Chapter 6 – DBE & OJT Goal Creation

Contents

DBE Goal

Creating a DBE goal for a proposal is performed entirely in AASHTOWare Project (AWP). The system is set up to allow both the RCCL User (Regional Contracts Compliance Liaison) role and the Proposal User role to select DBE items. However, those with the RCCL User role will create DBE goals in AWP and enter the goal data.

1. Log into AWP (see Chapter 1).
2. Make sure you are in the *RCCL User* role (see Chapter 2 for more info on roles).
3. (*Figure 6.1*) From the Proposal Overview component on the Dashboard, (A) search for and (B) select your proposal. NOTE: A minimum of a three (3) character string is required for the system to search. You can search by Proposal ID (State/IRIS number) or the Proposal Name.
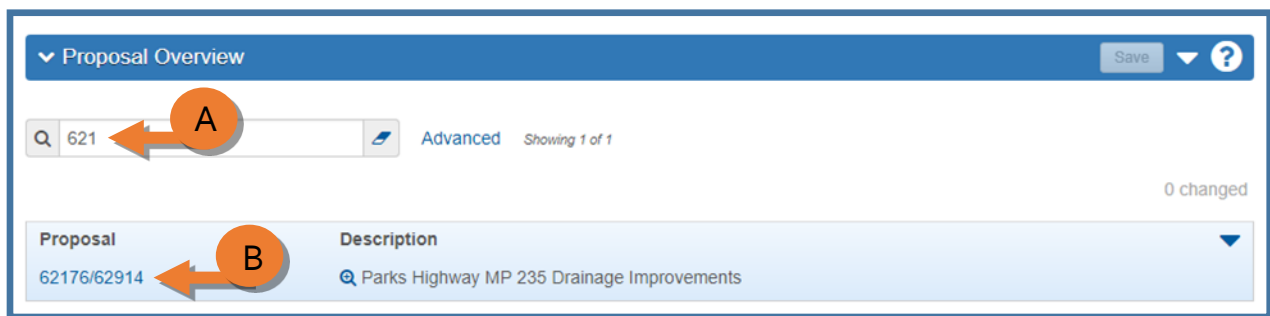

Figure 6.1

4. From the Proposal Summary component, select the Sections and Item quick link at the top (Figure 6.2).
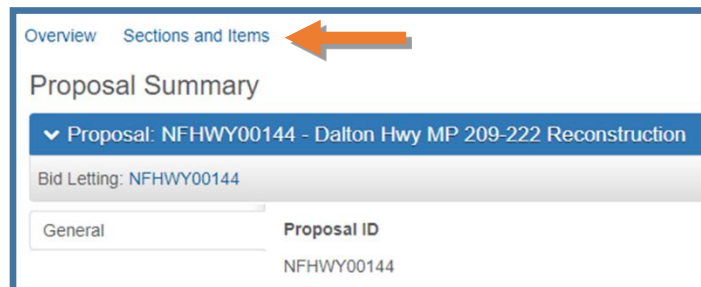

Figure 6.2

5. Select proposal items to be included in the DBE goal (*Figure 6.3*):
    a. Locate the DBE item.
    b. (A) Check the **DBE** checkbox.
    c. (B) Search for and select the appropriate **DBE Work Category**.
    d. Repeat for all DBE items.
    e. (C) Click **<Save>**.

Figure 6.3

Once all DBE items have been selected and assigned a DBE Work Category, run the DBE Goal Set report (*Figure 6.4* and *Figure 6.5*).

6. Return to the Proposal Summary component by clicking on the **Proposal** quick link on top. *TIP: If you may need to modify the DBE item selections, right click on the Proposal quick link and open in a new tab. This will allow you to switch tabs quickly to reselect DBE items and rerun the DBE Goal Set report.
7. (A) Expand the Proposal Summary component **action menu**.
8. (B) Select the **DBE Goal Set** report.

Figure 6.4

9. (C) In the Generate Reports window, click **<Execute>**.

Figure 6.5

The DBE Goal Set report groups the DBE items selected by DBE Work Category (*Figure 6.6*). The report divides the Proposal DBE Total amount by the Estimated Contract Amount to arrive at the Total Subcontract Percentage (or DBE Goal percentage).

Figure 6.6

If the DBE Goal (Estimated Total Subcontract Percentage) is over the 30% threshold, the number is displayed in red (*Figure 6.7*).

Figure 6.7

NOTE: When de-selecting DBE items to stay under the 30% threshold, be sure to both uncheck the DBE box and clear out the DBE Work Category field.

When no DBE items are selected, no work categories are selected for the DBE items, or when there are not three (3) DBEs certified in your region in a selected work category, the report will display an error message when run (*Figure 6.8*).

DBE Goal Set

Federal Number: **6512478**	Proposal Descr: **Lake Otis and Tudor Pedestrian Upgrades.**	Region: **CR**
State Number:		

No Valid Data: Must have DBE Items & Work Categories assigned on Proposal Items and minimum 3 DBEs certified in selected Work Categories for the Region

Figure 6.8

10. Enter the DBE Goal percentage in the Proposal Summary component (*Figure 6.9* and *Figure 6.10*).
    a. Navigate to the **Contract Compliance – DBE** container in the lower part of the component.
    b. (A) From the **DBE Goal** dropdown, select the appropriate DBE goal type for the proposal.
    c. (B) In the **DBE Goal Percent** field, enter the DBE Goal percentage from the DBE Goal Set report (the Total Subcontract Percentage).
    d. (C) In the **DBE Aspirational Goal Percent** field, enter the Department's aspirational goal for race neutral proposals.
    e. Scroll to the top of the page and click **<Save>**.

Contracts Compliance-DBE

DBE Goal (A)
04 - FHWA Race-Neutral ▼

DBE Goal Percent (B)
29.68

DBE Aspirational Goal Percent (C)
8.46

DBE Goal Approved By
🔍 Begin typing to search or press E

DBE Goal Approved Date
📅

DBE Comments

Figure 6.9

11. Save the DBE Goal Set report as a PDF to your files and attach to the Proposal Summary component (*Figure 6.10 – Figure 6.12*).
   a. (A) Expand the Proposal Summary component **action menu.**
   b. (B) Select **Attachments**.

Figure 6.10

12. (C) Click the **<Select File>** button.
13. Navigate to and select the DBE Goal Set report for your proposal.
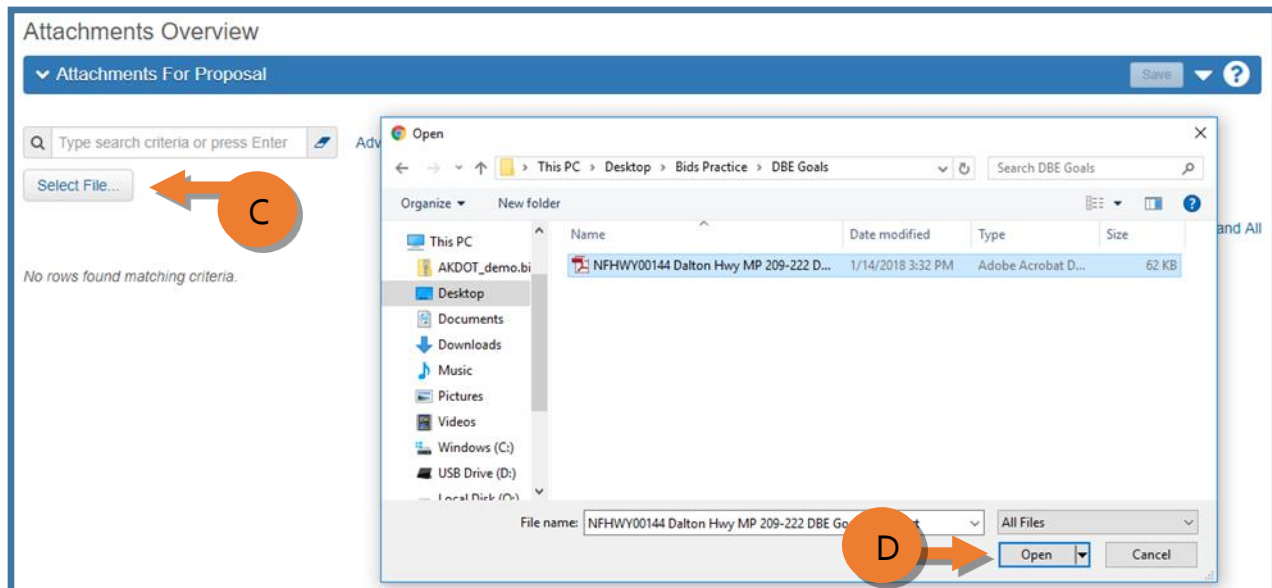14. (D) Click **<Open>**.

Figure 6.11

15. (E) In the **Description** field, enter the name of the attachment.
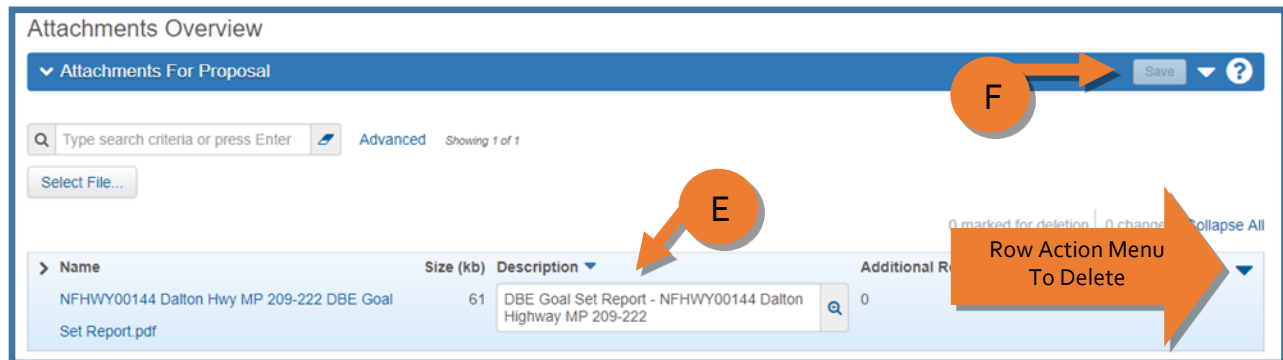16. (F) Click **<Save>**.

Figure 6.12

To delete an attachment:

1. Locate the attachment you want to delete.
2. Expand the **row actions menu** on the right side and select **Delete**. The attachment is marked for deletion and users may "undo" ↩ the action until the user clicks **<Save>**.

Once the DBE Goal information has been entered and the DBE Goal Set report attached, notify the CRO that the goal is ready to be reviewed.

Creating an OJT goal for a proposal uses both AASHTOWare Project (AWP) and the OJT Goal excel worksheet. The RCCL User role has the ability to run the OJT Goal Set Report and enter goal information into the Proposal Summary component. This chapter assumes you have access to and are familiar with the OJT Goal worksheet.

1. Log into AWP (see Chapter 1).
2. Make sure you are in the *RCCL User* role (see Chapter 2 for more info on roles).
3. (*Figure 6.13*) From the Proposal Overview component on the RCCL User role dashboard, (A) search for and (B) select your proposal. NOTE: A minimum of a three (3) character string is required for the system to search. You can search by Proposal ID (State/IRIS number) or the Proposal Name.
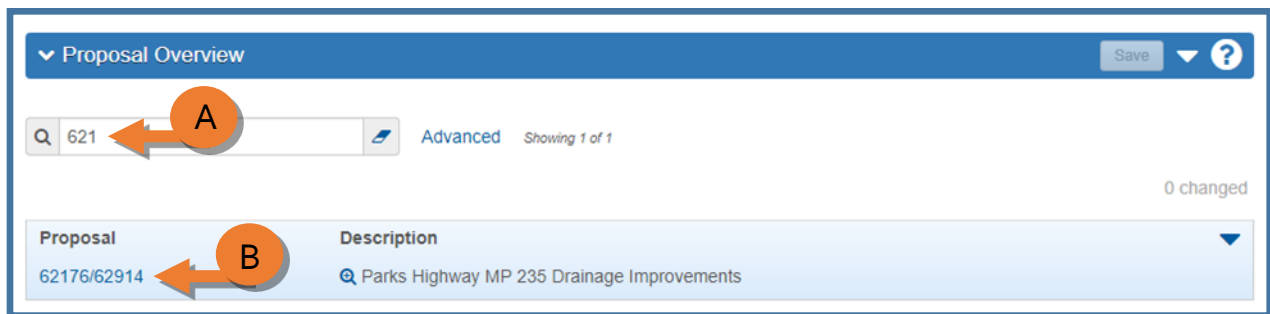

Figure 6.13

4. (C) Expand the Proposal Summary component **action menu** (*Figure 6.14*).
5. (D) Select **OJT Goal Set**.

Figure 6.14

6. (E) In the Generate Reports window, click **<Execute>** (*Figure 6.15*).

Figure 6.15

Items are marked as either OJT or Non-OJT in the database. This report will pull proposal items marked as Non-OJT (*Figure 6.16*).

Figure 6.16

7. (F) Enter the Proposal Non-OJT Item total into the OJT Goal Worksheet (*Figure 6.17*).

Figure 6.17

(*Figure 6.18*)

8. (G) Enter the date and person who created the OJT Goal.
9. (H) Enter the Proposal Name.
10. (I) Enter the Project (Proposal) Number, Basic Bid Amount, and Non-Labor Cost information.
11. (J) Enter the Number of Positions and Hours calculated.

Figure 6.18

12. Enter the OJT Hours and Positions in the Proposal Summary component (*Figure 6.19*).
    a. Navigate to the **Contract Compliance – OJT** container in the lower part of the component.
    b. (A) In the **OJT Goal – Hours** field, enter the goal hours from the OJT worksheet.
    c. (B) In the **OJT Goal – Number of Trainees** field, enter goal positions from the OJT worksheet.
    d. Scroll to the top of the page and click **<Save>**.

Figure 6.19

13. Save the first page (*Figure 6.18*) of the OJT Goal worksheet as a PDF and a PDF of the OJT Goal Set report to your files and attach both to the Proposal Summary component (*Figure 6.20 - Figure 6.22*).
    e. (A) Expand the Proposal Summary component **action menu.**
    f. (B) Select **Attachments**.

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Figure 6.20

14. (C) Click the **<Select File>** button.
15. Navigate to and select the OJT Goal Set report for your proposal.
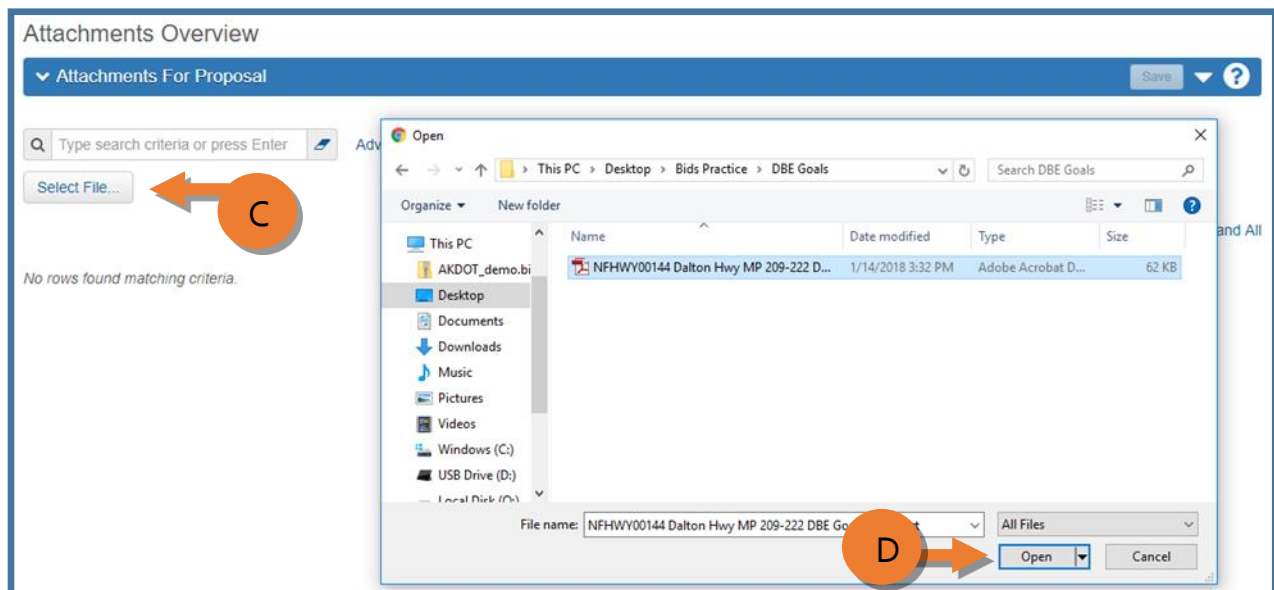16. (D) Click **<Open>**.

Figure 6.21

17. (E) In the **Description** field, enter the name of the attachment.
18. (F) Click **<Save>**.
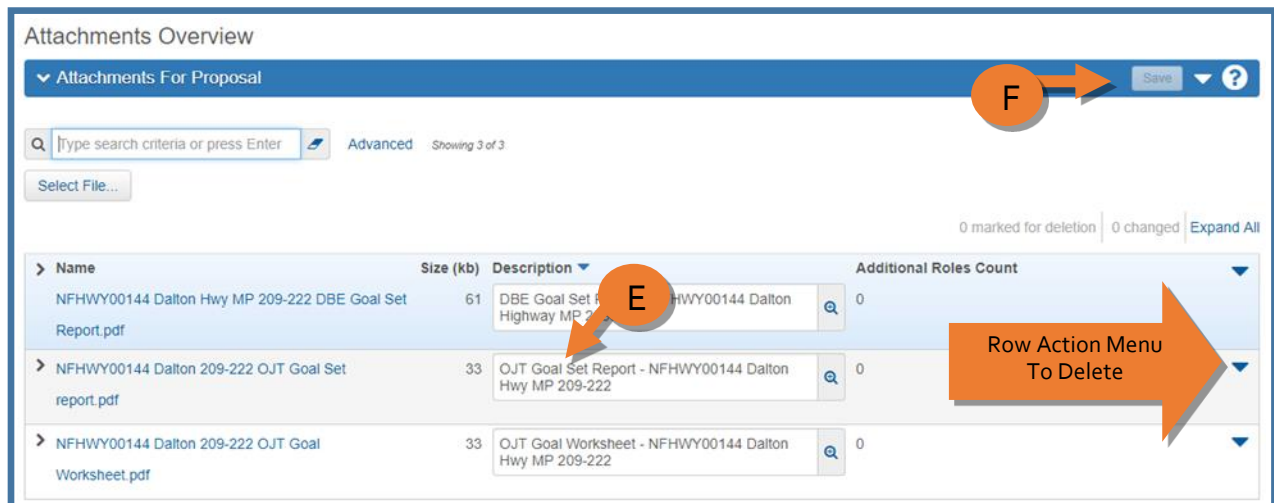19. Repeat to attach the PDF of the OJT Goal worksheet.

Figure 6.22

To delete an attachment:

1. Expand the Proposal Summary component **action menu**.
2. Select **Attachments**.
3. Locate the attachment you want to delete.
4. Expand the **row actions menu** on the right side and select **Delete**. The attachment is marked for deletion and users may "undo" ↩ the action until the user clicks **<Save>**.

Once the OJT Goal information has been entered and the OJT Goal Set report and the PDF of the first page of the OJT Goal worksheet attached, notify the CRO that the goal is ready to be reviewed and let the Designer know the goal information to add the 645 training item to the engineer's estimate.