participation in ETDM Planning and Programming Screens and statistics about participation in other related activities, as well as the status of issues and action items identified in the biennial reports and invoices.
- **Surveys and Survey Report Meetings** – The District ETDM Coordinators and agency ETAT members complete a survey on a biennial basis to assess the performance of the ETDM Program. Upon completion of the surveys, the results are analyzed and reported in the Agency and District Survey Results Reports. After the survey period, focused performance review meetings are scheduled with agencies and FDOT Districts to discuss the results and address any issues. During the early years of ETDM Process implementation, these meetings were held annually. Currently, meetings are planned according to agency and FDOT District requests. These agency meetings include the FDOT District and Turnpike ETDM Coordinators. Separate internal meetings are held with EMO staff and FDOT ETDM Coordinators. After the meetings are held, the reports are updated, if needed.

- **ETDM Progress Report** – Prepared by ETDM Program personnel and published on an as-needed basis, this report provides an update about the implementation of ETDM in Florida. The report documents major accomplishments and issues during the reporting period. It also includes a discussion of the path forward for the ETDM Process in Florida.

A Performance Management Practitioners Guide has been developed, which documents Performance Management Program elements, including the reviews associated with performance monitoring. An accompanying training module will be developed for on-line training purposes.

Over time, the Performance Management Program will be linked to FDOT's Quality Assurance Program for all EMO environmental program elements that are subject to Quality Assurance Review. Currently, the ETDM Process has been evaluated under FDOT's Quality Assurance Program, and in the near future the PD&E process will be assessed. All of this will be accomplished in conjunction with the Performance Management Task Work Group and District Intermodal Systems Development (ISD) management as a part of both the Performance Management Program and the Quality Assurance Program. The EMO core processes included in the 2008/09 Quality Assurance Plan are shown below:

- ETDM Screening Processes
- Scenic Highways
- PD&E Studies
- Public Involvement
- Alternatives Evaluation
- Biological Assessments and Studies
- Archaeological and Historical Resources
- Sociocultural Assessment
- Noise Assessment
- Permitting
- Contamination

4.3 Paperless Environmental Documentation

EMO is evaluating the feasibility of using e-documents for environmental documents, including all supporting data and technical reports. The Electronic Document Management System facilitates this initiative through the automated archival of project records from the EST into the official electronic document archive. It is intended that these environmental documents will be made available through the EST, linked to the applicable project record. This will lead to better record-keeping and improved access to the environmental documents, and could potentially improve the quality and currency of resource data available on the EST.

4.4 Quantifying Environmental Protection

A goal of the ETDM Process is to “*develop environmental stewardship through protection of environmental resources.*” The ETDM Process achieves this goal through avoidance and/or minimization of environmental effects, and mitigation and/or enhancement of resources. A “path forward” goal is to develop methods and procedures to better quantify the protection of environmental resources facilitated by the ETDM Process.

4.5 Sociocultural Effects

Current priorities focus on providing updated training and guidance documents to support sociocultural effects (SCE) evaluations. The SCE Evaluation Handbook was published in 2005 to provide guidance and assistance for transportation practitioners involved in conducting these evaluations. The SCE Evaluation Handbook does an excellent job in detailing the process and methodologies used for SCE evaluations. A companion document is needed to provide more specific instructions about performing these evaluations in the ETDM Process. This new SCE Evaluation Practical Application Guide will take the Handbook guidance one step further by providing step-by-step directions for evaluating sociocultural effects during Planning, Programming, and PD&E. It will combine computer instructions with community analysis techniques. The Guide will provide tip sheets for setting preferences in the EST, using the data available on the EST, and entering comments during the Planning and Programming Phases. It will also include specific instructions explaining the difference between these evaluations and those conducted in the PD&E Phase. The SCE Evaluation Practical Application Guide will use examples from real projects, with additional details that were not available when the SCE Evaluation Handbook was written.

4.6 Cultural Resources Management

The ETDM Process works to protect cultural resources. Methods and procedures will be developed to help quantify the protection of cultural resources. Quantifying the protection of cultural resources will provide tangible indications of how the ETDM Process has protected these resources. This in turn will help monitor the success of the ETDM Process in cultural resource management and protection.

4.7 Public Involvement

In 2009, EMO signed an 18-month contract with the Center for Urban Transportation Research (CUTR) to develop tools and survey instruments to accompany the performance measures developed in 2008. Public involvement training will incorporate the use of these performance measures.

4.8 Commitment Compliance

FDOT tracks commitments coming from ETAT reviews and the NEPA process through several different practices. Guidance may be developed to assist in tracking and monitoring these commitments. Currently, ETDM Coordinators and Project Managers have the option of using the EST to track commitments made in response to the ETAT Reviews. Some technology enhancements to the EST could be made to include more robust commitment tracking and monitoring functions that can be used during ETAT reviews and NEPA.

4.9 On-line or Web Based Training Courses

The FDOT will provide on-line training in the following program areas:

- On-line Invoicing and Reporting
- Performance Management
- Dispute Resolution
- Sociocultural Effects Evaluation
- Cultural Resources
- ETDM Process

- PD&E Process
- Section 4F

The on-line or Web-based training classes consist of a set of users logging on to a Web site and calling into a teleconference line. The training classes are conducted with the ability for users to see the instructor's presentation from their office computers, as well as interact with the instructor and work through examples.

4.10 Linking Planning and NEPA

The Federal Highway Administration (FHWA) and Federal Transit Administration (FTA) have developed legal and program guidance on how information, analysis, and products from metropolitan and statewide transportation planning processes can be incorporated into and relied upon in the NEPA process under existing Federal statutes and regulations.

The ETDM Planning and Programming Screening events link Planning and NEPA through the ETDM Manual and the EST; however, there may be greater opportunities to further enhance the connection between the two processes. FDOT plans to work closely with FHWA and FTA to establish operational procedures that are reflected in the MPO Manual, the ETDM Planning and Programming Manual, and the PD&E Manual to intrinsically link the MPO process and ETDM and NEPA Processes. This will assure MPO planning information and decisions can be used in subsequent NEPA documents and that such information is valid and reliable for NEPA purposes. A training module on Linking Planning and NEPA may be developed and added to the ETDM and PD&E training courses.

4.11 Enhancing the Permitting Process

The Environmental Management Office will be conducting research and analysis to find ways to enhance the permitting process. An initial objective of the ETDM Process was to integrate permitting into the process in a streamlined and efficient manner. The ETDM Process establishes a strong foundation in coordination of environmental issues with permitting agencies prior to availability of detailed design information which is necessary for permit application. The path forward work on linking efficiency with the permitting process is to reduce duplication and provide for a more streamlined permit process in one goal. This early communication with permit agency representatives should help expedite the issuance of permits.

4.12 Dispute Resolution

A Dispute Resolution training module with accompanying educational material will be developed for in-class and on-line training purposes. The objective of the course will be to educate ETDM participants concerning effective and efficient methods to resolve issues and conflicts quickly to reduce project delays in the future. Methods and techniques for communication, negotiation and issue resolution will be important elements of this training.