

Welcome to the

Awards Meeting

April 20, 2023, 10:00 AM EST

You have been joined to the meeting with your **audio muted** by default.

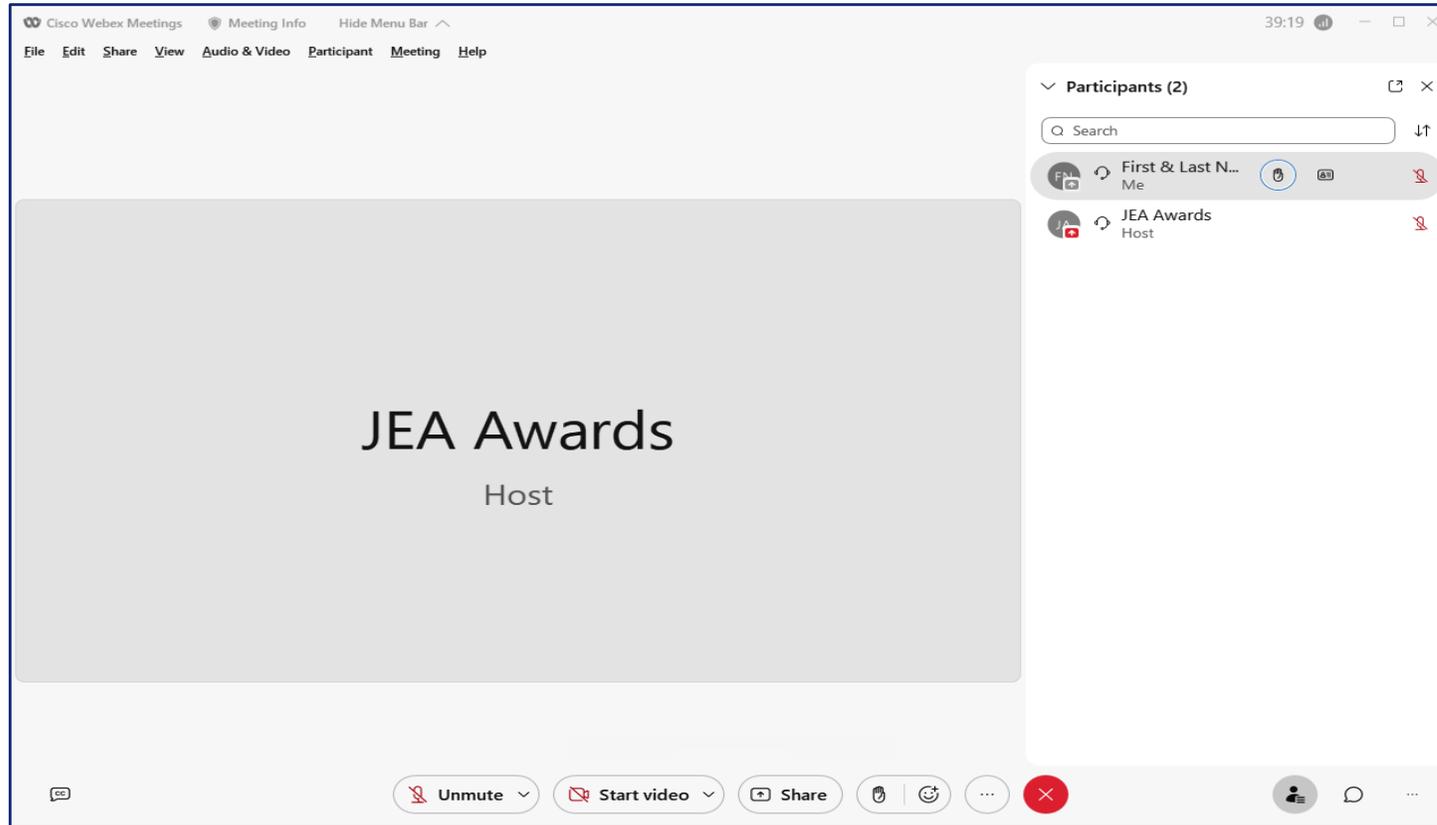
At the designated public comment time we will provide opportunity for you to unmute to speak.

During the meeting, public comments received via e-mail regarding any matter on the agenda for consideration will be read out. Per the Public Notice Agenda posted on JEA.com, public comments by e-mail must be received no later than 9:00 a.m. on the day of the meeting to be read during the public comment portion of the meeting.

Please contact **Victoria Holloway** by telephone at **(904) 651-7171** or by email at hollvl@jea.com if you experience any technical difficulties during the meeting.



Awards Meeting – Public Comments



Controls for Public Comments

Located on the bottom-right side of your screen you will find an icon that looks like a person  labeled Participants. This option will allow you to see a long list of individuals who have joined today's meeting.

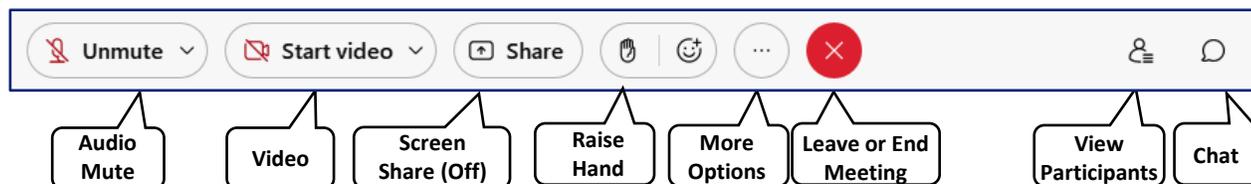
At the top of this list, your name will be visible and to the right you will notice a gray icon that looks like a hand .

If you click it, it will show a slash through the hand  letting us know that you would like to be recognized for comment, additionally you may click it again to lower your hand.

For those that may have called in directly, there are 2 additional ways that you can notify us that you would like to provide comment. The first is by **pressing *3** on your phone, which will raise your hand. The second way you may notify us is to **press *6** to unmute your line.

If you unmute your line, please state your name so that everyone may hear who is speaking before providing your comment.

Below is a summary of the meeting controls you will see at the bottom of your screen.



AWARDS COMMITTEE AGENDA

DATE: Thursday, April 20, 2023

TIME: 10:00 A.M.

PLACE: JEA, Customer Center, Hydrangea Room, 1st Floor, 225 N Pearl St Street,
Jacksonville, FL 32202 OR
WebEx/Teleconference
WebEx Meeting Number (access code): 2309 526 2709
WebEx Password: cQMmJPHA823

Public Comments:

Awards:

1. Approval of the minutes from the last meeting(04/13/2023)
2. Request approval to award a seven (7) month single source award to Oracle America Inc. for License and support services for Oracle Customer Care and Billing (CC&C) in the amount of \$491,663.07, subject to the availability of lawfully appropriated funds.
3. Request approval to award a one (1) year contract extension to Utility Consumer Analytics, Inc. for Utility Tracker Portal Tool in the amount of \$295,956.24, for a new not-to-exceed amount of \$556,940.58, subject to the availability of lawfully appropriated funds.
4. **DEFERRED** - Request approval to award a contract to Microsoft Enterprise Services for Workplace Modernization Consulting Services in the amount of \$2,332,015.00, subject to the availability of lawfully appropriated funds.
5. Request approval to award a contract increase to Concrete Advantage for concrete restoration services in the amount of \$777,157.53, for a new not-to-exceed amount of \$4,360,945.42, subject to the availability of lawfully appropriated funds.
6. Request approval to award a contract amendment for landscape maintenance and chemical spraying to Freedom Landscape and Lawn Maintenance Inc. in the amount of \$180,262.50 for a not-to-exceed amount of \$463,808.70, and Eagle Lawn Care of N.E. Florida in the amount of (\$169,350.00) for a not-to-exceed amount of \$133,572.00, for a new not-to-exceed amount of \$597,380.00, subject to the availability of lawfully appropriated funds.
7. Request approval to award a piggyback contract to Gary Yeomans Ford Company for JEA Fleet Services Light Duty Vehicle Maintenance and Repair Services in the amount of \$1,296,051.75, subject to the availability of lawfully appropriated funds.
8. Request approval to award a contract increase to Garney Companies, Inc. for the purchase of materials for the Greenland SIPS projects in the amount of \$8,142,183.93, for a new not-to-exceed amount of \$8,767,240.93, subject to the availability of lawfully appropriated funds.
9. **DEFERRED** - Request approval to award payment to Florida Department of Transportation for the FDOT I-95 and MLK Interchange project in the amount of \$3,604,636.55, as per attached FDOT FPID 433899-2 Work

Order Number 6, subject to the availability of lawfully appropriated funds.

Informational Items: N/A

Open Discussion: N/A

Public Notice: N/A

General Business: N/A

SPECIAL NOTES: Copies of the above items are available in JEA Procurement, if needed for review. If a person decides to appeal any decision made by the Awards Committee, with respect to any matter considered at this meeting, that person will need a record of the proceedings, and, for such purpose, needs to ensure that a verbatim record of the proceedings is made, which record includes the evidence and testimony upon which the appeal is to be based. If you have a disability that requires reasonable accommodations to participate in the above meeting, please call 665-8625 by 8:30 a.m. the day before the meeting and we will provide reasonable assistance for you.

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<u>Award#</u>	<u>Type of Award</u>	<u>Business Unit</u>	<u>Estimated/ Budgeted Amount</u>	<u>Amount</u>	<u>Awardee</u>	<u>Term</u>	<u>Summary</u>
1	Minutes	N/A	N/A	N/A	N/A	N/A	Approval of minutes from the 04/13/2023 meeting.
2	SINGLE SOURCE/ RATIFICATION	Selders	\$876,565.00	\$491,663.07	ORACLE AMERICA INC.	Seven (7) Months	<p><u>Oracle Customer Care and Billing (CC&B) Software License & Support</u></p> <p>This request is for a seven (7) month single source award for Oracle Customer Care and Billing (CC&B) Software License and Support. Oracle support is critical for software applications and Oracle engineered hardware system updates, troubleshooting, patches, as well as compliance and regulatory updates. A few of the specific ways JEA utilizes Oracle support include incident restorations, searching for solutions, downloading patches and updates, accessing proactive support tools, and creating service requests.</p> <p>This request is for seven (7) months of additional Oracle support from 03/01/2022 to 09/30/2023. JEA was able to negotiate 0% increase on this support and is only awarding for seven (7) months through the end of FY23 in an effort to co-term this contract to match the end of JEA's fiscal year. This will allow JEA more time to negotiate a better long term multi-year support agreement with Oracle beginning in FY24. Also due to the issues and cancelation of the Oracle C2M project and support, negotiation of Oracle CC&B was delayed. The table below is a summary charges for FY23.</p> <p>Request approval to award a seven (7) month single source award to Oracle America Inc. for License and support services for Oracle Customer Care and Billing (CC&C) in the amount of \$491,663.07, subject to the availability of lawfully appropriated funds.</p>
3	CONTRACT EXTENSION	Hunt	\$295,956.24	\$295,956.24	UTILITY CONSUMER ANALYTICS, INC.	One (1) Year w/Two (2) – One (1) Yr. Renewals	<p><u>Utility Tracker Portal Tool</u></p> <p>The goal of the JEA Customer Energy and Water Management Portal project centers around providing JEA customers the ability to better manage their energy and water costs by utilizing an on-line portal (My Utility Tracker) that will assist them in understanding their usage patterns and provide them information to improve the energy efficiency of their home or business. The project is part of the</p>

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							<p>JEA/Department of Energy (DOE) Smart Grid program and the tool and services are deliverables identified in the JEA/DOE Smart Grid Project Execution Plan (PEP).</p> <p>This request is for a one (1) year contract extension from 07/01/2023 to 06/30/2024, which includes \$295,956.24 in additional funds for Utility Consumer Analytics to continue its support and maintenance services on JEA's Utility Tracker Portal Tool. This extension is requested to enable JEA to focus on other strategic priorities. It should be noted that a replacement contract is already under evaluation as result of the procurement solicitation process. Due to the prioritization of Technology resources available for the implementation of a new contract, work on a new product is not estimated to begin until 01/01/2024 with an estimated six (6) month implementation and go live on 07/01/2024. When compared to the current pricing, the renewal rates are an eight (8%) percent increase.</p> <p>Request approval to award a one (1) year contract extension to Utility Consumer Analytics, Inc. for Utility Tracker Portal Tool in the amount of \$295,956.24, for a new not-to-exceed amount of \$556,940.58, subject to the availability of lawfully appropriated funds.</p>
4 - Defer	Defer	Defer	Defer	Defer	Defer	Defer	Defer
5	CONTRACT RENEWAL	Vu	\$761,575.74	\$777,157.53	CONCRETE ADVANTAGE	Three (3) Years w/Two (2) - 1 Yr. Renewals	<p><u>Concrete Restoration Services (South/East) - Open Market</u></p> <p>The purpose of this solicitation is to seek bids from qualified Contractors primarily for the restoration of cement concrete in City, County and FDOT roadways, rights of way and easements. The work will also include the replacement of curbs and gutters free of standing water, meter box, manhole and valve jacket adjustments and replacements. The work executed under this contract occurs after JEA construction or maintenance efforts are performed to ensure the safety of the community, while also ensuring customer satisfaction. All work orders performed under this contract are inspected prior to and after the restoration work is completed to ensure quality assurance and control.</p> <p>Concrete Advantage initially communicated an increase of 23% across all line items as their terms for renewal, citing several indexes in the construction industry, continued inflation, material supply shortages, increased labor wages,</p>

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						<p>and shortages of available labor to hire. For a pricing comparison, JEA reviewed the responses from the 2022 RFP for Disturbed Concrete in the North/West territory. Although the 2022 RFP was ultimately rescinded, JEA determined that the increase proposed by Concrete Advantage was favorable compared to pricing that would have resulted from a new solicitation for the South/East territory. JEA negotiated with Concrete Advantage to agree to a reduced increase of 20% across all line items.</p> <p>A new not-to-exceed amount of \$4,360,945.42.</p>
6	CONTRACT AMENDMENT	McElroy	N/A	<p>\$180,262.50 (\$169,350.00)</p>	<p>FREEDOM LANDSCAPE AND LAWN MAINTENANCE INC. EAGLE LAWN CARE OF N.E. FLORIDA, INC.</p>	<p>One (1) Year w/Two (2) – One (1) Yr. Renewals</p> <p><u>Facilities Landscaping Maintenance – Sheltered</u></p> <p>The purpose of this Request for Proposals (RFP) is to evaluate and select a vendor that can provide economical pricing for basic landscape maintenance and chemical spraying for the included JEA facilities. These services shall be performed in a safe manner, and the results must be aesthetically pleasing as these facilities represent JEA to our customers. The specifications require that the Company performs these maintenance activities with skilled personnel in a safe and professional manner adhering to all JEA, City, County and State regulations and requirements. Work will be performed at approximately 446 JEA facilities located in Duval and Nassau County, in Florida as listed in Appendix B - Proposal Workbook.</p> <p>The contract amendment in the amount of \$180,262.50 for District 5A is being awarded to Freedom Landscape and Lawn Maintenance Inc. Districts 5A and the 2N were originally awarded to Eagle Lawn Care of N.E. Florida, Inc.; however, they notified JEA that they would like to decline the award of District 5A for reasons related to logistics and workload. Freedom Landscape and Lawn Maintenance Inc. is the next highest ranked respondent and has agreed to accept the award for the additional services for District 5A. Freedom Landscape’s bid for District 2N was \$180,262.50 versus Eagle Lawn Care’s bid in the amount of \$169,350.00. This represents an increase of approximately six percent (6%). The original award amount for District 5A to Eagle Lawn Care of N.E. Florida, Inc. will be reduced in the amount of \$169,350.00, for a new not-to-exceed amount of \$133,572.00. The table below demonstrates the change in award amounts.</p>

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							A new not-to-exceed amount of \$597,380.70.
7	PIGGYBACK	McElroy	\$1,296,051.75	\$1,296,051.75	GARY YEOMANS FORD	Twenty-five (25) Months w/ Two (2) – 1 Yr. Renewals	<p><u>JEA Fleet Services Light Duty and Medium Duty Vehicle Maintenance and Repair Services</u></p> <p>The purpose of this award is to request approval to create a Piggyback contract to establish the vendor as the secondary/backup provider for Maintenance and Repair Services for JEA’s Light Duty and Medium Duty Fleet, as well as to ensure coverage during the storm season.</p> <p>JEA Fleet Services initially awarded an informal Emergency Purchase Order (PO) to Gary Yeomans Ford in March 2022 to provide Light Duty Vehicle Maintenance and Repair Service, as well as Yardwork coverage at Commonwealth and Westside Service Centers. The purpose of this emergency award was to provide coverage of services while onboarding a new vendor.</p> <p>During the original Medium and Light Duty Maintenance and Repair solicitations, JEA only received two (2) bids. Ford’s regional structure disqualified Yeomans from submitting bids for Medium and Light Duty solicitations. However, Ford’s parameters do allow JEA to direct award work when services are needed and the incumbent, Duval Ford, is unable to accommodate. A decision was made by JEA and strongly supported by the awardee, Duval Ford, to extend the term of the PO with Gary Yeomans Ford to provide services in support of JEA through November of 2022, allowing a smoother transition of services to the newly awarded vendor.</p> <p>As Duval Ford came on-line to provide 100% of the services of both Light and Medium Duty maintenance requirements, JEA saw an overall decrease in fleet uptime and a decrease for on-time preventative maintenance repairs. Similar to concepts utilized throughout JEA, in an effort to mitigate risk, JEA Fleet Services is moving to implement backup suppliers for the majority of maintenance and repair contracts. The request of this award is to continue the relationship established with Gary Yeomans previously in a more structured long term backup supplier role. This backup contract with JEA is purely to augment the existing source of supply with no guarantee of work and the term length is to mimic that of the Duval Ford agreement. Duval Ford’s term and Volusia County’s contract with</p>

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						<p>Yeomans Ford are both initial three (3) year term with the option for two (2) subsequent one (1) year renewals with Volusia County starting July 11, 2022 and Duval Ford starting June 1, 2022. While Gary Yeomans Ford's pricing is about 10% more for Medium Duty work and 20% more for Light Duty work when compared to Duval Ford, Gary Yeomans Ford is still 25% less expensive than pricing offered by the only other bidder of Light and Medium duty services (Coggin Ford), and Yeomans Ford is offering an additional discount to JEA of \$15/hr off the Volusia County hourly labor rate for work during normal business hours.</p> <p>The decision to source with Gary Yeomans Ford as secondary source of supply is rooted in Gary Yeomans Ford successfully providing coverage for Light Duty Maintenance for JEA in the past, their willingness to work with JEA in creating successful maintenance solutions, past proven performance, and competitive pricing. We believe Gary Yeomans Ford is the ideal candidate to become the secondary provider of Light and Medium Duty Maintenance and Repair and provide contingency services to support JEA Fleet Services.</p> <p>In reestablishing this relationship with Gary Yeomans Ford and honoring the existing contract with Duval Ford, JEA Fleet Services has implemented the following:</p> <ul style="list-style-type: none">• Internal process for determining appropriateness of work transfer from Duval Ford to Gary Yeomans Ford<ul style="list-style-type: none">○ Corrective and Preventative services that Duval Ford has indicated will take 72 hours or greater to initiate will be initiated through Gary Yeomans Ford.○ This process will enable Fleet Services to better measure and improve the scorecard process, that can drive educated conversations for both Duval and Yeomans, as well as support solid baselines that can be utilized to train coordinators on good management practices should JEA ever implement an insourcing work plan.
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						<p>JEA Fleet Services budget estimate is based on a 30% spend threshold, of the existing light and medium duty repair and services contract with Duval Ford.</p> <p>Request approval to award a piggyback contract to Gary Yeomans Ford Company for JEA Fleet Services Light Duty and Medium Duty Vehicle Maintenance and Repair Services in the amount of \$1,247,751.69, subject to the availability of lawfully appropriated funds.</p>
8	CONTRACT INCREASE	Melendez	\$8,200,000.00	\$8,142,183.93	GARNEY COMPANIES, INC.	<p><u>Construction Management-at-Risk (CMAR) Services for the SIPS – Greenland 30” WM, Davis 30” RWM & Burnt Mill 24” FM Projects</u></p> <p>The SIPS – Greenland – Southside Blvd – Deerwood 3 to Greenland WTP 30” Water Main scope of work is expected to generally include the following:</p> <ul style="list-style-type: none"> • Approximately 41,200 Linear Feet (LF) of 30-inch raw water transmission piping and fittings. • New 1.1 Mgal prestressed concrete storage tank and associated piping at the Greenland Water treatment plant. • Water Quality Monitoring Station • Greenland WTP SIPS Intertie Station • Supervisory Control and Data Acquisition (SCADA) System • Multiple trenchless crossings involving horizontal directional drill and/or auger jack and bore crossings of wetlands and major intersections. <p>The Davis - Gate Pkwy to RG Skinner – Reclaim Water Main (RWM) scope of work is expected to generally include the following:</p> <ul style="list-style-type: none"> • Approximately 16,300 LF of 30-inch reclaim water transmission piping and fittings. • Multiple trenchless crossings involving horizontal directional drill crossings of wetlands <p>The Burnt Mill 24” Force Main scope of work is expected to generally include the following:</p> <ul style="list-style-type: none"> • Approximately 1,150 LF of 24-inch PVC sewer force main transmission piping and fittings <p>This award request is for an initial purchase of materials for each pipeline segment. The purchase will include approximately 9,000 LF of 30" DIP CL150 pipe, 85 LF of 36" DIP CL 150 pipe, 11,000 LF of 36" HDPE DR11 pipe, 900 LF of 30" HDPE DR11 pipe, and various valves fittings</p>

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							and appurtenances for the projects. The quote is attached for reference. The quote was reviewed by JEA project staff and deemed reasonable compared to other projects. JEA will bring additional contract increases to the Awards Committee for approval as design progresses for additional material purchases and the final construction GMP. The current construction budget for these projects is \$66,443,964.00. A new not-to-exceed amount of \$8,767,240.93.
9 - Defer	Defer	Defer	Defer	Defer	Defer	Defer	Defer
Total Award				\$11,013,925.02			

JEA AWARDS COMMITTEE APRIL 13, 2023, MEETING MINUTES

The JEA procurement Awards Committee met on April 13, 2023, in person with a WebEx option.

WebEx Meeting Number (access code): 2309 526 2709

WebEx Password: cQMmJPHA823

Members in attendance were Jenny McCollum as Chief Procurement Officer, Stephen Datz as Chairperson (onsite), Stephanie Nealy as Budget Representative, Rebecca Lavie as Office of General Counsel Representative, Jackie Scheel for Hai Vu as Vice Chairperson, Laura Schepis (onsite), Ricky Erixton (onsite), and Joe Orfano (onsite). Unless otherwise indicated, all attendees were via WebEx.

Chair Datz called the meeting to order at 10:00 a.m., introduced the Awards Committee Members, and confirmed that there was an in-person quorum of the Committee membership present.

Public Comments:

Chair Datz recognized the public comment speaking period and opened the meeting floor to public comments. No public comments were provided by email, phone, or videoconference.

Awards:

1. Approval of the minutes from the last meeting (04/06/2023). Chair Datz verbally presented to the Committee Members the proposed April 06, 2023, minutes as presented.

MOTION: Joe Orfano made a motion to approve the April 06, 2023, minutes (Award Item 1) as presented in the committee packet. The motion was seconded by Ricky Erixton and approved unanimously by the Awards Committee (4-0).

The Committee Members reviewed and discussed the following Awards Items 2-5, 7-11.

2. Request approval to award a contract increase to Keville Enterprises Inc. for additional personnel for the Water/Wastewater Project Support Services contract in the amount of \$8,004,122.90, for a new not-to-exceed amount of \$26,783,428.90, subject to the availability of lawfully appropriated funds.

MOTION: Joe Orfano made a motion to approve Award Item 2 as presented in the committee packet. The motion was seconded by Jackie Scheel and approved unanimously by the Awards Committee (4-0).

3. 1410860846 – Request approval to award a contract to Quanta Infrastructure Solutions Group, LLC for Design Build services for the Fulton Cut - Transmission Line Raising & Tower Replacement Project in the amount of \$1,696,036.44, subject to the availability of lawfully appropriated funds.

Laura Schepis joined meeting.

MOTION: Ricky Erixton made a motion to approve Award Item 3 as amended in the committee packet. The motion was seconded by Joe Orfano and approved unanimously by the Awards Committee (5-0).

4. 1411119046 - Request approval to award a contract to Prolec-GE, Waukesha, Inc. for the supply of One (1) 69 kV/13/2 kV Water Street, One (1) 138 kV/26kV Starratt Road Transformer in the amount of \$2,919,056.00, subject to the availability of lawfully approved funds. AMENDED

MOTION: Ricky Erixton made a motion to approve Award Item 4 as presented in the committee packet. The motion was seconded by Joe Orfano and approved unanimously by the Awards Committee (5-0).

5. Request approval for a contract increase to Leidos Engineering, LLC for (\$1,322,812.00) and Power Engineers Inc. for (\$628,146.00) for protection and controls services for a new not-to-exceed amount of \$2,700,958.00, subject to the availability of lawfully appropriated funds.

MOTION: Ricky Erixton made a motion to approve Award Item 5 as presented in the committee packet. The motion was seconded by Laura Schepis and approved unanimously by the Awards Committee (5-0).

6. **DEFERRED** - Request approval to award a one (1) year contract extension to Utility Consumer Analytics, Inc. for Utility Tracker Portal Tool, in the amount of \$295,956.24, for a new not-to-exceed amount of \$556,940.58 subject to the availability of lawfully appropriated funds.
7. Request approval to award a change order to Red Clay Consulting, Inc. for additional services needed for implementation support for the Oracle Meter Data Management MDM modernization project in the amount of \$2,950,000.00, for a new not-to-exceed amount of \$8,451,563.90, subject to the availability of lawfully appropriated funds.

MOTION: Laura Schepis made a motion to approve Award Item 7 as presented in the committee packet. The motion was seconded by Joe Orfano and approved unanimously by the Awards Committee (5-0).

8. 1411045446 - Request approval to award a contract to PQH Group Design, Inc. for Westside Service Center Glove Lab and Admin Building Design Services in the not-to-exceed amount of \$171,900.00, subject to lawfully appropriated funds.

MOTION: Laura Schepis made a motion to approve Award Item 7 as presented in the committee packet. The motion was seconded by Jackie Scheel and approved unanimously by the Awards Committee (5-0).

9. Request approval to award a renewal to Merrell Bros, Inc. for Residuals Hauling and Disposal services in the amount of \$1,555,818.00, for a new not-to-exceed amount of \$7,180,972.48, subject to the availability of lawfully appropriated funds.

MOTION: Joe Orfano made a motion to approve Award Item 9 as presented in the committee packet. The motion was seconded by Ricky Erixton and approved unanimously by the Awards Committee (5-0).

10. Request approval to award a 3-month contract extension to Grainger (100,000.00), World Electric Supply (\$551,566.73) and Jo Kell, Inc. (\$527,100.00) to provide Maintenance, Repair and Overhaul (MRO) materials for a total amount of \$1,178,666.73, and new not-to-exceed amount for all three contracts of \$12,800,166.73, subject to availability of lawfully appropriated funds.

MOTION: Ricky Erixton made a motion to approve Award Item 10 as presented in the committee packet. The motion was seconded by Laura Schepis and approved unanimously by the Awards Committee (5-0).

11. Request approval to award a contract to Global Rental Company, Inc. for the purchase of four (4) trucks for FY23 in the amount of \$439,599.00, subject to the availability of lawfully appropriated funds.

MOTION: Laura Schepis made a motion to approve Award Item 11 as amended in the committee packet. The motion was seconded by Jackie Scheel and approved unanimously by the Awards Committee (5-0).

Informational Item:

No informational items were presented to the Awards Committee.

Ratifications:

Award 10 ratification was presented to the Awards Committee.

Public Comments:

No additional public comment speaking period was taken.

Adjournment:

Chair Datz adjourned the meeting at 10:33 a.m.

NOTE: These minutes provide a brief summary only of the Awards Committee meeting. For additional detail regarding the content of these minutes or discussions during the meeting, please review the meeting recording. The recording of this meeting as well as other relevant documents can be found at the link below:

https://www.jea.com/About/Procurement/Awards_Meeting_Agendas_and_Minutes/



Formal Bid and Award System

Award #2 April 20, 2023

Type of Award Request: SINGLE SOURCE/RATIFICATION

Requestor Name: Garcia, Jose D. – Dir CRM Systems

Requestor Phone: 904-665-4063

Project Title: Oracle Customer Care and Billing (CC&B) Software License & Support

Project Number: HEB0400 (BL01, 1992)

Project Location: JEA

Funds: O&M

Business Unit Estimate: \$876,565.00

Scope of Work:

This request is for a seven (7) month single source award for Oracle Customer Care and Billing (CC&B) Software License and Support. Oracle support is critical for software applications and Oracle engineered hardware system updates, troubleshooting, patches, as well as compliance and regulatory updates. A few of the specific ways JEA utilizes Oracle support include incident restorations, searching for solutions, downloading patches and updates, accessing proactive support tools, and creating service requests.

JEA IFB/RFP/State/City/GSA#: N/A

Purchasing Agent: Woyak, Nathan

Is this a Ratification?: Yes, \$140,475.17 Partial 2 months (March and April)

RECOMMENDED AWARDEE(S):

Name	Contact Name	Email	Address	Phone	Amount
ORACLE AMERICA INC.	Mavis Waters	mavis.waters@oracle.com	1910 Oracle Way Reston, VA 20190	(301) 641-0727	\$491,663.07

Amount for entire term of Contract: \$491,663.07

Award Amount for the remainder this FY: \$491,663.07

Length of Contract/PO Term: Seven (7) Months

Begin Date (mm/dd/yyyy): 03/01/2023

End Date (mm/dd/yyyy): 09/30/2023

Renewal Options: None

JSEB Requirement: JSEB opportunities were reviewed, and none were available

Background/Recommendation:

JEA began purchasing Oracle CC&B licenses and support in 2018. The Awards Committee has approved maintenance and support of these single source licenses since this time. This order was due 03/01/2023 and is overdue and will include a partial \$140,475.17 two (2) month ratification. JEA was reviewing services with Oracle in an effort to remove unneeded items; however, JEA discovered nothing could be removed. The ordering document quote is attached as backup.

This request is for seven (7) months of additional Oracle support from 03/01/2022 to 09/30/2023. JEA was able to negotiate 0% increase on this support and is only awarding for seven (7) months through the end of FY23 in an effort to co-term this contract to match the end of JEA’s fiscal year.

This will allow JEA more time to negotiate a better long term multi-year support agreement with Oracle beginning in FY24. Also due to the issues and cancelation of the Oracle C2M project and support, negotiation of Oracle CC&B was delayed. The table below is a summary charges for FY23.

Product Description	Quantity	Amount
Oracle Utilities Advanced Meter Solution - 100 Utilities Devices Perpetual	8470	\$117,032.45
Oracle Utilities Smart Grid Gateway Adapter for Landis+Gyr 100 Utilities Devices Perpetual	8250	\$11,399.27
Oracle Utilities Customer to Meter Base for Residential Customers - 100 in Customer Count Perpetual	4500	\$139,099.30
Oracle Utilities Customer to Meter Base for Commercial and Industrial Customers - 100 in Customer Count Perpetual	500	\$224,132.05
Total		\$491,663.07

Request approval to award a seven (7) month single source award to Oracle America Inc. for License and support services for Oracle Customer Care and Billing (CC&C) in the amount of \$491,663.07, subject to the availability of lawfully appropriated funds.

VP: Selders, Steven G - VP Application Delivery and Enterprise Architecture
Chief: Krol, Bradley D. (Brad) - Chief Information Officer

APPROVALS:

Chairman, Awards Committee **Date**

Budget Representative **Date**



17-Apr-23

Dear Annesley Brightwell

A support service renewal is expired or about to expire.

The technical support services for support service number 18818508 will expire, or have expired on 28-Feb-23.

Renewing these services is easy. Just click the Quick Checkout button below and complete your renewal online. Once your renewal is completed, the new Support Period for these services will begin on the start date listed for this renewal in your My Support Renewals account and will be provided through the end date as shown for this renewal in your My Support Renewals account. A renewal order containing all of the information about your renewal is also attached for your reference. So that there is no interruption in these services, please complete your renewal on or before 24-Apr-23. You can see and manage all of your support service renewals anytime on My Support Renewals by clicking the Manage Your Renewals button below.

[Quick Checkout](#)

[Manage Your Renewals](#)

To log into My Support Renewals, you will need your username and password:

Your Oracle.com username is: **BRIGAP@JEA.COM**

New Customer? Forgot your password? [Reset.](#)

If you are unable to complete your renewal on My Support Renewals, you can complete your renewal by following the instructions in the attached renewal order. So that there is no interruption in these services, please complete your renewal on or before 24-Apr-23. If applicable, the attached renewal order may include technical support services that you have requested to order that are in addition to the technical support services that you are renewing.

Have a question about your renewal? Call 301-641-0727 or email Oracle at mavis.waters@oracle.com.

Have a question regarding Auto Renew or the acceptance process on My Support Renewals? Call 301-641-0727, [Chat on My Support Renewals](#), or [Request Assistance](#).



TECHNICAL SUPPORT SERVICES RENEWAL ORDER

GENERAL INFORMATION

OFFER EXPIRATION		ORACLE: Oracle America, Inc.	
Support Service Number:	18818508	Oracle Contact Information: Mavis Waters	
Offer Expires:	24-Apr-23	Telephone:	301-641-0727
		Fax:	
		Email:	mavis.waters@oracle.com
CUSTOMER: JEA			
CUSTOMER QUOTE TO		CUSTOMER BILL TO	
Account Contact:	Annesley Brightwell	Account Contact:	Payable Accounts
Account Name:	JEA	Account Name:	JEA
Address:	225 N. Pearl Street NA Jacksonville FL 32202 United States	Address:	225 N. Pearl Street NA Jacksonville FL 32202 United States
Telephone:	904 699-7176	Telephone:	904-665-7363
Fax:		Fax:	
E-mail:	brigap@jea.com	E-mail:	Acctpaycustsrv@jea.com

"You" and "Your" as used in this renewal order, refer to the Customer listed above.

Please take a minute to make sure the email information entered above is correct. Your email address is particularly important because Oracle may email You certain notices about technical support services. If You need to make any changes to the Customer information above, You can either login to your [My Support Renewals](#) account and select "Update Quote to Information" to edit Your "Quote To" information and You can edit Your "Bill To" information at check out. Alternatively, this information can be updated by providing Your current information along with Your support service number 18818508, to Oracle per the General Information section above.

SERVICE DETAILS

Program Technical Support Services							
Service Level: Software Update License & Support							

Product Description	CSI #	Qty	License Metric	License Level / Type	Start Date	End Date	Price
Oracle Utilities Advanced Meter Solution - 100 Utilities Devices Perpetual	22047029	8470		FULL USE	1-Mar-23	30-Sep-23	117,032.45
Oracle Utilities Smart Grid Gateway Adapter for Landis+Gyr - 100 Utilities Devices Perpetual	22051287	8250		FULL USE	1-Mar-23	30-Sep-23	11,399.27
Oracle Utilities Customer to Meter Base for Residential Customers - 100 in Customer Count Perpetual	22051288	4500		FULL USE	1-Mar-23	30-Sep-23	139,099.30
Oracle Utilities Customer to Meter Base for Commercial and Industrial Customers - 100 in Customer Count Perpetual	22051289	500		FULL USE	1-Mar-23	30-Sep-23	224,132.05

Program Technical Support Fees: USD 491,663.07

Total Price: USD 491,663.07

Plus applicable tax

NOTES

- If Oracle accepts Your renewal order, the start date set forth in the Service Details table above shall serve as the commencement date of the technical support services and the technical support services ordered under this renewal order will be provided through the end date specified in the table for the applicable programs and/ or hardware ("Support Period").
- If any of the fields listed in the Service Details table above are blank, then such fields do not apply to Your renewal.

TECHNICAL SUPPORT SERVICES TERMS

If the Customer and the Customer Quote To name identified in the General Information table above are not the same, JEA represents that Customer has authorized JEA to execute this renewal order on the Customer's behalf and to bind the Customer to the terms contained in this renewal order. JEA agrees that the services ordered are for the sole benefit of Customer and shall only be used by Customer. JEA agrees to advise Customer of the terms of this renewal order as well as any communications received from Oracle regarding the services.

If the Customer and the Customer Bill To name identified in the General Information table above are not the same, Customer agrees that: a) Customer has the ultimate responsibility for payments under this renewal order; and b) any failure of JEA to make timely payment per the terms of this renewal order shall be deemed a breach by Customer and, in addition to any other remedies available to Oracle, Oracle may terminate Customer's technical support service under this renewal order.

Technical support is provided under Oracle's technical support policies in effect at the time the services are provided. The technical support policies are subject to change at Oracle's discretion; however, Oracle will not materially reduce the level of services provided for supported programs and/or hardware during the period for which fees for technical support have been paid, or for U.S. federal and public sector entities, the period for which services have been ordered. You should review the technical support policies prior to entering into this renewal order.

The current version of the technical support policies may be accessed at <http://www.oracle.com/us/support/policies/index.html>.

Regarding the inclusion of DFARS 252.204-7012, the parties agree that DFARS 252.204-7012, Safeguarding Covered Defense Information and Cyber Incident Reporting (OCT 2016), does not apply to the Commercial Off the Shelf (COTS) licenses or hardware, and does not apply to the associated technical support because Oracle will not process, collect, develop, receive, transmit, use, or store "covered defense information" on "covered contractor information systems" as defined in DFARS 252.204-7012, Safeguarding Covered Defense Information and Cyber Incident Reporting (OCT 2016), in performance of the associated technical support services ordered under this renewal quote, and the Government agrees that it will not provide "covered defense information" to Oracle in performance of the associated technical support services.

The technical support services renewed under this renewal order are governed by the terms and conditions of the US-OMA-271987 ("agreement"). Any use of the programs and/or hardware, which includes updates and other materials provided or made available by Oracle as a part of technical support services, is subject to the rights granted for the programs and/or hardware set forth in the order in which the programs and/or hardware were acquired.

This renewal order incorporates the agreement by reference. In the event of inconsistencies between the terms contained in this renewal order and the agreement, this renewal order shall take precedence.

RENEWAL PROCESSING DETAILS

Please renew the technical support services on this renewal order on [My Support Renewals](#).

If You are unable to renew using My Support Renewals, You can renew using the options below. Your renewal order is subject to Oracle's acceptance. Your renewal is considered complete when You provide Oracle with payment details for the renewal as detailed below or an executed Oracle Financing contract. Once completed, Your renewal cannot be cancelled and Your payment is nonrefundable, except as provided in the agreement. Oracle will issue an invoice to You upon receipt of a purchase order or a form of payment acceptable to Oracle. If You are U.S. federal government or public sector entity, Oracle will issue You an invoice quarterly in arrears after the services are performed.

Unless you are an U.S. federal government entity, Oracle's invoice includes applicable sales tax, GST, or VAT (collectively referred to as "tax"). If JEA is a tax exempt organization and is not an U.S. federal government entity, a copy of JEA's tax exemption certificate must be submitted with JEA's purchase order, credit card, or other acceptable form of payment.

Please note that unless You are a U.S. federal government or public sector entity, if the pre-tax value of this renewal is USD \$2,000 or less, the technical support services ordered must be paid by credit card; or You must renew Your support on My Support Renewals.

Technical Support fees are invoiced Quarterly in Arrears. All fees payable to Oracle are due within 30 NET from date of invoice.

You agree to pay any sales, value-added or other similar taxes imposed by applicable law, except for taxes based on Oracle's income.

PAYMENT DETAILS

Purchase Order

If You are submitting a purchase order for the payment of the renewal of the technical support services on this renewal order, the purchase order must be in a non-editable format (e.g., PDF) and include the following information:

- Support Service Number: 18818508
- Total Price: USD 491,663.07 (excluding applicable tax)
- Local Tax, if applicable

In issuing a purchase order, JEA agrees that the terms of this renewal order and the agreement supersede the terms in the purchase order or any other non-Oracle document, and no terms included in any such purchase order or other non-Oracle document shall apply to the technical support services renewed under this renewal order.

Please contact Oracle per the General Information section above to issue Your purchase order.

Credit Card

If You wish to use a credit card to pay for the renewal of the technical support services on this renewal order, please contact Oracle per the General Information section above. Please note that Oracle is unable to process credit card transactions of USD \$100,000 or greater or transactions that are not in USD.

Check

If You are submitting a check for the payment of the renewal of the technical support services on this

renewal order, the check must include the following information:

- Support Service Number: 18818508
- Total Price: USD 491,663.07 (excluding applicable tax)
- Local Tax, if applicable

In issuing a check, JEA agrees that only the terms of this renewal order and the agreement shall apply to the technical support services renewed under this renewal order. No terms attached or submitted with the check will apply.

Checks for technical support services renewed under this renewal order should be sent to:

AK, AZ, CA, HI, ID, NV, OR, UT, WA:

Oracle America, Inc
PO Box 884471
Los Angeles, CA 90088-4471

All Other States:

Oracle America, Inc
PO Box 203448
Dallas, TX 75320-3448

Payment Confirmation

If You cannot pay using any of the payment methods described above, please complete this payment confirmation and submit it to Oracle. Please initial the following statement that best applies to You.

- JEA does not issue purchase orders.
- JEA does not require a purchase order for the services ordered hereto.

JEA certifies that the information provided above is accurate and complies with JEA's business practices in entering into this renewal order, including obtaining all necessary approvals to release the funds for this renewal. In issuing this payment confirmation, JEA agrees that the terms of this renewal order and the agreement shall apply to the technical support services ordered under this renewal order. No terms attached or submitted with the payment confirmation will apply.

The signature below affirms JEA's commitment to pay for the services ordered in accordance with the terms of this renewal order.

JEA

Authorized Signature

Name

Title

Signature Date

Please contact Oracle per the General Information section above to issue Your Payment Confirmation.

Certification of Single Source or Emergency Procurement

Please use this form to certify a Single Source or Emergency Procurement complies with the requirements of the JEA Procurement Code. The JEA Procurement Code defines a Single Source and Emergency Procurement as follows:

3-112 Single Source

A Contract may be awarded for Supplies or Services as a Single Source when, pursuant to the Operational Procedures, the Chief Procurement Officer determines that:

- (a) there is only one justifiable source for the required Supplies or Services;
- (b) the Supplies or Services must be a certain type, brand, make or manufacturer due to the criticality of the item or compatibility within a JEA utility system, and such Supplies or Services may not be obtained from multiple sources such as distributors;
- (c) the Services are a follow-up of Services that may only be done efficiently and effectively by the Vendor that rendered the initial Services to JEA, provided the Procurement of the initial Services was competitive;
- (d) at the conclusion of a Pilot Project under Section 3-118 of this Code, the Procurement of Supplies or Services tested during the Pilot Project, provided the Vendor was competitively selected for the Pilot Project.

3-113 Emergency Procurements

In the event of an Emergency, the Chief Procurement Officer may make or authorize an Emergency Procurement, provided that Emergency Procurements shall be made with as much competition as practicable under the circumstances. A written Determination of the basis for the Emergency and for the selection of the particular Vendor shall be included in the Procurement file.

For purposes of this Section 3-113, an "Emergency" means any one of the following:

- (a) a reasonably unforeseen breakdown in machinery;
- (b) an interruption in the delivery of an essential governmental service or the development of a circumstance causing a threatened curtailment, diminution, or termination of an essential service;
- (c) the development of a dangerous condition causing an immediate danger to the public health, safety, or welfare or other substantial loss to JEA;
- (d) an immediate danger of loss of public or private property;
- (e) the opportunity to secure significant financial gain, to avoid delays to any Governmental Entity or avoid significant financial loss through immediate or timely action; or (f) a valid public emergency certified by the Chief Executive Officer.

Please provide the following information:

1. Vendor Name:

Oracle America, Inc.

2. Description of Services or Supplies provide by Vendor:

3.

Support for Oracle Utilities products: CC&B (Customer Care and Billing), MDM (Meter Data Management), SGG (Smart Grid gateway) and SOM (Service Order Manager) These modules are under the umbrella of Oracle's Utilities solution Customer to Meter.



Formal Bid and Award System

Award #3 April 20, 2023

Type of Award Request: CONTRACT EXTENSION
Requestor Name: Lawrence, Steven R. – Associate Program Manager
Requestor Phone: 904-665-7747
Project Title: Utility Tracker Portal Tool
Project Number: HE10003
Project Location: JEA
Funds: O&M
Budget Estimate: \$295,956.24

Scope of Work:

The goal of the JEA Customer Energy and Water Management Portal project centers around providing JEA customers the ability to better manage their energy and water costs by utilizing an on-line portal (My Utility Tracker) that will assist them in understanding their usage patterns and provide them information to improve the energy efficiency of their home or business. The project is part of the JEA/Department of Energy (DOE) Smart Grid program and the tool and services are deliverables identified in the JEA/DOE Smart Grid Project Execution Plan (PEP).

JEA IFB/RFP/State/City/GSA#: N/A
Purchasing Agent: Dambrose, Nickolas C.
Is this a Ratification?: NO

RECOMMENDED AWARDEE(S):

Name	Contact Name	Email	Address	Phone	Amount
UTILITY CONSUMER ANALYTICS, INC.	Adam Smith	AdamSmith@harriscomputer.com	2429 Military Rd Ste 300, Niagara Falls, NY, 14304	(802)233-3570	\$295,956.24

Amount of Original Award: \$260,984.34
Amount in Current FY: \$73,989.06
Date of Original Award: 06/25/2020
Change Order Amount: \$295,956.24
New Not-To-Exceed Amount: \$556,940.58
Length of Contract/PO Term: One (1) Year w/Two (2) – One (1) Yr. Renewals
Begin Date (mm/dd/yyyy): 07/01/2020
End Date (mm/dd/yyyy): 06/30/2024
Renewal Options: None remaining
JSEB Requirement: No JSEB opportunities have been identified

Background/Recommendations:

Originally approved by the Awards Committee on 06/25/2020. JEA has utilized its renewal option for its Utility Tracker Portal Tool. A copy of the previous awards are attached as backup.

This request is for a one (1) year contract extension from 07/01/2023 to 06/30/2024, which includes \$295,956.24 in additional funds for Utility Consumer Analytics to continue its support and maintenance services on JEA’s Utility Tracker Portal Tool. The itemized breakout of all the included items is seen below.

Description	Amount
Line Item 1: Alerts/Email/SMS	\$2,776.03
Line Item 2: License Fee	\$128,006.31
Line Item 3: Hosting Fees	\$88,370.35
Line Item 4: Maintenance Fees	\$76,803.55
Total	\$295,956.24

This extension is requested to enable JEA to focus on other strategic priorities. It should be noted that a replacement contract is already under evaluation as result of the procurement solicitation process. Due to the prioritization of Technology resources available for the implementation of a new contract, work on a new product is not estimated to begin until 01/01/2024 with an estimated six (6) month implementation and go live on 07/01/2024. When compared to the current pricing, the renewal rates are an eight (8%) percent increase.

Request approval to award a one (1) year contract extension to Utility Consumer Analytics, Inc. for Utility Tracker Portal Tool in the amount of \$295,956.24, for a new not-to-exceed amount of \$556,940.58, subject to the availability of lawfully appropriated funds.

- Director:** Pippin, Brian C. – Dir. Customer Experience Insights and Strategy
- VP:** Hunt, Timothy M. – VP Customer Experience Insights and Digitization
- Chief:** Pressley, Sheila E. - Chief Customer Officer

APPROVALS:

Chairman, Awards Committee **Date**

Budget Representative **Date**



Formal Bid and Award System

Award #2 May 26, 2022

Type of Award Request: RENEWAL/ASSIGNMENT
Requestor Name: Lawrence, Steven R.- Associate Program Manager
Requestor Phone: 904-665-7747
Project Title: Utility Tracker Portal Tool
Project Number: 10001
Project Location: JEA
Funds: O&M
Budget Estimate: \$392,450.00

Scope of Work:

The goal of the JEA Customer Energy and Water Management Portal project centers around providing JEA customers the ability to better manage their energy and water costs by utilizing an on-line portal (My Utility Tracker) that will assist them in understanding their usage patterns and provide them information to improve the energy efficiency of their home or business. The project is part of the JEA/Department of Energy (DOE) Smart Grid program and the tool and services are deliverables identified in the JEA/DOE Smart Grid Project Execution Plan (PEP).

JEA IFB/RFP/State/City/GSA#: N/A
Purchasing Agent: Woyak, Nathan J.
Is this a Ratification?: NO

RECOMMENDED AWARDEE(S):

Name	Contact Name	Email	Address	Amount
UTILITY CONSUMER ANALYTICS, a Division of N. Harris Computer Corporation	Jerry Rahon	jrahon@harrisutilities.com	77 Westport Plaza, Suite 500, St Louis, MO 63146	\$274,033.56

Amount of Original Award: \$260,984.34
Date of Original Award: 06/25/2020
Renewal Amount: \$274,033.56

List of Previous Renewals / Amendments:

CPA#	Amount	Date
199813	\$260,984.34	05/21/2021

New Not to Exceed Amount: \$796,002.24
Length of Contract/PO Term: One (1) Year w/Two (2) - One (1) Yr. Renewals
Begin Date (mm/dd/yyyy): 07/01/2020
End Date (mm/dd/yyyy): 06/30/2023
Renewal Options: None remaining

**AMENDMENT 8
TO CONTRACT #122993
BETWEEN
JEA and
Utility Consumer Analytics**

THIS AMENDMENT NUMBER 8 ("Eighth Amendment") is made and entered into this _____ day of _____ 2022, (the "Effective Date"), by and between JEA, a body politic and corporate located at 21 W. Church St, Jacksonville, Florida, 32202, and UTILITY CONSUMER ANALYTICS, a Division of N. Harris Computer Corporation, with its principal office located at _____ (hereinafter called the "Company"), as successor in interest to ACLARA TECHNOLOGIES LLC, a corporation existing under the laws of the State of Ohio, with its principal office located at 77 Westport Plaza, Suite 500, St Louis, MO 63146.

RECITALS:

WHEREAS, on March 1, 2012, the parties made and entered into an agreement (the "Original Agreement") under which Company agreed to provide software, hosting, maintenance and support services for the ACLARA for My Utility Tracker through October 1, 2015 ("Term.") with the option of one (1), one (1) year renewal option pursuant to JEA Contract Number 122993, with a Maximum Indebtedness of **Six Hundred Eighty Thousand and 00/100 Dollars (\$680,000.00)**; and

WHEREAS, on or about March 12, 2013, IBA added the "Aclara Mobile Experience" to the implementation contract, and increased the Maximum Indebtedness by **Fifty Thousand and 00/100 Dollars (\$55,000.00)** to make the new Maximum Indebtedness total **Seven Hundred Twenty-Six Thousand and 00/100 Dollars (\$726,000.00)**; and

WHEREAS, on or about September 11, 2014, JEA increased the Maximum Indebtedness in the amount of **One Hundred Seventeen Thousand Three Hundred Eighty-Nine and 00/100 Dollars (\$117,389.00,389.00)**; and

WHEREAS, on or about October 3, 2014, JEA administratively increased the Maximum Indebtedness, as allowed by the JEA Procurement Code, in the amount of **One Thousand Two Hundred Thirty-Nine and 68/100 Dollars (\$1,239.68)**; and

WHEREAS, on September 17, 2015, JEA increased the Maximum Indebtedness, as approved by the JEA Awards Committee, in the amount of **One Hundred Twenty Seven Thousand Nine Hundred Thirty Four and 00/100 Dollars (\$127,934.00)**, extended the Term of the Original Agreement by an additional six (6) months, making the new expiration date March 31, 2016 and implemented monthly reporting of the Tracker Web Stats report and WHEREAS, on or about October 22, 2015, JEA administratively increased the Maximum Indebtedness, as allowed by the JEA Procurement Code, in the amount of **One Thousand Four Hundred Forty and 00/100 Dollars (\$1,440.00)**; and

WHEREAS, on April 22, 2016, JEA increased the Maximum Indebtedness, as allowed by the JEA Procurement Code, in the amount of **Two Hundred Fifty-Five**

Thousand Eight Hundred Sixty- Seven and 00/100 Dollars (\$255,867.00) for a new not to exceed amount of **One Million Two Hundred Twenty Nine Thousand Eight Hundred Sixty-Nine and 68/100 Dollars (\$1,229,869.68)**, and extended the Term of the Original Agreement by an additional one year, making the new expiration date March 31, 2017; and

WHEREAS, on April 1, 2017, JEA increased the Maximum Indebtedness by **Two Hundred Fifty-Five Thousand Eight Hundred, Sixty-Seven and 00/100 Dollars (\$255,867.00)**, and extended the Term of the Original Agreement by an additional one year making the new expiration date March 31, 2018; and

WHEREAS, on April 1, 2018, JEA increased the Maximum Indebtedness by **Sixty-Three Thousand Nine Hundred, Sixty-Six and 75/100 Dollars (\$63,966.75)**, and extended the Term of the Original Agreement by an additional three months; and

WHEREAS, starting July 1, 2018, JEA increased the Original Agreement for an additional two-year period, and increased the Maximum Indebtedness by **Five Hundred, Eleven Thousand Seven Hundred Thirty-Four and 00/100 Dollars (\$511,734.00)** with a Maximum Indebtedness of **Two Million Sixty-Five Thousand Four Hundred Thirty-Seven and 43/100 (\$2,065,437.43)**.

WHEREAS, starting July 1, 2020, the Original Agreement was amended such that Company's fees for the services increased, by **Two Hundred Sixty Thousand, Nine Hundred Eight Four and 34/100 Dollars (\$260,984.34)** which shall be invoiced on a quarterly basis in accordance with Exhibit A, attached hereto. The new Maximum Indebtedness shall now be **Two Million Three Hundred Twenty-six Thousand Four Hundred Twenty-One and 77/100 Dollars (\$2,326,421.77)**.

WHEREAS, starting July 7, 2021, the Original Agreement was amended such that Company's fees for the services increased, by **Two Hundred Sixty Thousand, Nine Hundred Eight Four and 34/100 Dollars (\$260,984.34)** which shall be invoiced on a quarterly basis in accordance with Exhibit A, attached hereto. The new Maximum Indebtedness shall now be **Two Million Five Hundred Eighty-Seven Thousand, Four Hundred Six and 11/100 Dollars (\$2,587,406.11)**.

IN CONSIDERATION of the Original Agreement and for the mutual promises and covenants herein contained, the sufficiency and receipt of which is hereby acknowledged, the parties agree as follows:

AGREEMENT:

1. **Maximum Indebtedness.** The Original Agreement shall be amended such that Company's fees for the services shall be increased, by **Two Hundred Seventy-Four Thousand, Thirty-Three and 56/100 Dollars (\$274,033.56)** which shall be invoiced on a quarterly basis in accordance with Exhibit A, attached hereto. The new Maximum Indebtedness shall now be **Two Million Eight Hundred Sixty-One Thousand, Four Hundred Thirty-Nine and 67/100 Dollars (\$2,861,439.67)**.
2. **Term.** The Term of the Original Agreement shall be extended for an additional one year starting **July 1, 2022** making the new termination of date **June 30, 2023** at and for the prices established in Exhibit A. JEA reserves the right to terminate this agreement upon 60 days written notice.

3. The above recitals are true and correct and, by reference, are incorporated herein and made part hereof.

SAVE AND EXCEPT as hereby specifically amended herein, the terms and conditions of the Original Agreement, as amended, shall remain in full force and effect.

IN WITNESS WHEREOF, the parties hereto have duly executed this Amendment the day and year first above written.

**UTILITY CONSUMER ANALYTICS
A Division of N. Harris Computer Corporation**

By:

By:

Name:

Name:

Title: _____

Title:

Date:

Date:

ATTEST:

JEA

APPENDIX A

Pricing

[new enti] is offering a one-year extension of the current contract with JEA for My Utility Tracker. The initial period would be from July 1, 2022 to June 30, 2023. The contract budget would be for the one-year amount of \$260,984.34, itemized as follows:

Line Item 1: Alerts/Email/SMS	\$ 2,570.40
Line Item 2: License Fee	\$ 118,524.36
Line Item 3: Hosting Fees	\$ 81,824.40
<u>Line Item 4: Maintenance Fees</u>	<u>\$ 71,114.40</u>
	\$ 274,033.56

This equates out to a quarterly invoice of \$68,508.39.



Formal Bid and Award System

Award #3 May 21, 2021

Type of Award Request: RENEWAL
Request #: 6841
Requestor Name: Lawrence, Steven R.- Associate Program Manager
Requestor Phone: 904-665-7747
Project Title: Utility Tracker Portal Tool
Project Number: 10001
Project Location: JEA
Funds: O&M
Budget Estimate: \$392,450.00

Scope of Work:

The goal of the JEA Customer Energy and Water Management Portal project centers around providing JEA customers the ability to better manage their energy and water costs by utilizing an on-line portal (My Utility Tracker) that will assist them in understanding their usage patterns and provide them information to improve the energy efficiency of their home or business. The project is part of the JEA/Department of Energy (DOE) Smart Grid program and the tool and services are deliverables identified in the JEA/DOE Smart Grid Project Execution Plan (PEP).

JEA IFB/RFP/State/City/GSA#: N/A
Purchasing Agent: Woyak, Nathan J.
Is this a Ratification?: NO

RECOMMENDED AWARDEE(S):

Name	Contact Name	Email	Address	Amount
ACLARA TECHNOLOGIES LLC	Jerry Rahon	jrahon@aclara.com	30400 Solon Rd, Solon OH 44139	\$260,984.34

Amount of Original Award: \$260,984.34
Date of Original Award: 06/25/2020
Renewal Amount: \$260,984.34
New Not to Exceed Amount: \$521,968.68
Length of Contract/PO Term: One (1) Year w/Two (2) - One (1) Yr. Renewals
Begin Date (mm/dd/yyyy): 07/01/2020
End Date (mm/dd/yyyy): 06/30/2022
Renewal Options: Yes- One (1) - One (1) Yr. Renewals
JSEB Requirement: No JSEB opportunities have been identified

Background/Recommendations:

JEA first competitively bid these services in 2012. On 03/01/2012, the Awards Committee awarded a contract to Aclara Technologies for an original three (3) year period from 10/01/2012 to 09/30/2015. On

06/25/2020, the Awards Committee awarded a new sole source contract to Aclara Technologies through 06/30/2021. A copy of the previous award documentation is attached as back-up.

This renewal request is for a one (1) year term from 07/01/2021 to 06/30/2022 and \$260,984.34 in additional funding. The purpose of this request is for Aclara Technologies to continue to manage the utility tracker online portal tool on jea.com until a new strategy is implemented.

The new Aclara Technologies contract will specify that the contract may be terminated with a sixty (60) day notice, and the \$260,984.34 will be paid on a quarterly basis in the amount of \$65,246.08. Typically, Aclara charges four percent (4%) annual increase on this product, however, JEA negotiated a two percent (2%) increase on the new contract and agreed to hold the pricing the same for future optional renewals. The draft amendment and pricing offer is attached as back-up.

The contract budget would be for the one-year amount of \$260,984.34, itemized as follows:

- Line Item 1: Alerts/Email/SMS - \$2,448.00
- Line Item 2: License Fee - \$112,880.34
- Line Item 3: Hosting Fees - \$77,928.00
- Line Item 4: Maintenance Fees -\$67,728.00

Request approval for a one (1) year renewal award to Aclara Technologies LLC for Utility Tracker Portal Tool in the amount of \$260,984.34, with a new not-to-exceed amount of \$521,968.68, subject to the availability of lawfully appropriated funds.

Manager: Pippin, Brian C. - Strategic Segment Manager
Director: Nichols, Vicki D. - Dir Customer Solutions & Market Development
VP: Dutton, Laura M. – Chief Strategy Officer

APPROVALS:

Heather Beard 5/21/21

Chairman, Awards Committee **Date**
Shawn A. Union 5/21/21

Budget Representative **Date**



Formal Bid and Award System

Award #8 June 25, 2020

Type of Award Request: SOLE SOURCE
Request #: 6841
Requestor Name: Lawrence, Steven R.- Associate Program Manager
Requestor Phone: 904-665-7747
Project Title: Utility Tracker Portal Tool
Project Number: 8002359
Project Location: JEA
Funds: O&M
Budget Estimate: \$255,867.00

Scope of Work:

The goal of the JEA Customer Energy and Water Management Portal project centers around providing JEA customers the ability to better manage their energy and water costs by utilizing an on-line portal (My Utility Tracker) that will assist them in understanding their usage patterns and provide them information to improve the energy efficiency of their home or business. The project is part of the JEA/Department of Energy (DOE) Smart Grid program and the tool and services are deliverables identified in the JEA/DOE Smart Grid Project Execution Plan (PEP).

JEA IFB/RFP/State/City/GSA#: N/A
Purchasing Agent: Woyak, Nathan J.
Is this a Ratification?: NO

RECOMMENDED AWARDEE(S):

Name	Contact Name	Email	Address	Amount
ACLARA TECHNOLOGIES LLC	CHRISTINE JOHNSON	CJOHNSON@ACLARA.COM	30400 Solon Rd, Solon OH 44139	\$260,984.34

Amount for the entire term of the Contract: \$260,984.34
Award Amount for the remainder of this FY: \$65,246.08
Length of Contract/PO Term: One (1) Year w/Two (2) - One (1) Yr. Renewals
Begin Date (mm/dd/yyyy): 07/01/2020
End Date (mm/dd/yyyy): 06/30/2021
Renewal Options: Two (2) - One (1) Yr. Renewals
JSEB Requirement: N/A - Sole Source
Amount for the entire term of the Contract: \$260,984.34

Background/Recommendations:

JEA first competitively bid these services in 2012. On 03/01/2012, the Awards Committee awarded a contract to Aclara Technologies for an original three (3) year period from 10/01/2012 to 09/30/2015. A

copy of the original award documentation, all renewals, change orders, and contract extensions with the latest ending 06/30/2020, are attached as back-up. This request is for a new sole source contract to be awarded to Aclara Technologies. The JEA business unit has certified that these Services are a follow-up of Services that may only be done efficiently and effectively by the Company that rendered the initial Services to JEA, provided the initial procurement was competitive.

Note: In 2016, JEA again competitively bid these services out under RFP 043-16 and awarded a new contract to Schneider Electric. However, that contract was terminated for default on June 28, 2018 during implementation before transition from Aclara had taken place. As a result, JEA has continued to extend the existing contract with Aclara, which never expired.

This sole source request is for a one (1) year term from 07/01/2020 to 06/30/2021 and \$260,984.34 in funding dollars to the budget. The purpose of this sole source request is for Aclara Technologies to continue to manage the utility tracker online portal tool on jea.com thus allowing additional time for JEA to make a decision on whether to proceed with a full residential demand pricing rollout. Although, JEA's demand pricing pilot is ending in June 2020, a decision on moving forward with a full rollout will likely be delayed until a new permanent JEA CEO is in place and acclimated along with the JEA Board. A decision to move forward with a mandatory demand rate could eliminate the need for the Utility Tracker product completely in favor of a more robust and comprehensive Customer Engagement platform that includes demand (kW) pricing support tools. Included in the request are two (2) one (1) year optional renewals to allow for flexibility with the decision making of the new JEA leadership.

The new Aclara Technologies contract will specify that the contract may be terminated with a sixty (60) day notice, and the \$260,984.34 will be paid on a quarterly basis in the amount of \$65,246.08. Typically, Aclara charges four percent (4%) annual increase on this product, however, they have agreed to a two percent (2%) increase only for the new contract but will not agree to hold the pricing the same for future optional renewals. The pricing offer is attached as back-up.

Request approval for a one (1) year sole source award to Aclara Technologies LLC for Utility Tracker Portal Tool in the not to exceed amount of \$260,984.34, , subject to the availability of lawfully appropriated funds.

Manager: Pippin, Brian C. - Strategic Segment Manager
Director: Nichols, Vicki D. - Dir Customer Solutions & Market Development
VP: Dugan, R. Bruce - Interim Chief Customer Officer

APPROVALS:


_____ 06/25/2020

Chairman, Awards Committee **Date**

Steven Elmore
_____ 06/25/2020

Budget Representative **Date**



Formal Bid and Award System

Award #6 June 28, 2018

Type of Award Request: CONTRACT EXTENSION
Request #: 1822
Requestor Name: Tilden, Payson J. - Manager Customer Solutions
Requestor Phone: (904) 665-6187
Project Title: Utility Tracker Portal Tool
Project Number: 8002359
Project Location: JEA
Funds: O&M
Award Estimate: N/A

Scope of Work:

The goal of the JEA Customer Energy and Water Management Portal project centers around providing JEA customers the ability to better manage their energy and water costs by utilizing an on-line portal (My Utility Tracker) that will assist them in understanding their usage patterns and provide them information to improve the energy efficiency of their home or business. The project is part of the JEA/Department of Energy (DOE) Smart Grid program and the tool and services described herein are deliverables identified in the JEA/DOE Smart Grid Project Execution Plan (PEP).

JEA IFB/RFP/State/City/GSA#: #122993
Purchasing Agent: Woyak, Nathan J
Is this a Ratification?: NO

RECOMMENDED AWARDEE(S):

Name	Contact Name	Email	Address	Phone	Amount
ACLARA TECHNOLOGIES LLC	Christine Johnson	cjohnson@aclara.com	30400 Solon Rd Solon OH 44139	(440) 528-7222	\$511,734.00

Amount of Original Award: \$726,000.00
Date of Original Award: 03/01/2012
Change Order Amount: \$511,734.00

List of Previous Change Order/Amendments:

CPA #	Amount	Date
122993	\$117,389.00	9/11/2014
122993	\$1,239.68	10/3/2014
122993	\$1,440.00	10/22/2015
122993	\$127,934.00	10/1/2015
122993	\$255,867.00	03/3/2016
122993	\$255,867.00	01/12/2017
122993	\$63,966.75	03/28/2018

New Not-To-Exceed Amount: \$2,061,437.63
Begin Date (mm/dd/yyyy): 10/01/2012
End Date (mm/dd/yyyy): 03/31/2020
Renewal Options: NO
JSEB Requirement: N/A-Optional

Background/Recommendations:

Competitively bid and approved by the Awards Committee on 03/01/2012 to Aclara Technologies for a three (3) year period from 10/01/2012 to 09/30/2015. A copy of the original award documentation, other change orders to date, and the latest contract extension ending 06/30/2018, is attached as back-up.

This change order request is to extend the contract for two (2) additional years from 07/01/2018 to 06/30/2020, and add funds in the amount of \$511,734.00. The purpose of this contract extension is for Aclara Technologies to continue to manage the utility tracker online portal tool due to the decision by JEA to terminate for default the contract with Schneider Electric for a new utility tracker product. The amendment to the Aclara Technologies contract will stipulate that the contract may be terminated with a sixty (60) day notice, and the \$511,734.00 will be paid on a quarterly basis in the amount of \$63,966.75.

Typically Aclara charges a four percent (4%) annual increase on this product, but has agreed to hold current pricing for two (2) additional years for a cost avoidance of eight percent (8%). A two (2) year extension is recommended to allow time for JEA to complete the demand rate pilot, research, and for a potential lengthy rebid and implementation process of a new product. The pricing offer is attached as back-up.

The budget for this award will be:

FY18- \$63,966.75 (7/1/18-9/30/18)
FY19- \$255,867.00 (10/1/18-9/30/19)
FY20-\$191,990.25 (10/1/19-6/30/20)

The FY19 budgeted O&M cost for Schneider was expected to be lower than Aclara therefore approximately \$30,000.00 will be transferred from the HE10001 Director fund to cover the change.

Request approval to award a two (2) year contract extension to Aclara Technologies LLC for continued services for the utility tracker in the amount of \$511,734.00, for a new not-to-exceed amount of \$2,061,437.63, subject to the availability of lawfully appropriated funds.

Manager: Tilden, Payson J. - Manager Customer Solutions
Director: Nichols, Vicki D. - Dir Customer Solutions & Market Development
VP: Stewart, Kerri - VP & Chief Customer Officer

APPROVALS:

 6/28/18

Chairman, Awards Committee

Date


Manager, Capital Budget Planning

6/28/18
Date

**AMENDMENT 5
TO CONTRACT# 122993
BETWEEN
JEA AND
ACLARA TECHNOLOGIES LLC**

THIS AMENDMENT NUMBER 5 ("Fourth Amendment") is made and entered into this 1st day of July 2018, (the "Effective Date"), by and between **JEA**, a body politic and corporate located at 21 W. Church St., Jacksonville, Florida, 32202, and **ACLARA TECHNOLOGIES LLC**, a corporation existing under the laws of the State of Ohio, with its principal office located at 77 Westport Plaza, Suite 500, St. Louis, MO 63146, (hereinafter called the "Company").

RECITALS:

WHEREAS, on March 1, 2012, the parties made and entered into an agreement (the "Original Agreement") under which Company agreed to provide software, hosting, maintenance and support services for the ACLARA for My Utility Tracker through October 1, 2015 ("Term") with the option of one (1), one (1) year renewal option pursuant to JEA Contract Number 122993, with a Maximum Indebtedness of **Six Hundred Eighty Thousand and 00/100 Dollars (\$680,000.00)**; and

WHEREAS, on or about March 12, 2013, JEA added the "Aclara Mobile Experience" to the implementation contract, and increased the Maximum Indebtedness by **Fifty Thousand and 00/100 Dollars (\$50,000.00)** to make the new Maximum Indebtedness total **Seven Hundred Twenty Six Thousand and 00/100 Dollars (\$730,000.00)**; and

WHEREAS, on or about September 11, 2014, JEA increased the Maximum Indebtedness in the amount of **One Hundred Seventeen Thousand Three Hundred Eighty Nine and 00/100 Dollars (\$117,389.00)**; and

WHEREAS, on or about October 3, 2014, JEA administratively increased the Maximum Indebtedness, as allowed by the JEA Procurement Code, in the amount of **One Thousand Two Hundred Thirty Nine and 68/100 Dollars (\$1,239.68)**; and

WHEREAS, on September 17, 2015, JEA increased the Maximum Indebtedness, as approved by the JEA Awards Committee, in the amount of **One Hundred Twenty Seven Thousand Nine Hundred Thirty Four and 00/100 Dollars (\$127,934.00)**, extended the Term of the Original Agreement by an additional six (6) months, making the new expiration

date March 31, 2016, and implemented monthly reporting of the Tracker Web Stats report; and

WHEREAS, on or about October 22, 2015, JEA administratively increased the Maximum Indebtedness, as allowed by the JEA Procurement Code, in the amount of **One Thousand Four Hundred Forty and 00/100 Dollars (\$1,440.00)**; and

WHEREAS, on April 22, 2016, JEA increased the Maximum Indebtedness, as allowed by the JEA Procurement Code, in the amount of **Two Hundred Fifty Five Thousand Eight Hundred Sixty Seven and 00/100 Dollars (\$255,867.00)** for a new not to exceed amount of **One Million Two Hundred Twenty Nine Thousand Eight Hundred Sixty Nine and 68/100 Dollars (\$1,229,869.68)**, and extended the Term of the Original Agreement by an additional one year making the new expiration date March 31, 2017; and

WHEREAS, on April 1, 2017, JEA increased the Maximum Indebtedness by **Two Hundred Fifty Five Thousand Eight Hundred Sixty Seven and 00/100 Dollars (\$255,867.00)**, and extended the Term of the Original Agreement by an additional one year making the new expiration date March 31, 2018; and

WHEREAS, ON April 1, 2018, JEA increased the Maximum Indebtedness by **Sixty Three Thousand Nine Hundred and Six Six and 75/100 Dollars (\$63,966.75)**, and extended the Term of the Original Agreement by an additional three months; and

WHEREAS, JEA now desires to extend the Term of the Original Agreement starting July 1, 2018, for an additional two year period, and increase the Maximum Indebtedness by **Five Hundred Eleven Thousand Seven Hundred and Thirty Four and 00/100 Dollars (\$511,734.00)**.

IN CONSIDERATION of the Original Agreement and for the mutual promises and covenants herein contained, the sufficiency and receipt of which is hereby acknowledged, the parties agree as follows:

AGREEMENT:

1. **Maximum Indebtedness.** The Original Agreement shall be amended such that Company's fees for the services shall be increased, by **Five Hundred Eleven Thousand Seven Hundred and Thirty Four and 00/100 Dollars (\$511,734.00)** which shall be invoiced on a quarterly basis in accordance with **Exhibit A**, attached hereto. The new Maximum Indebtedness shall now be **Two Million Sixty One Thousand Four Hundred Thirty Seven and 43/100 (\$2,061,437.43)**.
2. **Term.** The Term of the Original Agreement shall be extended for an additional two years starting July 1, 2018, making the new termination of date **June 30, 2020**, at and for the prices established in **Exhibit A**. JEA reserves the right to terminate this agreement upon 60 days written notice.

3. The above recitals are true and correct and, by reference, are incorporated herein and made part hereof.

SAVE AND EXCEPT as hereby specifically amended herein, the terms and conditions of the Original Agreement, as amended, shall remain in full force and effect.

IN WITNESS WHEREOF, the parties hereto have duly executed this Amendment the day and year first above written.

ATTEST:

ACLARA TECHNOLOGIES LLC

By: _____

By: _____

Name: _____

Name: Erik Christian

Title: _____

Title: SVP, Finance, Strategy & IT

Date: _____

Date: _____

ATTEST:

JEA

By: _____

By: _____

Name: _____

John McCarthy

Title: _____

Director, Supply Chain Management

Date: _____

Date: _____

EXHIBIT A
PRICING

Aclara accepts the offer to extend at the pricing shown below:

JEA is offering a 2 year extension of the current contract with ACLARA for My Utility Tracker. The period would be from July 1, 2018 to June 30, 2020. The contract budget would be for the 2 year amount of \$511,734.00, itemized as follows:

Line Item 1: Alerts/Email/SMS	\$	4,800.00
Line Item 2: License Fee	\$	221,334.00
Line Item 3: Hosting Fees	\$	152,800.00
Line Item 4: Maintenance Fees	\$	<u>132,800.00</u>
TOTAL	\$	511,734.00

Thanks.

Joseph Polaski

Enterprise Sales Director

1/12/17 Item # 4



Formal Bid and Award System

Award #4 January 12, 2017

Type of Award Request: CONTRACT EXTENSION
Request #: 1822
Requestor Name: Tilden, Payson J. - Manager Customer Solutions
Requestor Phone: (904) 665-6187
Project Title: Utility Tracker Portal Tool
Project Number: 8002359
Project Location: JEA
Funds: O&M
Award Estimate: \$255,867.00
Scope of Work:

The goal of the JEA Customer Energy and Water Management Portal project centers around providing JEA customers the ability to better manage their energy and water costs by utilizing an on-line portal (My Utility Tracker) that will assist them in understanding their usage patterns and provide them information to improve the energy efficiency of their home or business. The project is part of the JEA/Department of Energy (DOE) Smart Grid program and the tool and services described herein are deliverables identified in the JEA/DOE Smart Grid Project Execution Plan (PEP).

JEA IFB/RFP/State/City/GSA#: #122993
Purchasing Agent: Woyak, Nathan J
Is this a Ratification?: NO

RECOMMENDED AWARDEE(S):

Name	Contact Name	Email	Address	Phone	Amount
ACLARA TECHNOLOGIES LLC	CHRISTINE JOHNSON	CJOHNSON@ACLARA.COM	30400 Solon Rd Solon OH 44139	(440) 528-7222	\$255,867.00

Amount of Original Award: \$726,000.00
Date of Original Award: 03/1/2012
Change Order Amount: \$255,867.00

List of Previous Change Order/Amendments:

CPA #	Amount	Date
122993	\$117,389.00	9/11/2014
122993	\$1,239.68	10/3/2014

122993	\$1,440.00	10/22/2015
122993	\$127,934.00	10/1/2015
122993	\$255,867.00	3/3/2016

New Not-To-Exceed Amount: \$1,485,736.68
Begin Date (mm/dd/yyyy): 10/01/2012
End Date (mm/dd/yyyy): 03/31/2018
Renewal Options: NO
JSEB Requirement: NA/Specialty Services

Background/Recommendations:

Competitively bid and approved by the Awards Committee on 03/01/2012 to Aclara Technologies for a three (3) year period from 10/01/2012 to 09/30/2015. A copy of the original award documentation, other change orders to date, and the latest contract extension ending 03/31/2017, is attached as back-up.

This change order request is to extend the contract for one (1) additional year from 03/31/2017 to 03/31/2018, and add funds in the amount of \$255,867.00. The purpose of this contract extension is for Aclara Technologies to continue to manage the utility tracker online portal tool while JEA's Technology Services (TS) implements the new portal with Schneider Electric (see Award #5 for reference), expected to take at least twelve (12) months. The amendment to the Aclara Technologies contract will stipulate that the contract may be terminated with a sixty (60) day notice, and the \$255,867.00 will be paid on a quarterly basis, should the new utility tracker be launched sooner than expected. The rates for the additional year are the same as what JEA is currently paying. The pricing is attached as back-up.

Request approval to award a one (1) year extension to Aclara Technologies LLC for continued services for the utility tracker in the amount of \$255,867.00, for a new not-to-exceed amount of \$1,485,736.68, subject to the availability of lawfully appropriated funds.

VP: Vento, Richard J. - Dir Customer Solutions & Market Development

APPROVALS:

 _____ 1/12/17

Chairman, Awards Committee **Date**

 _____ 1/12/17

Manager, Capital Budget Planning **Date**



Award #6 Back-Up

Approved by the JEA Awards Committee

Date 3/3/2016 Item # 4

Formal Bid and Award System

Award #4 March 3, 2016

Type of Award Request: CONTRACT EXTENSION
Request #: 538
Requestor Name: Tilden, Payson J. - Manager Customer Solutions
Requestor Phone: (904) 665-6187
Project Title: My Utility Tracker
Project Number: 8002359 - HE10001
Project Location: JEA
Funds: O&M
Award Estimate: \$255,867.00

Description of Request:

The goal of the JEA Customer Energy and Water Management Portal project centers around providing JEA customers the ability to better manage their energy and water costs by utilizing an on-line portal that will assist them in understanding their usage patterns and provide them information to improve the efficiency of their home or business. The project is part of the JEA/Department of Energy (DOE) Smart Grid program and the tool and services described herein are deliverables identified in the JEA/DOE Smart Grid Project Execution Plan (PEP).

Requisition Number:
JEA IFB/RFP/State/City/GSA#: 114-11 (CPA 122993)
Purchasing Agent: Nathan Woyak
Is this a Ratification?: NO

RECOMMENDED AWARDEE(S):

Name	Contact Name	Email	Address	Phone	Amount
ACLARA TECHNOLOGIES LLC	CHRISTINE JOHNSON	CJOHNSON@ACLARA.COM	30400 SOLON RD, SOLON OH 44139	(440) 528-7222	\$255,867.00

Amount of Original Award: \$726,000.00
Date of Original Award: 03/01/2012
Change Order Amount: \$255,867.00

List of Previous Change Order/Amendments:

CPA #	Amount	Date
122993	\$117,389.00	9/11/2014
122993	\$1,239.68	10/3/2014
122993	\$1,440.00	10/22/2015
122993	\$127,934.00	10/1/2015

New Not-To-Exceed Amount: \$1,229,869.68
Begin Date (mm/dd/yyyy): 10/01/2012

End Date (mm/dd/yyyy):

03/31/2017

Award #6 Back-Up

Renewal Options:

NO

JSEB Requirement:

N/A

Comments on JSEB Requirements:

N/A – Specialty Services

Background/Recommendations:

Through its competitive procurement process, JEA previously awarded a contract to Aclara Technologies for a three year period from 10/01/2012 to 09/30/2015. This was to provide the licensing, operation, maintenance and reporting for My Utility Tracker, the JEA on-line bill analysis and assessment product for all customers. A copy of the original award is attached.

In September 2014, the business requested a change order for \$117,889.00 in additional funds was approved by the Awards Committee to continue their services, and add an additional module and maintenance fees. Additional change orders were subsequently approved by JEA procurement for \$1239.68 and \$1400.00 due to the business underestimating the cost of the variable expected alerts email/SMS fees.

In September 2015, JEA Awards Committee approved a six (6) month renewal from 9/30/15 to 3/31/2016, and \$127,934.00 in additional funds, and a feasibility process was begun to determine whether it was in JEA's best interest to re-bid the scope of work. An RFI process was conducted, and it was determined that a full RFP could be beneficial to the customer experience, as well as to JEA's internal use of the tool. That process has been started, but will not be completed by the end of the current six month renewal expiring on 3/31/2016.

TPC will review the feasibility results to complete the potential RFP process. JEA expects a TPC presentation in March 2016 and a decision on whether to move forward with an RFP in April. JEA anticipates the transition of a new contract to take twelve (12) months, after the date of award. Therefore, this request is for an extension from 3/31/2016 to 3/31/2017, and additional funding in the amount of \$255,867.00, for Aclara to continue to operate the product. This award covers the O&M portion of the contract with Aclara. The \$255,867.00 increase will cover the services for the license, operating and maintenance of the JEA on-line portal, My Utility Tracker.

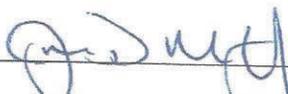
Request approval to award an extension to Aclara Technologies LLC, for providing a tool so customers have the ability to better manage their energy and water costs. This extension is in the amount of \$255,867.00 for a new not-to-exceed amount of \$1,229,869.68, subject to the availability of lawfully appropriated funds.

Manager:

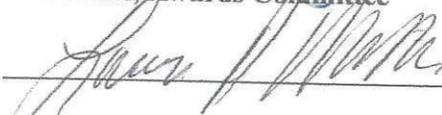
Director: Vento, Richard J. - Dir Customer Solutions & Market Development

VP: Whiting, Monica A. - Chief Customer Officer

APPROVALS:



Chairman, Awards Committee 3-3-16
Date



Manager, Capital Budget Planning 3/3/16
Date



Award #6 Back-Up

Approved by the JEA Awards Committee

Date 9/17/15 Item # 5

Formal Bid and Award System

Award #5 September 17, 2015

Award #:	Award Date:
Type of Award Request:	RENEWAL
Request #:	421
Requestor Name:	Tilden, Payson J. - Manager Customer Solutions
Requestor Phone:	(904) 665-6187
Project Title:	My Utility Tracker
Project Number:	8002359
Project Location:	JEA
Funds:	O&M
Award Estimate:	\$127,934.00
Scope of Work:	

The goal of the JEA Customer Energy and Water Management Portal project centers around providing JEA customers the ability to better manage their energy and water costs by utilizing an on-line portal that will assist them in understanding their usage patterns and provide them information to improve the efficiency of their home or business. The project is part of the JEA/Department of Energy (DOE) Smart Grid program and the tool and services described herein are deliverables identified in the JEA/DOE Smart Grid Project Execution Plan (PEP)

Requisition Number:
JEA IFB/RFP/State/City/GSA#: 114-11
Purchasing Agent: Woyak, Nathan
Is this a Ratification?: NO
If yes, explain:

RECOMMENDED AWARDEE(S):

119695

Name	Contact Name	Email	Address	Phone	Amount
ACLARA TECHNOLOGIES LLC	CHRISTINE JOHNSON	CJOHNSON@ACLARA.COM	30400 SOLON RD, SOLON OH 44139	(440) 528-7222	\$127,934.00

Amount of Original Award: \$726,000.00
Date of Original Award: 10/01/2012
Change Order Amount: \$127,934.00

List of Previous Change Order/Amendments:

CPA #	Amount	Date
#122993	\$117,489.00	8/28/2014

New Not-To-Exceed Amount:	\$971,423.00
Begin Date (mm/dd/yyyy):	10/01/2015
End Date (mm/dd/yyyy):	03/31/2016
Renewal Options:	NO
JSEB Requirement:	N/A
Comments on JSEB Requirements:	N/A – Specialty Services

Background/Recommendations:

Aclara Technologies LLC was awarded a three (3) year contract through JEA's competitive bid process on March 1, 2012 to provide JEA customers the ability to better manage their energy and water costs by utilizing an on-line portal to assist in understanding usage patterns.

In September 2014, the business requested a change order to the original JEA contract to continue their services and add additional module and maintenance fees, which increased the maximum indebtedness by \$117,489.00. Award document is attached for reference.

The current letter of agreement expires September 30, 2015. A committee has been reviewing the existing product to determine whether to extend the ACLARA agreement or conduct a formal bid process for a new vendor. An RFI process was conducted and five (5) vendors, including ACLARA, presented new products. JEA intends to bid out a formal RFP, and a six (6) month renewal is requested for ACLARA while this RFP process is completed.

Request approval to grant a renewal to Aclara Technologies LLC during the bidding process, in the amount of \$127,934.00 for a new not-to-exceed amount of \$971,423.00, subject to the availability of lawfully appropriated funds.

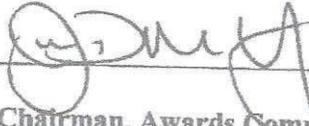
Manager:**Director:**

Vento, Richard J. - Dir Customer Solutions & Market Development

VP:

Whiting, Monica A. - Chief Customer Officer

APPROVALS:


 Chairman, Awards Committee

9-17-15

Date


 Manager, Capital Budget Planning

9/17/15

Date

From: Woyak, Nathan J.
To: Sundy, Rachelle M. - Procurement Vendor Specialist
Cc: Dickie, Samantha E.
Subject: RE: Breakdown of ACOARA funding
Date: Wednesday, September 16, 2015 1:49:42 PM

Rachelle or Sam, could you attached this email to award 5 in sharepoint. Thanks,

From: Tilden, Payson J. - Manager Customer Solutions
Sent: Wednesday, September 16, 2015 1:48 PM
To: Woyak, Nathan J.
Cc: Dickie, Samantha E.
Subject: Breakdown of ACOARA funding

Nathan,

Since the beginning of the ACLARA Agreement, JEA has paid ACLARA the same four line items each year beginning in FY2013

License Fees:	\$110,667	paid one time annually to cover license cost of Tracker software
Maintenance Fees	\$ 66,400	paid in quarterly installments to cover maintenance of Tracker software
ASP/Hosting Fees	\$ 76,400	paid in quarterly installments to cover ACLARA administration for operating Tracker software for JEA customers
Alerts Email/SMS Fees	\$ 2,400	paid in monthly amounts based on \$0.08 per email or alert sent out by ACLARA for JEA customers. This figure fluctuates, depending on JEA's requests for special email campaigns or

requested.

Or increased alerts messages

Total \$255,867 Amount established in Customer Solutions Program Portfolio
 Budget Details for FY16

This amount was divided by 2 to cover the six months extension being requested for ACLARA while an RFP process for a Tracker product is being completed. ACLARA's current letter of agreement expires on September 30, 2015.

I will scan and send to you a letter from ACLARA from the FY2014 program showing these same line item figures which were also the same for FY15.

Payson

Payson Tilden

Payson Tilden
 Program Manager, Customer Solutions
 JEA, Tower 12
 21 West Church



Formal Bid and Award System

Award #4 9/11/2014

Type of Award Request: CHANGE ORDER
Request #: 122
Requestor Name: Tilden, Payson J. - Manager Customer Solutions
Requestor Phone: (904) 665-6187
Project Title: My Utility Tracker
Project Number: 8002359
Project Location: JEA
Funds: O&M
Award Estimate: \$117,389.00

Description of Request:

Customer Solutions is requesting an increase of \$117,389.00 in the current agreement with Aclara Technologies for the license, operating and maintenance of the JEA on-line portal, My Utility Tracker, to be added to the current total of \$726,000.00 to continue their services through FY15 year to the end of their contract on 09/30/2015.

Requisition Number: TBD
JEA IFB/RFP/State/City/GSA#: 114-11 (CPA 122993)
Purchasing Agent: Woyak, Nathan
Is this a ratification?: NO
If yes, explain:

RECOMMENDED AWARDEE(S):

Name	Supplier Name	Email	Address	Phone	Amount
Aclara Technologies LLC	Christine Johnson	Cjohnson@Aclara.Com	30400 Solon Rd, Solon OH 44139	(440) 528-7222	\$117,389.00

Amount of Original Award: \$726,000.00
Date of Original Award: 3/1/2012
Change Order Amount: \$117,389.00
List of Previous Change Orders: N/A
New Not-To-Exceed Amount: \$843,500.00
Contract Type: Term Contract

Length of Contract/PO Term:	Three (3) Years w/ one (1) – 1-year renewal
Begin Date (mm/dd/yyyy):	10/01/2012
End Date (mm/dd/yyyy):	09/30/2015
Contract/PO Detail:	
Renewal Options Remaining:	Yes, one (1), 1-year renewal
JSEB Requirement:	Optional with criterion
Comments on JSEB Requirements:	No JSEBs were named

Background/Recommendations:

The Awards Committee approved an award on 3/1/2012 to Aclara Technologies for a three year period from 10/01/2012 to 09/30/2015 to provide the licensing, operation, maintenance and reporting for My Utility Tracker, the JEA on-line bill analysis and assessment product for all customers. The original award was competitively bid, with participation from three vendors. A copy of the prior award is attached.

This is a 3 year contract in the amount of \$726,000. The additional funding to fulfill the original contract term in the amount of \$117,389.00 is due to an additional module and maintenance fees that were not part of the original scope of work. During the next 12 months, a Program Feasibility and Functionality Review will be done to determine (within an appropriate time to process a new RFP if needed) whether it is cost efficient and beneficial to customers to continue with the current vendor, Aclara, or rebid this product.

114-11 – Request approval to award a Change Order to Aclara Technologies for My JEA Utility Tracker in the amount of \$117,389.00 for a total amount of \$843,500.00, subject to the availability of lawfully appropriated funds.

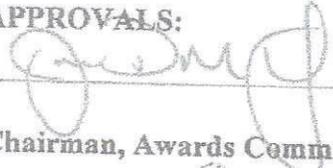
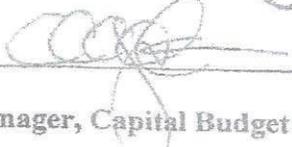
Manager:**Director:**

Vento, Richard J. - Dir Customer Solutions & Market Development

VP:

Whiting, Monica A. - Chief Customer Officer

APPROVALS:

	9-11-14
Chairman, Awards Committee	Date
	9/11/14
Manager, Capital Budget Planning	Date

Approved by the IEA Awards Committee
 Date 3-1-12 Item # 3



Formal Bid and Award System

Award #3 3/1/12

Type of Award Request: Proposal

Requestor Name: Selders, Steven Gregory
 Requestor Phone: 904-665-6597
 Request #: 2017
 Project Title: O&M Funding Award for Aclara Customer Energy Portal
 (Official Name: My JEA Utility Tracker)
 Project Number: 10501
 Award Estimate: N/A
 Funds: O&M

Description of Request/Product Description:

The goal of the JEA Customer Energy and Water Management Portal project centers around providing JEA customers the ability to better manage their energy and water costs by utilizing an on-line portal that will assist them in understanding their usage patterns and provide them information to improve the efficiency of their home or business. The project is part of the JEA/DOE Smart Grid program and the tool and services described herein are deliverables identified in the JEA/DOE Smart Grid Project Execution Plan (PEP).

This tool will be utilized by JEA customers, JEA CCC representatives and JEA's DSM Implementation Contractors to assist our customers in their energy and water management decisions.

Requisition Number: TBD
 JEA IFB/RFP/State/City/GSA #: 114-11
 Purchasing Agent: Renee' McQuaig
 Is this a Ratification? NO

If yes, explain:

Recommended Awardee(s)

Name	Address	Phone	Fax	Amount
Aclara Software, Inc.	16 Laurel Ave. Wellesley, MA 02481	(781) 694-3309	(781)694-3200	\$726,000.00

119695

Recommended Award Information

Amount for entire term of Contract/PO: \$726,000.00

Award Amount for initial year: \$242,000.00 (FY '13)
Length of Contract/PO Term: 3 years
Beginning Date: 10/1/2012
Ending Date: 9/30/2015
Renewal Options: YES
If Yes, please explain: Renewal option is included in the contract. This is a hosted software solution.
JSEB Requirement: JSEB participation was an evaluation criterion
Comments on JSEB Requirements: None of the proposals included JSEB participation

All Bidders

Name	Rank	Score	Disqualified	Reason
Aclara Software, Inc.	1	107.3	Γ	
Tendrill	2	98.9	Γ	
Opower	3	92.4	Γ	

Background/Recommendation

This award covers the O&M portion of the contract with Aclara. JEA advertised this solicitation on 8/8/11. Twelve (12) companies attended the pre-bid on 8/12/11. Three (3) companies submitted proposals. On 9/27/11 JEA held demonstration meetings for each of the companies that submitted proposals.

The proposals were then independently scored. The final scores and rankings were approved during JEA's public evaluation process on 10/14/11. On 12/15/11, the Awards Committee approved the capital portion of this contract for \$680,000.00.

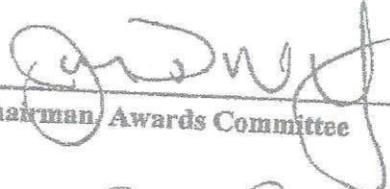
Current implementation of Aclara Energy Portal software is now underway. This is the O&M software-as-a-service (SaaS) piece that will be needed to pay for annual license, maintenance, and hosting fees for this software application begin once implementation is complete.

Aclara quoted O&M costs of \$210,000.00 / year. An additional amount of \$32,000 / year is included with this award amount as JEA has added additional features during implementation as well as to cover transactional costs for SMS and emails to JEA customers.

JEA RFP # 114-11 – Request approval to award a three-year contract to Aclara Software Inc., for JEA Customer Energy and Water Management Portal maintenance in the not to exceed amount of \$726,000.00, subject to the availability of lawfully appropriated funds.

	Approver
Manager:	
Director:	Fore, Lavonia L (Bea)
VP:	Kendrick, Wanyonyi Jaeger

APPROVALS:



Chairman Awards Committee 3-1-12
Date



Director, Financial Planning, Budgets and Rates 3/1/12
Date

Weir, Rachelle M. - Procurement Vendor Specialist

From: Tilden, Payson J. - Manager Customer Solutions
Sent: Monday, February 29, 2016 8:26 AM
To: Woyak, Nathan J.
Subject: Request for information for ACLARA

Nathan,

Since the beginning of the ACLARA Agreement, JEA has paid ACLARA the same four line items each 12 month period beginning in FY2013

License Fees: software	\$110,667	paid one time annually to cover license cost of Tracker
Maintenance Fees: Tracker software	\$ 66,400	paid in quarterly installments to cover maintenance of
ASP/Hosting Fees: administration for operating Tracker software for JEA customers	\$ 76,400	paid in quarterly installments to cover ACLARA
Alerts Email/SMS Fees: sent out by ACLARA for JEA customers. This figure fluctuates, depending or increased alerts messages requested.	\$ 2,400	paid in monthly amounts based on \$0.08 per email or alert on JEA's requests for special email campaigns
Total 12 month budget: Portfolio Budget Details for FY16	\$255,867	Amount established in Customer Solutions Program

The current ACLARA contract ends March 31, 2016. In order to complete the RFP process as well as cover the expected transition period for implementation and integration of a new system or an enhanced ACLARA system, Customer Solutions is requesting a 12 month extension of the contract from April 1, 2016 to March 31, 2017, with an increase in contract funds of \$255,867.

Please let me know if you need anything else.

Payson

Payson Tilden

Payson Tilden
 Program Manager, Customer Solutions
 JEA, Tower 12
 21 West Church
 Jacksonville, FL 32202
 Tel: 904 665-6187
 Fax: 904 665-7386



Award #6 Back-Up

Approved by the JEA Awards Committee

Date 3/3/2016 Item # 4

Formal Bid and Award System

Award #4 March 3, 2016

Type of Award Request: CONTRACT EXTENSION
Request #: 538
Requestor Name: Tilden, Payson J. - Manager Customer Solutions
Requestor Phone: (904) 665-6187
Project Title: My Utility Tracker
Project Number: 8002359 - HE10001
Project Location: JEA
Funds: O&M
Award Estimate: \$255,867.00

Description of Request:

The goal of the JEA Customer Energy and Water Management Portal project centers around providing JEA customers the ability to better manage their energy and water costs by utilizing an on-line portal that will assist them in understanding their usage patterns and provide them information to improve the efficiency of their home or business. The project is part of the JEA/Department of Energy (DOE) Smart Grid program and the tool and services described herein are deliverables identified in the JEA/DOE Smart Grid Project Execution Plan (PEP).

Requisition Number:
JEA IFB/RFP/State/City/GSA#: 114-11 (CPA 122993)
Purchasing Agent: Nathan Woyak
Is this a Ratification?: NO

RECOMMENDED AWARDEE(S):

Name	Contact Name	Email	Address	Phone	Amount
ACLARA TECHNOLOGIES LLC	CHRISTINE JOHNSON	CJOHNSON@ACLARA.COM	30400 SOLON RD, SOLON OH 44139	(440) 528-7222	\$255,867.00

Amount of Original Award: \$726,000.00
Date of Original Award: 03/01/2012
Change Order Amount: \$255,867.00

List of Previous Change Order/Amendments:

CPA #	Amount	Date
122993	\$117,389.00	9/11/2014
122993	\$1,239.68	10/3/2014
122993	\$1,440.00	10/22/2015
122993	\$127,934.00	10/1/2015

New Not-To-Exceed Amount: \$1,229,869.68
Begin Date (mm/dd/yyyy): 10/01/2012

End Date (mm/dd/yyyy): 03/31/2017
Renewal Options: NO
JSEB Requirement: N/A
Comments on JSEB Requirements: N/A – Specialty Services

Background/Recommendations:

Through its competitive procurement process, JEA previously awarded a contract to Aclara Technologies for a three year period from 10/01/2012 to 09/30/2015. This was to provide the licensing, operation, maintenance and reporting for My Utility Tracker, the JEA on-line bill analysis and assessment product for all customers. A copy of the original award is attached.

In September 2014, the business requested a change order for \$117,889.00 in additional funds was approved by the Awards Committee to continue their services, and add an additional module and maintenance fees. Additional change orders were subsequently approved by JEA procurement for \$1239.68 and \$1400.00 due to the business underestimating the cost of the variable expected alerts email/SMS fees.

In September 2015, JEA Awards Committee approved a six (6) month renewal from 9/30/15 to 3/31/2016, and \$127,934.00 in additional funds, and a feasibility process was begun to determine whether it was in JEA's best interest to re-bid the scope of work. An RFI process was conducted, and it was determined that a full RFP could be beneficial to the customer experience, as well as to JEA's internal use of the tool. That process has been started, but will not be completed by the end of the current six month renewal expiring on 3/31/2016.

TPC will review the feasibility results to complete the potential RFP process. JEA expects a TPC presentation in March 2016 and a decision on whether to move forward with an RFP in April. JEA anticipates the transition of a new contract to take twelve (12) months, after the date of award. Therefore, this request is for an extension from 3/31/2016 to 3/31/2017, and additional funding in the amount of \$255,867.00, for Aclara to continue to operate the product. This award covers the O&M portion of the contract with Aclara. The \$255,867.00 increase will cover the services for the license, operating and maintenance of the JEA on-line portal, My Utility Tracker.

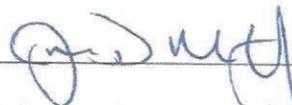
Request approval to award an extension to Aclara Technologies LLC, for providing a tool so customers have the ability to better manage their energy and water costs. This extension is in the amount of \$255,867.00 for a new not-to-exceed amount of \$1,229,869.68, subject to the availability of lawfully appropriated funds.

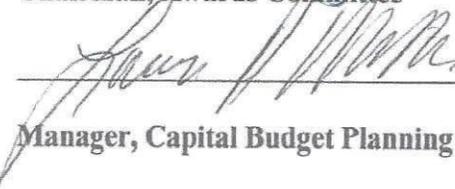
Manager:

Director: Vento, Richard J. - Dir Customer Solutions & Market Development

VP: Whiting, Monica A. - Chief Customer Officer

APPROVALS:


 _____ 3-3-16
Chairman, Awards Committee **Date**


 _____ 3/3/16
Manager, Capital Budget Planning **Date**



Formal Bid and Award System

Award #5

September 17, 2015

Award #:
Type of Award Request:
Request #:
Requestor Name:
Requestor Phone:
Project Title:
Project Number:
Project Location:
Funds:
Award Estimate:
Scope of Work:

Award Date:
 RENEWAL
 421
 Tilden, Payson J. - Manager Customer Solutions
 (904) 665-6187
 My Utility Tracker
 8002359
 JEA
 O&M
 \$127,934.00

The goal of the JEA Customer Energy and Water Management Portal project centers around providing JEA customers the ability to better manage their energy and water costs by utilizing an on-line portal that will assist them in understanding their usage patterns and provide them information to improve the efficiency of their home or business. The project is part of the JEA/Department of Energy (DOE) Smart Grid program and the tool and services described herein are deliverables identified in the JEA/DOE Smart Grid Project Execution Plan (PEP)

Requisition Number:
JEA IFB/RFP/State/City/GSA#:
Purchasing Agent:
Is this a Ratification?:
If yes, explain:

114-11

Woyak, Nathan

NO

RECOMMENDED AWARDEE(S):

119695

Name	Contact Name	E-mail	Address	Phone	Amount
ACLARA TECHNOLOGIES LLC	CHRISTINE JOHNSON	CJOHNSON@ACLARA.COM	30400 SOLON RD, SOLON OH 44139	(440) 528-7222	\$127,934.00

Amount of Original Award:
Date of Original Award:
Change Order Amount:

\$726,000.00

10/01/2012

\$127,934.00

List of Previous Change Order/Amendments:

CPA#	Amount	Date
#122993	\$117,489.00	8/28/2014

From: Woyak, Nathan J.
To: Sundy, Rachelle M. - Procurement Vendor Specialist
Cc: Dickie, Samantha E.
Subject: RE: Breakdown of ACOARA funding
Date: Wednesday, September 16, 2015 1:49:42 PM

Rachelle or Sam, could you attached this email to award 5 in sharepoint. Thanks,

From: Tilden, Payson J. - Manager Customer Solutions
Sent: Wednesday, September 16, 2015 1:48 PM
To: Woyak, Nathan J.
Cc: Dickie, Samantha E.
Subject: Breakdown of ACOARA funding

Nathan,

Since the beginning of the ACLARA Agreement, JEA has paid ACLARA the same four line items each year beginning in FY2013

License Fees:	\$110,667	paid one time annually to cover license cost of Tracker software
Maintenance Fees	\$ 66,400	paid in quarterly installments to cover maintenance of Tracker software
ASP/Hosting Fees	\$ 76,400	paid in quarterly installments to cover ACLARA administration for operating Tracker software for JEA customers
Alerts Email/SMS Fees	\$ 2,400	paid in monthly amounts based on \$0.08 per email or alert sent out by ACLARA for JEA customers. This figure fluctuates, depending on JEA's requests for special email campaigns or

requested.

Or increased alerts messages

Total \$255,867 Amount established in Customer Solutions Program Portfolio Budget Details for FY16

This amount was divided by 2 to cover the six months extension being requested for ACLARA while an RFP process for a Tracker product is being completed. ACLARA's current letter of agreement expires on September 30, 2015.

I will scan and send to you a letter from ACLARA from the FY2014 program showing these same line item figures which were also the same for FY15.

Payson

Payson Tilden

Payson Tilden
 Program Manager, Customer Solutions
 JEA, Tower 12
 21 West Church



Formal Bid and Award System

Award #4 9/11/2014

Type of Award Request: CHANGE ORDER
Request #: 122
Requestor Name: Tilden, Payson J. - Manager Customer Solutions
Requestor Phone: (904) 665-6187
Project Title: My Utility Tracker
Project Number: 8002359
Project Location: JEA
Funds: O&M
Award Estimate: \$117,389.00

Description of Request:

Customer Solutions is requesting an increase of \$117,389.00 in the current agreement with Aclara Technologies for the license, operating and maintenance of the JEA on-line portal, My Utility Tracker, to be added to the current total of \$726,000.00 to continue their services through FY15 year to the end of their contract on 09/30/2015.

Requisition Number: TBD
JEA IFB/RFP/State/City/GSA#: 114-11 (CPA 122993)
Purchasing Agent: Woyak, Nathan
Is this a ratification?: NO
If yes, explain:

RECOMMENDED AWARDEE(S):

Name	Contact Name	Email	Address	Phone	Amount
Aclara Technologies LLC	Christine Johnson	Cjohnson@Aclara.Com	30400 Solon Rd, Solon OH 44139	(440) 528-7222	\$117,389.00

Amount of Original Award: \$726,000.00
Date of Original Award: 3/1/2012
Change Order Amount: \$117,389.00
List of Previous Change Orders: N/A
New Not-To-Exceed Amount: \$843,500.00
Contract Type: Term Contract

Length of Contract/PO Term: Three (3) Years w/ one (1) – 1-year renewal
Begin Date (mm/dd/yyyy): 10/01/2012
End Date (mm/dd/yyyy): 09/30/2015
Contract/PO Detail:
Renewal Options Remaining: Yes, one (1), 1-year renewal
JSEB Requirement: Optional with criterion
Comments on JSEB Requirements: No JSEBs were named

Background/Recommendations:

The Awards Committee approved an award on 3/1/2012 to Aclara Technologies for a three year period from 10/01/2012 to 09/30/2015 to provide the licensing, operation, maintenance and reporting for My Utility Tracker, the JEA on-line bill analysis and assessment product for all customers. The original award was competitively bid, with participation from three vendors. A copy of the prior award is attached.

This is a 3 year contract in the amount of \$726,000. The additional funding to fulfill the original contract term in the amount of \$117,389.00 is due to an additional module and maintenance fees that were not part of the original scope of work. During the next 12 months, a Program Feasibility and Functionality Review will be done to determine (within an appropriate time to process a new RFP if needed) whether it is cost efficient and beneficial to customers to continue with the current vendor, Aclara, or rebid this product.

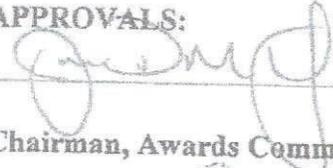
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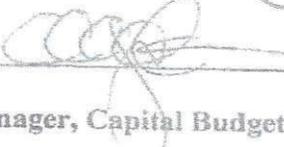
Manager:

Director: Vento, Richard J. - Dir Customer Solutions & Market Development

VP: Whiting, Monica A. - Chief Customer Officer

APPROVALS:


 _____ 9-11-14
Chairman, Awards Committee **Date**


 _____ 9/11/14
Manager, Capital Budget Planning **Date**



Formal Bid and Award System

Approved by the JEA Awards Committee
Date 3-1-12 Item # 3

Award #3 3/1/12

Type of Award Request: Proposal

Requestor Name: Selders, Steven Gregory
Requestor Phone: 904-665-6597
Request #: 2017
Project Title: O&M Funding Award for Aclara Customer Energy Portal
(Official Name: My JEA Utility Tracker)
Project Number: 10501
Award Estimate: N/A
Funds: O&M

Description of Request/Product Description:

The goal of the JEA Customer Energy and Water Management Portal project centers around providing JEA customers the ability to better manage their energy and water costs by utilizing an on-line portal that will assist them in understanding their usage patterns and provide them information to improve the efficiency of their home or business. The project is part of the JEA/DOE Smart Grid program and the tool and services described herein are deliverables identified in the JEA/DOE Smart Grid Project Execution Plan (PEP).

This tool will be utilized by JEA customers, JEA CCC representatives and JEA's DSM Implementation Contractors to assist our customers in their energy and water management decisions.

Requisition Number: TBD
JEA IFB/RFP/State/City/GSA #: 114-11
Purchasing Agent: Renee' McQuaig
Is this a Ratification? NO

If yes, explain:

Recommended Awardee(s)

Name	Address	Phone	Fax	Amount
119695 Aclara Software, Inc.	16 Laurel Ave. Wellesley, MA 02481	(781) 694-3309	(781) 694-3200	\$726,000.00

Recommended Award Information

Amount for entire term of Contract/PO: \$726,000.00

Award Amount for initial year: \$242,000.00 (FY '13)
Length of Contract/PO Term: 3 years
Beginning Date: 10/1/2012
Ending Date: 9/30/2015
Renewal Options: YES
If Yes, please explain: Renewal option is included in the contract. This is a hosted software solution.
JSEB Requirement: JSEB participation was an evaluation criterion
Comments on JSEB Requirements: None of the proposals included JSEB participation

All Bidders

Name	Rank	Score	Disqualified	Reason
Aclara Software, Inc.	1	107.3	Γ	
Tendrill	2	98.9	Γ	
Opower	3	92.4	Γ	

Background/Recommendation

This award covers the O&M portion of the contract with Aclara. JEA advertised this solicitation on 8/8/11. Twelve (12) companies attended the pre-bid on 8/12/11. Three (3) companies submitted proposals. On 9/27/11 JEA held demonstration meetings for each of the companies that submitted proposals.

The proposals were then independently scored. The final scores and rankings were approved during JEA's public evaluation process on 10/14/11. On 12/15/11, the Awards Committee approved the capital portion of this contract for \$680,000.00.

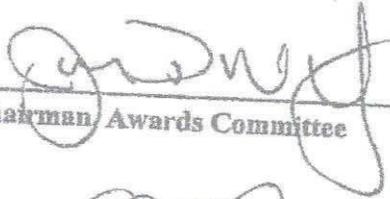
Current implementation of Aclara Energy Portal software is now underway. This is the O&M software-as-a-service (SaaS) piece that will be needed to pay for annual license, maintenance, and hosting fees for this software application begin once implementation is complete.

Aclara quoted O&M costs of \$210,000.00 / year. An additional amount of \$32,000 / year is included with this award amount as JEA has added additional features during implementation as well as to cover transactional costs for SMS and emails to JEA customers.

JEA RFP # 114-11 – Request approval to award a three-year contract to Aclara Software Inc., for JEA Customer Energy and Water Management Portal maintenance in the not to exceed amount of \$726,000.00, subject to the availability of lawfully appropriated funds.

	Approver
Manager:	
Director:	Fore, Lavonia L (Bea)
VP:	Kendrick, Wanyonyi Jaeger

APPROVALS:



Chairman Awards Committee 3-1-12
Date



Director, Financial Planning, Budgets and Rates 3/1/12
Date

Weir, Rachelle M. - Procurement Vendor Specialist

From: Tilden, Payson J. - Manager Customer Solutions
Sent: Monday, February 29, 2016 8:26 AM
To: Woyak, Nathan J.
Subject: Request for information for ACLARA

Nathan,

Since the beginning of the ACLARA Agreement, JEA has paid ACLARA the same four line items each 12 month period beginning in FY2013

License Fees: software	\$110,667	paid one time annually to cover license cost of Tracker
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Alerts Email/SMS Fees: sent out by ACLARA for JEA customers. This figure fluctuates, depending or increased alerts messages requested.	\$ 2,400	paid in monthly amounts based on \$0.08 per email or alert on JEA's requests for special email campaigns
Total 12 month budget: Portfolio Budget Details for FY16	\$255,867	Amount established in Customer Solutions Program

The current ACLARA contract ends March 31, 2016. In order to complete the RFP process as well as cover the expected transition period for implementation and integration of a new system or an enhanced ACLARA system, Customer Solutions is requesting a 12 month extension of the contract from April 1, 2016 to March 31, 2017, with an increase in contract funds of \$255,867.

Please let me know if you need anything else.

Payson

Payson Tilden

Payson Tilden
 Program Manager, Customer Solutions
 JEA, Tower 12
 21 West Church
 Jacksonville, FL 32202
 Tel: 904 665-6187
 Fax: 904 665-7386

**AMENDMENT 7
TO CONTRACT #122993
BETWEEN
JEA and
ACLARA TECHNOLOGIES, LLC**

THIS AMENDMENT NUMBER 7 ("Seventh Amendment") is made and entered into this 1st day of July 2021, (the "Effective Date"), by and between JEA, a body politic and corporate located at 21 W. Church St, Jacksonville, Florida, 32202, and ACLARA TECHNOLOGIES LLC, a corporation existing under the laws of the State of Ohio, with its principal office located at 77 Westport Plaza, Suite 500, St Louis, MO 63146, (hereinafter called the "Company").

RECITALS:

WHEREAS, on March 1, 2012, the parties made and entered into an agreement (the "Original Agreement") under which Company agreed to provide software, hosting, maintenance and support services for the ACLARA for My Utility Tracker through October 1, 2015 ("Term.") with the option of one (1), one (1) year renewal option pursuant to JEA Contract Number 122993, with a Maximum Indebtedness of **Six Hundred Eighty Thousand and 00/100 Dollars (\$680,000.00)**; and

WHEREAS, on or about March 12, 2013, IBA added the "Aclara Mobile Experience" to the implementation contract, and increased the Maximum Indebtedness by **Fifty Thousand and 00/100 Dollars (\$55,000.00)** to make the new Maximum Indebtedness total **Seven Hundred Twenty-Six Thousand and 00/100 Dollars (\$726,000.00)**; and

WHEREAS, on or about September 11, 2014, JEA increased the Maximum Indebtedness in the amount of **One Hundred Seventeen Thousand Three Hundred Eighty-Nine and 00/100 Dollars (\$117,389.00,389.00)**; and

WHEREAS, on or about October 3, 2014, JEA administratively increased the Maximum Indebtedness, as allowed by the JEA. Procurement Code, in the amount of **One Thousand Two Hundred Thirty-Nine and 68/100 Dollars (\$1,239.68)**; and

WHEREAS, on September 17, 2015, JEA increased the Maximum Indebtedness, as approved by the JEA Awards Committee, in the amount of **One Hundred Twenty Seven Thousand Nine Hundred Thirty Four and 00/100 Dollars (\$127,934.00)**, extended the Term of the Original Agreement by an additional six (6) months, making the new expiration date March 31, 2016 and implemented monthly reporting of the Tracker Web Stats report and WHEREAS, on or about October 22, 2015, JEA administratively increased the Maximum Indebtedness, as allowed by the JEA Procurement Code, in the amount of **One Thousand Four Hundred Forty and 00/100 Dollars (\$1,440.00)**; and

WHEREAS, on April 22, 2016, JEA increased the Maximum Indebtedness, as allowed by the JEA Procurement Code, in the amount of **Two Hundred Fifty-Five Thousand Eight Hundred Sixty-Seven and 00/100 Dollars (\$255,867.00)** for a new not to exceed amount of **One Million Two Hundred Twenty Nine Thousand Eight Hundred Sixty-Nine and 68/100 Dollars (\$1,229,869.68)**, and extended the Term of the Original Agreement by an additional one year, making the new expiration date March 31, 2017; and

WHEREAS, on April 1, 2017, JEA increased the Maximum Indebtedness by **Two Hundred Fifty-Five Thousand Eight Hundred, Sixty-Seven and 00/100 Dollars (\$255,867.00)**, and extended the Term of the Original Agreement by an additional one year making the new expiration date March 31, 2018; and

WHEREAS, on April 1, 2018, JEA increased the Maximum Indebtedness by **Sixty-Three Thousand Nine Hundred, Sixty-Six and 75/100 Dollars (\$63,966.75)**, and extended the Term of the Original Agreement by an additional three months; and

WHEREAS, starting July 1, 2018, JEA increased the Original Agreement for an additional two-year period, and increased the Maximum Indebtedness by **Five Hundred, Eleven Thousand Seven Hundred Thirty-Four and 00/100 Dollars (\$511,734.00)** with a Maximum Indebtedness of **Two Million Sixty-Five Thousand Four Hundred Thirty-Seven and 43/100 (\$2,065,437.43)**.

WHEREAS, starting July 1, 2020, the Original Agreement was amended such that Company's fees for the services increased, by **Two Hundred Sixty Thousand, Nine Hundred Eight Four and 34/100 Dollars (\$260,984.34)** which shall be invoiced on a quarterly basis in accordance with Exhibit A, attached hereto. The new Maximum Indebtedness shall now be **Two Million Three Hundred Twenty-six Thousand Four Hundred Twenty-One and 77/100 Dollars (\$2,326,421.77)**.

IN CONSIDERATION of the Original Agreement and for the mutual promises and covenants herein contained, the sufficiency and receipt of which is hereby acknowledged, the parties agree as follows:

AGREEMENT:

1. **Maximum Indebtedness.** The Original Agreement shall be amended such that Company's fees for the services shall be increased, by **Two Hundred Sixty Thousand, Nine Hundred Eight Four and 34/100 Dollars (\$260,984.34)** which shall be invoiced on a quarterly basis in accordance with Exhibit A, attached hereto. The new Maximum Indebtedness shall now be **Two Million Five Hundred Eighty-Seven Thousand, Four Hundred Six and 11/100 Dollars (\$2,587,406.11)**.
2. **Term.** The Term of the Original Agreement shall be extended for an additional one year starting **July 1, 2021** making the new termination of date **June 30, 2022**, at and for the prices established in Exhibit A. JEA reserves the right to terminate this agreement upon 60 days written notice.
3. The above recitals are true and correct and, by reference, are incorporated herein and made part hereof.

SAVE AND EXCEPT as hereby specifically amended herein, the terms and conditions of

the Original Agreement, as amended, shall remain in full force and effect.

IN WITNESS WHEREOF, the parties hereto have duly executed this Amendment the day and year first above written.

ATTEST:

By: _____

Name: _____

Title: _____

Date: _____

ACLARA TECHNOLOGIES LLC

DocuSigned by:
By: Kumi Premathilake
53474F6105C54F4

Name: Kumi Premathilake

Title: DVP AMI & Services

Date: 4/2/2021

ATTEST:

By: Maurice Scarboro

Name: Maurice Scarboro

Title: Contracts Associate

Date: 4/13/2021

JEA

By: Jenny McCollum

Name: Jenny McCollum

Title: Director of Procurement & Chief Procurement Officer

Date: 04/13/2021

APPENDIX A**Pricing**

Aclara is offering a one-year extension of the current contract with JEA for My Utility Tracker. The initial period would be from July 1, 2021 to June 30, 2022. The contract budget would be for the one-year amount of \$260,984.34, itemized as follows:

Line Item 1: Alerts/Email/SMS	\$ 2,448.00
Line Item 2: License Fee	\$ 112,880.34
Line Item 3: Hosting Fees	\$ 77,928.00
<u>Line Item 4: Maintenance Fees</u>	<u>\$ 67,728.00</u>
	\$ 260,984.34

Thank you.

Jerry Rahon

Sr. Director, Software Solutions Sales



Formal Bid and Award System

Award #3 May 21, 2021

Type of Award Request: RENEWAL
Request #: 6841
Requestor Name: Lawrence, Steven R. - Associate Program Manager
Requestor Phone: 904-665-7747
Project Title: Utility Tracker Portal Tool
Project Number: 10001
Project Location: JEA
Funds: O&M
Budget Estimate: \$392,450.00

Scope of Work:

The goal of the JEA Customer Energy and Water Management Portal project centers around providing JEA customers the ability to better manage their energy and water costs by utilizing an on-line portal (My Utility Tracker) that will assist them in understanding their usage patterns and provide them information to improve the energy efficiency of their home or business. The project is part of the JEA/Department of Energy (DOE) Smart Grid program and the tool and services are deliverables identified in the JEA/DOE Smart Grid Project Execution Plan (PEP).

JEA IFB/RFP/State/City/GSA#: N/A
Purchasing Agent: Woyak, Nathan J.
Is this a Ratification?: NO

RECOMMENDED AWARDEE(S):

Name	Contact Name	Email	Address	Amount
ACLARA TECHNOLOGIES LLC	Jerry Rahon	jrahon@aclara.com	30400 Solon Rd, Solon OH 44139	\$260,984.34

Amount of Original Award: \$260,984.34
Date of Original Award: 06/25/2020
Renewal Amount: \$260,984.34
New Not to Exceed Amount: \$521,968.68
Length of Contract/PO Term: One (1) Year w/Two (2) - One (1) Yr. Renewals
Begin Date (mm/dd/yyyy): 07/01/2020
End Date (mm/dd/yyyy): 06/30/2022
Renewal Options: Yes- One (1) - One (1) Yr. Renewals
JSEB Requirement: No JSEB opportunities have been identified

Background/Recommendations:

JEA first competitively bid these services in 2012. On 03/01/2012, the Awards Committee awarded a contract to Aclara Technologies for an original three (3) year period from 10/01/2012 to 09/30/2015. On

06/25/2020, the Awards Committee awarded a new sole source contract to Aclara Technologies through 06/30/2021. A copy of the previous award documentation is attached as back-up.

This renewal request is for a one (1) year term from 07/01/2021 to 06/30/2022 and \$260,984.34 in additional funding. The purpose of this request is for Aclara Technologies to continue to manage the utility tracker online portal tool on jea.com until a new strategy is implemented.

The new Aclara Technologies contract will specify that the contract may be terminated with a sixty (60) day notice, and the \$260,984.34 will be paid on a quarterly basis in the amount of \$65,246.08. Typically, Aclara charges four percent (4%) annual increase on this product, however, JEA negotiated a two percent (2%) increase on the new contract and agreed to hold the pricing the same for future optional renewals. The draft amendment and pricing offer is attached as back-up.

The contract budget would be for the one-year amount of \$260,984.34, itemized as follows:

- Line Item 1: Alerts/Email/SMS - \$2,448.00
- Line Item 2: License Fee - \$112,880.34
- Line Item 3: Hosting Fees - \$77,928.00
- Line Item 4: Maintenance Fees -\$67,728.00

Request approval for a one (1) year renewal award to Aclara Technologies LLC for Utility Tracker Portal Tool in the amount of \$260,984.34, with a new not-to-exceed amount of \$521,968.68, subject to the availability of lawfully appropriated funds.

Manager: Pippin, Brian C. - Strategic Segment Manager
Director: Nichols, Vicki D. - Dir Customer Solutions & Market Development
VP: Dutton, Laura M. – Chief Strategy Officer

APPROVALS:

Heather Beard

5/21/21

Chairman, Awards Committee

Date

Shawn A. Wilson

5/21/21

Budget Representative

Date



Formal Bid and Award System

Award #8 June 25, 2020

Type of Award Request: SOLE SOURCE
Request #: 6841
Requestor Name: Lawrence, Steven R.- Associate Program Manager
Requestor Phone: 904-665-7747
Project Title: Utility Tracker Portal Tool
Project Number: 8002359
Project Location: JEA
Funds: O&M
Budget Estimate: \$255,867.00

Scope of Work:

The goal of the JEA Customer Energy and Water Management Portal project centers around providing JEA customers the ability to better manage their energy and water costs by utilizing an on-line portal (My Utility Tracker) that will assist them in understanding their usage patterns and provide them information to improve the energy efficiency of their home or business. The project is part of the JEA/Department of Energy (DOE) Smart Grid program and the tool and services are deliverables identified in the JEA/DOE Smart Grid Project Execution Plan (PEP).

JEA IFB/RFP/State/City/GSA#: N/A
Purchasing Agent: Woyak, Nathan J.
Is this a Ratification?: NO

RECOMMENDED AWARDEE(S):

Name	Contact Name	Email	Address	Amount
ACLARA TECHNOLOGIES LLC	CHRISTINE JOHNSON	CJOHNSON@ACLARA.COM	30400 Solon Rd, Solon OH 44139	\$260,984.34

Amount for the entire term of the Contract: \$260,984.34
Award Amount for the remainder of this FY: \$65,246.08
Length of Contract/PO Term: One (1) Year w/Two (2) - One (1) Yr. Renewals
Begin Date (mm/dd/yyyy): 07/01/2020
End Date (mm/dd/yyyy): 06/30/2021
Renewal Options: Two (2) - One (1) Yr. Renewals
JSEB Requirement: N/A - Sole Source
Amount for the entire term of the Contract: \$260,984.34

Background/Recommendations:

JEA first competitively bid these services in 2012. On 03/01/2012, the Awards Committee awarded a contract to Aclara Technologies for an original three (3) year period from 10/01/2012 to 09/30/2015. A

copy of the original award documentation, all renewals, change orders, and contract extensions with the latest ending 06/30/2020, are attached as back-up. This request is for a new sole source contract to be awarded to Aclara Technologies. The JEA business unit has certified that these Services are a follow-up of Services that may only be done efficiently and effectively by the Company that rendered the initial Services to JEA, provided the initial procurement was competitive.

Note: In 2016, JEA again competitively bid these services out under RFP 043-16 and awarded a new contract to Schneider Electric. However, that contract was terminated for default on June 28, 2018 during implementation before transition from Aclara had taken place. As a result, JEA has continued to extend the existing contract with Aclara, which never expired.

This sole source request is for a one (1) year term from 07/01/2020 to 06/30/2021 and \$260,984.34 in funding dollars to the budget. The purpose of this sole source request is for Aclara Technologies to continue to manage the utility tracker online portal tool on jea.com thus allowing additional time for JEA to make a decision on whether to proceed with a full residential demand pricing rollout. Although, JEA's demand pricing pilot is ending in June 2020, a decision on moving forward with a full rollout will likely be delayed until a new permanent JEA CEO is in place and acclimated along with the JEA Board. A decision to move forward with a mandatory demand rate could eliminate the need for the Utility Tracker product completely in favor of a more robust and comprehensive Customer Engagement platform that includes demand (kW) pricing support tools. Included in the request are two (2) one (1) year optional renewals to allow for flexibility with the decision making of the new JEA leadership.

The new Aclara Technologies contract will specify that the contract may be terminated with a sixty (60) day notice, and the \$260,984.34 will be paid on a quarterly basis in the amount of \$65,246.08. Typically, Aclara charges four percent (4%) annual increase on this product, however, they have agreed to a two percent (2%) increase only for the new contract but will not agree to hold the pricing the same for future optional renewals. The pricing offer is attached as back-up.

Request approval for a one (1) year sole source award to Aclara Technologies LLC for Utility Tracker Portal Tool in the not to exceed amount of \$260,984.34, , subject to the availability of lawfully appropriated funds.

Manager: Pippin, Brian C. - Strategic Segment Manager
Director: Nichols, Vicki D. - Dir Customer Solutions & Market Development
VP: Dugan, R. Bruce - Interim Chief Customer Officer

APPROVALS:

 06/25/2020

Chairman, Awards Committee **Date**

 06/25/2020

Budget Representative **Date**



Formal Bid and Award System

Award #6 June 28, 2018

Type of Award Request: CONTRACT EXTENSION
Request #: 1822
Requestor Name: Tilden, Payson J. - Manager Customer Solutions
Requestor Phone: (904) 665-6187
Project Title: Utility Tracker Portal Tool
Project Number: 8002359
Project Location: JEA
Funds: O&M
Award Estimate: N/A

Scope of Work:

The goal of the JEA Customer Energy and Water Management Portal project centers around providing JEA customers the ability to better manage their energy and water costs by utilizing an on-line portal (My Utility Tracker) that will assist them in understanding their usage patterns and provide them information to improve the energy efficiency of their home or business. The project is part of the JEA/Department of Energy (DOE) Smart Grid program and the tool and services described herein are deliverables identified in the JEA/DOE Smart Grid Project Execution Plan (PEP).

JEA IFB/RFP/State/City/GSA#: #122993
Purchasing Agent: Woyak, Nathan J
Is this a Ratification?: NO

RECOMMENDED AWARDEE(S):

Name	Contact Name	Email	Address	Phone	Amount
ACLARA TECHNOLOGIES LLC	Christine Johnson	cjohnson@aclara.com	30400 Solon Rd Solon OH 44139	(440) 528-7222	\$511,734.00

Amount of Original Award: \$726,000.00
Date of Original Award: 03/01/2012
Change Order Amount: \$511,734.00

List of Previous Change Order/Amendments:

CPA #	Amount	Date
122993	\$117,389.00	9/11/2014
122993	\$1,239.68	10/3/2014
122993	\$1,440.00	10/22/2015
122993	\$127,934.00	10/1/2015
122993	\$255,867.00	03/3/2016
122993	\$255,867.00	01/12/2017
122993	\$63,966.75	03/28/2018

New Not-To-Exceed Amount: \$2,061,437.63
Begin Date (mm/dd/yyyy): 10/01/2012
End Date (mm/dd/yyyy): 03/31/2020
Renewal Options: NO
JSEB Requirement: N/A-Optional

Background/Recommendations:

Competitively bid and approved by the Awards Committee on 03/01/2012 to Aclara Technologies for a three (3) year period from 10/01/2012 to 09/30/2015. A copy of the original award documentation, other change orders to date, and the latest contract extension ending 06/30/2018, is attached as back-up.

This change order request is to extend the contract for two (2) additional years from 07/01/2018 to 06/30/2020, and add funds in the amount of \$511,734.00. The purpose of this contract extension is for Aclara Technologies to continue to manage the utility tracker online portal tool due to the decision by JEA to terminate for default the contract with Schneider Electric for a new utility tracker product. The amendment to the Aclara Technologies contract will stipulate that the contract may be terminated with a sixty (60) day notice, and the \$511,734.00 will be paid on a quarterly basis in the amount of \$63,966.75.

Typically Aclara charges a four percent (4%) annual increase on this product, but has agreed to hold current pricing for two (2) additional years for a cost avoidance of eight percent (8%). A two (2) year extension is recommended to allow time for JEA to complete the demand rate pilot, research, and for a potential lengthy rebid and implementation process of a new product. The pricing offer is attached as back-up.

The budget for this award will be:

FY18- \$63,966.75 (7/1/18-9/30/18)
FY19- \$255,867.00 (10/1/18-9/30/19)
FY20-\$191,990.25 (10/1/19-6/30/20)

The FY19 budgeted O&M cost for Schneider was expected to be lower than Aclara therefore approximately \$30,000.00 will be transferred from the HE10001 Director fund to cover the change.

Request approval to award a two (2) year contract extension to Aclara Technologies LLC for continued services for the utility tracker in the amount of \$511,734.00, for a new not-to-exceed amount of \$2,061,437.63, subject to the availability of lawfully appropriated funds.

Manager: Tilden, Payson J. - Manager Customer Solutions
Director: Nichols, Vicki D. - Dir Customer Solutions & Market Development
VP: Stewart, Kerri - VP & Chief Customer Officer

APPROVALS:

 6/28/18

Chairman, Awards Committee

Date


Manager, Capital Budget Planning

6/28/18
Date

**AMENDMENT 5
TO CONTRACT# 122993
BETWEEN
JEA AND
ACLARA TECHNOLOGIES LLC**

THIS AMENDMENT NUMBER 5 ("Fourth Amendment") is made and entered into this 1st day of July 2018, (the "Effective Date"), by and between **JEA**, a body politic and corporate located at 21 W. Church St., Jacksonville, Florida, 32202, and **ACLARA TECHNOLOGIES LLC**, a corporation existing under the laws of the State of Ohio, with its principal office located at 77 Westport Plaza, Suite 500, St. Louis, MO 63146, (hereinafter called the "Company").

RECITALS:

WHEREAS, on March 1, 2012, the parties made and entered into an agreement (the "Original Agreement") under which Company agreed to provide software, hosting, maintenance and support services for the ACLARA for My Utility Tracker through October 1, 2015 ("Term") with the option of one (1), one (1) year renewal option pursuant to JEA Contract Number 122993, with a Maximum Indebtedness of **Six Hundred Eighty Thousand and 00/100 Dollars (\$680,000.00)**; and

WHEREAS, on or about March 12, 2013, JEA added the "Aclara Mobile Experience" to the implementation contract, and increased the Maximum Indebtedness by **Fifty Thousand and 00/100 Dollars (\$50,000.00)** to make the new Maximum Indebtedness total **Seven Hundred Twenty Six Thousand and 00/100 Dollars (\$730,000.00)**; and

WHEREAS, on or about September 11, 2014, JEA increased the Maximum Indebtedness in the amount of **One Hundred Seventeen Thousand Three Hundred Eighty Nine and 00/100 Dollars (\$117,389.00)**; and

WHEREAS, on or about October 3, 2014, JEA administratively increased the Maximum Indebtedness, as allowed by the JEA Procurement Code, in the amount of **One Thousand Two Hundred Thirty Nine and 68/100 Dollars (\$1,239.68)**; and

WHEREAS, on September 17, 2015, JEA increased the Maximum Indebtedness, as approved by the JEA Awards Committee, in the amount of **One Hundred Twenty Seven Thousand Nine Hundred Thirty Four and 00/100 Dollars (\$127,934.00)**, extended the Term of the Original Agreement by an additional six (6) months, making the new expiration

date March 31, 2016, and implemented monthly reporting of the Tracker Web Stats report; and

WHEREAS, on or about October 22, 2015, JEA administratively increased the Maximum Indebtedness, as allowed by the JEA Procurement Code, in the amount of **One Thousand Four Hundred Forty and 00/100 Dollars (\$1,440.00)**; and

WHEREAS, on April 22, 2016, JEA increased the Maximum Indebtedness, as allowed by the JEA Procurement Code, in the amount of **Two Hundred Fifty Five Thousand Eight Hundred Sixty Seven and 00/100 Dollars (\$255,867.00)** for a new not to exceed amount of **One Million Two Hundred Twenty Nine Thousand Eight Hundred Sixty Nine and 68/100 Dollars (\$1,229,869.68)**, and extended the Term of the Original Agreement by an additional one year making the new expiration date March 31, 2017; and

WHEREAS, on April 1, 2017, JEA increased the Maximum Indebtedness by **Two Hundred Fifty Five Thousand Eight Hundred Sixty Seven and 00/100 Dollars (\$255,867.00)**, and extended the Term of the Original Agreement by an additional one year making the new expiration date March 31, 2018; and

WHEREAS, ON April 1, 2018, JEA increased the Maximum Indebtedness by **Sixty Three Thousand Nine Hundred and Six Six and 75/100 Dollars (\$63,966.75)**, and extended the Term of the Original Agreement by an additional three months; and

WHEREAS, JEA now desires to extend the Term of the Original Agreement starting July 1, 2018, for an additional two year period, and increase the Maximum Indebtedness by **Five Hundred Eleven Thousand Seven Hundred and Thirty Four and 00/100 Dollars (\$511,734.00)**.

IN CONSIDERATION of the Original Agreement and for the mutual promises and covenants herein contained, the sufficiency and receipt of which is hereby acknowledged, the parties agree as follows:

AGREEMENT:

1. **Maximum Indebtedness.** The Original Agreement shall be amended such that Company's fees for the services shall be increased, by **Five Hundred Eleven Thousand Seven Hundred and Thirty Four and 00/100 Dollars (\$511,734.00)** which shall be invoiced on a quarterly basis in accordance with **Exhibit A**, attached hereto. The new Maximum Indebtedness shall now be **Two Million Sixty One Thousand Four Hundred Thirty Seven and 43/100 (\$2,061,437.43)**.
2. **Term.** The Term of the Original Agreement shall be extended for an additional two years starting July 1, 2018, making the new termination of date **June 30, 2020**, at and for the prices established in **Exhibit A**. JEA reserves the right to terminate this agreement upon 60 days written notice.

3. The above recitals are true and correct and, by reference, are incorporated herein and made part hereof.

SAVE AND EXCEPT as hereby specifically amended herein, the terms and conditions of the Original Agreement, as amended, shall remain in full force and effect.

IN WITNESS WHEREOF, the parties hereto have duly executed this Amendment the day and year first above written.

ATTEST:

ACLARA TECHNOLOGIES LLC

By: _____

By: _____

Name: _____

Name: Erik Christian

Title: _____

Title: SVP, Finance, Strategy & IT

Date: _____

Date: _____

ATTEST:

JEA

By: _____

By: _____

Name: _____

John McCarthy

Title: _____

Director, Supply Chain Management

Date: _____

Date: _____

EXHIBIT A
PRICING

Aclara accepts the offer to extend at the pricing shown below:

JEA is offering a 2 year extension of the current contract with ACLARA for My Utility Tracker. The period would be from July 1, 2018 to June 30, 2020. The contract budget would be for the 2 year amount of \$511,734.00, itemized as follows:

Line Item 1: Alerts/Email/SMS	\$	4,800.00
Line Item 2: License Fee	\$	221,334.00
Line Item 3: Hosting Fees	\$	152,800.00
Line Item 4: Maintenance Fees	\$	<u>132,800.00</u>
TOTAL	\$	511,734.00

Thanks.

Joseph Polaski

Enterprise Sales Director



Formal Bid and Award System

Award #4 January 12, 2017

Type of Award Request: CONTRACT EXTENSION
Request #: 1822
Requestor Name: Tilden, Payson J. - Manager Customer Solutions
Requestor Phone: (904) 665-6187
Project Title: Utility Tracker Portal Tool
Project Number: 8002359
Project Location: JEA
Funds: O&M
Award Estimate: \$255,867.00
Scope of Work:

The goal of the JEA Customer Energy and Water Management Portal project centers around providing JEA customers the ability to better manage their energy and water costs by utilizing an on-line portal (My Utility Tracker) that will assist them in understanding their usage patterns and provide them information to improve the energy efficiency of their home or business. The project is part of the JEA/Department of Energy (DOE) Smart Grid program and the tool and services described herein are deliverables identified in the JEA/DOE Smart Grid Project Execution Plan (PEP).

JEA IFB/RFP/State/City/GSA#: #122993
Purchasing Agent: Woyak, Nathan J
Is this a Ratification?: NO

RECOMMENDED AWARDEE(S):

Name	Contact Name	Email	Address	Phone	Amount
ACLARA TECHNOLOGIES LLC	CHRISTINE JOHNSON	CJOHNSON@ACLARA.COM	30400 Solon Rd Solon OH 44139	(440) 528-7222	\$255,867.00

Amount of Original Award: \$726,000.00
Date of Original Award: 03/1/2012
Change Order Amount: \$255,867.00

List of Previous Change Order/Amendments:

CPA #	Amount	Date
122993	\$117,389.00	9/11/2014
122993	\$1,239.68	10/3/2014

122993	\$1,440.00	10/22/2015
122993	\$127,934.00	10/1/2015
122993	\$255,867.00	3/3/2016

New Not-To-Exceed Amount: \$1,485,736.68
Begin Date (mm/dd/yyyy): 10/01/2012
End Date (mm/dd/yyyy): 03/31/2018
Renewal Options: NO
JSEB Requirement: NA/Specialty Services

Background/Recommendations:

Competitively bid and approved by the Awards Committee on 03/01/2012 to Aclara Technologies for a three (3) year period from 10/01/2012 to 09/30/2015. A copy of the original award documentation, other change orders to date, and the latest contract extension ending 03/31/2017, is attached as back-up.

This change order request is to extend the contract for one (1) additional year from 03/31/2017 to 03/31/2018, and add funds in the amount of \$255,867.00. The purpose of this contract extension is for Aclara Technologies to continue to manage the utility tracker online portal tool while JEA's Technology Services (TS) implements the new portal with Schneider Electric (see Award #5 for reference), expected to take at least twelve (12) months. The amendment to the Aclara Technologies contract will stipulate that the contract may be terminated with a sixty (60) day notice, and the \$255,867.00 will be paid on a quarterly basis, should the new utility tracker be launched sooner than expected. The rates for the additional year are the same as what JEA is currently paying. The pricing is attached as back-up.

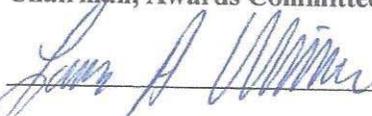
Request approval to award a one (1) year extension to Aclara Technologies LLC for continued services for the utility tracker in the amount of \$255,867.00, for a new not-to-exceed amount of \$1,485,736.68, subject to the availability of lawfully appropriated funds.

VP: Vento, Richard J. - Dir Customer Solutions & Market Development

APPROVALS:

 _____ 1/12/17

Chairman, Awards Committee **Date**

 _____ 1/12/17

Manager, Capital Budget Planning **Date**



Award #6 Back-Up

Approved by the JEA Awards Committee

Date 3/3/2016 Item # 4

Formal Bid and Award System

Award #4 March 3, 2016

Type of Award Request: CONTRACT EXTENSION
Request #: 538
Requestor Name: Tilden, Payson J. - Manager Customer Solutions
Requestor Phone: (904) 665-6187
Project Title: My Utility Tracker
Project Number: 8002359 - HE10001
Project Location: JEA
Funds: O&M
Award Estimate: \$255,867.00

Description of Request:

The goal of the JEA Customer Energy and Water Management Portal project centers around providing JEA customers the ability to better manage their energy and water costs by utilizing an on-line portal that will assist them in understanding their usage patterns and provide them information to improve the efficiency of their home or business. The project is part of the JEA/Department of Energy (DOE) Smart Grid program and the tool and services described herein are deliverables identified in the JEA/DOE Smart Grid Project Execution Plan (PEP).

Requisition Number:
JEA IFB/RFP/State/City/GSA#: 114-11 (CPA 122993)
Purchasing Agent: Nathan Woyak
Is this a Ratification?: NO

RECOMMENDED AWARDEE(S):

Name	Contact Name	Email	Address	Phone	Amount
ACLARA TECHNOLOGIES LLC	CHRISTINE JOHNSON	CJOHNSON@ACLARA.COM	30400 SOLON RD, SOLON OH 44139	(440) 528-7222	\$255,867.00

Amount of Original Award: \$726,000.00
Date of Original Award: 03/01/2012
Change Order Amount: \$255,867.00

List of Previous Change Order/Amendments:

CPA #	Amount	Date
122993	\$117,389.00	9/11/2014
122993	\$1,239.68	10/3/2014
122993	\$1,440.00	10/22/2015
122993	\$127,934.00	10/1/2015

New Not-To-Exceed Amount: \$1,229,869.68
Begin Date (mm/dd/yyyy): 10/01/2012

End Date (mm/dd/yyyy):

03/31/2017

Award #6 Back-Up

Renewal Options:

NO

JSEB Requirement:

N/A

Comments on JSEB Requirements:

N/A – Specialty Services

Background/Recommendations:

Through its competitive procurement process, JEA previously awarded a contract to Aclara Technologies for a three year period from 10/01/2012 to 09/30/2015. This was to provide the licensing, operation, maintenance and reporting for My Utility Tracker, the JEA on-line bill analysis and assessment product for all customers. A copy of the original award is attached.

In September 2014, the business requested a change order for \$117,889.00 in additional funds was approved by the Awards Committee to continue their services, and add an additional module and maintenance fees. Additional change orders were subsequently approved by JEA procurement for \$1239.68 and \$1400.00 due to the business underestimating the cost of the variable expected alerts email/SMS fees.

In September 2015, JEA Awards Committee approved a six (6) month renewal from 9/30/15 to 3/31/2016, and \$127,934.00 in additional funds, and a feasibility process was begun to determine whether it was in JEA's best interest to re-bid the scope of work. An RFI process was conducted, and it was determined that a full RFP could be beneficial to the customer experience, as well as to JEA's internal use of the tool. That process has been started, but will not be completed by the end of the current six month renewal expiring on 3/31/2016.

TPC will review the feasibility results to complete the potential RFP process. JEA expects a TPC presentation in March 2016 and a decision on whether to move forward with an RFP in April. JEA anticipates the transition of a new contract to take twelve (12) months, after the date of award. Therefore, this request is for an extension from 3/31/2016 to 3/31/2017, and additional funding in the amount of \$255,867.00, for Aclara to continue to operate the product. This award covers the O&M portion of the contract with Aclara. The \$255,867.00 increase will cover the services for the license, operating and maintenance of the JEA on-line portal, My Utility Tracker.

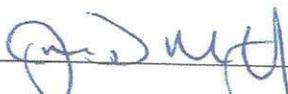
Request approval to award an extension to Aclara Technologies LLC, for providing a tool so customers have the ability to better manage their energy and water costs. This extension is in the amount of \$255,867.00 for a new not-to-exceed amount of \$1,229,869.68, subject to the availability of lawfully appropriated funds.

Manager:

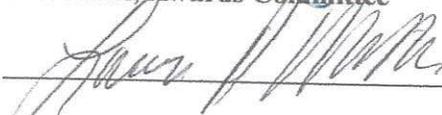
Director: Vento, Richard J. - Dir Customer Solutions & Market Development

VP: Whiting, Monica A. - Chief Customer Officer

APPROVALS:



Chairman, Awards Committee 3-3-16
Date



Manager, Capital Budget Planning 3/3/16
Date



Award #6 Back-Up

Approved by the JEA Awards Committee

Date 9/17/15 Item # 5

Formal Bid and Award System

Award #5 September 17, 2015

Award #:
Type of Award Request:
Request #:
Requestor Name:
Requestor Phone:
Project Title:
Project Number:
Project Location:
Funds:
Award Estimate:
Scope of Work:

Award Date:
RENEWAL
421
Tilden, Payson J. - Manager Customer Solutions
(904) 665-6187
My Utility Tracker
8002359
JEA
O&M
\$127,934.00

The goal of the JEA Customer Energy and Water Management Portal project centers around providing JEA customers the ability to better manage their energy and water costs by utilizing an on-line portal that will assist them in understanding their usage patterns and provide them information to improve the efficiency of their home or business. The project is part of the JEA/Department of Energy (DOE) Smart Grid program and the tool and services described herein are deliverables identified in the JEA/DOE Smart Grid Project Execution Plan (PEP)

Requisition Number:
JEA IFB/RFP/State/City/GSA#:
Purchasing Agent:
Is this a Ratification?:
If yes, explain:

114-11
Woyak, Nathan
NO

RECOMMENDED AWARDEE(S):

119695

Name	Contact Name	Email	Address	Phone	Amount
ACLARA TECHNOLOGIES LLC	CHRISTINE JOHNSON	CJOHNSON@ACLARA.COM	30400 SOLON RD, SOLON OH 44139	(440) 528-7222	\$127,934.00

Amount of Original Award: \$726,000.00
Date of Original Award: 10/01/2012
Change Order Amount: \$127,934.00

List of Previous Change Order/Amendments:

CPA #	Amount	Date
#122993	\$117,489.00	8/28/2014

New Not-To-Exceed Amount:	\$971,423.00
Begin Date (mm/dd/yyyy):	10/01/2015
End Date (mm/dd/yyyy):	03/31/2016
Renewal Options:	NO
JSEB Requirement:	N/A
Comments on JSEB Requirements:	N/A – Specialty Services

Background/Recommendations:

Aclara Technologies LLC was awarded a three (3) year contract through JEA's competitive bid process on March 1, 2012 to provide JEA customers the ability to better manage their energy and water costs by utilizing an on-line portal to assist in understanding usage patterns.

In September 2014, the business requested a change order to the original JEA contract to continue their services and add additional module and maintenance fees, which increased the maximum indebtedness by \$117,489.00. Award document is attached for reference.

The current letter of agreement expires September 30, 2015. A committee has been reviewing the existing product to determine whether to extend the ACLARA agreement or conduct a formal bid process for a new vendor. An RFI process was conducted and five (5) vendors, including ACLARA, presented new products. JEA intends to bid out a formal RFP, and a six (6) month renewal is requested for ACLARA while this RFP process is completed.

Request approval to grant a renewal to Aclara Technologies LLC during the bidding process, in the amount of \$127,934.00 for a new not-to-exceed amount of \$971,423.00, subject to the availability of lawfully appropriated funds.

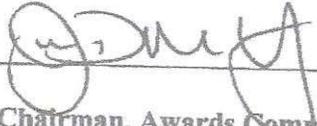
Manager:**Director:**

Vento, Richard J. - Dir Customer Solutions & Market Development

VP:

Whiting, Monica A. - Chief Customer Officer

APPROVALS:


 _____ 9-17-15
 Chairman, Awards Committee Date


 _____ 9/17/15
 Manager, Capital Budget Planning Date

From: Woyak, Nathan J.
To: Sundy, Rachelle M. - Procurement Vendor Specialist
Cc: Dickie, Samantha E.
Subject: RE: Breakdown of ACOARA funding
Date: Wednesday, September 16, 2015 1:49:42 PM

Rachelle or Sam, could you attached this email to award 5 in sharepoint. Thanks,

From: Tilden, Payson J. - Manager Customer Solutions
Sent: Wednesday, September 16, 2015 1:48 PM
To: Woyak, Nathan J.
Cc: Dickie, Samantha E.
Subject: Breakdown of ACOARA funding

Nathan,

Since the beginning of the ACLARA Agreement, JEA has paid ACLARA the same four line items each year beginning in FY2013

License Fees: software	\$110,667	paid one time annually to cover license cost of Tracker
Maintenance Fees Tracker software	\$ 66,400	paid in quarterly installments to cover maintenance of
ASP/Hosting Fees	\$ 76,400	paid in quarterly installments to cover ACLARA
Alerts Email/SMS Fees	\$ 2,400	paid in monthly amounts based on \$0.08 per email or alert
sent out by ACLARA for JEA customers. This figure fluctuates, depending on JEA's requests for special email campaigns or		

requested.

Or increased alerts messages

Total \$255,867 Amount established in Customer Solutions Program Portfolio
 Budget Details for FY16

This amount was divided by 2 to cover the six months extension being requested for ACLARA while an RFP process for a Tracker product is being completed. ACLARA's current letter of agreement expires on September 30, 2015.

I will scan and send to you a letter from ACLARA from the FY2014 program showing these same line item figures which were also the same for FY15.

Payson

Payson Tilden

Payson Tilden
 Program Manager, Customer Solutions
 JEA, Tower 12
 21 West Church



Formal Bid and Award System

Award #4 9/11/2014

Type of Award Request: CHANGE ORDER
Request #: 122
Requestor Name: Tilden, Payson J. - Manager Customer Solutions
Requestor Phone: (904) 665-6187
Project Title: My Utility Tracker
Project Number: 8002359
Project Location: JEA
Funds: O&M
Award Estimate: \$117,389.00

Description of Request:

Customer Solutions is requesting an increase of \$117,389.00 in the current agreement with Aclara Technologies for the license, operating and maintenance of the JEA on-line portal, My Utility Tracker, to be added to the current total of \$726,000.00 to continue their services through FY15 year to the end of their contract on 09/30/2015.

Requisition Number: TBD
JEA IFB/RFP/State/City/GSA#: 114-11 (CPA 122993)
Purchasing Agent: Woyak, Nathan
Is this a ratification?: NO
If yes, explain:

RECOMMENDED AWARDEE(S):

Name	Supplier Name	Email	Address	Phone	Amount
Aclara Technologies LLC	Christine Johnson	Cjohnson@Aclara.Com	30400 Solon Rd, Solon OH 44139	(440) 528-7222	\$117,389.00

Amount of Original Award: \$726,000.00
Date of Original Award: 3/1/2012
Change Order Amount: \$117,389.00
List of Previous Change Orders: N/A
New Not-To-Exceed Amount: \$843,500.00
Contract Type: Term Contract

Length of Contract/PO Term: Three (3) Years w/ one (1) – 1-year renewal
Begin Date (mm/dd/yyyy): 10/01/2012
End Date (mm/dd/yyyy): 09/30/2015
Contract/PO Detail:
Renewal Options Remaining: Yes, one (1), 1-year renewal
JSEB Requirement: Optional with criterion
Comments on JSEB Requirements: No JSEBs were named

Background/Recommendations:

The Awards Committee approved an award on 3/1/2012 to Aclara Technologies for a three year period from 10/01/2012 to 09/30/2015 to provide the licensing, operation, maintenance and reporting for My Utility Tracker, the JEA on-line bill analysis and assessment product for all customers. The original award was competitively bid, with participation from three vendors. A copy of the prior award is attached.

This is a 3 year contract in the amount of \$726,000. The additional funding to fulfill the original contract term in the amount of \$117,389.00 is due to an additional module and maintenance fees that were not part of the original scope of work. During the next 12 months, a Program Feasibility and Functionality Review will be done to determine (within an appropriate time to process a new RFP if needed) whether it is cost efficient and beneficial to customers to continue with the current vendor, Aclara, or rebid this product.

114-11 – Request approval to award a Change Order to Aclara Technologies for My JEA Utility Tracker in the amount of \$117,389.00 for a total amount of \$843,500.00, subject to the availability of lawfully appropriated funds.

Manager:

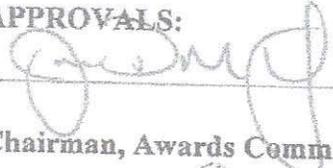
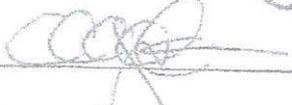
Director:

Vento, Richard J. - Dir Customer Solutions & Market Development

VP:

Whiting, Monica A. - Chief Customer Officer

APPROVALS:

	9-11-14
Chairman, Awards Committee	Date
	9/11/14
Manager, Capital Budget Planning	Date



Formal Bid and Award System

Approved by the JEA Awards Committee
Date 3-1-12 Item # 3

Award #3 3/1/12

Type of Award Request: Proposal

Requestor Name: Selders, Steven Gregory
Requestor Phone: 904-665-6597
Request #: 2017
Project Title: O&M Funding Award for Aclara Customer Energy Portal
(Official Name: My JEA Utility Tracker)
Project Number: 10501
Award Estimate: N/A
Funds: O&M

Description of Request/Product Description:

The goal of the JEA Customer Energy and Water Management Portal project centers around providing JEA customers the ability to better manage their energy and water costs by utilizing an on-line portal that will assist them in understanding their usage patterns and provide them information to improve the efficiency of their home or business. The project is part of the JEA/DOE Smart Grid program and the tool and services described herein are deliverables identified in the JEA/DOE Smart Grid Project Execution Plan (PEP).

This tool will be utilized by JEA customers, JEA CCC representatives and JEA's DSM Implementation Contractors to assist our customers in their energy and water management decisions.

Requisition Number: TBD
JEA IFB/RFP/State/City/GSA #: 114-11
Purchasing Agent: Renee' McQuaig
Is this a Ratification? NO

If yes, explain:

Recommended Awardee(s)

Name	Address	Phone	Fax	Amount
119695 Aclara Software, Inc.	16 Laurel Ave. Wellesley, MA 02481	(781) 694-3309	(781) 694-3200	\$726,000.00

Recommended Award Information

Amount for entire term of Contract/PO: \$726,000.00

Award Amount for initial year: \$242,000.00 (FY '13)
Length of Contract/PO Term: 3 years
Beginning Date: 10/1/2012
Ending Date: 9/30/2015
Renewal Options: YES
If Yes, please explain: Renewal option is included in the contract. This is a hosted software solution.
JSEB Requirement: JSEB participation was an evaluation criterion
Comments on JSEB Requirements: None of the proposals included JSEB participation

All Bidders

Name	Rank	Score	Disqualified	Reason
Aclara Software, Inc.	1	107.3	Γ	
Tendrill	2	98.9	Γ	
Opower	3	92.4	Γ	

Background/Recommendation

This award covers the O&M portion of the contract with Aclara. JEA advertised this solicitation on 8/8/11. Twelve (12) companies attended the pre-bid on 8/12/11. Three (3) companies submitted proposals. On 9/27/11 JEA held demonstration meetings for each of the companies that submitted proposals.

The proposals were then independently scored. The final scores and rankings were approved during JEA's public evaluation process on 10/14/11. On 12/15/11, the Awards Committee approved the capital portion of this contract for \$680,000.00.

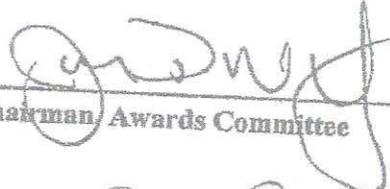
Current implementation of Aclara Energy Portal software is now underway. This is the O&M software-as-a-service (SaaS) piece that will be needed to pay for annual license, maintenance, and hosting fees for this software application begin once implementation is complete.

Aclara quoted O&M costs of \$210,000.00 / year. An additional amount of \$32,000 / year is included with this award amount as JEA has added additional features during implementation as well as to cover transactional costs for SMS and emails to JEA customers.

JEA RFP # 114-11 – Request approval to award a three-year contract to Aclara Software Inc., for JEA Customer Energy and Water Management Portal maintenance in the not to exceed amount of \$726,000.00, subject to the availability of lawfully appropriated funds.

	Approver
Manager:	
Director:	Fore, Lavonia L (Bea)
VP:	Kendrick, Wanyonyi Jaeger

APPROVALS:



Chairman Awards Committee 3-1-12
Date



Director, Financial Planning, Budgets and Rates 3/1/12
Date

Weir, Rachelle M. - Procurement Vendor Specialist

From: Tilden, Payson J. - Manager Customer Solutions
Sent: Monday, February 29, 2016 8:26 AM
To: Woyak, Nathan J.
Subject: Request for information for ACLARA

Nathan,

Since the beginning of the ACLARA Agreement, JEA has paid ACLARA the same four line items each 12 month period beginning in FY2013

License Fees: software	\$110,667	paid one time annually to cover license cost of Tracker
Maintenance Fees: Tracker software	\$ 66,400	paid in quarterly installments to cover maintenance of
ASP/Hosting Fees: administration for operating Tracker software for JEA customers	\$ 76,400	paid in quarterly installments to cover ACLARA
Alerts Email/SMS Fees: sent out by ACLARA for JEA customers. This figure fluctuates, depending or increased alerts messages requested.	\$ 2,400	paid in monthly amounts based on \$0.08 per email or alert on JEA's requests for special email campaigns
Total 12 month budget: Portfolio Budget Details for FY16	\$255,867	Amount established in Customer Solutions Program

The current ACLARA contract ends March 31, 2016. In order to complete the RFP process as well as cover the expected transition period for implementation and integration of a new system or an enhanced ACLARA system, Customer Solutions is requesting a 12 month extension of the contract from April 1, 2016 to March 31, 2017, with an increase in contract funds of \$255,867.

Please let me know if you need anything else.

Payson

Payson Tilden

Payson Tilden
 Program Manager, Customer Solutions
 JEA, Tower 12
 21 West Church
 Jacksonville, FL 32202
 Tel: 904 665-6187
 Fax: 904 665-7386



Award #6 Back-Up

Approved by the JEA Awards Committee

Date 3/3/2016 Item # 4

Formal Bid and Award System

Award #4 March 3, 2016

Type of Award Request: CONTRACT EXTENSION
Request #: 538
Requestor Name: Tilden, Payson J. - Manager Customer Solutions
Requestor Phone: (904) 665-6187
Project Title: My Utility Tracker
Project Number: 8002359 - HE10001
Project Location: JEA
Funds: O&M
Award Estimate: \$255,867.00

Description of Request:

The goal of the JEA Customer Energy and Water Management Portal project centers around providing JEA customers the ability to better manage their energy and water costs by utilizing an on-line portal that will assist them in understanding their usage patterns and provide them information to improve the efficiency of their home or business. The project is part of the JEA/Department of Energy (DOE) Smart Grid program and the tool and services described herein are deliverables identified in the JEA/DOE Smart Grid Project Execution Plan (PEP).

Requisition Number:
JEA IFB/RFP/State/City/GSA#: 114-11 (CPA 122993)
Purchasing Agent: Nathan Woyak
Is this a Ratification?: NO

RECOMMENDED AWARDEE(S):

Name	Contact Name	Email	Address	Phone	Amount
ACLARA TECHNOLOGIES LLC	CHRISTINE JOHNSON	CJOHNSON@ACLARA.COM	30400 SOLON RD, SOLON OH 44139	(440) 528-7222	\$255,867.00

Amount of Original Award: \$726,000.00
Date of Original Award: 03/01/2012
Change Order Amount: \$255,867.00

List of Previous Change Order/Amendments:

CPA #	Amount	Date
122993	\$117,389.00	9/11/2014
122993	\$1,239.68	10/3/2014
122993	\$1,440.00	10/22/2015
122993	\$127,934.00	10/1/2015

New Not-To-Exceed Amount: \$1,229,869.68
Begin Date (mm/dd/yyyy): 10/01/2012

End Date (mm/dd/yyyy): 03/31/2017
Renewal Options: NO
JSEB Requirement: N/A
Comments on JSEB Requirements: N/A – Specialty Services

Background/Recommendations:

Through its competitive procurement process, JEA previously awarded a contract to Aclara Technologies for a three year period from 10/01/2012 to 09/30/2015. This was to provide the licensing, operation, maintenance and reporting for My Utility Tracker, the JEA on-line bill analysis and assessment product for all customers. A copy of the original award is attached.

In September 2014, the business requested a change order for \$117,889.00 in additional funds was approved by the Awards Committee to continue their services, and add an additional module and maintenance fees. Additional change orders were subsequently approved by JEA procurement for \$1239.68 and \$1400.00 due to the business underestimating the cost of the variable expected alerts email/SMS fees.

In September 2015, JEA Awards Committee approved a six (6) month renewal from 9/30/15 to 3/31/2016, and \$127,934.00 in additional funds, and a feasibility process was begun to determine whether it was in JEA's best interest to re-bid the scope of work. An RFI process was conducted, and it was determined that a full RFP could be beneficial to the customer experience, as well as to JEA's internal use of the tool. That process has been started, but will not be completed by the end of the current six month renewal expiring on 3/31/2016.

TPC will review the feasibility results to complete the potential RFP process. JEA expects a TPC presentation in March 2016 and a decision on whether to move forward with an RFP in April. JEA anticipates the transition of a new contract to take twelve (12) months, after the date of award. Therefore, this request is for an extension from 3/31/2016 to 3/31/2017, and additional funding in the amount of \$255,867.00, for Aclara to continue to operate the product. This award covers the O&M portion of the contract with Aclara. The \$255,867.00 increase will cover the services for the license, operating and maintenance of the JEA on-line portal, My Utility Tracker.

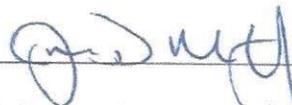
Request approval to award an extension to Aclara Technologies LLC, for providing a tool so customers have the ability to better manage their energy and water costs. This extension is in the amount of \$255,867.00 for a new not-to-exceed amount of \$1,229,869.68, subject to the availability of lawfully appropriated funds.

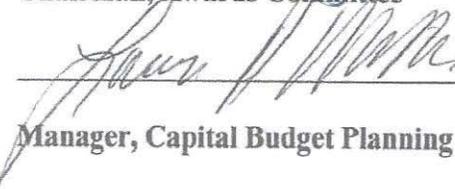
Manager:

Director: Vento, Richard J. - Dir Customer Solutions & Market Development

VP: Whiting, Monica A. - Chief Customer Officer

APPROVALS:


 _____ 3-3-16
Chairman, Awards Committee **Date**


 _____ 3/3/16
Manager, Capital Budget Planning **Date**



Formal Bid and Award System

Award #5

September 17, 2015

Award #:
Type of Award Request:
Request #:
Requestor Name:
Requestor Phone:
Project Title:
Project Number:
Project Location:
Funds:
Award Estimate:
Scope of Work:

Award Date:
 RENEWAL
 421
 Tilden, Payson J. - Manager Customer Solutions
 (904) 665-6187
 My Utility Tracker
 8002359
 JEA
 O&M
 \$127,934.00

The goal of the JEA Customer Energy and Water Management Portal project centers around providing JEA customers the ability to better manage their energy and water costs by utilizing an on-line portal that will assist them in understanding their usage patterns and provide them information to improve the efficiency of their home or business. The project is part of the JEA/Department of Energy (DOE) Smart Grid program and the tool and services described herein are deliverables identified in the JEA/DOE Smart Grid Project Execution Plan (PEP)

Requisition Number:
JEA IFB/RFP/State/City/GSA#:
Purchasing Agent:
Is this a Ratification?:
If yes, explain:

114-11

Woyak, Nathan

NO

RECOMMENDED AWARDEE(S):

119695

Name	Contact Name	E-mail	Address	Phone	Amount
ACLARA TECHNOLOGIES LLC	CHRISTINE JOHNSON	CJOHNSON@ACLARA.COM	30400 SOLON RD, SOLON OH 44139	(440) 528-7222	\$127,934.00

Amount of Original Award:
Date of Original Award:
Change Order Amount:

\$726,000.00

10/01/2012

\$127,934.00

List of Previous Change Order/Amendments:

CPA#	Amount	Date
#122993	\$117,489.00	8/28/2014

New Not-To-Exceed Amount: \$971,423.00
Begin Date (mm/dd/yyyy): 10/01/2015
End Date (mm/dd/yyyy): 03/31/2016
Renewal Options: NO
JSEB Requirement: N/A
Comments on JSEB Requirements: N/A – Specialty Services

Background/Recommendations:

Aclara Technologies LLC was awarded a three (3) year contract through JEA's competitive bid process on March 1, 2012 to provide JEA customers the ability to better manage their energy and water costs by utilizing an on-line portal to assist in understanding usage patterns.

In September 2014, the business requested a change order to the original JEA contract to continue their services and add additional module and maintenance fees, which increased the maximum indebtedness by \$117,489.00. Award document is attached for reference.

The current letter of agreement expires September 30, 2015. A committee has been reviewing the existing product to determine whether to extend the ACLARA agreement or conduct a formal bid process for a new vendor. An RFI process was conducted and five (5) vendors, including ACLARA, presented new products. JEA intends to bid out a formal RFP, and a six (6) month renewal is requested for ACLARA while this RFP process is completed.

Request approval to grant a renewal to Aclara Technologies LLC during the bidding process, in the amount of \$127,934.00 for a new not-to-exceed amount of \$971,423.00, subject to the availability of lawfully appropriated funds.

Manager:

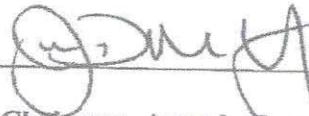
Director:

Vento, Richard J. - Dir Customer Solutions & Market Development

VP:

Whiting, Monica A. - Chief Customer Officer

APPROVALS:



 Chairman, Awards Committee Date

9-17-15



 Manager, Capital Budget Planning Date

9/17/15

From: Woyak, Nathan J.
To: Sundy, Rachelle M. - Procurement Vendor Specialist
Cc: Dickie, Samantha E.
Subject: RE: Breakdown of ACOARA funding
Date: Wednesday, September 16, 2015 1:49:42 PM

Rachelle or Sam, could you attached this email to award 5 in sharepoint. Thanks,

From: Tilden, Payson J. - Manager Customer Solutions
Sent: Wednesday, September 16, 2015 1:48 PM
To: Woyak, Nathan J.
Cc: Dickie, Samantha E.
Subject: Breakdown of ACOARA funding

Nathan,

Since the beginning of the ACLARA Agreement, JEA has paid ACLARA the same four line items each year beginning in FY2013

License Fees:	\$110,667	paid one time annually to cover license cost of Tracker software
Maintenance Fees	\$ 66,400	paid in quarterly installments to cover maintenance of Tracker software
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requested.

Or increased alerts messages

Total \$255,867 Amount established in Customer Solutions Program Portfolio Budget Details for FY16

This amount was divided by 2 to cover the six months extension being requested for ACLARA while an RFP process for a Tracker product is being completed. ACLARA's current letter of agreement expires on September 30, 2015.

I will scan and send to you a letter from ACLARA from the FY2014 program showing these same line item figures which were also the same for FY15.

Payson

Payson Tilden

Payson Tilden
 Program Manager, Customer Solutions
 JEA, Tower 12
 21 West Church



Formal Bid and Award System

Award #4 9/11/2014

Type of Award Request: CHANGE ORDER
Request #: 122
Requestor Name: Tilden, Payson J. - Manager Customer Solutions
Requestor Phone: (904) 665-6187
Project Title: My Utility Tracker
Project Number: 8002359
Project Location: JEA
Funds: O&M
Award Estimate: \$117,389.00

Description of Request:

Customer Solutions is requesting an increase of \$117,389.00 in the current agreement with Aclara Technologies for the license, operating and maintenance of the JEA on-line portal, My Utility Tracker, to be added to the current total of \$726,000.00 to continue their services through FY15 year to the end of their contract on 09/30/2015.

Requisition Number: TBD
JEA IFB/RFP/State/City/GSA#: 114-11 (CPA 122993)
Purchasing Agent: Woyak, Nathan
Is this a ratification?: NO
If yes, explain:

RECOMMENDED AWARDEE(S):

Name	Contact Name	Email	Address	Phone	Amount
Aclara Technologies LLC	Christine Johnson	Cjohnson@Aclara.Com	30400 Solon Rd, Solon OH 44139	(440) 528-7222	\$117,389.00

Amount of Original Award: \$726,000.00
Date of Original Award: 3/1/2012
Change Order Amount: \$117,389.00
List of Previous Change Orders: N/A
New Not-To-Exceed Amount: \$843,500.00
Contract Type: Term Contract

Length of Contract/PO Term: Three (3) Years w/ one (1) – 1-year renewal
Begin Date (mm/dd/yyyy): 10/01/2012
End Date (mm/dd/yyyy): 09/30/2015
Contract/PO Detail:
Renewal Options Remaining: Yes, one (1), 1-year renewal
JSEB Requirement: Optional with criterion
Comments on JSEB Requirements: No JSEBs were named

Background/Recommendations:

The Awards Committee approved an award on 3/1/2012 to Aclara Technologies for a three year period from 10/01/2012 to 09/30/2015 to provide the licensing, operation, maintenance and reporting for My Utility Tracker, the JEA on-line bill analysis and assessment product for all customers. The original award was competitively bid, with participation from three vendors. A copy of the prior award is attached.

This is a 3 year contract in the amount of \$726,000. The additional funding to fulfill the original contract term in the amount of \$117,389.00 is due to an additional module and maintenance fees that were not part of the original scope of work. During the next 12 months, a Program Feasibility and Functionality Review will be done to determine (within an appropriate time to process a new RFP if needed) whether it is cost efficient and beneficial to customers to continue with the current vendor, Aclara, or rebid this product.

114-11 – Request approval to award a Change Order to Aclara Technologies for My JEA Utility Tracker in the amount of \$117,389.00 for a total amount of \$843,500.00, subject to the availability of lawfully appropriated funds.

Manager:

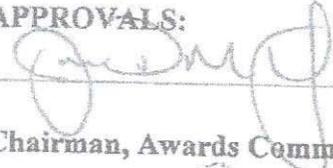
Director:

Vento, Richard J. - Dir Customer Solutions & Market Development

VP:

Whiting, Monica A. - Chief Customer Officer

APPROVALS:


 _____ 9-11-14
 Chairman, Awards Committee Date


 _____ 9/11/14
 Manager, Capital Budget Planning Date



Formal Bid and Award System

Approved by the JEA Awards Committee
Date 3-1-12 Item # 3

Award #3 3/1/12

Type of Award Request: Proposal

Requestor Name: Selders, Steven Gregory
Requestor Phone: 904-665-6597
Request #: 2017
Project Title: O&M Funding Award for Aclara Customer Energy Portal
(Official Name: My JEA Utility Tracker)
Project Number: 10501
Award Estimate: N/A
Funds: O&M

Description of Request/Product Description:

The goal of the JEA Customer Energy and Water Management Portal project centers around providing JEA customers the ability to better manage their energy and water costs by utilizing an on-line portal that will assist them in understanding their usage patterns and provide them information to improve the efficiency of their home or business. The project is part of the JEA/DOE Smart Grid program and the tool and services described herein are deliverables identified in the JEA/DOE Smart Grid Project Execution Plan (PEP).

This tool will be utilized by JEA customers, JEA CCC representatives and JEA's DSM Implementation Contractors to assist our customers in their energy and water management decisions.

Requisition Number: TBD
JEA IFB/RFP/State/City/GSA #: 114-11
Purchasing Agent: Renee' McQuaig
Is this a Ratification? NO

If yes, explain:

Recommended Awardee(s)

Name	Address	Phone	Fax	Amount
119695 Aclara Software, Inc.	16 Laurel Ave. Wellesley, MA 02481	(781) 694-3309	(781) 694-3200	\$726,000.00

Recommended Award Information

Amount for entire term of Contract/PO: \$726,000.00

Award Amount for initial year: \$242,000.00 (FY '13)
Length of Contract/PO Term: 3 years
Beginning Date: 10/1/2012
Ending Date: 9/30/2015
Renewal Options: YES
If Yes, please explain: Renewal option is included in the contract. This is a hosted software solution.
JSEB Requirement: JSEB participation was an evaluation criterion
Comments on JSEB Requirements: None of the proposals included JSEB participation

All Bidders

Name	Rank	Score	Disqualified	Reason
Aclara Software, Inc.	1	107.3	Γ	
Tendrill	2	98.9	Γ	
Opower	3	92.4	Γ	

Background/Recommendation

This award covers the O&M portion of the contract with Aclara. JEA advertised this solicitation on 8/8/11. Twelve (12) companies attended the pre-bid on 8/12/11. Three (3) companies submitted proposals. On 9/27/11 JEA held demonstration meetings for each of the companies that submitted proposals.

The proposals were then independently scored. The final scores and rankings were approved during JEA's public evaluation process on 10/14/11. On 12/15/11, the Awards Committee approved the capital portion of this contract for \$680,000.00.

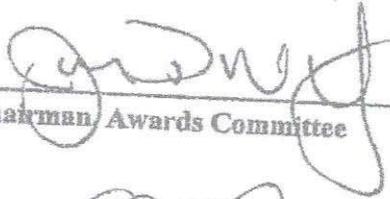
Current implementation of Aclara Energy Portal software is now underway. This is the O&M software-as-a-service (SaaS) piece that will be needed to pay for annual license, maintenance, and hosting fees for this software application begin once implementation is complete.

Aclara quoted O&M costs of \$210,000.00 / year. An additional amount of \$32,000 / year is included with this award amount as JEA has added additional features during implementation as well as to cover transactional costs for SMS and emails to JEA customers.

JEA RFP # 114-11 – Request approval to award a three-year contract to Aclara Software Inc., for JEA Customer Energy and Water Management Portal maintenance in the not to exceed amount of \$726,000.00, subject to the availability of lawfully appropriated funds.

	Approver
Manager:	
Director:	Fore, Lavonia L (Bea)
VP:	Kendrick, Wanyonyi Jaeger

APPROVALS:



Chairman Awards Committee 3-1-12
Date



Director, Financial Planning, Budgets and Rates 3/1/12
Date

Weir, Rachelle M. - Procurement Vendor Specialist

From: Tilden, Payson J. - Manager Customer Solutions
Sent: Monday, February 29, 2016 8:26 AM
To: Woyak, Nathan J.
Subject: Request for information for ACLARA

Nathan,

Since the beginning of the ACLARA Agreement, JEA has paid ACLARA the same four line items each 12 month period beginning in FY2013

License Fees: software	\$110,667	paid one time annually to cover license cost of Tracker
Maintenance Fees: Tracker software	\$ 66,400	paid in quarterly installments to cover maintenance of
ASP/Hosting Fees: administration for operating Tracker software for JEA customers	\$ 76,400	paid in quarterly installments to cover ACLARA
Alerts Email/SMS Fees: sent out by ACLARA for JEA customers. This figure fluctuates, depending or increased alerts messages requested.	\$ 2,400	paid in monthly amounts based on \$0.08 per email or alert on JEA's requests for special email campaigns
Total 12 month budget: Portfolio Budget Details for FY16	\$255,867	Amount established in Customer Solutions Program

The current ACLARA contract ends March 31, 2016. In order to complete the RFP process as well as cover the expected transition period for implementation and integration of a new system or an enhanced ACLARA system, Customer Solutions is requesting a 12 month extension of the contract from April 1, 2016 to March 31, 2017, with an increase in contract funds of \$255,867.

Please let me know if you need anything else.

Payson

Payson Tilden

Payson Tilden
 Program Manager, Customer Solutions
 JEA, Tower 12
 21 West Church
 Jacksonville, FL 32202
 Tel: 904 665-6187
 Fax: 904 665-7386

**AMENDMENT 7
TO CONTRACT #122993
BETWEEN
JEA and
ACLARA TECHNOLOGIES, LLC**

THIS AMENDMENT NUMBER 7 ("Seventh Amendment") is made and entered into this 1st day of July 2021, (the "Effective Date"), by and between JEA, a body politic and corporate located at 21 W. Church St, Jacksonville, Florida, 32202, and ACLARA TECHNOLOGIES LLC, a corporation existing under the laws of the State of Ohio, with its principal office located at 77 Westport Plaza, Suite 500, St Louis, MO 63146, (hereinafter called the "Company").

RECITALS:

WHEREAS, on March 1, 2012, the parties made and entered into an agreement (the "Original Agreement") under which Company agreed to provide software, hosting, maintenance and support services for the ACLARA for My Utility Tracker through October 1, 2015 ("Term.") with the option of one (1), one (1) year renewal option pursuant to JEA Contract Number 122993, with a Maximum Indebtedness of **Six Hundred Eighty Thousand and 00/100 Dollars (\$680,000.00)**; and

WHEREAS, on or about March 12, 2013, IBA added the "Aclara Mobile Experience" to the implementation contract, and increased the Maximum Indebtedness by **Fifty Thousand and 00/100 Dollars (\$55,000.00)** to make the new Maximum Indebtedness total **Seven Hundred Twenty-Six Thousand and 00/100 Dollars (\$726,000.00)**; and

WHEREAS, on or about September 11, 2014, JEA increased the Maximum Indebtedness in the amount of **One Hundred Seventeen Thousand Three Hundred Eighty-Nine and 00/100 Dollars (\$117,389.00,389.00)**; and

WHEREAS, on or about October 3, 2014, JEA administratively increased the Maximum Indebtedness, as allowed by the JEA. Procurement Code, in the amount of **One Thousand Two Hundred Thirty-Nine and 68/100 Dollars (\$1,239.68)**; and

WHEREAS, on September 17, 2015, JEA increased the Maximum Indebtedness, as approved by the JEA Awards Committee, in the amount of **One Hundred Twenty Seven Thousand Nine Hundred Thirty Four and 00/100 Dollars (\$127,934.00)**, extended the Term of the Original Agreement by an additional six (6) months, making the new expiration date March 31, 2016 and implemented monthly reporting of the Tracker Web Stats report and WHEREAS, on or about October 22, 2015, JEA administratively increased the Maximum Indebtedness, as allowed by the JEA Procurement Code, in the amount of **One Thousand Four Hundred Forty and 00/100 Dollars (\$1,440.00)**; and

WHEREAS, on April 22, 2016, JEA increased the Maximum Indebtedness, as allowed by the JEA Procurement Code, in the amount of **Two Hundred Fifty-Five Thousand Eight Hundred Sixty-Seven and 00/100 Dollars (\$255,867.00)** for a new not to exceed amount of **One Million Two Hundred Twenty Nine Thousand Eight Hundred Sixty-Nine and 68/100 Dollars (\$1,229,869.68)**, and extended the Term of the Original Agreement by an additional one year, making the new expiration date March 31, 2017; and

WHEREAS, on April 1, 2017, JEA increased the Maximum Indebtedness by **Two Hundred Fifty-Five Thousand Eight Hundred, Sixty-Seven and 00/100 Dollars (\$255,867.00)**, and extended the Term of the Original Agreement by an additional one year making the new expiration date March 31, 2018; and

WHEREAS, on April 1, 2018, JEA increased the Maximum Indebtedness by **Sixty-Three Thousand Nine Hundred, Sixty-Six and 75/100 Dollars (\$63,966.75)**, and extended the Term of the Original Agreement by an additional three months; and

WHEREAS, starting July 1, 2018, JEA increased the Original Agreement for an additional two-year period, and increased the Maximum Indebtedness by **Five Hundred, Eleven Thousand Seven Hundred Thirty-Four and 00/100 Dollars (\$511,734.00)** with a Maximum Indebtedness of **Two Million Sixty-Five Thousand Four Hundred Thirty-Seven and 43/100 (\$2,065,437.43)**.

WHEREAS, starting July 1, 2020, the Original Agreement was amended such that Company's fees for the services increased, by **Two Hundred Sixty Thousand, Nine Hundred Eight Four and 34/100 Dollars (\$260,984.34)** which shall be invoiced on a quarterly basis in accordance with Exhibit A, attached hereto. The new Maximum Indebtedness shall now be **Two Million Three Hundred Twenty-six Thousand Four Hundred Twenty-One and 77/100 Dollars (\$2,326,421.77)**.

IN CONSIDERATION of the Original Agreement and for the mutual promises and covenants herein contained, the sufficiency and receipt of which is hereby acknowledged, the parties agree as follows:

AGREEMENT:

1. **Maximum Indebtedness.** The Original Agreement shall be amended such that Company's fees for the services shall be increased, by **Two Hundred Sixty Thousand, Nine Hundred Eight Four and 34/100 Dollars (\$260,984.34)** which shall be invoiced on a quarterly basis in accordance with Exhibit A, attached hereto. The new Maximum Indebtedness shall now be **Two Million Five Hundred Eighty-Seven Thousand, Four Hundred Six and 11/100 Dollars (\$2,587,406.11)**.
2. **Term.** The Term of the Original Agreement shall be extended for an additional one year starting **July 1, 2021** making the new termination of date **June 30, 2022**, at and for the prices established in Exhibit A. JEA reserves the right to terminate this agreement upon 60 days written notice.
3. The above recitals are true and correct and, by reference, are incorporated herein and made part hereof.

SAVE AND EXCEPT as hereby specifically amended herein, the terms and conditions of

the Original Agreement, as amended, shall remain in full force and effect.

IN WITNESS WHEREOF, the parties hereto have duly executed this Amendment the day and year first above written.

ATTEST:

By: _____

Name: _____

Title: _____

Date: _____

ATTEST:

By: Maurice Scarboro

Name: Maurice Scarboro

Title: Contracts Associate

Date: 4/13/2021

ACLARA TECHNOLOGIES LLC

DocuSigned by:
By: Kumi Premathilake
53474F6105C54F4

Name: Kumi Premathi I lake

Title: DVP AMI & Services

Date: 4/2/2021

JEA

By: Jenny McCollum

Name: Jenny McCollum

Title: Director of Procurement & Chief Procurement Officer

Date: 04/13/2021

APPENDIX A**Pricing**

Aclara is offering a one-year extension of the current contract with JEA for My Utility Tracker. The initial period would be from July 1, 2021 to June 30, 2022. The contract budget would be for the one-year amount of \$260,984.34, itemized as follows:

Line Item 1: Alerts/Email/SMS	\$ 2,448.00
Line Item 2: License Fee	\$ 112,880.34
Line Item 3: Hosting Fees	\$ 77,928.00
<u>Line Item 4: Maintenance Fees</u>	<u>\$ 67,728.00</u>
	\$ 260,984.34

Thank you.

Jerry Rahon

Sr. Director, Software Solutions Sales

Description	Current	Renewal
Line Item 1: Alerts/Email/SMS	\$ 2,570.39	\$2,776.03
Line Item 2: Maintenance Fees	\$ 71,114.39	\$76,803.55
Line Item 3: Hosting Fees	\$ 81,824.40	\$88,370.35
Line Item 4: License Fee	\$ 118,524.38	\$128,006.31
Total	\$ 274,033.56	\$ 295,956.24

8% increase



Formal Bid and Award System

Award #5 April 20, 2023

Type of Award Request: RENEWAL
Requestor Name: Schoettler, Kyle C. - Mgr W/WW System Operations & Customer Response
Requestor Phone: (904) 524-3989
Project Title: Concrete Restoration Services (South/East) - Open Market
Project Number: Various
Project Location: JEA
Funds: Capital and O&M
Budget Estimate: N/A

Scope of Work:

The purpose of this solicitation is to seek bids from qualified Contractors primarily for the restoration of cement concrete in City, County and FDOT roadways, rights of way and easements. The work will also include the replacement of curbs and gutters free of standing water, meter box, manhole and valve jacket adjustments and replacements.

The work executed under this contract occurs after JEA construction or maintenance efforts are performed to ensure the safety of the community, while also ensuring customer satisfaction. All work orders performed under this contract are inspected prior to and after the restoration work is completed to ensure quality assurance and control.

JEA IFB/RFP/State/City/GSA#: 045-19
Purchasing Agent: Brown, Darriel
Is this a Ratification?: NO

RECOMMENDED AWARDEE(S):

Name	Contact Name	Email	Address	Phone	Amount
CONCRETE ADVANTAGE	Tom Hanson	concreteadvantage@comcast.net	806 Talleyrand Ave, Jacksonville FL 32206	(904) 886-4991	\$777,157.53

Amount of Original Award: \$2,467,079.90
Date of Original Award: 4/18/2019
Contract Increase Amount: \$777,157.53

List of Previous Increases:

CPA	Amount	Date	Description
181727	\$246,707.99	02/17/2022	10% Admin increase
181727	\$870,000.00	06/23/2022	Contract increase due to increase in work orders

New Not-To-Exceed Amount: \$4,360,945.42
Length of Contract/PO Term: Three (3) Years w/Two (2) - 1 Yr. Renewals
Begin Date: 04/30/2019
End Date: 04/29/2024
Renewal Options: None Remaining

JSEB Requirement:

Ten Percent (10%) Evaluation Criteria

Comments on JSEB Requirements:

Concrete Advantage is a JSEB

Background/Recommendations:

Originally awarded on 04/18/2019 for \$2,467,079.90 to Concrete Advantage. A copy of the previous award is attached as backup. On 02/17/2022, a one (1) year renewal and an administrative increase of \$246,707.99 was approved to cover a request for a CPI increase. On 06/23/2022, an increase of \$870,000.00 was approved to cover the remaining term of the contract taking into account a 43% increase in work orders for the South/East territory, and Concrete Advantage taking on 30% of the work for the North/West territory due to performance issues with the vendor servicing that territory.

Concrete Advantage initially communicated an increase of 23% across all line items as their terms for renewal, citing several indexes in the construction industry, continued inflation, material supply shortages, increased labor wages, and shortages of available labor to hire. For a pricing comparison, JEA reviewed the responses from the 2022 RFP for Disturbed Concrete in the North/West territory. Although the 2022 RFP was ultimately rescinded, JEA determined that the increase proposed by Concrete Advantage was favorable compared to pricing that would have resulted from a new solicitation for the South/East territory. JEA negotiated with Concrete Advantage to agree to a reduced increase of 20% across all line items.

Request approval to award a contract increase to Concrete Advantage for concrete restoration services in the amount of \$777,157.53, for a new not-to-exceed amount of \$4,360,945.42, subject to the availability of lawfully appropriated funds.

Director: Scheel, Jackie B. – Dir. W/WW Reuse Delivery & Collection

VP: Vu, Hai X. - VP Water Wastewater Systems

APPROVALS:

Chairman, Awards Committee **Date**

Budget Representative **Date**



Formal Bid and Award System

Award #7 June 23, 2022

Type of Award Request: CONTRACT INCREASE
Requestor Name: Schoettler, Kyle C. - Mgr W/WW System Operations & Customer Response
Requestor Phone: (904) 524-3989
Project Title: Concrete Restoration Services (South/East) - Open Market
Project Number: Various
Project Location: JEA
Funds: Capital and O&M
Budget Estimate: \$870,000.00

Scope of Work:

The purpose of this solicitation is to seek bids from qualified Contractors primarily for the restoration of cement concrete in City, County and FDOT roadways, rights of way and easements. The work will also include the replacement of curbs and gutters free of standing water; meter box, manhole and valve jacket adjustments and replacements.

This work executed under this contract is after JEA construction or maintenance efforts are performed to ensure the safety of the community, while also ensuring customer satisfaction. All work orders performed under this contract are inspected prior to and after the restoration work is completed to ensure quality assurance and control.

JEA IFB/RFP/State/City/GSA#: 045-19
Purchasing Agent: Brown, Darriel
Is this a Ratification?: NO

RECOMMENDED AWARDEE(S):

Name	Contact Name	Email	Address	Phone	Amount
CONCRETE ADVANTAGE	Tom Hanson	concreteadvantage@comcast.net	806 Talleyrand Ave, Jacksonville FL 32206	(904) 886-4991	\$870,000.00

Amount of Original Award: \$2,467,079.90
Date of Original Award: 4/18/2019
Contract Increase Amount: \$870,000.00

List of Previous Increases:

CPA	Amount	Date
181727	\$246,707.99	02/17/2022

New Not-To-Exceed Amount: \$3,583,787.89
Length of Contract/PO Term: Three (3) Years w/Two (2) - 1 Yr. Renewals
Begin Date: 04/30/2019
End Date: 04/29/2023
Renewal Options: Yes – One (1) – 1 Yr. Renewals

JSEB Requirement:

Ten Percent (10%) Evaluation Criteria

Comments on JSEB Requirements:

Concrete Advantage is a JSEB

Background/Recommendations:

Originally awarded on 04/18/2019 for \$2,467,079.90 to Concrete Advantage. A copy of the original award is attached as backup. On 02/17/2022, a one (1) year renewal and an administrative increase of \$246,707.99 was approved to cover a request for a CPI increase.

This increase is to cover the remaining term of the contract. Over the last calendar year, Concrete Advantage has also been tasked with completing 30% of the concrete restoration work orders within the North/West Service Territory along with their designated area on the South/East side. Additionally, the first six months of FY22 have shown a 43% increase in work orders completed by Concrete Advantage compared to the first six month of FY21. The North/West Service Territory concrete restoration contract expires 10/31/2022 and is planned to be out for bid within the next month.

Request approval to award a contract increase to Concrete Advantage for concrete restoration services in the amount of \$870,000.00, for a new not-to-exceed amount of \$3,583,787.89, subject to the availability of lawfully appropriated funds.

Director: Scheel, Jackie B. - Dir W/WW Reuse Delivery & Collection

VP: Vu, Hai X. - VP Water Wastewater Systems

APPROVALS:

Stephen Deby 6/23/22

Chairman, Awards Committee Date

Laure A Whitmer 6/23/22

Budget Representative Date



Formal Bid and Award System

CPA 181727

Award #7 April 18, 2019

Type of Award Request: INVITATION TO NEGOTIATE (ITN)
Request #: 6459
Requestor Name: Smith, Thaliah D. – Contract Specialist
Requestor Phone: (904) 665-8165
Project Title: Concrete Restoration Services (South/East) - Open Market
Project Number: Various (see attached list)
Project Location: JEA
Funds: Capital and O&M (line 416)
Budget Estimate: \$2,200,000.00 (50% Capital, 50% O&M)

Scope of Work:

The purpose of this solicitation is to seek bids from qualified Contractors primarily for the restoration of cement concrete in City, County and FDOT roadways, rights of way and easements. The work will also include the replacement of curbs and gutters free of standing water; meter box, manhole and valve jacket adjustments and replacements.

This award will impact the following Measures of Value:

- Customer Value: This contract will restore customer driveways/curbs to the pre-maintenance/pre-construction state or better.
- Community Impact Value: Increasing amount of business JEA does with the JSEB community.

JEA IFB/RFP/State/City/GSA#: 045-19
Purchasing Agent: Kruck, Daniel R.
Is this a Ratification?: NO

RECOMMENDED AWARDEE(S):

Name	Contact Name	Email	Address	Phone	Amount
CONCRETE ADVANTAGE	Tom Hanson	concreteadvantage@comcast.net	806 Talleyrand Ave, Jacksonville FL 32206	(904) 886-4991	\$2,467,079.90

Amount for entire term of Contract/PO: \$2,467,079.90
Award Amount for remainder of this FY: \$411,179.90
Length of Contract/PO Term: Three Years w/ Two (2) - One (1) Year Renewals
Begin Date (mm/dd/yyyy): 04/30/2019
End Date (mm/dd/yyyy): 04/30/2022
Renewal Options: Yes, Two (2) - One (1) Year Renewals
JSEB Requirement: Ten Percent (10%) Evaluation Criteria
Comments on JSEB Requirements:
 Concrete Advantage is a JSEB

BIDDERS:

Name	Original Amount	Original Rank	BAFO Amount	BAFO Rank
HG CONCRETE, LLC (dba CONCRETE ADVANTAGE)	\$2,705,738.90	2	\$2,467,079.90	1
JAX UTILITIES MANAGEMENT, INC.	\$2,290,798.40	1	\$2,290,798.40	2

Background/Recommendations:

Advertised on 02/12/2019. Four (4) prime contractors attended the mandatory pre-response meeting held on 02/21/2019. At Response opening on 03/12/2019, JEA received two (2) Responses. Companies that attended the pre-bid, but did not submit, stated a lack of experience in this type of concrete restoration, as the reason for not submitting a response. The two Respondents were short-listed and invited to submit Best and Final Offers (BAFO). JEA evaluated the companies on price, years of experience, available equipment, approach and work plan, organization structure and JSEB participation. Concrete Advantage is the highest evaluated Respondent. A copy of the BAFO bid form, workbook and BAFO evaluation summary are attached as backup.

The unit prices are approximately fourteen percent (14%) higher on average, than current pricing. Since this work was last bid in 2016, the market for concrete materials has increased between 12%-16% depending on the concrete used for each job type. The unit price increases are deemed reasonable considering market conditions.

The work for this contract will be completed on a task order basis, and payments will be made in accordance with the unit prices on the bid workbook. The unit prices are fixed for one (1) year, and then may be increased using a Consumer Price Index (CPI) adjustment. The quantities on the bid workbook used to determine the award total were based on JEA's increased work volume over the past year for this service territory. Concrete Advantage is the incumbent provider and has been performing well under the current contract. A budget request has been made to cover the increase in costs.

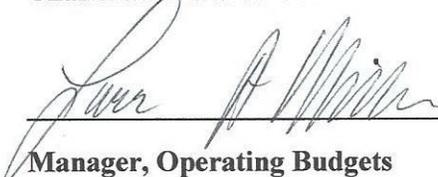
045-19 – Request approval to award a contract to HG Concrete, LLC (dba Concrete Advantage) for Concrete Restoration Services in the amount of \$2,467,079.90, subject to the availability of lawfully appropriated funds.

Manager: Schoettler, Kyle C. - Mgr W/WW System Operations & Customer Response
Director: Scheel, Jackie B. – Dir W/WW Reuse Delivery & Collection
VP: Calhoun, Deryle I. - VP/GM Water Wastewater Systems

APPROVALS:

 4/18/19

Chairman, Awards Committee **Date**

 4/18/19

Manager, Operating Budgets **Date**



Formal Bid and Award System

CPA 181727

Award #7 April 18, 2019

Type of Award Request: INVITATION TO NEGOTIATE (ITN)
Request #: 6459
Requestor Name: Smith, Thaliah D. – Contract Specialist
Requestor Phone: (904) 665-8165
Project Title: Concrete Restoration Services (South/East) - Open Market
Project Number: Various (see attached list)
Project Location: JEA
Funds: Capital and O&M (line 416)
Budget Estimate: \$2,200,000.00 (50% Capital, 50% O&M)

Scope of Work:

The purpose of this solicitation is to seek bids from qualified Contractors primarily for the restoration of cement concrete in City, County and FDOT roadways, rights of way and easements. The work will also include the replacement of curbs and gutters free of standing water; meter box, manhole and valve jacket adjustments and replacements.

This award will impact the following Measures of Value:

- Customer Value: This contract will restore customer driveways/curbs to the pre-maintenance/pre-construction state or better.
- Community Impact Value: Increasing amount of business JEA does with the JSEB community.

JEA IFB/RFP/State/City/GSA#: 045-19
Purchasing Agent: Kruck, Daniel R.
Is this a Ratification?: NO

RECOMMENDED AWARDEE(S):

Name	Contact Name	Email	Address	Phone	Amount
CONCRETE ADVANTAGE	Tom Hanson	concreteadvantage@comcast.net	806 Talleyrand Ave, Jacksonville FL 32206	(904) 886-4991	\$2,467,079.90

Amount for entire term of Contract/PO: \$2,467,079.90
Award Amount for remainder of this FY: \$411,179.90
Length of Contract/PO Term: Three Years w/ Two (2) - One (1) Year Renewals
Begin Date (mm/dd/yyyy): 04/30/2019
End Date (mm/dd/yyyy): 04/30/2022
Renewal Options: Yes, Two (2) - One (1) Year Renewals
JSEB Requirement: Ten Percent (10%) Evaluation Criteria
Comments on JSEB Requirements:
 Concrete Advantage is a JSEB

045-19 BAFO Summary Evaluation Overview

Vendor Rankings	Kyle Schoettler	Thaliah Smith	Whitney Saunders	Total	Rank
HG Concrete, LLC (DBA Concrete Advantage)	94.43	94.43	96.43	285.29	1
Jax Utilities Management, Inc.	95	95	95	285	2

Kyle Schoettler	Price (50 Points)	Years of Experience (10 Points)	Equipment List (10 Points)	Approach and Work Plan (10 Points)	Organization Structure (10 Points)	JSEB (10 Points)	Total
HG Concrete, LLC (DBA Concrete Advantage)	46.43	10	10	10	8	10	94.43
Jax Utilities Management, Inc.	50	7	10	10	10	8	95

Thaliah Smith	Price (50 Points)	Years of Experience (10 Points)	Equipment List (10 Points)	Approach and Work Plan (10 Points)	Organization Structure (10 Points)	JSEB (10 Points)	Total
HG Concrete, LLC (DBA Concrete Advantage)	46.43	10	10	10	8	10	94.43
Jax Utilities Management, Inc.	50	7	10	10	10	8	95

Whitney Saunders	Price (50 Points)	Years of Experience (10 Points)	Equipment List (10 Points)	Approach and Work Plan (10 Points)	Organization Structure (10 Points)	JSEB (10 Points)	Total
HG Concrete, LLC (DBA Concrete Advantage)	46.43	10	10	10	10	10	96.43
Jax Utilities Management, Inc.	50	7	10	10	10	8	95

Overall Averages	Price (50 Points)	Years of Experience (10 Points)	Equipment List (10 Points)	Approach and Work Plan (10 Points)	Organization Structure (10 Points)	JSEB (10 Points)	Total
HG Concrete, LLC (DBA Concrete Advantage)	46.43	10	10	10	8.7	10	95.10
Jax Utilities Management, Inc.	50	7	10	10	10	8	95

	BAFO Reduction	As Percentage
HG Concrete	\$ 238,659.00	8.8%
Jax Utilities	\$ -	0.0%

RESPONDENT INFORMATION:

RESPONDENT NAME: HG Concrete LLC dba Concrete Advantage _____
 BUSINESS ADDRESS: 806 Talleyrand Avenue _____
 CITY, STATE, ZIP CODE: Jacksonville, FL 32206 _____
 TELEPHONE: 904-886-4991 _____
 FAX: _____
 EMAIL OF CONTACT: concreteadvantage@comcast.net _____

QUOTATION OF RATES

Maximum points for this criterion: 50 points
 Respondent shall provide pricing for the Contract by completing the enclosed Appendix B – Response Workbook and Response Form. The rates provided shall be all-inclusive and shall include all profit, taxes, benefits, travel, and all other overhead items.

Please note, the rates or lump sums quoted by Respondent on the Response Form must be firm prices, not estimates. ANY MODIFICATIONS, EXCEPTIONS, OR OBJECTIONS CONTAINED WITHIN THE PROPOSAL FORM SHALL SUBJECT THE PROPOSAL TO DISQUALIFICATION.

Description of Services	Total Three (3) Year Response Price
Total Three (3) Year Response Price (transfer cell H47 from Response Workbook)	\$ 2,467,079.90

Respondent's Certification

By submitting this Response, the Respondent certifies (1) that the Respondent has read and reviewed all of the documents pertaining to this RFP 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 Company 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.

Please initial below:

 TH (Initials) 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".

We have received addenda One through Two

Thomas Hanson
 Signature of Authorize Officer of Respondent or Agent

3-28-2019
 Date

Thomas Hanson V.P.

904-813-4412

Addendum 1 BAFO 045-19 Concrete Response Workbook (Quotation of Rates)
company shall fill in yellow boxes

Company

Concrete Advantage

Item No.	Description	UOM	Unit Price	Annual Est. Qty	3 year Est. Qty	Total Price
1						
A	Wheel Chair Ramp	EA	\$ 1,200.00	2	6	\$ 7,200.00
2	Manhole/Valve Jacket Adjustment					
A	Sanitary Manhole Adjustment	EA	\$ 100.00	4	12	\$ 1,200.00
B	Valve Jacket Adjustment	EA	\$ 10.00	6	18	\$ 180.00
3	Sidewalk Replacement					
A	City of Jacksonville Right of Way	SF	\$ 8.50	19,096	57,288	\$ 486,948.00
B	FDOT Right of Way	SF	\$ 9.25	2,464	7,392	\$ 68,376.00
C	Nassau County Right of Way	SF	\$ 9.25	308	924	\$ 8,547.00
D	St Johns County Right of Way	SF	\$ 9.25	308	924	\$ 8,547.00
E	Clay County Right of Way	SF	\$ 9.25	62	186	\$ 1,720.50
4	Driveway Replacement					
A	City of Jacksonville Right of Way	SF	\$ 9.25	32,000	96,000	\$ 888,000.00
B	FDOT Right of Way	SF	\$ 10.00	4,000	12,000	\$ 120,000.00
C	Nassau County Right of Way	SF	\$ 10.00	800	2,400	\$ 24,000.00
D	St Johns County Right of Way	SF	\$ 10.00	3,200	9,600	\$ 96,000.00
E	Clay County Right of Way	SF	\$ 10.00	192	576	\$ 5,760.00
5	Cement Curb Replacement					
A	Standard Curb	LF	\$ 30.00	2,400	7,200	\$ 216,000.00
B	Miami curb	LF	\$ 40.00	800	2,400	\$ 96,000.00
C	FDOT Standard Curb	LF	\$ 40.00	400	1,200	\$ 48,000.00
D	Header Curb	LF	\$ 30.00	40	120	\$ 3,600.00
6	Excavation & Fill					
A	A-3 Fill	CY	\$ 10.00	400	1200	\$ 12,000.00
7	Meter Boxes					
A	Install #37 Standard/Flare Meter Box	EA	\$ 10.00	20	60	\$ 600.00
B	Install #65 Standard/Flare Meter Box	EA	\$ 10.00	4	12	\$ 120.00
C	Adjustment #37 Standard/Flare Meter Box	EA	\$ 10.00	60	180	\$ 1,800.00
D	Adjustment #65 Standard/Flare Meter Box	EA	\$ 10.00	4	12	\$ 120.00
8	Mobilization Fee and Miscellaneous					
A	Mobilization City of Jacksonville Fee Each Ticket	EA	\$ 165.00	540	1620	\$ 267,300.00
B	Mobilization St Johns County Fee Each Ticket	EA	\$ 165.00	40	120	\$ 19,800.00
C	Mobilization Nassau County Fee Each Ticket	EA	\$ 165.00	20	60	\$ 9,900.00
D	Mobilization Clay County Fee Each Ticket	EA	\$ 165.00	8	24	\$ 3,960.00
E	Right of Way Permitting	EA	\$ 50.00	68	204	\$ 10,200.00
F	Emergency Mobilization Response	EA	\$ 100.00	60	180	\$ 18,000.00
G	Miscellaneous Concrete Work	CY	\$ 200.00	18	54	\$ 10,800.00
H	Miscellaneous Masonry Crew Work	HR	\$ 75.00	4	12	\$ 900.00
I	Stencil Octagonal Finish On Concrete	SF	\$ 10.00	360	1080	\$ 10,800.00
J	Site De-Water	EA	\$ 100.00	1	3	\$ 300.00
K	Wire Mesh	SY	\$ 6.50	20	60	\$ 390.00
L	Rebar	LF	\$ 0.95	4	12	\$ 11.40
9	SWA (controlled and applied by JEA)					\$ 20,000.00

Quotations of Rates Total (Enter this Amount on the Proposal Form)

\$ 2,467,079.90

FY19 Project #	FY19 Work Order #	Description	FY18 Project #	Manager
8005184	19321011	Sewer R&R - Collection System	8004628	Allsbrook
8005186	19321011	Sewer R&R - Administration Labor	8004620	Allsbrook
8005185	19321011	Sewer R&R - Manhole Replacement - JEA Labor	8004621	Allsbrook
8005190	19321011	Sewer R&R - Service Relocates - JEA Labor	8004622	Allsbrook
8005191	19321011	Sewer R&R - Service Renewals - JEA Labor	8004623	Allsbrook
8005192	19321011	Sewer R&R - TV/Cleaning in support of Pipe Replacements	8004624	Allsbrook
8005189	19321011	Sewer R&R - Main line replacements (Large Dia.)	8004625	Allsbrook
8005188	19321011	Sewer R&R - Main line replacements (26' >)	8004626	Allsbrook
8005187	19321011	Sewer R&R - CI replacements	8004627	Allsbrook
8005119	19321001	PA19S Manhole SCADA R&R		
8005139	19321010	Sewer R&R - Ductile Iron FM Replacement	8004619	Allsbrook
8005173	19321009	Sewer Main Taps & Extn.	8004618	Allsbrook
8005172	19321008	Air Release Valve Replacement	8004617	Allsbrook
8005171	19321007	Sewer R&R Trenchless Technology - Specific Projects	8004616	Allsbrook
8005153	19221006	Water R&R - Main. & Capital Repair	8004572	Allsbrook
8005152	19221006	Water R&R - Service Relocates	8004571	Allsbrook
8005151	19221006	Dirty Water Renewals	8004570	Allsbrook
8005150	19221006	Water R&R - Service Renewals	8004569	Allsbrook
8005149	19221006	Water R&R - Fire Hydrant Replacements	8004568	Allsbrook
8005148	19221006	Water R&R - Valve Replacements	8004567	Allsbrook
8005146	19221005	New Water Main Taps & Extensions	8004566	Allsbrook
8005083	19321013	PA17S-SEWER COLLECTION R&R	8004630	Allsbrook
8005179	19321011	PA18S-IN KIND PROJ AND EQUIP	8004948	
		Jax Golf & CC Project	8004834	
		PA18S-Callaway WW Cap Repl-S	8004998	
		PA18W-Moncrief Gal Pipe Repl-W	8004999	
		PA18S-OM-Callaway Wastewater	8005000	



Formal Bid and Award System

Award #6 April 20, 2023

Type of Award Request: CONTRACT AMENDMENT
Request #: 707
Requestor Name: Ventura, Mildred - Contract Specialist
Requestor Phone: (904) 665-5201
Project Title: Facilities Landscaping Maintenance - Sheltered
Project Number: 30801
Project Location: JEA
Funds: O&M
Business Unit Estimate: N/A

Scope of Work:

The purpose of this Request for Proposals (RFP) is to evaluate and select a vendor that can provide economical pricing for basic landscape maintenance and chemical spraying for the included JEA facilities. These services shall be performed in a safe manner, and the results must be aesthetically pleasing as these facilities represent JEA to our customers. The specifications require that the Company performs these maintenance activities with skilled personnel in a safe and professional manner adhering to all JEA, City, County and State regulations and requirements. Work will be performed at approximately 446 JEA facilities located in Duval and Nassau County, in Florida as listed in Appendix B - Proposal Workbook. These locations include exteriors of buildings, lots, lift stations, electric substations, wells, ditches, water treatment plants, communication towers, road access, fences, areas around electric power lines, highways, exterior of generating plants, and trails.

JEA IFB/RFP/State/City/GSA#: 1411059446
Purchasing Agent: Selders, Elaine L.
Is this a Ratification?: NO

RECOMMENDED AWARDEE(S):

Name	Contact Name	Email	Address	Original Award Amount	Contract Amendment	New Not-To-Exceed Amount
FREEDOM LANDSCAPE AND LAWN MAINTENANCE INC.	Zakee Furqan	Zakee0126@gmail.com	7232 Smyrna St, Jacksonville, FL 32208	\$283,546.20	\$180,262.50	\$463,808.70
EAGLE LAWN CARE OF N.E. FLORIDA, INC.	Brenda Williams	info@eaglelawncarefl.com	11828 New Kings Rd #109, Jacksonville, FL 32219	\$302,922.00	(\$169,350.00)	\$133,572.00

Amount of Original Award: \$586,468.20
Date of Original Award: 03/30/2023
Change Order Amount: \$180,262.50 (Freedom), (\$169,350.00) (Eagle)
New Not-To-Exceed Amount: \$597,380.70
Length of Contract/PO Term: One (1) Year w/Two (2) – One (1) Yr. Renewals
Begin Date (mm/dd/yyyy): 04/18/2023
End Date (mm/dd/yyyy): 04/17/2024
Renewal Options: YES - Two (2) - One (1) Yr. Renewals
JSEB Requirement: JSEB Sheltered Market

Comments on JSEB Requirements:

Freedom Landscape and Lawn Maintenance Inc. and Eagle Lawn Care of N.E. Florida are JSEB vendors.

Background/Recommendations:

Originally awarded and approved by the Awards Committee on 03/30/2023 to Eagle Lawn Care of N.E. Florida for District 5A in the amount of \$169,350.00 and District 2N (Nassau County) in the amount of \$133,572.00 for a total of \$302,922.00, and to Freedom Landscape and Lawn Maintenance Inc. for Districts 1A and 1B, in the amount of \$283,546.20. A copy of the original award is attached as backup.

The contract amendment in the amount of \$180,262.50 for District 5A is being awarded to Freedom Landscape and Lawn Maintenance Inc. Districts 5A and the 2N were originally awarded to Eagle Lawn Care of N.E. Florida, Inc.; however, they notified JEA that they would like to decline the award of District 5A for reasons related to logistics and workload. Freedom Landscape and Lawn Maintenance Inc. is the next highest ranked respondent and has agreed to accept the award for the additional services for District 5A. Freedom Landscape’s bid for District 2N was \$180,262.50 versus Eagle Lawn Care’s bid in the amount of \$169,350.00. This represents an increase of approximately six percent (6%). The original award amount for District 5A to Eagle Lawn Care of N.E. Florida, Inc. will be reduced in the amount of \$169,350.00, for a new not-to-exceed amount of \$133,572.00. The table below demonstrates the change in award amounts.

	EAGLE LAWN CARE OF N.E. FLORIDA, INC.	FREEDOM LANDSCAPE AND LAWN MAINTENANCE INC.
District 1A	\$357,630.00	<u>\$179,454.00</u>
District 1B	\$116,016 .00	<u>\$104,092.20</u>
District 5A	\$169,350.00	<u>\$180,262.50</u>
District 2N	<u>\$133,572.00</u>	\$189,960.00
Total Award	<u>\$133,572.00</u>	<u>\$463,808.70</u>

Request approval to award a contract amendment for landscape maintenance and chemical spraying to Freedom Landscape and Lawn Maintenance Inc. in the amount of \$180,262.50 for a not-to-exceed amount of \$463,808.70, and Eagle Lawn Care of N.E. Florida in the amount of (\$169,350.00) for a not-to-exceed amount of \$133,572.00, for a new not-to-exceed amount of \$597,380.00, subject to the availability of lawfully appropriated funds.



Formal Bid and Award System

Award #8 March 30, 2023

Type of Award Request: REQUEST FOR PROPOSALS (RFP)
Request #: 707
Requestor Name: Ventura, Mildred - Contract Specialist
Requestor Phone: (904) 665-5201
Project Title: Facilities Landscaping Maintenance-Sheltered
Project Number: 30801
Project Location: JEA
Funds: O&M
Business Unit Estimate: \$515,000.00

Scope of Work:

The purpose of this Request for Proposals (RFP) is to evaluate and select a vendor that can provide economical pricing for basic landscape maintenance and chemical spraying for the included JEA facilities. These services shall be performed in a safe manner, and the results must be aesthetically pleasing as these facilities represent JEA to our customers. The specifications require that the Company performs these maintenance activities with skilled personnel in a safe and professional manner adhering to all JEA, City, County and State regulations and requirements. Work will be performed at approximately 446 JEA facilities located in Duval and Nassau County, in Florida as listed in Appendix B - Proposal Workbook. These locations include exteriors of buildings, lots, lift stations, electric substations, wells, ditches, water treatment plants, communication towers, road access, fences, areas around electric power lines, highways, exterior of generating plants, and trails.

JEA IFB/RFP/State/City/GSA#: 1411059446
Purchasing Agent: Selders, Elaine L.
Is this a Ratification?: NO

RECOMMENDED AWARDEE(S):

Name	Contact Name	Email	Address	Phone	Amount
EAGLE LAWN CARE OF N.E. FLORIDA, INC.	Brenda Williams	info@eaglelawncarenefl.com	11828 New Kings Rd #109, Jacksonville, FL 32219	(904) 879-2518	\$302,922.00
FREEDOM LANDSCAPE AND LAWN MAINTENANCE INC.	Zakee Furqan	Zakee0126@gmail.com	7232 Smyrna St, Jacksonville, FL 32208	(904) 993-7239	\$283,546.20

Amount for entire term of Contract/PO: \$586,468.20
Award Amount for remainder of this FY: \$393,829.54
Length of Contract/PO Term: One (1) Year w/Two (2) – One (1) Yr. Renewals
Begin Date (mm/dd/yyyy): 04/18/2023
End Date (mm/dd/yyyy): 04/17/2024
Renewal Options: YES - Two (2) - One (1) Yr. Renewals

JSEB Requirement:

JSEB Sheltered Market

Comments on JSEB Requirements:

Eagle Lawn Care of N.E. Florida, Inc. and Freedom Landscape and Lawn Maintenance Inc. are JSEB vendors.

RESPONDENTS:

DISTRICT	EAGLE LAWN CARE OF N.E. FLORIDA, INC.	FREEDOM LANDSCAPE AND LAWN MAINTENANCE INC.	A SANCTUARY HOUSE OF N. FL INC	RZ SERVICE GROUP LLC
District 1A	\$357,630.00	<u>\$179,454.00</u>	\$329,355.36	\$256,200.00
District 1B	\$116,016 .00	<u>\$104,092.20</u>	\$132,556.80	\$139,080.00
District 5A	<u>\$169,350.00</u>	\$180,262.50	\$186,446.40	\$261,690.00
District 2N Nassau Cty	<u>\$133,572.00</u>	\$189,960.00	\$202,080.00	\$157,380.00

Background/Recommendations:

Advertised on 02/03/2023. Four (4) prime contractors attended the optional pre-response meeting held on 02/13/2023. At proposal opening on 02/28/2023, JEA received four (4) Proposals. Eagle Lawn Care of N.E. Florida, Inc. and Freedom Landscape and Lawn Maintenance Inc. are the highest ranked respondents. Eagle Lawn Care of N.E. Florida, Inc. shall be awarded districts 5A and 2N Nassau County, and Freedom Landscape and Lawn Maintenance Inc. shall be awarded districts 1A and 1B. A copy of the response forms and evaluation results are attached as backup.

The award amount of \$586,468.20 is approximately fourteen percent (14%) higher than the business unit estimate which was based on the actual expenditures under the current term, and included a projected rate increase and pricing for added sites. When compared to the current contract there was an approximate 9% increase in the number of sites and an approximately thirty-four percent (34%) increase in rates. Funding for the FY23 variance has been identified and communicated to Finance.

1411059446 – Request approval to award a contract to Eagle Lawn Care of N.E. Florida, Inc. (\$302,922.00) and Freedom Landscape and Lawn Maintenance Inc. (\$283,546.20) for landscape maintenance and chemical spraying for a total not-to-exceed amount of \$586,468.20, subject to the availability of lawfully appropriated funds.

Manager: Kelly, Joseph L - Manager Facilities Maintenance & Operations

Director: Brunell, Baley L. – Dir. Facilities & Fleet Services

VP: McElroy, Alan D. - VP Supply Chain & Operations Support

APPROVALS:

Stephen Datz 3/30/2023

Chairman, Awards Committee **Date**

Stephanie M Healy 3/30/2023

Budget Representative **Date**



Formal Bid and Award System

Award #7 April 20, 2023

Type of Award Request: PIGGYBACK
Requestor Name: Ryan, Jeanne
Requestor Phone: (904) 665-5818
Project Title: JEA Fleet Services Light Duty and Medium Duty Vehicle Maintenance and Repair Services
Project Numbers: HEA0800
Project Location: JEA
Funds: O&M
Budget Estimate: \$1,247,751.69

Scope of Work:

The purpose of this award is to request approval to create a Piggyback contract to establish the vendor as the secondary/backup provider for Maintenance and Repair Services for JEA’s Light Duty and Medium Duty Fleet, as well as to ensure coverage during the storm season. JEA Fleet Services maintains 396 Light Duty and 475 Medium Duty vehicles.

JEA IFB/RFP/State/City/GSA#: Volusia County Master Agreement 860 12434-1
Purchasing Agent: Bayouth, Eddie
Is this a Ratification?: No

RECOMMENDED AWARDEE(S):

Name	Contact Name	Email	Address	Award Amount
GARY YEOMANS FORD	Joel Jones	jjones@anewford.com	1420 N Tomoka Farm Rd. Daytona Beach, FL 32124	\$1,247,751.69

Amount for entire term of Contract/PO: \$1,247,751.69
Award Amount for remainder of this FY: \$244,854.50
Length of Contract/PO Term: Twenty-five (25) Months and fourteen (14) days w/ Two (2) – 1 Yr. Renewals
Begin Date (mm/dd/yyyy): 05/01/2023
End Date (mm/dd/yyyy): 06/14/2025
Renewals Yes - Two (2) – 1 Yr. Renewals
JSEB Requirement: N/A – No JSEBs available

Background/Recommendations:

JEA Fleet Services initially awarded an informal Emergency Purchase Order (PO) to Gary Yeomans Ford in March 2022 to provide Light Duty Vehicle Maintenance and Repair Service, as well as Yardwork coverage at Commonwealth and Westside Service Centers. The purpose of this emergency award was to provide coverage of services while onboarding a new vendor.

During the original Medium and Light Duty Maintenance and Repair solicitations, JEA only received two (2) bids. Ford’s regional structure disqualified Yeomans from submitting bids for Medium and Light Duty solicitations. However, Ford’s parameters does allow JEA to direct award work when services are needed and the incumbent, Duval Ford, is unable to accommodate. A decision was made by JEA and strongly supported by the awardee, Duval Ford, to extend the term of the PO with Gary Yeomans Ford to provide services in

support of JEA through November of 2022, allowing a smoother transition of services to the newly awarded vendor.

As Duval Ford came on-line to provide 100% of the services of both Light and Medium Duty maintenance requirements, JEA saw an overall decrease in fleet uptime and a decrease for on-time preventative maintenance repairs. Similar to concepts utilized throughout JEA, in an effort to mitigate risk, JEA Fleet Services is moving to implement backup suppliers for the majority of maintenance and repair contracts. The request of this award is to continue the relationship established with Gary Yeomans previously in a more structured long term backup supplier role. This backup contract with JEA is purely to augment the existing source of supply with no guarantee of work and the term length is to mimic that of the Duval Ford agreement. Duval Ford's term and Volusia County's contract with Yeomans Ford are both initial three (3) year term with the option for two (2) subsequent one (1) year renewals with Volusia County starting July 11, 2022, and Duval Ford starting June 1, 2022. While Gary Yeomans Ford's pricing is about 10% more for Medium Duty work and 20% more for Light Duty work when compared to Duval Ford, Gary Yeomans Ford is still 25% less expensive than pricing offered by the only other bidder of Light and Medium duty services (Coggin Ford), and Yeomans Ford is offering an additional discount to JEA of \$15/hr off the Volusia County hourly labor rate for work during normal business hours.

The decision to source with Gary Yeomans Ford as secondary source of supply is rooted in Gary Yeomans Ford successfully providing coverage for Light Duty Maintenance for JEA in the past, their willingness to work with JEA in creating successful maintenance solutions, past proven performance, and competitive pricing. We believe Gary Yeomans Ford is the ideal candidate to become the secondary provider of Light and Medium Duty Maintenance and Repair and provide contingency services to support JEA Fleet Services.

In reestablishing this relationship with Gary Yeomans Ford and honoring the existing contract with Duval Ford, JEA Fleet Services has implemented the following:

- Internal process for determining appropriateness of work transfer from Duval Ford to Gary Yeomans Ford
 - Corrective and Preventative services that Duval Ford has indicated will take 72 hours or greater to initiate will be initiated through Gary Yeomans Ford.
 - This process will enable Fleet Services to better measure and improve the scorecard process, that can drive educated conversations for both Duval and Yeomans, as well as support solid baselines that can be utilized to train coordinators on good management practices should JEA ever implement an insourcing work plan.

JEA Fleet Services budget estimate is based on a 30% spend threshold, of the existing light and medium duty repair and services contract with Duval Ford.

Request approval to award a piggyback contract to Gary Yeomans Ford Company for JEA Fleet Services Light Duty and Medium Duty Vehicle Maintenance and Repair Services in the amount of \$1,247,751.69, subject to the availability of lawfully appropriated funds.

Manager: Hightower, Justin - Manager, Fleet Services & Business Operations
Director: Brunell, Baley – Director, Facilities and Fleet Services
VP: McElroy, Alan - VP of Supply Chain and Operations Support

APPROVALS:

Chairman, Awards Committee **Date**

Budget Representative **Date**

Contract Amount			<u>FY23 (April-Sept 5 months)</u>	<u>FY24 (12 Months)</u>	<u>FY25 (8.5 months)</u>	<u>TOTAL</u>
Start Date	5/1/2023	Yeoman Ford's Projected Spend	\$ 244,854.50	\$ 587,650.79	\$ 415,246.39	\$ 1,247,751.69
End Date	6/14/2025					
Term (Years)	2.1233					
Term (Months)	25.4794521					
Monthly Average (30%) of LD & MD	\$ 48,970.90					
Projected Annual	\$ 587,650.79					
Projected Award	\$ 1,247,751.69					

	<u>FY23 (6 Months)</u>
Approved Budget	\$ 575,000.00
YTD Spend	\$ 275,928.07
Projected YE Spend- Duval Ford	\$ 579,448.95
Projected YE Spend- Yeoman's	\$ 244,854.50
Variance	\$ (525,231.51)



Formal Bid and Award System

Award #8 April 20, 2023

Type of Award Request: CONTRACT INCREASE
Requestor Name: Betancur, Maria A.
Requestor Phone: (904) 553-2432
Project Title: Construction Management-at-Risk (CMAR) Services for the SIPS – Greenland 30” WM, Davis 30” RWM & Burnt Mill 24” FM Projects
Index Numbers: 102-37, 417-47, 100-71
Project Location: JEA
Funds: Capital
Budget Estimate: \$8,200,000.00

Scope of Work:

For each area/project listed below, the initial scope of work will consist of pre-construction phase services such as design and constructability reviews, construction phase sequencing, coordination, maintenance of traffic, and maintenance of utility operations pre-planning, alternatives evaluations, cost estimating and cost control (value engineering) services, project schedule development, and preparation and submission of an “open-book” Guaranteed Maximum Price (GMP) proposal for construction phase services.

The SIPS – Greenland – Southside Blvd – Deerwood 3 to Greenland WTP 30” Water Main scope of work is expected to generally include the following:

- Approximately 41,200 Linear Feet (LF) of 30-inch raw water transmission piping and fittings.
- New 1.1 Mgal prestressed concrete storage tank and associated piping at the Greenland Water treatment plant.
- Water Quality Monitoring Station
- Greenland WTP SIPS Intertie Station
- Supervisory Control and Data Acquisition (SCADA) System
- Multiple trenchless crossings involving horizontal directional drill and/or auger jack and bore crossings of wetlands and major intersections.

The Davis - Gate Pkwy to RG Skinner – Reclaim Water Main (RWM) scope of work is expected to generally include the following:

- Approximately 16,300 LF of 30-inch reclaim water transmission piping and fittings.
- Multiple trenchless crossings involving horizontal directional drill crossings of wetlands

The Burnt Mill 24” Force Main scope of work is expected to generally include the following:

- Approximately 1,150 LF of 24-inch PVC sewer force main transmission piping and fittings

The SIPS-Greenland project was identified as part of the iWater (Integrated Water Testing, Evaluation, and Rehabilitation) study which investigated JEA’s future water supply needs. This project will deliver raw water from the Main Street WTP (North Grid) to the Greenland WTP which serves the South Grid resulting in a direct offset of water withdrawal from the JEA South Grid wellfield of concern. The Davis reclaimed water main is part of the JEA Reclaimed Water Master Plan and will complete a portion of the connection between the Arlington East WRF with the future Greenland WRF providing reliability for the South Grid reclaim water system.

JEA IFB/RFP/State/City/GSA#: 1410764646

Purchasing Agent: Kruck, Dan

Is this a Ratification?: NO

RECOMMENDED AWARDEE(S):

Name	Contact Name	Email	Address	Phone	Amount
GARNEY COMPANIES, INC.	Jason Seubert	jseubert@garney.com	370 E. Crown Point Rd, Winter Garden, FL 34787	(816) 746-7233	\$8,142,183.93

Amount of Original Award: \$625,057.00

Date of Original Award: 09/22/2022

Contract Increase Amount: \$8,142,183.93

New Not-To-Exceed Amount: \$8,767,240.93

Length of Contract/PO Term: Project Completion

Begin Date: 10/17/2022

End Date: Project Completion (Expected: April 2026)

JSEB Evaluation: N/A – Optional for Phase 1

Comments on JSEB Requirements:

JSEB participation will be required during construction GMP (Phase 2)

Background/Recommendations:

Originally approved by the Awards Committee on 09/22/2022 in the amount of \$625,057.00 to Garney Companies, Inc. A copy of the original award is attached for reference.

This award request is for an initial purchase of materials for each pipeline segment. The purchase will include approximately 9,000 LF of 30" DIP CL150 pipe, 85 LF of 36" DIP CL 150 pipe, 11,000 LF of 36" HDPE DR11 pipe, 900 LF of 30" HDPE DR11 pipe, and various valves fittings and appurtenances for the projects. The quote is attached for reference. The quote was reviewed by JEA project staff and deemed reasonable compared to other projects. JEA will bring additional contract increases to the Awards Committee for approval as design progresses for additional material purchases and the final construction GMP. The current construction budget for these projects is \$66,443,964.00.

Request approval to award a contract increase to Garney Companies, Inc. for the purchase of materials for the Greenland SIPS projects in the amount of \$8,142,183.93, for a new not-to-exceed amount of \$8,767,240.93, subject to the availability of lawfully appropriated funds.

Senior Manager: DiMeo, Elizabeth A. – Senior Manager Project Management

Director: Conner, Sean M., Dir. - W/WW Project Engineering & Construction

VP: Melendez, Pedro A. – VP Planning Engineering & Construction

APPROVALS:

Chairman, Awards Committee **Date**

Budget Representative **Date**



Formal Bid and Award System

Award #5 September 22, 2022

Type of Award Request: REQUEST FOR PROPOSAL (RFP)
Requestor Name: DiMeo, Elizabeth A., Senior Manager, Grid Projects
Requestor Phone: (904) 599-7591
Project Title: Construction Management-at-Risk (CMAR) Services for the SIPS – Greenland 30” WM, Davis 30” RWM & Burnt Mill 24” FM Projects
Index Number: 102-37, 417-47
Project Location: JEA
Funds: Capital
Budget Estimate: \$996,659.00

Scope of Work:

The scope of work includes providing Construction Manager at Risk (CMAR) services during design and construction of the Southside Integrated Piping System (SIPS) - Greenland - Southside Blvd - Deerwood 3 to Greenland WTP 30” Water Main, Davis - Gate Pkwy to RG Skinner - 30” Reclaim Water Main and Burnt Mill Road 24” Force Main. For each area/project listed below, the initial scope of work will consist of pre-construction phase services such as design and constructability reviews, construction phase sequencing, coordination, maintenance of traffic, and maintenance of utility operations pre-planning, alternatives evaluations, cost estimating and cost control (value engineering) services, project schedule development, and preparation and submission of an “open-book” Guaranteed Maximum Price (GMP) proposal for construction phase services.

The SIPS – Greenland – Southside Blvd – Deerwood 3 to Greenland WTP 30” Water Main scope of work is expected to generally include the following:

- Approximately 41,200 LF of 30-inch raw water transmission piping and fittings.
- New 1.1 Mgal prestressed concrete storage tank and associated piping at the Greenland Water treatment plant.
- Water Quality Monitoring Station
- Greenland WTP SIPS Intertie Station
- Supervisory Control and Data Acquisition (SCADA) System
- Multiple trenchless crossings involving horizontal directional drill and/or auger jack and bore crossings of wetlands and major intersections.

The Davis - Gate Pkwy to RG Skinner – Reclaim Water Main (RWM) scope of work is expected to generally include the following:

- Approximately 16,300 LF of 30-inch reclaim water transmission piping and fittings.
- Multiple trenchless crossings involving horizontal directional drill crossings of wetlands

The Burnt Mill 24” Force Main scope of work is expected to generally include the following:

- Approximately 1,150 LF of 24-inch PVC sewer force main transmission piping and fittings

The SIPS-Greenland project was identified as part of the iWater (Integrated Water Testing, Evaluation, and Rehabilitation) study which investigated JEA’s future water supply needs. This project will deliver raw water from the Main Street WTP (North Grid) to the Greenland WTP which serves the South Grid resulting in a direct offset of water withdrawal from the JEA South Grid wellfield of concern. The Davis reclaimed water main is part of the JEA Reclaimed Water Master Plan and will complete a portion of the connection between

the Arlington East WRF with the future Greenland WRF providing reliability for the South Grid reclaim water system.

JEA IFB/RFP/State/City/GSA#: 1410764646

Purchasing Agent: Kruck, Dan

Is this a Ratification?: NO

RECOMMENDED AWARDEE(S):

Name	Contact Name	Email	Address	Phone	Amount
GARNEY COMPANIES, INC.	Jason Seubert	jseubert@garney.com	370 E. Crown Point Rd, Winter Garden, FL 34787	(816) 746-7233	\$625,057.00

Amount for entire term of Contract/PO: \$625,057.00

Award Amount for remainder of this FY: \$0.00

Length of Contract/PO Term: Project Completion

Begin Date: 10/17/2022

End Date: Project Completion (Expected: November 2025)

JSEB Evaluation: N/A – Optional for Phase 1

Comments on JSEB Requirements:

JSEB participation will be required during construction GMP (Phase 2)

PROPOSERS:

Name	Amount	Rank
GARNEY COMPANIES, INC.	\$625,057.00	1
RUBY-COLLINS, INC.	N/A	2

Background/Recommendations:

Advertised on 06/23/2022. Four (4) prime companies attended the mandatory pre-proposal meeting held on 07/06/2022. At proposal opening on 07/26/2022, JEA received two (2) Proposals. The firms that did not submit a proposal stated a lack of projected manpower as the reason. The public evaluation meeting was held on 08/17/2022 and JEA deemed Garney Companies, Inc. most qualified to perform the work. A copy of the evaluation matrix and negotiated scope and fees are attached for reference.

This award request is for Phase 1 services for pre-construction work for the Greenland SIPS projects. As the design progresses, contract increases will be brought before the Awards Committee for early material purchases and the final GMP. The award amount is approximately 37.3% lower than estimated. JEA used an industry average of 1.5% of construction costs for the cost of this pre-construction work as the basis of the estimate. JEA negotiated the hourly rates used in the formation of the fee based on historical hourly rates with increases allowed for CPI. JEA project staff and procurement have reviewed the scope and fee and deemed it reasonable when compared to past projects. The current construction budget for these projects is \$66,443,964.00.

Request approval to award a contract to Garney Companies, Inc. for construction management at risk services for the Greenland SIPS projects in the amount of \$625,057.00, subject to the availability of lawfully appropriated funds.

Director: Conner, Sean M., Dir W/WW Project Engineering & Construction

VP: Vu, Hai X. - VP Water Wastewater Systems

APPROVALS:

Stephen Datz 9/22/2022

Chairman, Awards Committee **Date**

Stephanie M Realy 9/23/2022

Budget Representative **Date**

1410764646 Construction Management-at-Risk (CMAR) Services for the SIPS – Greenland 30” WM, Davis 30” RWM & Burnt Mill 24” FM Projects

Vendor Rankings	Elizabeth DiMeo	Tom Hamilton	Bryan Dewberry	Σ Rank	Rank
Garney Companies, Inc.	1	1	1	3	1
Ruby-Collins, Inc.	2	2	2	6	2

Elizabeth DiMeo	General Information (10 Points)	Key Staff Experience (30 Points)	Relevant Project Experience (25 Points)	Understanding of Scope of Work and Approach (35 Points)	Total	Rank
Garney Companies, Inc.	10	28.5	23	29	90.50	1
Ruby-Collins, Inc.	7	18.4	14	19	58.40	2

Tom Hamilton	General Information (10 Points)	Key Staff Experience (30 Points)	Relevant Project Experience (25 Points)	Understanding of Scope of Work and Approach (35 Points)	Total	Rank
Garney Companies, Inc.	10	25.4	19	31	85.40	1
Ruby-Collins, Inc.	7	18	13	14	52.00	2

Bryan Dewberry	General Information (10 Points)	Key Staff Experience (30 Points)	Relevant Project Experience (25 Points)	Understanding of Scope of Work and Approach (35 Points)	Total	Rank
Garney Companies, Inc.	10	27.3	20	26	83.30	1
Ruby-Collins, Inc.	7	18.5	15	24	64.50	2

Overall Averages	General Information (10 Points)	Key Staff Experience (30 Points)	Relevant Project Experience (25 Points)	Understanding of Scope of Work and Approach (35 Points)	Total
Garney Companies, Inc.	10.00	27.07	20.67	28.67	86.40
Ruby-Collins, Inc.	7.00	18.30	14.00	19.00	58.30



Daniel Kruck
JEA Procurement Department
21 West Church Street, T-4
Jacksonville, FL 32202

September 13, 2022

RE: Construction Management at Risk (CMAR) Services for the SIPS – Greenland 30” WM, Davis 30” RWM & Burnt Mill 24” FM_REV.2

Dear Mr. Kruck,

Garney Companies, Inc. (Garney) is pleased to submit our Pre-Construction Phase Scope and Fee for the JEA SIPS-Greenland 30” WM, Davis 30” RWM & Burnt Mill 24” FM.

Pre-Construction Phase services are intended to assist in design development of the following:

- The SIPS – Greenland – Southside Blvd – Deerwood 3 to Greenland WTP 30” Water main scope of work is expected to generally include:
 - Approximately 41,200 LF of 30-inch raw water transmission piping and fittings.
 - New 1.1 Mgal prestressed concrete storage tank and associated piping at the Greenland Water treatment plant.
 - Water Quality Monitoring Station
 - Greenland WTP SIPS Intertie Station
 - Supervisory Control and Data Acquisition (SCADA) System
 - Multiple trenchless crossings involving horizontal directional drill and/or auger jack and bore crossings of wetlands and major intersections.
- The Davis - Gate Pkwy To RG Skinner – Reclaim Water Main scope of work is expected to generally include:
 - Approximately 16,300 LF of 30-inch reclaim water transmission piping and fittings.
 - Multiple trenchless crossings involving horizontal directional drill crossings of wetlands
- The Burnt Mill 24” Force Main scope of work is expected to generally include:
 - Approximately 1,150 LF of 24-inch PVC sewer force main transmission piping and fittings.

Services also include providing JEA with a preliminary price at the 60% design milestone to include the estimated CMAR fee, General Conditions, direct cost of work, insurance, bonds, contingencies, allowances and related costs. The contractual guaranteed maximum price (GMP) will be developed at the 90% design milestone with final cost and scope reconciliation at 100% design.

The scope tasks associated with Pre-Construction Phase services are described below.

SCOPE OF SERVICES – Pre-Construction Phase

TASK 1 – General Project Management and Meetings

Garney will provide general project management throughout the duration of the pre-construction phase scope of services. General management activities will include developing and maintaining project controls related to, Garney’s contract execution and invoices submitted to JEA for review and approval on a monthly basis in electronic format. Following NTP, Garney will attend the project kickoff meeting to be held with JEA and Mott MacDonald to discuss project goals, objectives, communication protocols, challenges and scope of services.

During the execution of the pre-construction phase services, Garney anticipates the following Task 1 meetings to occur over the anticipated 11-month duration through July 2023:

- 1 – Project kick-off meeting
- 5 - Community Outreach Meetings (including easement/property owner specific meetings)
- 2 - TTC/Maintenance of Utility Operations Planning Workshop
- 22 – Conference Calls w/ design Engineer
- 6 – Design review meetings (60% & 90% for each of the three segments of work)
- 6 – Risk management workshops (60% & 90% for each of the three segments of work)
- 6 – GMP Development Meetings (2 for each of the three segments of work)
- 6 – Budget and scope reconciliation meetings at 90% and 100%
- Up to 4 – Permitting/Agency
- 6 – Schedule Development meetings (2 for each of the three segments of work)

TASK 2 – Develop and Maintain Project Schedule

Garney will develop and update the project schedules from project inception through the completion of pre-construction services. A preliminary schedule will be developed within 30 days following receipt of the Design Engineer’s schedule after NTP to detail design and pre- construction activities to be completed. This preliminary schedule will be cost loaded only.

Based on the 30% design deliverables, Garney will develop a high-level schedule to verify project milestone dates and identify early work and procurement needs. This schedule will not be cost loaded.

The initial Baseline schedule depicting both design and construction activities will be updated after receipt of the 60% design deliverable and updated monthly during the pre-construction services phase. Additional detail will be added to the construction section after the 90% and 100% design review meetings. Mott MacDonald’s anticipated design tasks will be included in the schedule updates. Schedules will be provided in CPM format and compatible with Primavera P6 import capabilities (.xer file format). All schedule submissions will be provided in both native and PDF file format.

TASK 3 – Develop Work Packages

Following the 30% design deliverable, Garney will begin identifying any potential early work packages for the project. Subcontractor and vendor scope packages will be developed for both specialty and scopes of work not self-performed by Garney. Anticipated scope packages may include:

- Trenchless Installations
- Clearing
- Erosion Control
- Temporary Traffic Control
- Surface Restorations
- Pavement Resurfacing
- Concrete Restoration
- Storage Tank Construction
- SCADA & Electrical
- Early Work/Material Procurement

Scope packages will include project documents, including construction plans and specifications developed to a 60

percent level, subcontract agreements, with applicable JEA, COJ, and FDOT standards and anticipated construction schedule.

Garney will collaborate with the Jacksonville Small Emerging Business (JSEB) group to perform the following tasks during pre-construction phase services:

- Schedule and attend one (1) meeting with JEA JSEB Manager after 60% design, scope and preliminary pricing completion
- Coordinate with JEA JSEB Manager
- Identify project scopes aligned with certified JSEB firms
- Perform JSEB outreach via email, providing notice of upcoming work, anticipated schedule, subcontractor scopes, project contact information, and document access instructions

Scope packages will be utilized to solicit pricing from subcontractors and vendors at GMP milestone dates to provide accurate pricing and feedback.

TASK 4 – Design and Constructability

Garney will do a cursory review of the 30% design documents to provide a high-level schedule, identify material needs and long lead time items as well as any potential early work packages. Garney will thoroughly review design deliverables at 60%, 90% and 100% for each segment of work, providing feedback to JEA and Mott MacDonald on constructability, coordination, site conditions and scope. At each milestone we will analyze the cost and schedule impacts of design alternatives being evaluated and provide that information for consideration. We will involve our Trenchless Technologies Specialist in analyzing the selected route and geotechnical information along with any design alternatives for constructability and concerns related to the feasibility of trenchless operations. Included in the review of the design deliverables will be attendance at design review meetings at 60%, 90% design.

If necessary, Garney's SUE subconsultant will perform additional SUE dependent on the route and number of potential alternatives. Additional SUE services are considered an allowance item to further refine the plan documents and may not be fully utilized dependent on the final route alignment and level of investigation previously performed. Garney has allocated \$50,000 for additional soft digs (SUE) and TTC for pre-construction services for the water main route.

TASK 5 – Value Engineering

After the 60% design deliverables have been issued, Garney will develop a list of value engineering (VE) items for JEA's consideration. VE items will be reviewed with JEA and Mott MacDonald to determine whether or not the VE item shall be further pursued. If an item is selected by the team, Garney will investigate the VE item further and present the findings at a future meeting. The analysis will address cost savings, schedule savings and effects on pipe alignment, design, maintenance and permitting. A VE log will be maintained throughout pre-construction phase services to summarize the overall result of the VE process. During this time Garney will also be identifying items with long lead times or procurement constraints that may affect the project schedule as well as any items that may be suitable for Owner direct purchase. Garney can work with the Team to procure material items early if needed to take advantage of long lead times or pricing advantages that may be observed in the market during the pre-construction phase.

TASK 6 – Guaranteed Maximum Price (GMP) Development

30% budget will be developed and provided by Mott MacDonald. Garney will provide a preliminary GMP based on the 60% design deliverable for each segment of construction and lead a review workshop. The GMP will be updated and reviewed again at 90% design along with any VE items agreed to by the Team at 60%, after which the GMP will be negotiated for the project. Garney will prepare the risk register for the project for use in developing the project contingencies. JEA and Mott MacDonald will provide input. The GMP submittal will include a listing of documents (plans and specifications), assumptions and clarifications used as a basis of developing the GMP, as well as identify a time limit for acceptance of the proposal. The submittal will include a proposed schedule of values establishing design and construction components with sufficient detail to utilize for approximating progress billings.

Pricing will be provided in a breakdown based on the known funding resources for the project:

- SIPS Greenland 30" Raw Water Main and Facility/Ground Storage components
- Davis 30" Reclaim Water Main
- Burnt Mill Force Main

Pre-Construction Phase Fee

The lump sum for CMAR pre-construction services is **\$625,057**. A breakdown of the pre-construction fee for the work described in this proposal is included as **Exhibit A**. Garney will submit monthly invoices to JEA based on a percent complete each month.

Garney looks forward to working with JEA and Mott MacDonald on this very important project. Should you have any questions or require additional information with this scope, do not hesitate to call me directly at 407-319-1780.

Sincerely,

GARNEY COMPANIES, INC.



Will Poczekaj
CMAR Manager

Enclosures:

Exhibit A – Pre-Construction Fee

EXHIBIT A - PRE-CONSTRUCTION PHASE FEE BREAKDOWN

TASK LIST				TOTAL HOURS	TOTAL COST
Task 1 - General Project Management/Meetings				483	\$88,239
Task 2 - Develop & Maintain Project Schedule				188	\$32,962
Task 3 - Develop Work Packages				336	\$59,336
Task 4 - Design & Constructibility				1062	\$245,296
Task 5 - Value Engineering				76	\$13,092
Task 6 - GMP Development				1034	\$186,132
PHASE 1 TOTALS				3179	\$625,057
Task Description				Total Hours	Total Cost
Task 1 - General Project Management/Meetings					
Company	Staff	Name	Rate		
Garney	Principal-In-Charge	Jason Seubert	\$262	22	\$ 5,764
Garney	Sr. Project Manager	Will Poczekaj	\$207	228	\$ 47,196
Garney	Superintendent	Myles Smith	\$191	28	\$ 5,348
Garney	Lead Estimator	Kevin Kraus	\$170	100	\$ 17,000
Garney	Trade Estimator	Stuart Smith	\$164	12	\$ 1,968
Garney	Construction Manger	John Galman	\$143	26	\$ 3,718
Garney	Project Coordinator	Kallie Lowery	\$93	44	\$ 4,092
Garney	QA/QC Support	Eric Wagner	\$150	-	\$ -
Garney	Project Engineer	Matt McCreary	\$120	-	\$ -
Garney	Junior Estimator	Khaled Almasri	\$129	11	\$ 1,419
Garney	Safety Manager	Ryan Smith	\$150	6	\$ 900
TB Landmark	Preconstruction HDD	Marty Adams	\$139	6	\$ 834
				-	\$ -
			Task 1 Subtotal	483	\$ 88,239.00
Task 1 - General Project Management/Meetings - Total				483	\$ 88,239.00
Task 2 - Develop & Maintain Project Schedule					
Company	Staff	Name	Rate		
Garney	Principal-In-Charge	Jason Seubert	\$262	4	\$ 1,048
Garney	Sr. Project Manager	Will Poczekaj	\$207	76	\$ 15,732
Garney	Superintendent	Myles Smith	\$191	4	\$ 764
Garney	Lead Estimator	Kevin Kraus	\$170	28	\$ 4,760
Garney	Trade Estimator	Stuart Smith	\$164	18	\$ 2,952
Garney	Construction Manger	John Galman	\$143	16	\$ 2,288
Garney	Project Coordinator	Kallie Lowery	\$93	-	\$ -
Garney	QA/QC Support	Eric Wagner	\$150	4	\$ 600
Garney	Project Engineer	Matt McCreary	\$120	16	\$ 1,920
Garney	Junior Estimator	Khaled Almasri	\$129	16	\$ 2,064

Task Description				Total Hours	Total Cost
Garney	Safety Manager	Ryan Smith	\$150	-	\$ -
TB Landmark	Preconstruction HDD	Marty Adams	\$139	6	\$ 834
				-	\$ -
Task 2 Subtotal				188	\$ 32,962.00
Task 2 - Develop & Maintain Project Schedule - Total				188	\$ 32,962.00
Task 3 - Develop Work Packages					
Company	Staff	Name	Rate		
Garney	Principal-In-Charge	Jason Seubert	\$262	-	\$ -
Garney	Sr. Project Manager	Will Poczekaj	\$207	148	\$ 30,636
Garney	Superintendent	Myles Smith	\$191	-	\$ -
Garney	Lead Estimator	Kevin Kraus	\$170	96	\$ 16,320
Garney	Trade Estimator	Stuart Smith	\$164	16	\$ 2,624
Garney	Construction Manger	John Galman	\$143	24	\$ 3,432
Garney	Project Coordinator	Kallie Lowery	\$93	8	\$ 744
Garney	QA/QC Support	Eric Wagner	\$150	4	\$ 600
Garney	Project Engineer	Matt McCreary	\$120	20	\$ 2,400
Garney	Junior Estimator	Khaled Almasri	\$129	20	\$ 2,580
Garney	Safety Manager	Ryan Smith	\$150	-	\$ -
TB Landmark	Preconstruction HDD	Marty Adams	\$139	-	\$ -
				-	\$ -
Task 3 Subtotal				336	\$ 59,336.00
Task 3 - Develop Work Packages - Total				336	\$ 59,336.00
Task 4 - Design & Constructibility					
Company	Staff	Name	Rate		
Garney	Principal-In-Charge	Jason Seubert	\$262	6	\$ 1,572
Garney	Sr. Project Manager	Will Poczekaj	\$207	464	\$ 96,048
Garney	Superintendent	Myles Smith	\$191	36	\$ 6,876
Garney	Lead Estimator	Kevin Kraus	\$170	372	\$ 63,240
Garney	Trade Estimator	Stuart Smith	\$164	56	\$ 9,184
Garney	Construction Manger	John Galman	\$143	80	\$ 11,440
Garney	Project Coordinator	Kallie Lowery	\$93	-	\$ -
Garney	QA/QC Support	Eric Wagner	\$150	-	\$ -
Garney	Project Engineer	Matt McCreary	\$120	-	\$ -
Garney	Junior Estimator	Khaled Almasri	\$129	-	\$ -
Garney	Safety Manager	Ryan Smith	\$150	24	\$ 3,600
TB Landmark	Preconstruction HDD	Marty Adams	\$139	24	\$ 3,336
Task 4 Subtotal				1,062	\$ 195,296.00
Southeastern Survey	Additional SUE		Expenses		\$ 50,000
Task 4 - Design & Constructibility - Total				1062	\$ 245,296.00
Task 5 - Value Engineering					

Task Description				Total Hours	Total Cost
Company	Staff	Name	Rate		
Garney	Principal-In-Charge	Jason Seubert	\$262	-	\$ -
Garney	Sr. Project Manager	Will Poczekaj	\$207	24	\$ 4,968
Garney	Superintendent	Myles Smith	\$191	-	\$ -
Garney	Lead Estimator	Kevin Kraus	\$170	24	\$ 4,080
Garney	Trade Estimator	Stuart Smith	\$164	8	\$ 1,312
Garney	Construction Manger	John Galman	\$143	8	\$ 1,144
Garney	Project Coordinator	Kallie Lowery	\$93	-	\$ -
Garney	QA/QC Support	Eric Wagner	\$150	-	\$ -
Garney	Project Engineer	Matt McCreary	\$120	-	\$ -
Garney	Junior Estimator	Khaled Almasri	\$129	8	\$ 1,032
Garney	Safety Manager	Ryan Smith	\$150	-	\$ -
TB Landmark	Preconstruction HDD	Marty Adams	\$139	4	\$ 556
				-	\$ -
				-	\$ -
			Task 5 Subtotal	76	\$ 13,092.00
Task 5 - Value Engineering - Total				76	\$13,092.00
Task 6 - GMP Development					
Company	Staff	Name	Rate		
Garney	Principal-In-Charge	Jason Seubert	\$262	54	\$ 14,148
Garney	Sr. Project Manager	Will Poczekaj	\$207	320	\$ 66,240
Garney	Superintendent	Myles Smith	\$191	32	\$ 6,112
Garney	Lead Estimator	Kevin Kraus	\$170	384	\$ 65,280
Garney	Trade Estimator	Stuart Smith	\$164	40	\$ 6,560
Garney	Construction Manger	John Galman	\$143	96	\$ 13,728
Garney	Project Coordinator	Kallie Lowery	\$93	16	\$ 1,488
Garney	QA/QC Support	Eric Wagner	\$150	36	\$ 5,400
Garney	Project Engineer	Matt McCreary	\$120	24	\$ 2,880
Garney	Junior Estimator	Khaled Almasri	\$129	24	\$ 3,096
Garney	Safety Manager	Ryan Smith	\$150	8	\$ 1,200
TB Landmark	Preconstruction HDD	Marty Adams	\$139	-	\$ -
			Task 6 Subtotal	1,034	\$ 186,132.00
Task 6 - GMP Development - Total				1034	\$ 186,132.00
PROJECT TOTAL				TOTAL HOURS	TOTAL COST
				3,179	\$625,057

**Construction Manager at Risk (CMAR) Services for the
SIPS – Greenland 30” WM, Davis 30” RWM & Burnt
Mill 24” FM Projects**



DATE 4/11/2023

ITEM NO.	DESCRIPTION	TOTAL VALUE
1	<i>PIPE AND MATERIALS PURCHASE – SIPS Greenland 30” RAW WM</i>	\$ 7,702,060.79
2	<i>PIPE AND MATERIALS PURCHASE – Davis 30” RWM</i>	\$ 271,411.68
3	<i>PIPE AND MATERIALS PURCHASE – Burnt Mill 24” FM</i>	\$ 168,711.46
PROPOSED AMENDMENT VALUE		\$ 8,142,183.93

AMENDMENT NOTES

Pricing for HDPE is valid through 5/1/2023. JEA authorization must be obtained by 5/1/2023 so Garney can issue purchase orders to the vendors no later than 5/1/2023. Pipe deliveries would need to start no later than 7/10/2023.

Pricing for ductile iron pipe is value through 6/30/2024. Any pipe deliveries after 6/30/2024 will be subject to an estimated 5% price increase. (32 Week Lead Time)

ATTACHMENTS

Category	Description	Pipeline
Supplier Quote	HDPE - Core and Main	RAW , RWM, FM
Supplier Quote	HDPE - Ferguson	RAW , RWM, FM
Supplier Quote	HDPE - ISCO	RAW , RWM, FM
Supplier Quote	Fittings, Valves, and Supply Material – Core and Main	RAW , RWM , FM
Supplier Quote	Fittings, Valves, and Supply Material – Ferguson	RAW, WM, FM
Supplier Quote	Ductile Iron Pipe - American Cast Iron Pipe Company	RAW , RWM, FM