

B2G**N**OW

Software for Government

Staff User Manual

Chapter 8 – Goal Setting



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Chapter 8 – Goal Setting

The B2Gnow Goal Setting module provides a process to set contract-specific goals that is based upon statistical methods, past accomplishment, and current market conditions. It follows the U.S. Department of Transportation 49 CFR Part 26 guidelines for setting goals.

There are three steps to the process:

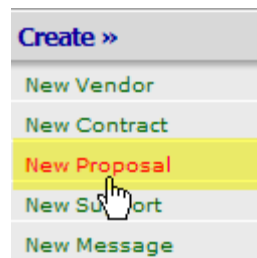
1. Determine the “Step 1” baseline goals based upon a statistical method.
2. Determine the “Step 2” goal based on past contract participation on similar projects.
3. Consider the two goals and adjust for market conditions (bonding, capacity, etc.) to generate a final goal for the contract.

Creating a Proposal

First a record is created to hold the goal setting information. Before starting, it is recommended that a copy of the project cost breakdown is obtained.

To create a proposal

1. From the left menu click **Create**, and then click **New Proposal**.



2. On the **Proposal Compose** page, in the **Proposal Information and Organization** section, complete the required fields.

3. In the Organization Contacts section, select a **Project Manager** and **Staff Contact** from the list.

Proposal: Compose

HELP VIDEO HELP

* required entry

Proposal Information			
Proposal Number *	321-00		
Title *	Renovation of Firehouse #22		
Estimated Cost (\$) *	1000000.00		
Department *	Fire Department		

Organization Contacts			
Buyer/Project Manager (in-system user) *	Fire Department - Administrator, Contract		
Staff Contact	Roxanne Crossland		
Additional Contacts	Contact #1	Contact #2	Contact #3
Contact Role			
Contact Name			
Department			
Phone			
	Ext.	Ext.	Ext.
Fax			
Email			

4. In the **Proposal Type** and **Proposal Category** fields, select options for tracking and reporting purposes.

Proposal Settings	
Proposal Type	None selected
Proposal Category	None selected

NOTE: The Proposal Type and Proposal Category fields are not required; however, they may be helpful for reporting purposes.

5. In the **Proposal Summary** section, describe the proposed project, and use the **Attach File** option to add supporting documentation related to the proposed project.
6. When finished, click **Review** and verify the information.
7. Click **Save**.

WARNING: You must click Save on the Proposal Review page, or all information will be lost.

Setting a Goal

Goals can be set on a proposal for each goal type needed, e.g. DBE, MBE, WBE, SBE, etc. The only limitation is the underlying statistical data that has been loaded into the module.

1. From the Proposal Main tab, click the **Goal Setting** tab.

Proposal Management

[Proposal Main](#) | [View Proposal](#) | [Goal Setting](#)

321-00: Renovation of Firehouse #22

Status: **Open**
Estimated Cost: **\$1,000,000**

[Refresh Page](#)

Proposal Information	
Proposal Title	Renovation of Firehouse #22
Proposal Number	321-00
System Transaction Number	00457690-001
Estimated Cost	\$1,000,000.00

Proposal Status & Actions			
	Status	Actions	Previous Transactions
Proposal		View Proposal , Edit Proposal , Close Out	
Other Functions		Reverse Close Out , Delete Proposal	

2. From the list, select a program type, and then click **Add Goal**.

Proposal Management: Goal Setting Summary

[Proposal Main](#) | [View Proposal](#) | [Goal Setting](#)

321-00: Renovation of Firehouse #22

Status: **Open**
Estimated Cost: **\$1,000,000**

Select goal type

Select goal type

- MBE
- WBE
- SBE
- Section3

his proposal.

NOTE: The goal setting process must be followed for each goal type required.

The Goal Setting page for the selected program/goal type displays. You can edit the following goals:

- **Goal Step 1:** Goal calculated based on a statistical method.
- **Goal Step 2:** Goal calculated based on actual goal achievement on contract records managed in B2Gnow.

Goal Step 1

The methods defined in the U.S. DOT regulations (49 CFR Part 26 §45) provide guidance for setting annual goals on DBE programs. The general concept of a goal is based on “demonstrable evidence of the availability of ready, willing and able [certified firms] relative to all businesses ready, willing and able to participate on your ... contracts.”

There are several options:

1. Use certified directories and Census Bureau data. For a given work category:

$$\text{Goal} = \text{Number Certified Firms} / \text{Total Number Firms}$$
2. Use a bidders list:

$$\text{Number of Certified Bidders} / \text{Total Number of Bidders}$$
3. Use a disparity study
4. Use a goal from a similar organization that has the same, or substantially similar, market
5. Alternate methods

The key is that the process must be based on “demonstrable evidence of local market conditions and be designed to ultimately attain a goal that is rationally related to the relative availability of [certified firms] in your market.”

NOTE: Prior to using the module, data provided by your organization and based on one or more of the options will be loaded into the system by B2Gnow.

1. Click **Edit Step 1 Goal Calculation**.

Proposal Management: Goal Setting

[Proposal Main](#) | [View Proposal](#) | [Goal Setting](#)

321-00: Renovation of Firehouse #22 Status: Open Estimated Cost: \$1,000,000

Goal Calculation	
Goal Type *	MBE
Estimated Total Amount	\$0.00
Calculated Participation Amount	\$0.00
Goal - Step 1 *	0 % Edit Step 1 Goal Calculation
Goal - Step 2 *	0 % Edit Step 2 Goal Calculation
Final Goal *	0
Attached File(s)	Attach File
Comments	<div></div>

[Save](#) [Save and Return](#) [Cancel](#)

2. Click **Edit**.

Proposal Management: Goal Setting Detail

[Proposal Main](#) | [View Proposal](#) | [Goal Setting](#)

321-00: Renovation of Firehouse #22 Status: Open Estimated Cost: \$1,000,000

[Edit](#) [Return](#)

Work Categories
No work categories present for this goal type.

NOTE: You need to add work categories, because the current work categories were not organized into groups.

3. Select a group and click **Add Entire Group** to add all work categories assigned to the group, e.g. Construction or Professional Services.
4. Or, click **Add Individual Work Category** to select specific categories.

Proposal Management: Goal Setting Detail HELP VIDEO HELP

[Proposal Main](#) | [View Proposal](#) | [Goal Setting](#)

321-00: Renovation of Firehouse #22 Status: **Open**
Estimated Cost: **\$1,000,000**

Select group

Work Categories ?

No work categories present for this goal type.

5. To add a work category, click **Add**, and continue adding categories until finished. You can search for categories, display all at once, and sort the list. Categories will drop from the list as they are added to the goal.

Proposal Management: Select Work Category HELP VIDEO HELP

1 - 20 of 116 records displayed: [Previous Page](#) < Page 1 > [Next Page](#)

To sort, click on column title.

Actions	Work Category	Goal	Data Type	Source
Add	1622 - Bridge, Tunnel and Elevated Highway Contractors	0.00%	Miscellaneous	1999 Construction Enterprises - MBE
Add	1623 - Water, Sewer, Pipeline, Communications, Power Line	11.80%	Miscellaneous	1999 Construction Enterprises - MBE
Add	1629 - Heavy Construction Contractors	0.00%	Miscellaneous	1999 Construction Enterprises - MBE
Add	1711 - Plumbing, Heating and Air Conditioning	7.12%	Miscellaneous	1999 Construction Enterprises - MBE

6. When finished, click **Return**. The selected work categories will display on the Goal Setting Detail page.

- From your internal documentation, enter the estimates calculated for each work category.

Proposal Management: Goal Setting Detail

[Proposal Main](#) | [View Proposal](#) | [Goal Setting](#)

321-00: Renovation of Firehouse #22 Status: **Open**
Estimated Cost: \$1,000,000

Select group

Work Categories						
Actions	#	Work Category	Amount (\$)	Category Goal (%)	Amount Participation (\$)	Comments
Reset Delete	1	tractors - Nonresidential Builc	250000.00	9.38	23450.00	
Reset Delete	2	1721 - Painting and Paper He	100000.00	8.62	8620.00	
Reset Delete	3	1731 - Electrical Work	300000.00	3.99	11970.00	
Reset Delete	4	1751 - Carpentry Work	200000.00	5.49	10980.00	
Reset Delete	5	1761 - Roofing, Siding and St	150000.00	7.81	11715.00	
Totals			1000000.00	6.67%	66735.00	

- The **Category Goal** is automatically filled into the field. You may be aware of specific situations in your market where factors have limited the stated availability/goal. For example, bonding capacity, resource availability, and other conditions such as multiple very large projects are underway at the same time. Adjust the Category Goal up or down as needed and add a comment to the line to note the change.
- Click **Recalculate** to update the line and page totals.
- The Amount Participation (\$) field is updated with Amount x Category Goal. The totals at the bottom of the page are also updated with the Category Goal weighted average.
- Click **Save** to lock in the information.

NOTE: If you need to change or update a value or add a work category, click **Edit**.

Goal Step 2

The next step is to consider past contract participation and compare to the Step 1 statistical result.

- From the Proposal Management: Goal Setting page, click **Edit Step 2 Goal Calculation**.

2. Click **Add Contract**.

Proposal Management: Goal History Detail HELP VIDEO HELP

[Proposal Main](#) [View Proposal](#) [Goal Setting](#) [Bid List](#)

P1234: Runway Resurfacing Status: **Open**
Estimated Cost: **\$15,000,000**

Goal History Information ?

Goal Type

Contracts ?

No contracts assigned to this goal type.

3. Search for similar contracts on any parameter – title, contract number, description, commodity code.

Search: Contracts HELP VIDEO HELP

[Users](#) [Vendors](#) [Contracts](#) [Concessions](#) [Proposals](#) [Payments](#)

Search your organization's contract database. Enter information into any of the boxes below and click **Search**. Some parameters are required.

Search Parameters ?

Contract/Reference Number	<input type="text"/> (Contract number, financial system reference, project number)
Contract Title	<input type="text" value="renovation"/>
Containing Text	<input type="text"/> (Contract description, summary, notes, comments)
Contractor	<input type="text"/> <input checked="" type="radio"/> Prime <input type="radio"/> Subcontractor <input type="radio"/> Either
Buyer/Project Manager	<input type="text"/> (Organization name, contact name)
Contract Compliance Officer	<input type="text" value="None selected"/>

- Click **Select Contract** for any contract that is to be included in as part of the Step 2 Goal calculation. You can click the back icon at the top of the left menu to return to the search results to add more contracts.

Search: Contracts

[? HELP](#) [VIDEO HELP](#)
[Users](#) [Vendors](#) [Contracts](#) [Concessions](#) [Proposals](#) [Payments](#)

Here's a list of the contracts that matched your search criteria. Use the sort and filter functions of the table to reduce the size of the list. You can view more listings by using the navigation line at the bottom of the table.

Click the **Transaction Number** to view that Contract or the **Vendor Name** link to view that vendor's profile. To refine or expand your search use the search table at the bottom of the page.

To resort, click on column title.

Contract Number	Contract Title	Prime Contractor	Contract Amount & End Date	System Transaction #
	All	All	ALL	All
901553000	AIRPORT MAINTENANCE ADMINISTRATION BUILDING RENOVATION	Joe R. Jones Construction, Inc.	\$1,810,580.89 3/9/1998	Select Contract
850215000 SA No. 4	CONSTRUCTION AND GENERAL CONTRACTING SERVICES - Terminal B Renovations, ATA move to gate B25	DFWIA-IP	\$456,667.41 9/30/2006	Select Contract
850215000 SA No. 13	CONSTRUCTION AND GENERAL CONTRACTING SERVICES - Terminal B/D Stringer Renovation	DFWIA-IP	\$357,261.5 9/30/2006	Select Contract
850132000 SA No. 14	CONSTRUCTION & GENERAL CONTRACTING SERVICES (ADT) - APM - Terminal Stations Renovations (TSR) (Closed)	Azteca Enterprises, Inc.	\$26,198,724.00 9/30/2002	Select Contract

- The selected contract(s) will be added to the Step 2 Goal calculation. Multiple contracts can be added, and the system will calculate a weighted value for the goals and participation of the historic contracts. The participation value will be added to the proposal as the Step 2 Goal.

Proposal Management: Goal History Detail

[? HELP](#) [VIDEO HELP](#)
[Proposal Main](#) [View Proposal](#) [Goal Setting](#) [Bid List](#)

P1234: Runway Resurfacing

 Status: **Open**
 Estimated Cost: **\$15,000,000**

Add Contract

Return

Goal History Information

?

Goal Type	DMWBE
Historical Current/Final Goal	29.12%
Historical Participation	49.80%

Contracts

?

Actions	Contract Number	Prime	Description	Dates	Contract Value	Current Goal	Participation
Reset Delete	850215000 SA No. 4	DFWIA-IP	CONSTRUCTION AND GENERAL CONTRACTING SERVICES - Terminal B Renovations, ATA move to gate B25	1/7/2003 to 9/30/2006	\$456,667	35.00%	42.43%
Reset Delete	850132000 SA No. 14	Azteca Enterprises, Inc.	CONSTRUCTION & GENERAL CONTRACTING SERVICES (ADT) - APM - Terminal Stations Renovations (TSR) (Closed)	10/27/1999 to 9/30/2002	\$26,198,724	30.00%	48.87%
Reset Delete	850133000 SA No. 5	Meridian Commercial, LP	CONSTRUCTION & GENERAL CONTRACTING SERVICES (ADT) - Renovation of DFW Business CRT., North Tower	10/27/1999 to 9/30/2002	\$5,091,145	26.00%	57.24%
Reset Delete	850134000 SA No. 8	Gilbert May, Inc. & Phillips/May Corp	CONSTRUCTION AND GENERAL CONTRACTING SERVICES (ADT) - DFW Terminal B International Sec Renovation	9/14/1999 to 9/30/2004	\$1,338,947	26.00%	41.93%
Reset Delete	901553000	Joe R. Jones Construction, Inc.	AIRPORT MAINTENANCE ADMINISTRATION BUILDING RENOVATION	4/3/1997 to 3/9/1998	\$1,810,581	26.00%	0.00%
Totals					\$1,810,581	29.12%	49.80%

NOTE: When a contract is added to the calculation, only the award and participation amounts for the matching goal type will be included. For example, if the contract has an MBE and WBE goal, and the MBE goal is being determined for a new contract, the MBE award and payment amounts will be added to the calculation. The WBE information will not be included.

Final Goal

Set a final goal using the Step 1 statistical goal and the Step 2 actual goal achievement. The Federal regulations (49 CFR Part 26 §45) provide guidance for potential adjustments which is useful for both Federal and local programs:

§26.45 (d)

Once you have calculated a base figure, you must examine all of the evidence available in your jurisdiction to determine what adjustment, if any, is needed to the base figure in order to arrive at your overall goal.

- (1) There are many types of evidence that must be considered when adjusting the base figure. These include:*
 - (i) The current capacity of [certified firms] to perform work in your... contracting program, as measured by the volume of work [certified firms] have performed in recent years;*
 - (ii) Evidence from disparity studies conducted anywhere within your jurisdiction, to the extent it is not already accounted for in your base figure; and*
 - (iii) If your base figure is the goal of another recipient, you must adjust it for differences in your local market and your contracting program.*
- (2) If available, you must consider evidence from related fields that affect the opportunities for [certified firms] to form, grow and compete. These include, but are not limited to:*
 - (i) Statistical disparities in the ability of [certified firms] to get the financing, bonding and insurance required to participate in your program;*
 - (ii) Data on employment, self-employment, education, training and union apprenticeship programs, to the extent you can relate it to the opportunities for [certified firms] to perform in your program.*
- (3) If you attempt to make an adjustment to your base figure to account for the continuing effects of past discrimination (often called the “but for” factor) or the effects of an ongoing ... program, the adjustment must be based on demonstrable evidence that is logically and directly related to the effect for which the adjustment is sought.*

1. Enter the final goal in the **Final Goal** field. This is the goal for the goal type listed at the top of the page.

Proposal Management: Goal Setting

[Proposal Main](#) | [View Proposal](#) | [Goal Setting](#)

321-00: Renovation of Firehouse #22 Status: **Open**
Estimated Cost: **\$1,000,000**

Goal Calculation

Goal Type *	MBE		
Estimated Total Amount	\$1,000,000.00		
Calculated Participation Amount	\$66,115.00		
Goal - Step 1 *	6.612 %	Edit Step 1 Goal Calculation	
Goal - Step 2 *	0.000 %	Edit Step 2 Goal Calculation	
Final Goal *	6.612		
Attached File(s)	Attach File		
Comments	<div></div>		

[Save](#) [Save and Return](#) [Cancel](#)

2. Attach any supporting documents related to the goal setting process, such as the work estimate or market survey.
3. Add comments related to the final goal setting adjustments.
4. Click **Save and Return**.

The program goal displays on the Goal Setting Summary page along with the Total Goal, which differs if there is more than one goal type set up.

Proposal Management: Goal Setting Summary

[Proposal Main](#) | [View Proposal](#) | [Goal Setting](#)

321-00: Renovation of Firehouse #22 Status: **Open**
Estimated Cost: **\$1,000,000**

Select goal type [Add Goal](#)

Goal Types				
Actions	Goal Type	Step 1 Goal	Step 2 Goal	Final Goal
View Delete	MBE	6.61%	0.00%	6.61%
Total Goal:				6.61%

5. Continue adding goals if the proposed project has more program goals (WBE, etc.).

Viewing a List of Proposals

1. To access a list of proposals, from the left menu click **View**, and then click **Proposals**.

Diversity User Control Panel: Proposals

Contracts | Contract Audits | Sub Requests | **Proposals** | Support | Messages

☐ Show ONLY proposals assigned to you

1 - 3 of 3 records displayed: Previous Page < Page 1 > Next Page Records per page 20

To resort, click on column title.

Status	Proposal #	Description	Submit Date	Department	Buyer/PM
All	123456	Test Goal Setting	10/12/2009 11:10:00 PM	Civil Rights	Administrator, Contract
	593-00	test 2	10/14/2009 2:58:49 PM	Fire Department	Administrator, Contract
	321-00	Renovation of Firehouse #22	10/27/2009 1:03:53 PM	Fire Department	Administrator, Contract

2. You can filter and sort the list.
3. To open the proposal record, click the Proposal # or Description hyperlink.

TIP: If the proposal does not display, clear the **Show ONLY proposals assigned to you** check box.

Searching for Proposals

1. To search for a specific proposal, from the left menu click **View**, and then click **Search**.

Search: Proposals

Users | Vendors | Contracts | **Proposals**

Search for proposals. Enter information into any of the boxes below and click Search.

Search First 20 Matches Search All Matches Clear Form

Search Parameters

Proposal/Reference Number	
Proposal Title	
Outreach Status	Any
Buyer/Project Manager	None selected
Staff Contact	None selected
System Transaction Number	

Search First 20 Matches Search All Matches Clear Form

2. Enter search parameters and click **Search First 20 Matches**.
3. You can filter and sort the list.
4. To open the proposal record, click the View link.