

APPENDIX A- TECHNICAL SPECIFICATIONS
Capital Asset Management Solution

SCOPE OF WORK

The purpose of this Invitation to Negotiate (the "ITN") is to evaluate and select a vendor that can provide a software solution to enable the efficient delivery of capital assets and support the Enterprise Asset Management (EAM) initiative. The capital asset project delivery groups rely on a system of spreadsheets, email, adhoc reports and a network drive to manage all aspects of project management and capital asset delivery at JEA. The information and business requirements to deliver even a small capital project are significant and not suited to management by email or spreadsheets. This solution should accommodate current JEA work processes required to deliver capital projects.

The software solution should at a minimum:

- Formalize project management processes and procedures.
- Allow the use of automated workflow to drive behavior and processes.
- Increase the transparency of capital projects.
- Consolidate all capital asset project delivery information (design drawings, communications, schedules, estimates, invoices, permits, etc.) in one centralized area (i.e., document control).
- Integrate with JEA systems e.g. Oracle R12.2.5 suite modules including EAM and Primavera P6 to bring all capital project information into one system thereby minimizing data silos.
- Connect all groups who play a role in capital asset delivery.
- Enable better reporting of capital project metrics to include financial, schedule and ball-in-court.
- Enable the automation of many project management processes.
- Allow streamlined communication and exchange of information with consulting engineers and contractors.
- Provide the ability to apply approvals/denials to workflows across multiple platforms e.g. MS Exchange, Mobile/Cell platforms (ios, android), and Citrix.
- Provide the ability to integrate with Oracle EBS 12.2.5 General Ledger (GL) module to provide YTD Oracle work order budget, encumbrance, funds available, and actual data.
- Provide the ability to integrate with Oracle EBS 12.2.5 General Ledger (GL) module to provide PTD Oracle work order funds available, budget, actuals, and encumbrance data.
- Provide the ability to integrate with Oracle EBS 12.2.5 General Ledger (GL) module to provide Oracle work order budget, encumbrance, actuals, and funds available data by period.
- Provide the ability to integrate with Oracle EBS 12.2.5 General Ledger (GL) module to provide Oracle project number rollup data for encumbrances and actuals.
- Provide the ability to integrate with Oracle EBS 12.2.5 General Ledger (GL) module to provide Oracle project number line item detail for encumbrances and actuals.
- Provide the ability to design reports using data from Oracle EBS 12.2.5.
- Provide the ability to integrate with Oracle EBS 12.2.5 Project Accounting module.
- Provide the ability to integrate with Oracle EBS 12.2.5 General Ledger module.
- Provide the ability to integrate with Oracle EBS 12.2.5 EAM module.
- Provide the ability to integrate with Oracle Business Intelligence Engine (OBIE) solution.

1. JEA CURRENT STATE

JEA owns, operates and manages the electric system established by the City of Jacksonville, Florida in 1895. JEA is Florida's largest municipally owned utility and the seventh largest municipal in the United States.

JEA's Strategic Plan includes implementing a Capital Asset Management System (CAMS) that will prove to be a critical enabler of the four areas of business focus: Customer Value; Financial Value; Community Impact Value; and Financial Value. The primary purpose of JEA's future CAMS is to efficiently deliver capital assets that the desired business information and knowledge can be used for reporting, analysis, and integration with other systems to facilitate intelligent business decisions.

JEA currently leverages a system of spreadsheets, email, adhoc reports and a network drive as the base of managing capital assets.

2. JEA CURRENT PLATFORM PRODUCTS

- Oracle Exadata / Exalogic X5 Engineered System
- Citrix: XenApp 7.13
- Oracle EBS R12.2.5:
 - Oracle Payroll
 - Oracle Time/Labor (OTL)
 - Oracle Project Accounting
 - Oracle Procurement
 - Oracle Accounts Payable (AP)
 - Oracle Accounts Receivables (AR)
 - Oracle General Ledger (GL)
 - Oracle Cash Management (CM)
 - Oracle Projects
 - Oracle eAM 12.2.5
 - ADI Desktop Integrator
 - Workflow
 - Oracle iProcurement
 - Oracle Payments
 - Oracle Collections
 - Oracle Inventory
 - Oracle Approvals Management
 - Oracle Advanced Benefits
 - Oracle Cash Management
 - Order Entry
 - Contracts Core
 - Order Management
 - Learning Management
 - Human Resources
 - Purchasing
 - Labor Distribution
 - Warehouse Management
 - Subledger Accounting
 - Treasury
 - E-Business Tax

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3. ANNUAL SOFTWARE LICENSES COST

Per Appendix B – Response Workbook, JEA estimates a minimum 215 Licenses.

4. SETUP/IMPLEMENTATION FEES

One-Time Setup Costs must include all costs attributable to providing the complete solution; deployment and setup of the complete solution, and all costs associated with satisfying all requirements for all required environments. One-time setup costs should be inclusive of but not limited to the following:

- a. Project Management/Professional Services
- b.
- c. Technical Team Professional Services including but not limited to:
 - a. Analysis
 - b. Configuration
 - c. Development / Customization
 - d. Unit, Configuration and System
 - e. Testing
 - f. Integration
- d. Travel Expenses (According to JEA’s travel policy)

5. RECURRING ANNUAL MAINTENANCE AND SUPPORT

6. TRAINING

Training is to be completed for all identified personnel 2 weeks before launch. Product shall be piloted for at least 30 days to identify areas of opportunity before full launch. Onsite support at a minimal of 30 days after implementation/launch. Training deliverables to include: written material, CBTs, classroom training, robust Q&A, daily triage of performance.

7. PROOF OF CONCEPT

The highest ranked vendor shall be asked to develop and present a proof of concept (POC) of their proposed solution. After vendors/resellers/integrators have submitted their responses to the detailed requirements defined within these document

If this is determined to be appropriate, JEA may desire to have POC implemented in a SaaS environment to further evaluate the short-listed proposed solutions. In the event a POC is determined to be appropriate, JEA will provide detailed information on what is desired to be evaluated at that time. JEA estimates a sixty (60) day proof of concept to validate the functionality of the business requirements. The details of the proof of concept shall be finalized after intent to award. If proof of concept is unable to validate the business requirements, then JEA shall proceed to next highest ranked Respondent.

Costs shall include, but may not be limited to:

- a. Maintenance and Support, must include technical support, customizations, and free software upgrades

8. REQUIREMENTS RESPONSE INSTRUCTIONS

- A. In Appendix A-Business Requirements are the functional, technical and security requirements for this Contract. Use this workbook to indicate if your solution will meet each item as denoted below. **ALL REQUIREMENTS MUST BE ADDRESSED INDIVIDUALLY AND NO BLANKET RESPONSE TO ALL REQUIREMENTS WILL BE ACCEPTED.**
- a) **Rank 1 – Functionality is included as a core functionality of your software solution** This functionality already exists without additional pricing or changes to the base product.
- b) **Rank 2 - Additional component to core functionality, but purchased separately** Once the current product release is installed, if configuration (a mechanism to make changes) is required, describe the configuration method (i.e. parameter table value, scripts) in the "Supplier Comments" field in Appendix A Business Requirements. **Applications that fully meet the requirements with a base configuration without product enhancement or customization will receive higher points.**
- c) **Rank 3 - Customized code development and implementation required Product Enhancement–** Application changes to the product that will be unique for JEA and not part of the Respondent’s future base product are needed to meet the requirement. Customization will require coding changes to the product or creation of a new interface to a third party vendor. The Respondent must also specify estimated lead time from NTP for customization.
- d) **Rank 4 - Functionality not currently offered; will be available as part of future releases–** A planned enhancement to the base product included in the Respondent’s future product roadmap is necessary to meet the requirement. If this functionality is a product roadmap, the Respondent must provide details of estimated lead time from NTP of availability and any dependencies with other roadmap items that may delay its availability.
- e) **Rank 5 - Functionality not currently offered; no plans to offer functionality in the future -** This functionality does not exist without any foreseeable ability to provide.

9. PROJECT MANAGEMENT METHODOLOGY

1. Project Planning

The Respondent will be required to provide professional services during the Planning, Analysis, Design, Implementation, and Testing of the design solution, The Respondent is required to plan the implementation and abide to JEA’s Change Management Procedures in such a manner as to provide NO outages to JEA’s business operations during normal business hours. Any outages will need to be pre-approved and planned after business hours. Please note that customer impacting events need to take place during pre-approved windows in order to minimize customer impact.

Professional Services should include the following at a minimum (below is not an all-inclusive list).

- Weekly Core and Technical Team meetings
- Weekly Status Reports & Project Plan Updates
- Design, document and provide assistance in the implementation of JEA’s hosted Portal solution.
- Participate in working requirements gathering and JAD sessions.
- Migrate content where appropriate (templates, menus, and functionality).
- Pre-cutover meetings
- An installation schedule
- Testing of installation
- End-user training on all applicable systems before, during and after cutover
- Provision for “Help Desk” staffing during each installation cutover
- Provide complete implementation documentation, as outlined within JEA’s Project Management Methodology - including system administration manuals, quick reference guides and as built drawings.

2. Approach, Timeline and Service Deliverables

To ensure alignment in regards to project delivery, below you will find JEA’s Project Methodology. This methodology will be followed during the project.

- **Planning:**

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In summary, the primary activities accomplished during *Planning* include:

- Complete the environmental information gathering
- Define the Project Communications Process
- Identify Initial Projects Risks
- Identify Initial Project Costs
- Develop Statement of Work (SOW) and Procurement Documentation for RFP
- Define the Master Project Plan and WBS

The following deliverables will be created during the *Planning* phase:

- Draft High Level Business Requirements
- Communications Plan
- Roles, Responsibilities and Deliverables
- Scope Document
- Statement of Work and RFP
- Master Project Plan and WBS

• **Analysis:**

In summary, the primary activities accomplished during *Analysis* include:

- Complete a review of JEA’s current business processes
- Complete Functional Analysis and document findings
- Complete Technical Analysis and document findings
- True-Up Detailed Requirements Document
- Complete Fit-Gap Analysis
- Update Master Project Plan and WBS

The following deliverables will be created during *Analysis* phase:

- Draft Detailed Solution Architectural Design (SAD) document to include the High Level Logical Design and Capacity Plan
- Draft Acquisition Plan
- Draft CVR (Customer Valid Requirements) Traceability Matrix
- Draft changes to business process maps
- Provide business process mitigation plan
- Detailed Requirements Document Approval
- Updated Master Project Plan and Master Project Schedule
- Final Project Review Matrix

• **Design:**

In summary, the primary activities accomplished during *Design* include:

- Finalize Detailed Design
- Finalize Capacity Plan
- Business Continuity Plan
- Update Master Project Plan and WBS
- Update CVR Traceability Matrix
- Develop Implementation and Contingency Plan
- Develop Test Plan
- Develop Use Cases
- Develop Conversion Plan
- Develop Disaster Recovery Plan

The following deliverables will be created during *Design* phase:

- Draft Implementation and Contingency Plan
- Draft Functional Test Plan
- Draft Technical Test Plan
- Draft the System/Integration Test Plan
- Draft Disaster Recovery Plan
- Draft Conversion Plan
- Draft Performance/Load Testing Plan
- Final Solution Architectural Design document including final Capacity Plan
- Final Detailed Requirements
- Final Acquisition Plan
- Final Business Continuity Plan
- Updated Master Project Plan and Master Project Schedule.
- Use Case Documents
- Project Executive Summary Approval

• **Construction:**

In summary, the primary activities accomplished during *Construction* include:

- Complete Setup/Configuration changes
- True-up Test Plan with test case details
- True-up Architectural Design
- True-up Training Plan
- Update Conversion Plan
- Update the Implementation and Contingency Plan
- Update Master Project Plan and WBS

The following deliverables will be created during *Construction* phase:

- Updated Implementation and Contingency Plan
- Updated Conversion Plan
- Updated CVR Traceability Matrix
- Updated Master Project Plan and WBS
- Final Test Plan to include detailed test scripts/cases
- Input requirements, detail requirements, and test scripts/cases in HPQC
- Final Training Plan
- Project Code (source code)

• **Testing:**

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In summary, the primary activities accomplished during *Testing* include:

- True-up Architectural Design
- True-up the Implementation and Contingency Plan
- True-up the Conversion Plan
- Mock Cutovers
- User Acceptance Testing

The following deliverables will be created during *Testing* phase:

- CVR Traceability Matrix (updated with UAT)
- Test Analysis Report
- Test Phase Approval Form
- Final Implementation and Contingency Plan
- Final Conversion Plan
- Updated Master Project Plan and Master Project Schedule.
- Operators Manual
- Technical Manual
- User's Manual
- Project Code

• **Start-Up:**

In summary, the primary activities accomplished during *Start-up* include:

- Prepare code to deploy to production
- True-up Architectural Design
- Obtain CM Approval
- Coordinate Start-up

The following deliverables will be created during *Start-up* phase:

- Provide Issues Log
- Provide necessary work-arounds
- CM Approval Verification

• **Turn-Over:**

In summary, the primary activities accomplished during *Turn-Over* include:

- Complete Lessons Learned
- True-Up As-Built schematics
- True-up Disaster Recovery Plan

The following deliverables will be created during *Turn-Over* phase:

- Code and Application moved to Production
- Architectural Design (as-built) document.
- Final CVR Traceability Matrix
- Final Master Project Plan and Master Project Schedule
- Final Disaster Recovery Plan
- Lesson Learned Document

10. IMPLEMENTATION AND CONTINGENCY

These plans need to include the following information:

1. Service Level Agreement (SLA)
2. Recovery Teams (Name, Role, Responsibilities, etc.)
3. Application and Servers
4. System Dependencies
5. Lessons Learned

Implementation and Contingency Plan:

Implementation Plan – Respondent needs to document:

1. Project Description
2. Implementation Team (Name, Roles, Contact Numbers)
3. Implementation Tasks/Activities (Task Name, Responsibility, Completion Date)
4. Security Process or issue related to implementation
5. Hardware – Identify hardware required for successful implementation (date ordered, received)
6. Software – Identify software required for successful implementation (date ordered, received)
7. Facility/location (resource, hours, days, and date needed)
8. Notice of Success - who is to be notified of successful implementation

Contingency Plan – Respondent needs to document and identify the detail steps to follow should the system implementation not go as planned. How do you get the system back to the state it was before the implementation began? Indicate who will be notified and what the next course of action should be.

11. SOFTWARE IMPLEMENTATION POLICIES

Resources assigned to JEA shall be knowledgeable and available to collaborate and perform project related tasks . Such work shall fall within the terms and conditions of this contract.

All system changes are required to follow the JEA Design Assurance process. (Reference Exhibit 1). The Design Assurance Board (DAB) meets every other Friday to review submitted design documents at four phases; Introduction, 30% - Build, 60% - Integrate and 90% - Operate.

All system changes are required to follow the JEA Change Management process (Reference Exhibit 2). The Change Approval Board (CAB) meets every Thursday for CMs that will be completed during the subsequent seven (7) day period. All maintenance items should be planned out accordingly.

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Exhibit 1

The purpose of the DAB is to reduce or eliminate errors or omissions linked to design and to ensure design integrity and robustness while maintaining efficiency. The objective of the DAB is to provide a design assurance process that *discovers design risks* in an effort to prevent impact prior to the Design Phase continuing throughout the build process. The general responsibility of the DAB is to ensure that system design is in conformance to methodologies, standards, future direction and requirements.

Governance:

The DAB is made up of five voting members (PMO, CA, IS, TI, EA) and one chair representing most areas in Technology Services (TS).

- Review sessions are held bi-monthly, where exceptions to standard, methodologies, standards and future state direction.
- The board will approve or disapprove with comments of design checkpoint documents
- There must be at least three core members present for a sanction approval.
- The Board Chair will only approve in the event of a tie.
- Minutes for all sessions will be taken and sent out within three days of completed session.
- Metrics will be tracked and reported on monthly bases.

Exhibit 2

JEA’s Change Management Process ensures that all elements are in place, all parties notified and trained, and the schedule for implementation is coordinated with all other activities in the organization prior to implementing changes in Technology Services systems and programs. This procedure applies to all individuals who install, operate and/or maintain production Technology Services systems and programs. The production systems and programs are defined as all Infrastructure (i.e. network components, servers, disk arrays and storage systems, tape librarians, etc.) and any subsystems, services or applications within these systems. Change Management is not required for Development and Quality Assurance environments; only Production.

Testing and change control management is the responsibility of all Technology Services (TS) employees. A Change Approval Board (CAB) will meet weekly to review high risk change requests and to ensure that change reviews and communications are being satisfactorily performed. The CAB will be composed of the Technology Services director team, and chaired by the Director, Technology Infrastructure (Three (3) Directors represent a quorum). All change requests not deemed high risk, by the Risk Assessment web form in the application used for Change Management, will be reviewed and approved by the manager or designee of the implementer.

PROCEDURE:

A. Testing

1. Testing of a change, before movement to Production, will be completed in one of the following environments:
 - a) A Development or Quality Assurance environment that reflects the production environment.
 - b) A redundant environment where multiple of the same assets and configurations are running. Testing will be completed on one environment first; then implemented on other environment.
 - c) Vendor certification. When unable to test in JEA environment, will require vendor certification of change, to include requirement for vendor to provide testing evidence.
 - d) Peer devices – same asset type, but not in a redundant setup
 - e) When none of the above is available for testing, changes will require CAB approval and be implemented during a preapproved scheduled outage window

B. Change Management

Any work that will result in the addition, modification, replacement or removal of approved supported or base-lined hardware, network, software, application, environment, system, desktop build or associated documentation must be approved via the Technology Services Change Management (CM) process.

1. A Change record must be submitted and approved for maintenance work, all vendor work, the addition of new equipment, the removal or disposal of old equipment, or changes to existing equipment. These conditions include:
 - a) A modification is made to a production system.
 - b) A permanent state change is made to a production system (enable/disable, turn on/turn off, etc.).
 - c) An installation or retirement of a production system.
 - d) Preventive maintenance activities that require a state change (perpetual change) to a production system.
2. Upon submission of a Change record the requester (In Planning task) must complete the Risk Assessment web form in the application used for Change Management control.
3. Actions that do not require a standard Change record:
 - a) Emergency repairs that do not result in a system modification or permanent state change
 - b) Preventive maintenance that does not result in a system modification or permanent state change
 - c) Front end changes in the application performed by application user
 - d) Non-perpetual changes such as clearing cache, restarting services and the aforementioned examples will be handled as Event Tracking CM’s for tracking and problem management purposes.

The NOC is responsible for verifying the Change documentation. The overall Change Management Process is owned, controlled, updated, reported and enforced by Technology Infrastructure. In the event of any failed Changes from the previous week, these will be reviewed at the following CAB for Lessons Learned and next steps

APPENDIX B - LIST OF SUBCONTRACTORS FORM
068-19 CAPITAL ASSET MANAGEMENT SYSTEM (CAMS)

JEA Solicitation Number 068-19 requires certain major Subcontractors be listed on this form, unless the work will be self-performed by the Company.

The undersigned understands that failure to submit the required Subcontractor information on this form will result in bid rejection, and the Company agrees to employ the Subcontractors specified below: (Use additional sheets as necessary)

Note: This list of Subcontractors shall not be modified subsequent to bid opening, without a showing of good cause and the written consent of JEA.

Type of Work	Corporate Name of Subcontractor	Subcontractor Primary Contact Person & Telephone Number	Subcontractor's License Number (if applicable)	Percentage of Work or Dollar Amount

Signed: _____

Company: _____

Address: _____

Date: _____

Appendix B - Minimum Qualification Form
#068-19 CAPITAL ASSET MANAGEMENT SOLUTION (CAMS)

GENERAL

THE MINIMUM QUALIFICATIONS SHALL BE SUBMITTED ON THIS FORM. IN ORDER TO BE CONSIDERED A QUALIFIED BIDDER BY JEA YOU MUST MEET THE MINIMUM QUALIFICATIONS LISTED BELOW, AND BE ABLE TO PROVIDE ALL THE SERVICES LISTED IN THIS SOLICITATION.

THE BIDDER MUST COMPLETE THE BIDDER INFORMATION SECTION BELOW AND PROVIDE ANY OTHER INFORMATION OR REFERENCE REQUESTED. THE BIDDER MUST ALSO PROVIDE ANY ATTACHMENTS REQUESTED WITH THIS MINIMUM QUALIFICATIONS FORM.

PLEASE SUBMIT THE ORIGINAL AND THREE COPIES OF THIS FORM AND ANY REQUESTED ADDITIONAL DOCUMENTATION WITH THE BID SUBMISSION.

BIDDER INFORMATION

COMPANY NAME: _____

BUSINESS ADDRESS: _____

CITY, STATE, ZIP CODE: _____

TELEPHONE: _____

FAX: _____

E-MAIL: _____

PRINT NAME OF AUTHORIZED REPRESENTATIVE: _____

SIGNATURE OF AUTHORIZED REPRESENTATIVE: _____

NAME AND TITLE OF AUTHORIZED REPRESENTATIVE: _____

MINIMUM QUALIFICATIONS:

- The Respondent shall provide evidence of successful completion of one (1) similar Capital Asset Management System (CAMS) contract within three (3) years of the Response Due Date. The Respondent shall be either the software provider or implementer or both. The contract shall be either self-performed by the Respondent or may be a contract of the subcontractor which the Respondent shall use for this engagement with JEA. A similar contract is defined as:
 - The contract shall be of similar complexity as specified in Appendix A – Technical Specifications for an electric and/or water utility with no less than 150 end users in an IT environment including Oracle EBS R12.2x or greater.

Appendix B - Minimum Qualification Form
#068-19 CAPITAL ASSET MANAGEMENT SOLUTION (CAMS)

Similar Capital Asset Management System (CAMS) CONTRACT 1

Company Name _____

Reference (Contact) Name _____

Reference (Contact) Phone Number _____

Reference (Contact) E-Mail Address _____

Contract Year/Amount _____

Project Title _____

Is this Contract for an Electric and/or Water Utility? ☐ Yes ☐ No

Is the Implementation Portion of this Contract Self-Performed or Subcontracted?

☐ Self-Performed ☐ Subcontracted

Is this Contract for a Population of no less than 150 end users? ☐ Yes ☐ No

Was this Contract implemented in an IT environment containing Oracle EBS R12.2x or greater?

☐ Yes ☐ No

Address of Work _____

Description of Project _____

APPENDIX B - RESPONSE FORM
#068-19 CAPITAL ASSET MANAGEMENT SOLUTION (CAMS)

The Respondent shall submit one (1) original Proposal, five (5) duplicates (hardcopies), and one (1) CD. If there is a discrepancy between the electronic copy and hard copy, the hard copy will prevail. JEA will not accept Proposals transmitted via email.

RESPONDENT INFORMATION:

RESPONDENT'S COMPANY NAME: _____

BUSINESS ADDRESS: _____

CITY, STATE, ZIP CODE: _____

TELEPHONE: _____

FAX: _____

EMAIL OF CONTACT: _____

WEBSITE: _____

1.4.2 QUOTATION OF RATES

Maximum points for this criterion: 35 points

Respondent shall provide a firm-fixed price quote for all Work in this ITN by completing the enclosed Appendix B Response Form and Response Workbook. The prices shall include all profit, taxes, benefits, travel, and all other overhead items.

Please note, the prices quoted by Respondent on the Response Form must be firm-fixed prices, not estimates.

This Amount Should Be Transferred From Appendix B – Response Workbook

Item No.	Description	Capital Asset Management System (CAMS)
3	TOTAL BID PRICE	<Insert “TOTAL BID PRICE” from “Appendix B – Response Workbook” here>

☐ **I have read and understood the Sunshine Law/Public Records clauses contained within this solicitation. I understand that in the absence of a redacted copy my proposal will be disclosed to the public “as-is”.**

Respondent's Certification

By submitting this Response, the Respondent certifies (1) that it has read and reviewed all of the documents pertaining to this ITN and agrees to abide by the terms and conditions set forth therein, (2) that the person signing below is an authorized representative of the Respondent, and (3) that the Respondent is legally authorized to do business and maintains an active status in the State of Florida. The Respondent certifies that its recent, current, and projected workload will not interfere with the Respondent's ability to work in a professional, diligent and timely manner.

The Respondent certifies, under penalty of perjury, that it holds all licenses, permits, certifications, insurances, bonds, and other credentials required by law, contract or practice to perform the Work. The Respondent also certifies that, upon the prospect of any change in the status of applicable licenses,

permits, certifications, insurances, bonds or other credentials, the Respondent shall immediately notify JEA of status change.

We have received addenda _____through_____

Signature of Authorize Officer of Respondent or Agent

Date

Printed Name & Title

Phone Number

The Grid

FINANCE

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Woyak, Nathan J. - Procurement Category ...

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Contracts



VENDOR PERFORMANCE SCORECARD

The purpose of the JEA Vendor Performance Program is to ensure JEA vendors are successful in the completion of JEA work, and also ensure that JEA receives quality work. A vendor that scores a 1 on any evaluation criteria, or scores an average of less than 2.8 on all evaluation criteria, is considered by JEA to be a deficient performer and may be in default of its contract.

Once a vendor is determined to be a deficient performer, JEA Procurement will schedule a meeting with the corporate officer from the vendor's company, and will review the deficient scorecard with the vendor. During the meeting a performance plan will be agreed upon, and JEA will then re-evaluate the vendor's performance in a certain number of days.

If the vendor's performance does not improve in the agreed upon number of days, the vendor may be provided with a notice that they are in default of the contract, and they risk having their contract terminated for default. A vendor's contract that is terminated for default by JEA, will not be allowed to bid on a JEA project for two (2) years from the date of the termination of default.

JEA Project Manager:

Today's Date:

Project Description*:

Contract Number:

Vendor*:

Solicitation Number:

JEA Procurement Category Manager*:

IT Software

IT SOFTWARE

Cost

Performance Criteria	Rating	Scale				
		1	2	3	4	5
<u>PRICE COMPETITIVENESS</u> Degree to which vendor provides competitive pricing and cost structure relative to other vendors	<input type="text" value="Choose..."/>	Least competitive	Below average competitiveness	Average competitiveness	Above average competitiveness	Most competitive
<u>COST MANAGEMENT</u>	<input type="text" value="Choose..."/>	Far below expectations (less				

Degree to which projects and services are delivered within budget estimates		than 90% of the time)	Below expectations (90% to 94% of the time)	Meets expectations (95% to 97% of the time)	Exceeds expectations (98% to 99% of the time)	Far exceeds expectations (100% of the time)
<u>COST TRANSPARENCY</u>	Choose... ▼					
Degree to which vendor shares cost breakdowns and explains variations on products/services provided		Never shares cost information requested	Occasionally shares cost information requested	Regularly shares cost information requested	Always shares cost information requested	Proactive, Leading edge open book approach to sharing information
<u>IDENTIFICATION OF SAVINGS OPPORTUNITIES</u>	Choose... ▼					
Degree to which vendor adds value by proactively identifying savings opportunities and other lower-cost service alternatives		0 viable opportunities in evaluation period	1 viable opportunity in evaluation period	2 viable opportunities in evaluation period	3 viable opportunities in evaluation period	>3 viable opportunities in evaluation period
<u>SOFT-DOLLAR BENEFITS</u>	Choose... ▼					
Degree to which vendor is willing to provide extra features/services at no additional charge		Never	Sometimes	Usually	Almost always	Every time
COST SCORE: <input type="text"/>	INSERT COMMENT:					

Delivery and Support

Performance Criteria	Rating	Scale				
		1	2	3	4	5
<u>RESPONSIVENESS</u>	Choose... ▼					
Degree to which vendor responds to our requests in a timely fashion		Far below expectations (less than 75% of the time)	Below expectations (75% to 89% of the time)	Meets expectations (90% to 95% of the time)	Exceeds expectations (96% to 99% of the time)	Far exceeds expectations (100% of the time)
<u>PROBLEM RESOLUTION OWNERSHIP</u>	Choose... ▼					
Degree to which vendor is willing to take ownership of day-to-day issues and problems		Never takes ownership of problem resolution	Sometimes takes ownership of problem resolution	Regularly takes ownership of problem resolution and suggests solutions	Always takes ownership of problem resolution and practices problem avoidance	Always takes ownership; assists in resolving other contractors' problems
<u>APPLICATION SUPPORT</u>	Choose... ▼					
Degree to which vendor resources including helpdesk and/or supporting documentation successfully troubleshoots software issues		Far below expectations (less than 75% of the time)	Below expectations (75% to 89% of the time)	Meets expectations (90% to 95% of the time)	Exceeds expectations (96% to 99% of the time)	Far exceeds expectations (100% of the time)
<u>TIMELY COMMUNICATION</u>	Choose... ▼					
Degree to which vendor provides timely notification of software releases, upgrades, and patches		Far below expectations	Below expectations	Meets expectations	Exceeds expectations	Far exceeds expectations
DELIVERY AND SUPPORT SCORE: <input type="text"/>	INSERT COMMENT:					

Flexibility and Ease of Doing Business

Performance Criteria	Rating	Scale				
		1	2	3	4	5
<u>ACCOUNT MANAGEMENT</u>	Choose... ▼					
Degree to which vendor's account team has established a productive and healthy working relationship		Far below expectations	Below expectations	Meets expectations	Exceeds expectations	Far exceeds expectations
<u>INVOICE TIMELINESS</u>	Choose... ▼					
Degree to which vendor provides invoices in a timely manner		Far below expectations (less than 90% of the time)	Below expectations (90% to 94% of the time)	Meets expectations (95% to 97% of the time)	Exceeds expectations (98% to 99% of the time)	Far exceeds expectations (100% of the time)

USEFULNESS OF REPORTING Degree to which reports provided by the vendor contain clear, concise, and actionable information	Choose... Far below expectations (less than 75% of the time)	Below expectations (75% to 89% of the time)	Meets expectations (90% to 95% of the time)	Exceeds expectations (96% to 99% of the time)	Far exceeds expectations (100% of the time)
RESPONSIVENESS TO CHANGE AND/OR ENHANCEMENT REQUESTS Degree to which vendor is able to accommodate software change and/or enhancement requests in a timely manner	Choose... Far below expectations	Below expectations	Meets expectations	Exceeds expectations	Far exceeds expectations
FLEXIBILITY AND EASE SCORE: <input type="text"/>	INSERT COMMENT: <input type="text"/>				

Partnership and Innovation

Performance Criteria	Rating	1	2	3	4	5
PROVISION OF INNOVATIVE SOLUTIONS Degree to which vendor proactively provides valuable, innovative, and on-target solutions	Choose... Far below expectations	Below expectations	Meets expectations	Exceeds expectations	Far exceeds expectations	
CONTINUOUS IMPROVEMENT FOCUS vendor's level of commitment and follow-through of vendor relationship management program (e.g. commitment to vendor review meeting, strategy development, and continuous improvement planning)	Choose... Far below expectations	Below expectations	Meets expectations	Exceeds expectations	Far exceeds expectations	
BEST PRACTICE TRANSFER Degree to which vendor shares industry best practices and proactively transfers knowledge to our staff	Choose... Far below expectations	Below expectations	Meets expectations	Exceeds expectations	Far exceeds expectations	
UNDERSTANDING OF THE BUSINESS Degree to which vendor understands and accurately communicates the nature of our industry and business, leading to relevant business enhancements	Choose... Far below expectations	Below expectations	Meets expectations	Exceeds expectations	Far exceeds expectations	
PARTNERSHIP AND INNOVATION SCORE: <input type="text"/>	INSERT COMMENT: <input type="text"/>					

Quality

Performance Criteria	Rating	1	2	3	4	5
INSTALLATION ACCURACY Degree to which vendor installs software releases, upgrades, and patches in an error-free fashion	Choose... Far below expectations (less than 75% of the time)	Below expectations (75% to 89% of the time)	Meets expectations (90% to 95% of the time)	Exceeds expectations (96% to 99% of the time)	Far exceeds expectations (100% of the time)	
APPLICATION DEFECTS Degree to which incidents/defects/bugs in production environment negatively impact workflow	Choose... Very high (more than 2 critical incidents or more than 10 non-critical incidents) in evaluation period	High (1 critical or 5-10 non-critical incidents) in evaluation period	Medium (zero critical and less than 5 non-critical incidents) in evaluation period	Low (zero critical and less than 3 non-critical incidents) in evaluation period	Very Low in evaluation period	
USER SATISFACTION	Choose... Below expectations	Meets expectations				

Degree to which end users are satisfied with service performance		Far below expectations			Exceeds expectations	Far exceeds expectations
<u>INTEGRATION</u>	Choose... ▼					
Degree to which vendor effectively integrates software with existing platforms, when necessary		Far below expectations	Below expectations	Meets expectations	Exceeds expectations	Far exceeds expectations
<u>TECHNICAL EXPERTISE</u>	Choose... ▼					
Degree to which vendor displays leading-edge technical expertise and robust understanding of its own solution offerings		Far below expectations	Below expectations	Meets expectations	Exceeds expectations	Far exceeds expectations
QUALITY SCORE: <input type="text"/>	INSERT COMMENT:					

Risk and Contract Compliance

Performance Criteria	Rating	Scale				
		1	2	3	4	5
<u>CORPORATE INFORMATION SECURITY AND PRIVACY STANDARDS</u>	Choose... ▼					
Degree to which vendor personnel are aware of and comply with corporate information security and privacy standards		Never complies	Sometimes complies	Regularly complies	Always complies	Always complies and acts as advocate
<u>vendor FINANCIAL VIABILITY</u>	Choose... ▼					
Degree to which vendor is financially viable		Significant Risk	High Risk	Medium Risk	Low Risk	No Risk- Stable
RISK AND COMPLIANCE SCORE: <input type="text"/>	INSERT COMMENT:					

Environmental Stewardship

Performance Criteria	Rating	Scale				
		1	2	3	4	5
<u>COMPLIANCE WITH ENVIRONMENTAL REGULATIONS AND PERMIT REQUIREMENTS</u>	Choose... ▼					
Measure of how contractor complies with environmental issues related to the job sites with regards, to wetlands, stormwater compliance, dewatering, etc.		Never complies	Sometimes complies	Regularly complies	Always complies	Always complies and acts as advocate
ENVIRONMENTAL SCORE: <input type="text"/>	INSERT COMMENT:					

JSEB Compliance

Performance Criteria	Rating	Scale				
		1	2	3	4	5
<u>JSEB COMPLIANCE</u>	Choose... ▼					
		Far Below Expectations - Less	Below Expectations -70% - 99%	Meets Expectations -	Exceeds Expectations -	Far Exceeds Expectations -

Measure of vendor's compliance with JSEB program commitment, its intent and achievement goals	than 70% compliance with established JSEB goal and minimal to no JSEB spend reports were submitted to JEA's JSEB Manager	compliance with established JSEB goal, with some JSEB spend reports submitted to JEA's JSEB Manager	100% of JSEB goal met, with supporting JSEB spend reports submitted to JEA's JSEB Manager	Greater than 100% of JSEB goal met, with supporting JSEB spend reports submitted to JEA's JSEB Manager	Greater than 100% of JSEB goal met and JSEB spend reports were submitted timely to JEA's JSEB Manager
JSEB COMPLIANCE SCORE: <input type="text"/>		INSERT COMMENT:			
<div></div>					

Safety

Performance Criteria	Rating	Scale				
		1	2	3	4	5
<u>TIMELINESS</u> Measure of how well the vendor adheres to schedule and meets due dates	Choose... <input type="button" value="v"/>	Rarely on Schedule Few or no due dates met; little or no sense of urgency; little or no use of a scheduling process; more than 20% behind schedule and delay is attributable to vendor performance	Inconsistently on Schedule 10% to 20% behind schedule and delay is attributed to vendor performance; some sense of urgency, but little effective action; some use of a scheduling process	Usually on Schedule Demonstrated sense of urgency and commitment to a schedule; less than 10% over/under schedule, adjusting for change orders; no portion of delay is attributed to vendor performance; regularly utilized a schedule system and communicates progress	Consistently on Schedule Proactive in identifying schedule-related issues; scheduling/planning processes formalized; where being ahead of schedule is beneficial to JEA, work was more than 10% but less than 20% ahead of schedule, adjusting for change orders	Always on Schedule Met all due dates, including interim steps; proactive in identifying and resolving schedule-related issues; scheduling/planning processes formalized and integrated into aspects of the work; where being ahead of schedule is beneficial to JEA, work was more than 20% ahead of schedule, adjusting for change orders
<u>RESPONSIVENESS</u> Measure of how well the vendor responds to on-call requests as specified in the contract	Choose... <input type="button" value="v"/>	Poor Responsiveness Did not respond according to specifications; little or no use of a call-tracking system; no sense of urgency	Fair Responsiveness Only sometimes responded according to specifications; some semblance of a call-tracking system with some follow-up; some sense of urgency, but little effective action	Good Responsiveness Demonstrated sense of urgency and commitment to providing good service; regularly utilizes call-tracking system to monitor service; usually responded according to specifications	Very Good Responsiveness Consistently responded according to specifications; proactively identified response-related issues	Excellent Responsiveness Always responded according to specifications; call-tracking and work-management processes documented and used to manage all portions of work; proactively identified and resolved response-related issues
<u>CUSTOMER SERVICE</u> Measure of customer service orientation of vendor to JEA and other agencies involved in the work as demonstrated through courtesy and cooperation, credibility and adequacy of communications, reliability of stated actions and flexibility	Choose... <input type="button" value="v"/>	Poor Customer Service Demonstrated little or no courtesy or cooperation with others; inflexible to changing conditions; little or no regard for serving JEA; little or no useful communication; unreliable in meeting commitments	Customer Service Needs Improvement Some effective communication, but could be improved; some issues relating to cooperation with others; some issues that could have been more easily resolved had vendor been more flexible; sometimes did not follow through to ensure commitments made were met	Good Customer Service Cooperative and courteous; demonstrated intent to be flexible to JEA needs; met commitments made; timely and useful communication	Very Good Customer Service Consistently cooperative and courteous; met all commitments made to JEA and other agencies; very flexible in handling day-to-day issues; very good communication and coordination	Exceptional Customer Service Always a can-do approach to business and extremely flexible to JEA needs; always courteous and cooperative; formal processes for providing updates and other useful communication; excellent verbal/written communications; proactively seeks ways to better serve JEA
INSERT COMMENT:						

SAFETY SCORE:

PLEASE INCLUDE SUPPORTING DOCUMENTATION (IF AVAILABLE):

[Click here to attach a file](#)

EMAIL ADDRESS OF VENDOR RECIPIENT TO RECEIVE COPY:

MINIMUM SCORE:

AVERAGE SCORE:

****NOTE: Will not submit unless all scores are filled out (or marked NA).**