

APPENDIX A – TECHNICAL SPECIFICATIONS ITN 95767 SAFETY LEADERSHIP TRAINING

Scope of Work (ITN)

JEA is seeking proposals from qualified firms to provide and develop a classroom style safety leadership training course. The goal of the course is to provide the student a foundation and skill set to be able to successfully lead for safety. The course should focus on soft skills for safety leadership. We are not seeking a course that provides insight into root cause(s) analysis, training methodologies, or a regulatory review. At the conclusion of the course, the student should be able to identify how leadership styles, personalities, effective communication, relationships, coaching and feedback all play a role in making a frontline supervisor a more effective leader for safety. JEA is seeking a one (1) day, eight (8) hour course. The recommended course content is provided in the Technical Requirements below.

Background

JEA owns, operates and manages the electric system established by the City of Jacksonville, Florida in 1895. In June 1997, JEA assumed operation of the water and sewer system previously managed by the City. JEA is Florida's largest municipally owned utility and the seventh largest municipal in the United States.

Technical Requirements

The Proposer's response should include a copy of the course you propose to deliver. The materials should include:

- A brief course description.
- Specific course objectives.
- What it takes from the student now and in the future to be a successful safety leader using this course material.
- A copy of the student workbook, videos, and handout materials you propose to deliver. You may mark them not for reproduction if you have any concerns about the use of the materials. If the proposer does not have this exact course, the proposer may submit a similar course. JEA's desire is to have a course that mirrors the curriculum in this proposal. The following topics are the desired course content. Other design approaches and content may be acceptable but it must be demonstrated that they support the goal of the course as stated above.
 - Leadership
 - Introduction to Human Performance – definitions, goals of HP and the 5 basic principles
 - Personalities and Leadership Styles
 - Communication
 - Developing Relationships
 - Coaching and Feedback
 - How to Successfully Lead Change

It is important that you specify in your proposal how these topics will be delivered and linked to safety throughout the course. For example, define leadership styles and under which scenarios certain leadership styles would be more or less appropriate; under communication, define what it is and what are some possible obstacles to it, and provide examples of effective and ineffective communication for safety tasks.

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- Target audience for this class are those employees leading teams in the field, commonly referred to as frontline supervision (approximately 180-200 people initially)
- After the initial training, the course may become required training for all leaders and management personnel (approximately an additional 500 people)
- An NDA (non-disclosure agreement) can be requested of JEA

The total price on the Appendix B – Proposal Form should include:

- Delivery of up to thirty (30) courses over a three (3) year period. The number of courses is estimated based on class size and number of employees. The actual number of classes may vary slightly.
- Course development (for bidding purpose, include 10 hours of client required changes on top of your time for course development). Include:
 - Time for development
 - Cost of producing the student workbook in a spiral or similar bound book. A print out of the instructor slides is not acceptable.
 - A copy of the instructor material/slides and any other handouts/videos
- Travel costs for five (5) trips – each trip you will deliver the eight (8) hour course, two (2) sessions. This would be the initial wave of courses and is for bidding purposes only.
 - Note: There is no need to rent conference room space or audio visual equipment. JEA has on-site facilities for the instructor throughout our service territory. All sites are within a thirty (30) minute drive of the city center or within 40-45 minutes of the airport.
- A post course student feedback questionnaire will be provided by JEA but the Proposer will be required to distribute and collect the questionnaire. It shall be provided to the JEA contact at the conclusion of the course.

Once initial proposals are received and evaluated, the top two (2) firms may be required to participate in an in person demonstration. Your account manager and the course instructor shall be part of this meeting. The demonstration (a client panel evaluation) will have three (3) parts:

- Overview of the course, approximately 15 minutes
- Instructor delivery of an owner selected portion of the course, approximately 20-25 minutes
- The remaining time will be dedicated to any follow-up questions from the evaluation team.

APPENDIX B – MINIMUM QUALIFICATIONS FORM
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GENERAL

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

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

PLEASE SUBMIT THE ORIGINAL VIA EMAIL TO SHEREA HARPER AT HARPSB@JEA.COM AND ANY REQUESTED ADDITIONAL DOCUMENTATION WITH THE PROPOSAL SUBMISSION.

PROPOSER 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:

MINIMUM QUALIFICATIONS FOR SUBMISSION

Proposer shall have the following Minimum Qualifications to be considered eligible to submit a Proposal in response to this Solicitation.

It is the responsibility of the Proposer to ensure and certify that it meets the Minimum Qualifications stated below. A Company not meeting all of the following criteria shall not have their Proposals considered for Award:

- The Proposer shall provide two (2) account references for similar work as referenced in Appendix A – Technical Specifications. References should cover work within the last three (3) years ending October 30, 2018.
- Similar work is defined as Safety Leadership Training experience as described in Appendix A - Technical Specifications.

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- The account references must include the reference company name, contact person, phone number, email address and a summary of the scope of work provided. JEA will contact and verify the account references.

REFERENCE 1

Reference Company Name _____

Reference Contact Name _____

Reference Phone Number _____

Reference E-Mail Address _____

Address of Work _____

Description of Customer Relationship _____

REFERENCE 2

Reference Company Name _____

Reference Contact Name _____

Reference Phone Number _____

Reference E-Mail Address _____

Address of Work _____

Description of Customer Relationship _____

APPENDIX B - RESPONSE FORM
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RESPONDENT INFORMATION:

COMPANY NAME: _____

BUSINESS ADDRESS: _____

CITY, STATE, ZIP CODE: _____

TELEPHONE: _____

FAX: _____

NAME & EMAIL OF CONTACT: _____

WEBSITE: _____

RESPONDENT MUST COMPLETE THE FOLLOWING INFORMATION AND RETURN THIS FORM VIA EMAIL TO SHEREA HARPER AT HARPSB@JEA.COM.

QUOTATION OF RATES (35 Points)

Respondent shall provide a firm-fixed lump sum price term of the project as specified in the Technical Specifications by completing the information on the Response Form located in Appendix B of this ITN. The lump sum price submitted by the Respondent shall be all inclusive and shall include course development and refinements to the curriculum (for bidding purpose, include 10 hours for refinement), delivery of up to thirty (30) courses over a three (3) year period, instructor time, cost of producing the student workbook in spiral or similar bound book, a copy of the instructor material/slides and any other handouts, travel costs for 5 trips – each trip you will deliver the eight (8) hour course, two (2) sessions.

Please note, the rate quoted by the Respondent must be firm-fixed prices, and not an estimates. ANY MODIFICATIONS, EXCEPTIONS, OR OBJECTIONS CONTAINED WITHIN THE RESPONSE FORM SHALL SUBJECT THE RESPONSE TO DISQUALIFICATION.

Annual Cost for training course \$ _____ X three (3) years \$ _____

Annual Lump Sum Price

Total for Contract Term

PROFESSIONAL EXPERIENCE (15 Points)

The Respondent shall provide the resume of the instructor available to work on the JEA engagement. **The points for this section will be awarded as follows: Five (5) Points for years of relevant training experience and ten (10) Points for depth of relevant industry experience.**

At minimum, the resumes shall present the employee's name, title, work location, availability, years of service with the company, applicable professional registrations, education, and work experience. The resumes shall be no more than two (2) pages in length, single sided, and on 8.5" by 11" sized paper. If the resumes contain more than two (2) pages, only the information contained on the first two (2) pages will be evaluated by JEA.

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PAST PERFORMANCE/COMPANY EXPERIENCE (15 Points)

The two (2) customer references provided in the Minimum Qualifications section of this ITN will be scored for points in this section.

At Minimum include the following information:

- Reference Company Name
- Reference Contact Person Name
- Reference Contact Person Name Phone and Email Address
- Describe how the project/contract is similar to JEA's Technical Specifications
- Number of employees included in the contract
- Annual value of the Contract
- Brief description of the scope and services included in the contract (not to exceed ten (10) lines)
- Client business sector, e.g. public, private, transportation, utility, financial services, etc.

ABILITY TO DESIGN AN APPROACH TO MEET THE TRAINING REQUIREMENTS (30 Points)

Describe in your own format the Respondent's approach to provide the services and manage the engagement described in the Technical Specifications located in Appendix A of this ITN.

The work plan should include:

- For the two (2) referenced accounts listed in the section above, Respondent shall explain how the Respondent managed the engagement.
- Describe in your own format your Company's approach to provide the services described in the Technical Specifications. The description shall provide a comprehensive design approach and explain how the Respondent intends to manage the engagement.
- Provide details of the provided course content.

The response for this section is limited to a maximum of five (5) pages.

____ 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.

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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 Authorized Officer of Respondent or Agent

Date

Printed Name & Title

Phone Number