

Evaluation Matrix								
Solicitation 127-19 ITN for Strategic Alternatives		Firm:	Reply 1	Evaluator:	Juli Crawford			
Proposed to Achieve JEA's Goals in this ITN (20% Weighted Value)	Proposal to Achieve JEA's Goals in this ITN (20% Weighted Value)							
	Respondents must indicate clearly and specifically how their Reply would allow JEA to achieve the goals outlined in this ITN	Exceptional	Good	Adequate	Poor	Inadequate	3	15.00
		(4 points)	(3 points)	(2 points)	(1 point)	(0 points)		
Experience and Customer Commitment (15% Weighted Value)	Experience and Customer Commitment (15% Weighted Value)							
	A summary of experience managing related or similar operations of comparable size and scope to JEA is required. The Respondent must provide information regarding its experience, knowledge, skills, and abilities for owning, operating, and managing electric generation, transmission, distribution, and water systems or other complex business entities. Specific information regarding experience in other customer service areas, including customer billing, complaint management and resolution history, experience with purchases of other utility systems, customer question management, and emergency repair reply times should be included. Replies demonstrating the following will be treated favorably: 1. Longevity of utility generation, transmission, and distribution operations greater than 5 years; 2. Successful customer relations demonstrated through customer outreach, surveys such as JD Power or other comparable sources; 3. Corporate culture demonstrating a long-term commitment to operations; 4. Strong focus on maintaining reliability and minimizing time of disruptions; and 5. Focus on maintaining rate stability for customers, as illustrated through historical rates. Where available, Respondents should also include a history of their customer rates for the past 10 years. Respondents are encouraged to provide any incremental information they believe relevant to demonstrate their experience and customer commitment	Exceptional	Good	Adequate	Poor	Inadequate	3	11.25
		(4 points)	(3 points)	(2 points)	(1 point)	(0 points)		
Economic Development and Benefits to Jacksonville (10% Weighted Value)	Economic Development and Benefits to Jacksonville (10% Weighted Value)							
	Respondents will be treated favorably for their willingness to make commitments to the City of Jacksonville. Additionally, Respondents will be treated favorably based on ability to demonstrate how they may drive economic development and job creation in the City of Jacksonville	Exceptional	Good	Adequate	Poor	Inadequate	3	7.50
		(4 points)	(3 points)	(2 points)	(1 point)	(0 points)		
Employee Retention and Benefits (10% Weighted Value)	Employee Retention and Benefits (10% Weighted Value)							
	Respondents will be evaluated on the basis of their willingness to make certain commitments to employees consistent with JEA's goals of: 1. Protection of certain employee retirement benefits; 2. Maintenance of substantially comparable employee compensation and benefits for three (3) years; and 3. Confirmation to funding of retention payments to all full-time employees of 100% of current base compensation, as provided in the Employee Protection and Retention Agreement approved by the Board of Directors on July 23, 2019	Exceptional	Good	Adequate	Poor	Inadequate	1	7.50
		(4 points)	(3 points)	(2 points)	(1 point)	(0 points)		
Innovation Plan (15% Weighted Value)	Innovation Plan (15% Weighted Value)							
	Respondents should provide initiatives under which they will be committed to provide innovative services or investments that leverage the tangible and intangible assets of JEA in order to achieve the following: 1. Position the business for the future; 2. Create new revenue channels; and 3. "Future-proof" the utility business. Separately, Respondents only interested in providing Replies related to potential new business opportunities or innovation or disruption of JEA's business are strongly encouraged to do so	Exceptional	Good	Adequate	Poor	Inadequate	3	11.25
		(4 points)	(3 points)	(2 points)	(1 point)	(0 points)		
Environmental, Social and Governance (10% Weighted Value)	Environmental, Social and Governance (10% Weighted Value)							
	Respondents will be treated favorably for their willingness to make commitments, including, but not limited to, sustainability initiatives, renewable energy goals and the maintenance of an equitable workforce and management team	Exceptional	Good	Adequate	Poor	Inadequate	0	0.00
		(4 points)	(3 points)	(2 points)	(1 point)	(0 points)		
Community Stewardship (10% Weighted Value)	Community Stewardship (10% Weighted Value)							
	Respondents will be treated favorably for their willingness to make commitments to the City of Jacksonville and surrounding communities, including, but not limited to, volunteer activities, charitable contributions, an ongoing community relationship plan and comprehensive storm responsiveness plans	Exceptional	Good	Adequate	Poor	Inadequate	3	7.50
		(4 points)	(3 points)	(2 points)	(1 point)	(0 points)		
Financial Stability (10% Weighted Value)	Financial Stability (10% Weighted Value)							
	Respondents will be treated favorably based on long duration and/or permanent capital availability. Additional merit will be placed on willingness and demonstrated ability to continue growth investments in JEA	Exceptional	Good	Adequate	Poor	Inadequate	3	7.50
		(4 points)	(3 points)	(2 points)	(1 point)	(0 points)		
Total Score							67.50	

