

Project Prioritization Scoring Process Update

Pre-Proposal Meeting

- Welcome, the meeting will begin shortly.
- We respectfully request the following:
 - ✓ Please mute your microphones.
 - ✓ Please enter your contact information in the chat box (Name, Firm, Email, indicate DBE/ESBE status).
- Please note that this session will be recorded for internal use only, to allow staff to review questions presented at today's meeting.

Project Prioritization Scoring Process Update

Pre-Proposal Meeting
March 14, 2024
2:00 PM (ET)



John Witsch, Principal Project Information Specialist
Maria A. Slump, Sr. Grants and Contracts Administrator

NJTPA Region

Bergen

Essex

Hudson

Hunterdon

Jersey City

Middlesex

Monmouth

Morris

Newark

Ocean

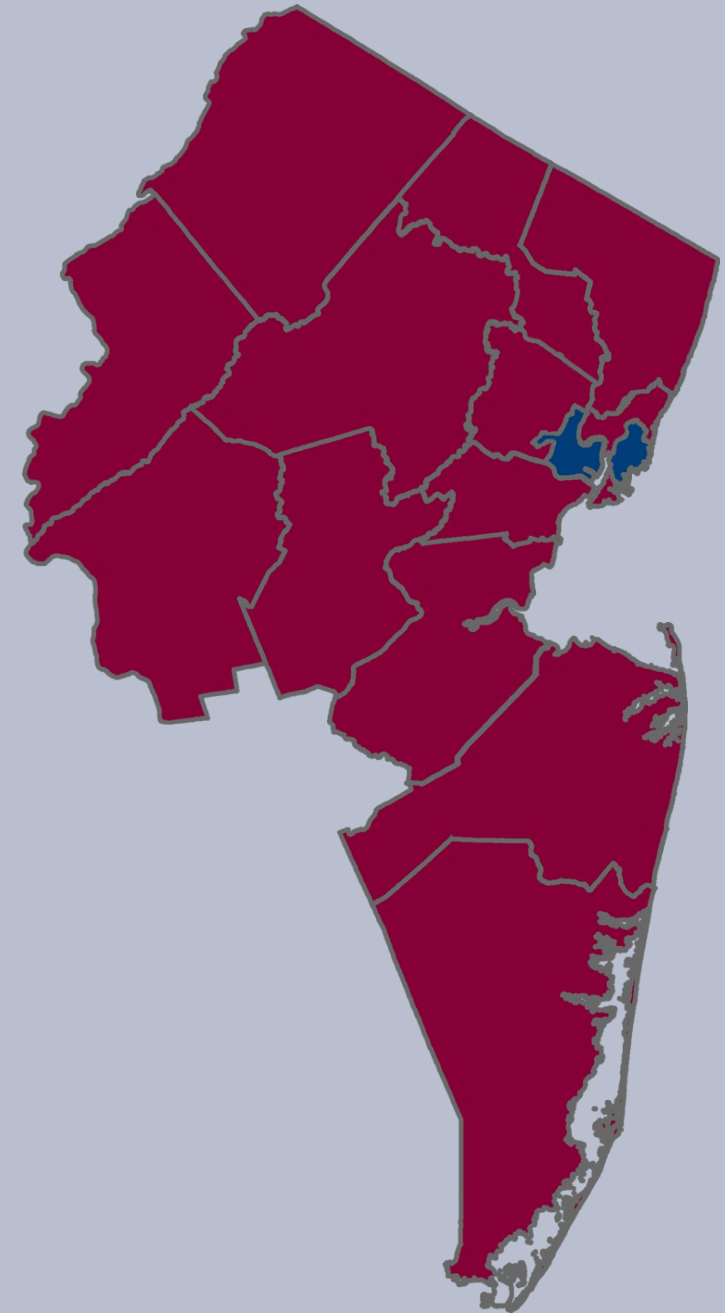
Passaic

Somerset

Sussex

Union

Warren



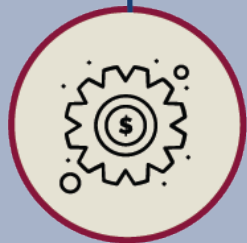
NJTPA Board and Committees

Bergen Essex Hudson Hunterdon Jersey City Middlesex Monmouth

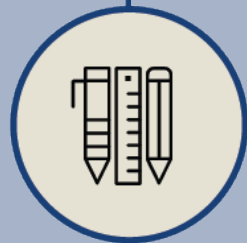
Morris Newark Ocean Passaic Somerset Sussex Union Warren

NJDOT NJ TRANSIT Port Authority Governor's Rep. Citizens' Rep.

Standing Committees



Planning & Economic
Development Committee



Project Prioritization
Committee



Freight Initiatives
Committee



Regional Transportation
Advisory Committee



NJTPA Board Executive Committee

From left to right: Morris County Commissioner **Stephen Shaw, Secretary**

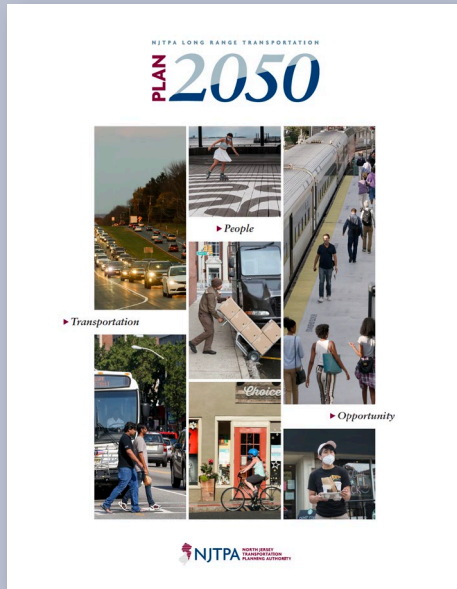
Warren County Commissioner **Jason Sarnoski, Second Vice Chair**

Ocean County Commissioner **John P. Kelly, Chair**

Middlesex County Commissioner **Charles Kenny, First Vice Chair**

Union County Commissioner **Bette Jane Kowalski, Third Vice Chair**

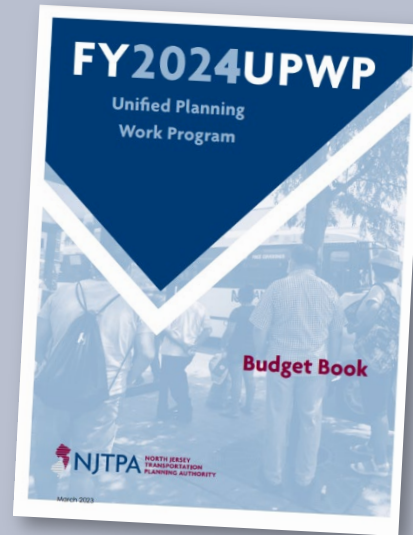
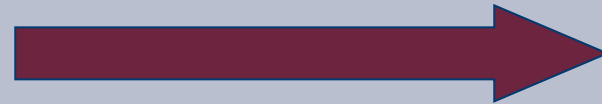
Key Products



Long Range Transportation Plan (LRTP)

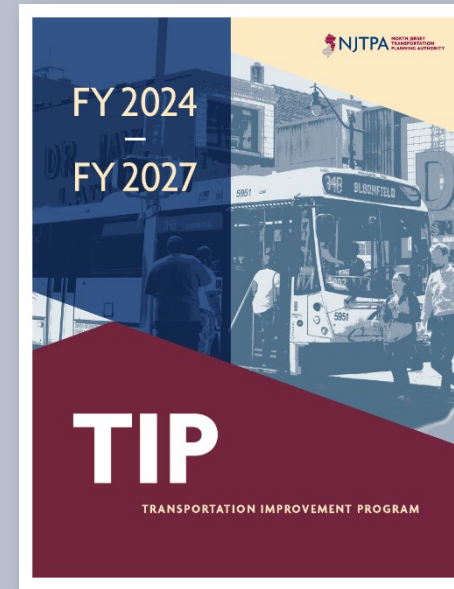
Updated every four years

Planning



Transportation Improvement Program (TIP)

Updated every other year



Project Background

- Project Prioritization Criteria are used to create a ranked list of projects as input for preparation of the TIP
- Criteria are used in a scoring system that ranks projects according to the degree to which they satisfy the NJTPA's goals as stated in the Long Range Transportation Plan
- These criteria are part of an overall performance-based transportation planning process that assesses the operation of the transportation system to identify potential needed investments
- Currently use an application built in Microsoft Excel and Access, and ESRI ArcGIS and ArcGIS API for Python which allows manual scoring for qualitative criteria and automatic calculations for quantitative criteria

Current RFP

The NJTPA is seeking consultant support to update the criteria and scoring application to:

- Reflect the current needs and priorities of the NJTPA Board.
- Coordinate with the policies and priorities of partner agencies.
- Take advantage of new data sources, and decision support software and tools.
- Meet new and emerging federal mandates.
- Update the criteria and scores for state and local lead highway and bridge projects, and transit projects.

Project Goals

- Align criteria with NJTPA Planning, NJDOT, NJ TRANSIT, and other statewide processes
- Facilitate collaboration amongst partner agencies and NJTPA subregions to obtain consensus
- Update TIP Project Prioritization Criteria
- Develop a new application for automated project scoring
- Produce a new criteria rulebook and instruction manual, to document and guide use of the criteria in practice

Project Schedule

- The consultant effort is expected to begin in mid-June 2024
- Project to be completed within 24 months of commencement
- Draft products for use in TIP project prioritization to be prepared by January 2026

Scope of Work

- **Task 1:** Research Best Practices for Prioritization and Selection Criteria
- **Task 2:** Recommend Updated Criteria and Associated Weights
- **Task 3:** Define Project Scoring Parameters Based on Feedback
- **Task 4:** Finalize and Implement Updated Criteria
- **Task 5:** Project Management

Task 1: Research Best Practices for Prioritization and Selection Criteria

Summary:

Identify best practices in project prioritization and selection criteria used by other MPOs or agencies, along with the latest federal regulations and guidance.

This includes the review of relevant policy, program, funding, and guidance documents from partner agencies, and existing decision-making processes used by NJDOT and NJ TRANSIT to advance projects.

Task 1: Research Best Practices for Prioritization and Selection Criteria

Deliverables:

- A maximum of 4 interviews and technical meetings with NJTPA Central Staff and partner agencies
- Technical memo on how the criteria update can address best practices in project prioritization; performance-based planning and programming requirements; and emerging federal requirements and priorities
- TAC meeting, and summary of TAC comments and input
- Technical memo recommending how data-driven processes from the NJDOT and NJ TRANSIT might be used in the criteria

Task 2: Recommend Updated Criteria and Associated Weights

Summary:

The consultant shall work with staff to review the NJTPA's current Project Prioritization Criteria and develop initial options and recommendations on whether or how performance measures, criteria, rating scales, scoring measures, scoring calculations and approaches should be revised.

Task 2: Recommend Updated Criteria and Associated Weights

Deliverables :

- Technical memo identifying initial options and recommendations for updating the Criteria
- Presentation at a RTAC meeting to provide an overview of the project and its schedule
- 1 TAC session to arrange voting exercises and demonstrate the decision support software tool that will be used to decide on criteria selection and goal area weights
- 2 TAC sessions to conduct iterative decision-making exercises with the RTAC, and to discuss the results
- Facilitation of a minimum of 5 decision making sessions for establishing the goal area criteria/sub-criteria, and goal area criteria weights

Task 2: Research Best Practices for Prioritization and Selection Criteria

Deliverables (Continued):

- Draft technical memo identifying TAC-recommended criteria and overall goal area weights, defining a measurable scoring system, creating rating scales, and developing qualitative/quantitative assessments
- Presentation on options and recommendations at a public meeting/workshop with the Project Prioritization Committee (PPC)
- Summary document of comments and input received and how they can be addressed in the updated criteria

Task 3: Define Project Scoring Parameters Based on Feedback

Summary:

The consultant shall work with staff and the TAC to develop a final set of recommended criteria revisions and the automated scoring application. The sub-criteria weights within each goal area and defined rating scales and breakpoints for sub-criteria will be established.

The scoring application will require identifying and gathering data to operationalize the sub-criteria.

Task 3: Define Project Scoring Parameters Based on Feedback

Deliverables:

- 1 TAC session to discuss scoring exercise results and proposed recommendations for the criteria and goal areas, and to set up the voting exercises for the sub-criteria
- 1 TAC session to discuss scoring exercise results and proposed recommendations for the sub-criteria
- Facilitation of a minimum of 8 decision making sessions for establishing sub-criteria weights within each goal area
- Technical report assessing the validity of data being used to calculate the criteria and sub-criteria scores

Task 3: Define Project Scoring Parameters Based on Feedback

Deliverables (Continued):

- Final technical report of the updated project prioritization criteria scoring process
- Application for automated project scoring

Task 4: Finalize and Implement Updated Criteria

Summary:

The consultant shall prepare summary and presentation materials for the NJTPA Board conveying proposed changes and their implications for project scoring.

This will include the results of the comparisons of scores for sample projects under the old and new criteria.

Task 4: Finalize and Implement Updated Criteria

Deliverables:

- Summary and presentation materials on final draft criteria
- Presentations to the NJTPA RTAC, PPC, and Board
- Criteria rule book and manual to document and guide use of the criteria in practice
- Training and technical assistance with implementing the criteria and modifications or enhancements to the criteria application, during first 6 months of implementation
- Final report documenting the criteria update and recommending future changes

Task 5: Project Management

Summary:

The Consultant shall establish an effective means of coordinating and reporting its activities with the NJTPA project manager throughout the project to ensure an expeditious exchange of information.

Task 5: Project Management

Deliverables:

- Development and maintenance of a web-based project collaboration website that allows for online project management and data sharing
- A detailed project schedule to be finalized at the Project Team kick-off meeting for the NJTPA's review and approval
- A minimum of 6 technical Project Team management meetings to be held at key decision points throughout the process
- Meeting agendas and minutes, including written summaries of all project management meetings

Task 5: Project Management

Deliverables (Continued):

- Bi-weekly status updates between the NJTPA project manager and the Consultant project manager
- Monthly progress reports and progress schedule, corresponding to the invoices
- A final progress report and invoice

Consultant Selection Criteria

- Understanding of scope and technical approach
- Professional qualifications
- Relevant experience and technical competence
- Demonstrated knowledge of NJTPA region
- Ability to successfully perform work
- Clarity/thoroughness of proposal

Consultant Eligibility & Documentation

EEO/Affirmative Action

- Letter of Federal Affirmative Action Plan Approval, or
- Certificate of Employee Information Report issued by NJ Treasury, or
- Copy of Employee Information Report Form AA302 submitted to NJ Treasury

Note: A Copy of Prime's Certificate of Employee Information Report is requested to be submitted with the Technical Proposal.

Consultant Eligibility & Documentation

Federally Mandated DBE Participation Program

- 13.23% participation goal
- DBE Certification by NJDOT, NJ TRANSIT, or PANYNJ
- Or ESBE Certification by NJDOT
- State of NJ MBE/WBE or SBE Certifications issued by the Treasury **do not** satisfy this requirement

Consultant Eligibility & Documentation

Insurance & Liability

- Workers Compensation \$1M
- Commercial General Liability \$3M
- Automobile Liability \$1M
- Professional Liability/Errors & Omissions \$1M
- Cyber Liability \$1M
- Excess Liability \$1M

Proof of insurance must be submitted by the Prime consultant with the Technical Proposal. All consultants will be required to submit proof of insurance prior to award of contract.

Consultant Eligibility & Documentation

NJ Business Registration

- Certificate must be submitted prior to contract execution, for prime and all subconsultants

Disclosure of Investment Activities in Iran and Certification of Non- Involvement in Prohibited Activities in Russia or Belarus

- Forms must be submitted with the proposal, for prime and all subconsultants

Consultant Eligibility & Documentation

Non-Disbarment for Receipt of Federal Awards

- Prime consultant and each subconsultant must have an active registration in the Federal System for Award Management (SAM.gov) with a Unique Entity ID number and shall have no active exclusion records disbarring them from receiving federal awards.

How to Respond

Deadline for Proposal is **April 3, 2024** at **2:00 PM sharp** (online submission)

- All proposals and supporting documentation must be submitted electronically through the **Submit RFP Proposal Submission Form**
- Inquiries pertaining to submission of a proposal should be directed to Angellita Young at young@njtpa.org.

How to Respond

Transmittal Letter:

- Identifying Prime, Project Manager, person(s) authorized to negotiate on the respondent's behalf, and any proposed subconsultants including DBE/ESBEs
- Certifying respondent's eligibility & commitment to the project
- Technical proposal in PDF Format
- Cost Proposal in both PDF and Excel Format

Technical Proposal Submission Requirements

- Consultant team's approach to the project
- Firms' experience/ability to complete work
- Work plan and schedule
- Staff plan table, organization chart, qualifications & resumes of key staff
- DBE/ESBE Participation Documentation
- Certificate of Employee Information Report
 - Prime Consultant

Technical Proposal Submission Requirements

- New Jersey Business Registration Certificate
- Disclosure Forms: Investment Activities in Iran & Non-Involvement in Russia/Belarus Firms' commitment to quality management
- Proof of insurance- Prime Consultant

Cost Proposal Submission Requirements

- Cost reimbursement contract subject to Federal and State Laws, Policies and Procedures
- Cost plus fixed fee contract, up to an agreed ceiling
- Summary budget and detailed budget forms for each firm on the project team using NJTPA's Sample Budget Form
 - Budget Period
 - Salary/wages, staff-hours by tasks
 - Overhead
 - Direct Expenses
 - Subconsultant Fees
 - Fixed Fee (or profit)

RFP Inquiries

- Follow-up questions must be submitted in writing to the Project Manager, John Witsch, with a copy to the Senior Director of Finance and Administration, Angellita Young
- Inquiries received after **March 21, 2024** may not be reviewed or considered
- Questions and formal responses, including those from today's meeting, to be posted on our website by **March 26, 2024**

<http://www.njtpa.org/Get-Involved/RFPs.aspx>

Important Dates

- Deadline for Consultant Inquires:
March 21, 2024
- Deadline for Submission of Proposals:
April 3, 2024 at 2:00 PM (ET)
- Consultant Interviews (if needed):
Week of May 6, 2024 (Tentative)
- Contract Award Date:
June, 2024

Questions?

