



FY 2022 – FY 2023 SUBREGIONAL STUDIES PROGRAM (SSP)

ADMINISTRATIVE GUIDELINES

July 1, 2021

As a federal grant program, the NJTPA is required to administer and oversee work conducted through the Subregional Studies Program (SSP) to ensure the efficient, effective, and appropriate use of federal funds. In addition, the SSP is a critical element of the NJTPA's continuous, cooperative, and comprehensive metropolitan planning process. Products developed through this program must address issues of significance to the entire region and must be consistent with plans at the state and regional level to ensure validity and implementation.

Subregional studies should progress through the following schedule and adhere to the following requirements:

Grant Management Requirements

Federal funding awarded for studies selected under this notice will be awarded through UPWP subcontract agreements and be made available to grantees on a reimbursable basis. **A subcontract cannot be issued to the subregion until all required Pre-Award information, including the subregion's annual audit, has been received and accepted and reviewed by the NJTPA.** The Pre-Award information required for this program is the same information that is required for the Subregional Transportation Planning (STP) pass-through program.

To be eligible for reimbursement, costs must be in accordance with 2 CFR Chapter I, Chapter II, Part 200, et al., Uniform Administrative Requirements, Cost Principles, and Audit Requirements for Federal Awards; the NJTPA's Subregional Pass-through Program Management and Administrative Procedures (which are included in the annual NJTPA STP Requirements and Allowable Expenses and attached as a separate document); [NJTPA's Procedures for Procurement of Professional Services](#); and the following additional grant management requirements for subregional studies.

1. *Quarterly Progress Reports:* At the end of each quarter, the subregional project manager must submit to the NJTPA, with their invoices, the products and status updates for work completed within the quarter, including a comparison of actual accomplishments to the objectives of the Federal award and reasons why established goals were not met, if appropriate. Reports must be based on tasks in the original proposal/scope of work and shall note any favorable significant developments or any major issues that may impact the study's delivery or materially impair the ability to meet the objective of the Federal award. The final quarterly report shall include a summary of highlights and key recommendations resulting from the completion of the study.
2. *Invoices, Supporting Documentation:* Please note that supporting documentation for all consultant expenses to be reimbursed under this program is required for both the prime and subconsultants. This includes and is not limited to:
 - a. Approved Timesheets and Certified Payroll Summary (A Certified Payroll Summary must provide the following information)
 - i. Name of Employee/Classification
 - ii. Date (Payroll period covered)
 - iii. Hours (by Task)
 - iv. Hourly Rate
 - v. Total Salary
 - vi. Executed certification of accuracy by authorized personnel.
 - b. Direct Expense Receipts
 - i. All direct expense receipts must be submitted with consultants' invoice. This includes but not limited to: Printing, Postage/Express Mail, Travel Vouchers (should

detail destination and purpose of trip, and a web-generated mileage calculator) with toll, transit and parking receipts, detailed hotel and lodging receipts, detailed meal and incidental receipts, and all other direct expense receipts. All travel must adhere to federal travel regulations and per diems in effect during time of travel. (Information for current POV and Per Diem Rates can be found at www.gsa.gov).

c. Time and Effort

- i. Summary/progress report that shows percent of study completed (overall and consultant effort, if applicable).

3. *DBE (Disadvantage Business Enterprise) or ESBE (Emerging Small Business Enterprise) Participation:* Consultant contracts, if and where included in a proposal's work program, are subject to Title 49, Part 26, Code of Federal Regulations (49 CFR 26) entitled "Participation by Disadvantaged Business Enterprises in Department of Transportation Financial Assistance Programs" and shall comply with the NJDOT's statewide DBE/ESBE participation goal in effect at the time of consultant solicitation. As subrecipients of USDOT funding, NJDOT, NJTPA and local agencies are required to comply with and enforce certain nondiscrimination requirements in the award and administration of USDOT assisted contracts and procurements, which includes taking necessary steps to ensure that DBE firms have the opportunity to participate in the projects. Such steps include the setting of goals to ensure DBE firms are considered by the proposing consultants and, when feasible, organizing the project schedule and task requirements to encourage participation in the contract by DBE firms. Local agencies should be fully aware of all of the subcontracting opportunities in their consultant contracts. This may also include consideration of proposed task activities that the recipients might otherwise contemplate performing with their own work forces and the availability of certified DBEs and ESBEs certified under the State of New Jersey's Unified Certification Program (the databases of certified DBEs and ESBEs can be found at <http://njucp.dbesystem.com/> and <http://www.state.nj.us/transportation/business/procurement/ProfServ/information.shtm>). Once the consultant contracts are awarded the subregions will be required to monitor the proposed DBE participation to ensure the proposed goal is maintained as the study progresses. If any subregion is unable to achieve this goal, a formal request to waive the DBE/ESBE goal for the SSP agreement must be provided in writing and presented to the NJTPA Executive Committee for approval. Central Staff must be made aware of any concerns about not obtaining the goal, immediately.
4. *Study Initiation:* Upon approval by the NJTPA Board of Trustees, NJDOT and federal sponsors, FY 2022 – FY 2023 studies will be authorized to begin July 1, 2021. The performance schedule under the SSP's subcontract shall begin on July 1, 2021 and shall end on June 30, 2023. Costs incurred prior to or after these dates will not be reimbursable or credited to the local match share under the federal grant.
5. *Preliminary Meeting with NJTPA:* The subregion's project manager shall meet with the NJTPA Central Staff who will be involved on the study, before the consultant or subregional staff commence work in order to discuss program requirements, review the project scope of work, and address any questions.
6. *Adherence to the SSP Study Schedule:* The NJTPA requires that subregions adhere to the established study schedule and report progress in meeting the schedule in the quarterly reports. Subregions must immediately notify the NJTPA of any actual or potential condition that is delaying or threatens to delay the timely performance of the contract. NJTPA staff is available to assist where needed to ensure that the schedule is maintained. When a study misses a milestone or falls a month behind schedule, the NJTPA will work with the subregion to secure a corrective action plan from the Consultant (or subregional staff if not a consultant supported effort). The NJTPA will provide

additional oversight for the project and interim progress status reports may be required from the subregions until the problem is satisfactorily resolved.

7. *Final Invoice and Local Match requirement:* All reconciled final reports, products, invoices with final release clause and supporting documentation are due by 5:00 PM on July 24, 2023. Deliverables are not considered Final, and the final invoice will not be paid, until all NJTPA edits and comments are reconciled. There is a 20 percent local match requirement for the Subregional Studies Program. Subregions will only be reimbursed for 80 percent of the study's total actual expenses. The NJTPA will distribute the reimbursement by providing 80 percent of all total expenses, which includes the invoicing of staff and consultant time. If only federal dollars are assumed for consultant costs and the match is to be met by staff time, and if the total actual staff hours for the study are lower than projected, then the subregion will not be reimbursed for the full amount of their consultant costs.

Consultant Procurement

8. *Development of Requests for Proposals:* The subregions must use their own documented procurement procedures that reflect applicable State and local laws and regulations, provided that the procurements conform to applicable Federal law and the standards identified in 2 CFR 200, and the NJTPA procurement policies for professional services. The NJTPA's detailed requirements and applicable checklists for Procurement of Professional Services, including the development of RFPs and current DBE/ESBE participation goal, can be found on the NJTPA's RFP webpage at: <http://www.njtpa.org/Get-Involved/RFPs/RFP-RFQ/Procurement-Guidance.aspx>. The RFP should reflect the Scope of Work contained in the NJTPA FY 2022 UPWP.
9. *Request for Proposals:* **The RFP may not be issued until NJTPA staff has approved the content.** The NJTPA estimates that it can take up to eight weeks to review draft RFPs. Exact timeframes will vary due to the completeness of the draft RFP submitted, timing of the submission, and the subregion's internal review and response process. NJTPA encourages subregional project managers to assemble and submit the draft RFP for review prior to the start of FY 2022. To assist consultants in developing proposals, the RFP should identify all tasks and subtasks, deliverables, and a realistic time frame for the study to be completed, incorporating the NJTPA and selection committee review and comment process outlined below in Item 10. In addition to the public advertisement process checklist described in the NJTPA Procedures for Procurement of Professional Services link referenced above in item 8, the RFP shall be advertised on the subregion's website (where possible) and on the NJTPA website. The subregion must provide NJTPA with the final version of the RFP in PDF format.
10. *Consultant Selection:* Consultant services must be obtained through maximum free and open competition; the study specifications must be clear and unrestrictive; and the selection process should be competitive. Subregions must develop a Consultant Selection Committee, comprised of a minimum of three people, one of which must include the NJTPA Project Manager and, where applicable, may include at least one other representative from the Steering Committee or Technical Advisory Committee (such as NJ TRANSIT, NJDOT, etc.). Prior to publicly distributing the RFP, the NJTPA may recommend the Consultant Selection Committee have an opportunity to review and comment on the RFP (allow a minimum of two weeks for their review), along with the criteria that will be used by the committee for the evaluation of each proposal. Once the proposals are received by the subregional project manager, they should be distributed to the committee for evaluation (allow a minimum of two (2) weeks for proposal scoring - additional if interviews are held). This requirement must be built into the overall study schedule.
11. *Consultant Interviews (if applicable):* It is highly recommended that interviews are held with the three highest scoring consultant team(s) prior to selecting a team. Interviews typically consist of a 15-minute presentation by the proposed consultant project manager followed by 15 minutes of

questions from the consultant selection committee. It is also recommended that key members of the proposed study team, including representatives of proposed subconsultants, are present.

12. *Consultant Selection Report and Recommendation:* The subregion should follow their own procurement procedures as it relates to consultant recommendation and award. The NJTPA recommends that once a consultant is selected by the Consultant Selection Committee and a final scope of work agreed upon, the subregional project manager shall prepare a selection report or memorandum documenting the rationale for the Consultant Selection Committee's recommendation for award. NJTPA can provide guidance on what to include in the memo upon request. A decision to select the recommended consultant shall be made by the subregion's agency head or designated selection authority.
13. *Award of Consultant Contract:* Contracts shall not be awarded to consultants until the NJTPA has issued a Letter to Incur Costs to the subregion for their Subregional Studies Program subcontract, which is contingent upon federal and NJDOT approval of the NJTPA's FY 2022 UPWP and submission of Pre-Award information.
14. *Contract Duration:* The consultant contract must be completed by June 30, 2023, which is the last day to incur costs. Therefore, to meet this deadline, the final report must be submitted by May 31, 2023. This allows sufficient time for finalization of the report and to address any remaining issues prior to the grant deadline.
15. *Quality Control/Assurance:* The subregions must maintain oversight to ensure that their consultant performs in accordance with the terms, conditions and specifications of their contracts. The Consultant Project Manager and the Subregional Project Manager should coordinate frequently to ensure that interim and final deliverables and other products for dissemination to the public or stakeholders are of the highest quality. All written and graphic materials should be reviewed by the consultant before delivery to the subregion for accuracy, clarity, spelling, and grammar. The Subregional Project Manager should return products to the consultant for revision, if necessary. The Subregional Project Manager, in turn, should review consultant products before disseminating them to Technical Advisory Committee members, NJTPA, or the public. The Subregional Project Manager is responsible for the successful completion of the study. The NJTPA is available to provide support as requested.
16. *Press Releases:* The NJTPA welcomes any opportunity to increase public awareness of our various metropolitan planning activities. The Subregional Project Manager shall coordinate any announcement/advertisement of study milestones, such as the study's kick-off, public meeting, or public comment period, with the NJTPA Project Manager. The NJTPA Outreach Division can assist in developing a press release and can advertise events through our traditional and social media outlets, such as our Twitter or Facebook page. The NJTPA requires any press releases developed by a subregion concerning an NJTPA-funded study be shared with the NJTPA Project Manager a minimum of five (5) days in advance of release.

Development and Approval of Study Deliverables

17. *Interim Study Deliverables:* In addition to the final study deliverables, the work plans for the Subregional Studies should provide for interim deliverables, such as the table of contents for the final report, technical memoranda or preliminary drafts of the final technical report's chapters as the study develops. Interim deliverables should be spaced appropriately throughout the duration of the study to facilitate project management and oversight, and to identify and address gaps and/or challenges to the successful completion of the study as they arise. The subregion retains the right to delay/refuse payment to the consultant should they be dissatisfied with inferior or unacceptable work products, especially products that have not undergone a thorough quality control/quality

assurance process that includes grammar and spell-checking and verification of facts/statistics. The NJTPA should be notified as early as possible if this type of problem arises.

18. *Review of Study Deliverables and Required Deliverable Format for Written/Text Deliverables:* All meeting and outreach materials presented the SAC/TAC or public (e.g. meeting agendas, flyers, handouts, display boards, PowerPoint) must be provided in Microsoft Word or other editable format to the NJTPA for review and comment at least two (2) weeks prior to their presentation or release. All draft study deliverables must be provided in Microsoft Word or other editable format to the NJTPA for review and comment at least two (2) weeks prior to their release to the public.
19. *NJTPA Review Process:* All written and graphic products produced by the consultant must be approved by the Subregional Project Manager and the NJTPA Project Manager. Products of an in-house effort also must be reviewed by NJTPA staff. NJTPA staff will provide specific comments through the Track Changes function in Word with additional comments through e-mail. NJTPA staff strive to review and provide consolidated comments on technical memorandum within a two-week timeframe. This is not always feasible, but it is a goal. Final deliverables require additional review time. NJTPA will work with subregions to discuss and address all comments. This is required for all deliverables.
20. *Required Deliverable Format for GIS/Mapping:* GIS (interim and final) datasets and mapping applications are required to be developed and submitted using the metadata standards and file nomenclature documentation procedures described in the NJTPA's EGIS User Manual, specifically Appendix U3 – EGIS Quality Assurance Program. This manual can be found at <http://www.njtpa.org/Data-Maps/Maps-GIS-Data/Enterprise-GIS.aspx>. These standards are established to assist in the interagency sharing process and to create consistency in the data products published by NJTPA. For any technical questions relating to the NJTPA EGIS standards, please contact Gabrielle Fausel at gfausel@njtpa.org and copy the NJTPA Project Manager.
21. *Funding Streams:* Due to the uncertainty of whether current funding programs will be continued, studies should not identify specific funding programs to be pursued to implement recommendations. It is best to mention common grant programs with potential suitability as resources, or simply identify that local, state and/or federal funding streams will be pursued. Subregions are encouraged to explore multiple funding sources for projects, including local, state, federal and public-private partnerships.

Study Conclusion/Closeout Procedures

22. *Delivery of Draft Report to Steering Advisory Committee or Technical Advisory Committee (SAC or TAC) for Review:* The recommended milestone for delivery of all drafts of the deliverables to the members of the SAC or TAC for their review is March 17, 2023. The subregion should have approved these deliverables prior to their dissemination to the SAC or TAC. The NJTPA project manager may receive the draft documents for review concurrent with the SAC or TAC.
23. *Final Meeting of the Steering Advisory Committee Review or Technical Advisory Committee (SAC or TAC):* The recommended milestone for the final SAC or TAC meeting is March 17, 2023, at which presentation and discussion of the draft study report should occur, to allow time for revisions based on SAC or TAC feedback.
24. *Develop Final Report, Abstract, Executive Summary, PowerPoint presentation and GIS Files:* All draft final deliverables, reflecting all SAC, TAC, stakeholder and/or public input, are requested to be submitted to the NJTPA for final review and comment by April 28, 2023. All written reports should follow the guidance provided in the Guidelines for Preparation of NJTPA Reports and Studies report. Due to the number of studies that conclude concurrently, allow two to four weeks for NJTPA review and comment on the Draft Final Report. The Abstract, Executive Summary and PowerPoint should

adhere to the following guidance: The primary audience for the abstract is technical professionals. The abstract should briefly and objectively encapsulate the study methodology and need not include specific study recommendations. The Abstract should NOT be repeated in the executive summary. The primary audience for the Executive Summary includes elected officials and the general public. The Executive Summary should begin with a brief section highlighting the major findings or recommendations of the report. This does not necessarily have to be very detailed, but it should quickly let the reader know why this report matters and the key takeaways. Next, it should briefly outline the study's scope of work, the regional significance of this study, stakeholders, public outreach, methodology, relevant data, and summarize study findings, final recommendations and next steps. The PowerPoint presentation should follow the same organizational structure as the Executive Summary, avoid overly wordy slides, and be accompanied by a written script or talking points that may be in the slide notes. All images used in PowerPoint presentation must be of print quality (minimum of 300 dpi at final image size) and provided in electronic form with the final deliverables.

25. *Submit the Final Reconciled Report to NJTPA: Include on the report cover the NJTPA Logo and a disclaimer statement on the inside cover or the title page of any published report concerning this study. Also, submit GIS files (if applicable), Abstract, Executive Summary, and PowerPoint presentation. The final report, reflecting all reconciled revisions, is due by May 31, 2023.*
26. *PRIME data entry: All study findings must be entered into PRIME, the NJTPA's planning information management system containing the final reports and specific findings of all SSP (and other planning) studies. It is the subregional project manager's responsibility to enter study recommendations into PRIME (sometime following the end of the study); however, the subregional project manager may anticipate the need for consultant support for this in the request for proposals. The subregion or consultant will incorporate all study findings, including map features, document attachments and data entries into PRIME per the system's requirements. Full information about PRIME, including PRIME Quick Start Guide, Introductory and How-To Videos, FAQs, Glossary and the full PRIME User Guide are available at www.njtpa.org/PRIME.*
27. *Problem Statements: Studies that recommend improvements on State roadways may consider submitting a NJDOT Problem Statement to NJDOT. The NJTPA can assist with the preparation of NJDOT Problem Statements and identifying other potential paths for project development.*
28. *Final Report Copies: After final review by NJTPA, please submit to NJTPA two (2) hard copies of all final deliverables, as well as, two (2) electronic copies on CDs (submitted on two separate CDs) of the study's final technical reports and products, including the final report, GIS files (if any), the Abstract, Executive Summary and PowerPoint. These deliverables are required for final submission on **June 30, 2023**. Deliverables are not *considered final, and the final invoice will not be paid, until NJTPA edits and comments are reconciled.**

QUARTERLY REPORTING EXHIBITS

Sample Subregional Studies Program Quarterly Progress Report

FY 2022 – FY 2023 SUBREGIONAL STUDIES PROGRAM QUARTERLY PROGRESS REPORT <i>All text in RED must be updated.</i> <i>All dates in BLACK are NJTPA deadlines.</i>			
[SUBREGION]			
[STUDY TITLE/NAME OF STUDY]			
Reporting Period	Quarter xx (Month xx, 202x – Month xx, 202x)		
Project Manager	[Subregional Project Manager]		
In-House and/or Consultant Effort	[In-house and/or Consultant Effort]		
Consultant DBE/ESBE Goal	[Goal % or N.A. if no consultant]		
Budget Status Report			
Total Budget <i>(including local match)</i>	Amount Authorized	Amount Expended to Date	% Expended to Date
Federal	\$	\$	
Local Match	\$	\$	
Total Budget	\$	\$	## %
DBE Participation	\$	\$	## %
Quarterly Reporting Deadlines*			
First Quarter	Second Quarter	Third Quarter	Fourth Quarter
October 15, 2021	January 14, 2022	April 14, 2022	July 15, 2022
Fifth Quarter	Sixth Quarter	Seventh Quarter	Eighth/Final Quarter
October 17, 2022	January 17, 2023	April 17, 2023	July 24, 2023
<i>*The quarterly Progress Report package (including financial documents) must be submitted by the above deadlines. Subregions place financial reimbursement for quarterly activities at risk if the reporting package is submitted after the quarterly reporting deadline. If final reports and products are submitted after the eighth quarter/ final report deadline, full reimbursement cannot be guaranteed.</i>			

Schedule

*The separate Project Gantt Chart must also be updated quarterly.
All work must be performed within the grant performance period. Costs incurred prior to July 1, 2021 and after June 30, 2023 are not eligible for reimbursement*

Milestone <i>(Add additional milestones at project start as needed)</i>	Estimated Completion Date <i>(Recommended schedule provided in red. Replace with study specific estimated completion dates in black no later than the study kickoff or consultant kickoff meeting.)</i>	Actual Completion Date <i>(Update quarterly)</i>
Authorized Study Start Date	July 1, 2021	July 1, 2021
Kick-off Meeting with NJTPA	July 1 – September 30, 2021	Insert date
Draft RFP to NJTPA	April 1 – July 31, 2021	Insert date
Consultant RFP Issued	July 1 – December 30, 2021	Insert date
Consultant Contract Awarded/Executed	September 1, 2021 – February 1, 2022	Insert date
Kick-off Meeting with Successful Consultant	September 1, 2021 – February 1, 2022	Insert date
Technical Memorandum #1 – Data Collection Summary Report (Insert Task Name)	Month xx, 20xx	Insert date
Technical Memorandum #2 – Technical Analysis	Month xx, 20xx	Insert date
Technical Memorandum #3 – Plan Development	Month xx, 20xx	Insert date
Draft Report Due to TAC/SAC for Review	March 17 – March 31, 2023	Insert date
Final TAC/SAC meeting	March 31, 2023	Insert date
Final Report due to NJTPA (This is a last review by NJTPA only)	April 28, 2023	Insert date
Reconciled Final Report due to NJTPA and all final deliverables	May 31, 2023	Insert date
Conclusion of Consultant Contract	June 30, 2023	Insert date
Subregional Sub-Contract & Study Completion Date	June 30, 2023	June 30, 2023
Project Description		
[Insert a brief description of the project that was provided in the UPWP.]		

Goals and Objectives		
<i>[Insert the project’s goal and objectives that were provided in the UPWP.]</i>		
Progress & Milestones by Task		
<p><i>Briefly list - by task - all significant progress and milestone events (with dates) completed in the reporting period. All task activities performed by the Subregion and the consultant must be addressed in each quarterly report, even if no work was done on a particular task for the current reporting period. Exclude work and progress completed in previous quarters. Provide the cumulative percent of work completed to date by task, and the total percent of work completed to date. Add additional tasks at project start, as needed.</i></p>		
Task	Progress & Milestones This Quarter	% Completed to Date
Task 1 – Project Management	<ul style="list-style-type: none"> A consultant kick-off meeting was held on December 13, 2021 (name parties present and agenda discussed). 	38%
Task 2A – Outreach and Partnerships	<ul style="list-style-type: none"> The County conducted a series of focus group meetings with educators, municipal officials, non-profits and business owners (briefly describe meeting goals and objectives). A TAC meeting was held on March 29, 2022, to discuss the feedback collected from the focus groups and the results of the consultant’s data collection effort. 	60%
Task 2B – Data Collection and Review	<ul style="list-style-type: none"> The data collection task was completed during this quarter. The consultant (insert consultant work completed this quarter). A technical memorandum summarizing all data collected was submitted by the consultant on March 29, 2022 (include if this report is in draft or completion form). 	100%
Task 2C – Equity Assessment	<ul style="list-style-type: none"> The data was collected, and traditionally underserved populations were identified. 	60%
Task 3 – Data Analysis and Mapping	<ul style="list-style-type: none"> No work was completed for this task during this quarter. Technical analysis work is scheduled to begin in the fourth quarter. 	0%
Task 4 – Study Findings and Recommendations	<ul style="list-style-type: none"> No work was completed for this task during this quarter. 	0%
Task 5 – Final Report and Final Deliverables	<ul style="list-style-type: none"> No work was completed for this task during this quarter. 	0%
Total Percent of Study Work Completed to Date		33%

Products & Outcomes

List all interim and final products and outcomes completed this quarter.

Completion of public outreach focus group meetings (describe advertisement methods, number of participants, dates, etc.).

Technical Memorandum #1 – Data Collection Summary Report Finalized

Comments

Note any work program revisions. Fully explain any budget variance greater than 10%, between the % of work completed and the % of budget expended. Note if project is on schedule, or behind or ahead of schedule. Note any problems encountered with any aspect of the study such as administrative, project management, budget, schedule, public response, methodology, product delivery etc. Also note any action being undertaken to address the problem. Briefly note impacts of any work accomplished this quarter.

The study is on schedule and within budget.

Sample Subregional Studies Program Project Schedule

FY 2022 – FY 2023 SUBREGIONAL STUDIES PROGRAM

SUBREGION
STUDY TITLE

PROJECT GANTT CHART

Subregional Studies Program Grant Performance Period (July 1, 2021 - June 30, 2023)

	FY 2021			FY 2022												FY 2023														
	Prior Quarter			1st Quarter			2nd Quarter			3rd Quarter			4th Quarter			5th Quarter			6th Quarter			7th Quarter			8th/Final Quarter				Final Qtr Report	
	Task # - Description	April	May	June	July	Aug	Sept	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	June	July	Aug	Sept	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May		June	July
Project Management Milestones	Authorized Study Start Date				★ July 1, 2021																									
	Quarterly Reports & Invoices							★																						★
	RFP Development and Procurement Process	● April 15, 2021																												
	Kick-Off Meeting with NJTPA				● September 15, 2021																									
	Consultant Contract Awarded/Executed										● January 1, 2022																			
	Kick-Off Meeting with Successful Consultant										● January 1, 2022																			
	Draft Final Report Due to TAC/SAC for Review																													
	Final TAC/SAC meeting																													
	Final Report due to NJTPA (subject to review)																													
	Reconciled Final Report and all deliverables due to NJTPA																													
Study Task Milestones	Conclusion of Consultant Contract																													
	Subregional Sub-Contract Study Completion Date																													
	Task 1 - Project Management																													
	Task 2A - Outreach and Partnerships																													
	Task 2B - Data Collection and Review																													
	Task 3 - Data Analysis and Mapping																													
	Task 4 - Study Findings and Recommendations																													
	Task 5 - Final Report and Final Deliverables																													
	Contingency (10% of the study duration)																													

All Project Management Deadline dates with circles are NJTPA recommended deadlines. Some of these dates note the end of a range of recommended schedule.

All work must be performed within the grant performance period. Costs incurred prior to July 1, 2021 and after June 30, 2023 are not eligible for reimbursement.

Legend:

- Latest Milestone Date (Recommended) ●
- Required Deadline ★
- Meeting Date ○
- NJTPA Project Management Recommended Schedule: |
- Proposed Timeline [light blue bar]
- Actual Progression of Work Completed [dark blue bar]

SAMPLE CONSULTANT PROGRESS REPORT TEMPLATE

Study:

Consultant:

Invoice Number:

Invoice Period:

Overall Project Status / Description of Work Completed This Period

This section should describe the work activities undertaken during the reporting period organized by task. The level of detail included in the narrative should be commensurate with the reimbursement request. Include reference to specific meeting dates where appropriate. Activities should be listed in bullet format.

Task 1 – Project Management

- Kick off meeting held on...
- Contract invoicing, and general coordination.

Task 2A – Outreach and Partnerships

- No activity this period.

Task 2B – Data Collection and Review

- No activity this period.

Task 2C – Equity Assessment

- No activity this period.

Task 3 – Data Analysis and Mapping

- No activity this period.

Task 4 – Study Findings and Recommendations

- No activity this period.

Task 5 – Final Report and Final Deliverables

- No activity this period.

Budget Status / Summary of Work Percent Complete

Percent of Work Complete to Date by Task: Must be based on actual work completed (not hours spent based on staff plan)

Task #	Task Name	% of Work Complete to Date	% Billed to Date
1	Project Management		
2A	Outreach and Partnerships		
2B	Data Collection and Review		
2C	Equity Assessment		
3	Data Analysis and Mapping		
4	Study Findings and Recommendations		
5	Final Report and Final Deliverables		

- Total Estimated Project Completion to Date: **15%**
- Total Project Billed to Date: **18%**
- Budget Status: **As of this invoice the project effort remains within the allotted budget.**

[Note: Any deviation of percent of total task work completed to percent of project billed to date greater than 10% must be explained and must note, under Project Controls section below, what if any actions are needed to maintain overall budget.]

Scheduled Milestones/Deliverables Status

- **No deliverables have been completed to date.** (This section should provide a list of work products/deliverables provided during this period (include product date).
- The scheduled completion of the study is **June 30, 2023. No deviations from this end date are anticipated at present.** (Any adjustments to the schedule must be approved and noted here.)

Primary Work Tasks Scheduled for Next Reporting Period

This section should describe the primary work activities proposed to be undertaken during the next reporting period organized by task. Activities should be listed in bullet format.

Action Items

- **None at present.**

Project Controls

This section should describe any problems/issues experience during the period and/or expected during the next period that may or will affect successful completion of the project work plan and/or impact the project budget or schedule. Describe what actions are being taken or are recommended to address the problems/issues described herein.

- **No issues at present**