



Building Community®

Purchasing, Bids and Awards  
225 North Pearl Street  
Jacksonville, Florida 32202

April 19, 2024

ADDENDUM NUMBER: Five (5)

TITLE: Business Excellence – 1411645246

RESPONSE DUE DATE: April 23, 2024

TIME OF RECEIPT: 12:00 PM EST

**THIS ADDENDUM IS FOR THE PURPOSE OF MAKING THE FOLLOWING CHANGES OR CLARIFICATIONS:**

1. **Clarification:** It should be noted that JEA intends to award both the initial evaluation prior to short-listing and the final evaluation by the JEA Board of Directors using the ranking process detailed in section 1.12 Basis of Award. The ranks from both rounds will be added together to compile a final total rank and determine the awarded Company.

2. **Question:** As directed in Section 1.36 of the Business Excellence Consulting Services ITN, the Company shall receive JEA's permission to use subcontractors for more than 50% of the Work. If the information is provided by email is that sufficient to process the request to JEA, or do you need the Subcontractors Form now?

**Answer:** JEA does not intend to allow subcontracting of over 50% for this contract. If you choose to still subcontract some of the work, please use the subcontracting form that is due at the time of Response submittal.

3. **Question:** We intend to utilize a number of experienced professionals on our team who would be working for our firm as 1099 contractors. Our firm would direct all their work, maintain quality control, and be responsible for providing the Work to JEA. Does such use of 1099 contractors constitute use of a "Subcontractor", in JEA's view?

**Answer:** Yes

4. **Question:** In section 1.18) "Design Approach and Workplan" it is specified that the maximum pages aloud are 20 pages. Is 20 pages for the entire response, or just for the requirements in section 1.18. Should consultant resumes (Team Lead + 4 consultant resume) go in this section as well, or can they be an attachment to the submission document.

**Answer:** The 20-page limit refers to the design approach section only.

5. **Question:** Do the resume's and quals count towards the design approach page limit?

**Answer:** No. Here is clarification regarding the selection criteria page limits. The 20-page limit is for the Design Approach section 1.18. Sections 1.16 and 1.17 have their own page limit requirements. In section 1.16 for Experience of Professional Personnel, each resume is limited to two pages. In section 1.17 for Past Performance/Company Experience, the three projects should be described in no more than 2 pages per consulting project reference.

6. **Question:** Should the cover letter be addressed to the Buyer?

**Answer:** If you intend to submit a cover letter it should be addressed to the JEA Evaluation Team.

7. **Question:** Is the proper address: Procurement Department Bid Section, 225 North Pearl Street, Jacksonville, Florida 32202?

**Answer:** Yes. That is the correct address to use on the cover page. Responses shall be electronically submitted through Zycus.

8. **Question:** Can you share any information on cost allocation methods?

**Answer:** The following documents have been attached to Addendum 5 to provide information regarding JEA's cost allocation methods: Calculation of Overhead Rates, Allocation of O and M Salaries and Expenses, Overhead Rates – FY24 and Allocation O and M Expenses.

9. **Question:** Can you provide any information on the scope and duties of the internal audit functions?

**Answer:** The Internal Audit (IA) mission is to provide risk-based independent and objective assurance, advice, and insight to enhance and protect JEA's organizational value. Internal Audit helps JEA to accomplish its objectives by bringing a systematic, disciplined approach to evaluate and improve the effectiveness of governance, risk management, and control processes.

IIA prepares an annual Audit Plan (Plan), which is submitted and approved by the Board in accordance with the Internal Audit Charter. The Plan classifies IA's activities into three primary activities: Assurance/Audit, Consulting/Support, and administrative activities. IA's scope includes:

- Staff support of the annual external audit.
- Staff support of The Energy Authority Member Review.
- Operational audits of JEA's Departments, including Electric, Water, Wastewater, Customer, Technology, Shared Services and Finance (not including any work already completed by external auditors).
- Employee hotline data review and analysis, including documenting any investigations in collaboration with Ethics and Labor Relations.
- Compliance with requests from City of Jacksonville or the Office of the Inspector General.
- Management Action Plan follow-up; and,
- Unplanned Board and Management requests.

10. **Question:** The RFP says, "The JEA organization structure, reporting relationships, and staffing levels shall be provided to the awarded Company." Notwithstanding, can you provide any information on the JEA operating model with-in each utility and across utilities? Can you provide some high-level information on the JEA organizational structure? For example, is there a central call center for customer support or does water operate a separate call center from electric? Are HR and accounting functions centralized or dispersed within the various business units? How are the various divisions or operating units organized within the utility without getting down to an org-chart level of detail.

**Answer:** JEA's organization structure has 6 major functional areas: operations, customer experience, external affairs, human resources, finance, and strategy. The first five areas each have their own chief, while strategy currently reports directly to the CEO. The Chief Operating Officer is responsible for the electric operations; water/wastewater operations; planning, construction and engineering; and supporting operational services (meters, asset management, preventative maintenance, laboratory services, and real estate). Electric and Water/Wastewater are structured as separate business segments. The Chief Customer Officer is responsible for the residential call center and residential billing services that respond to customers regarding both electric and water/wastewater services and for the business client accounts. The Chief External Affairs Officer is responsible for government and community relations; regulatory, electric, and CIP compliance; internal audit;

corporate communications; legal; ethics; and public records. The human resources function is centralized under the Chief Human Resources Officer including the following functional areas: people & culture (talent acquisition, learning & development, organizational effectiveness), human resources business partners, human resources operations (HRIS and payroll), employee services (labor relations, compensation and benefits), DE&I, safety & health services, security, and emergency preparedness. The finance function is centralized under the Chief Financial Officer including the following areas: facilities and fleet, procurement, finance and treasury services, and technology services. The strategy function reports to the CEO; it includes long-range enterprise strategy & planning and grid modernization & business development.

**11. Question:** Are three projects required for the Past Performance/Company Experience section?

**Answer:** The Company shall submit three similar consulting projects for the Past Performance/Company Experience section. These can be in addition to or include the same as the references provided in the minimum qualifications. The evaluation team will score the three references provided for this section, with each reference receiving up to ten (10) points for each project.

**ACKNOWLEDGE RECEIPT OF THIS ADDENDUM ON THE RESPONSE FORM**