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**Sent:** Thursday, June 28, 2018 9:00 AM

**To:** Zahn, Aaron F. - Interim Managing Director/CEO; (Mgmt - JEA Senior Leadership Team (SLT); Bartley, La'Trece M. - Executive Assistant

**Cc:** Brost, Mike J. - VP/GM Electric Systems; Brooks, Jody L. - VP & Chief Legal Officer; Dykes, Melissa H. - President/COO; Wannemacher, Ryan F. - Interim Chief Financial Officer; McCarthy, John P. - VP & Chief Supply Chain Officer; Steinbrecher, Paul K. - VP & Chief Environmental Svcs Officer; Hiers, Angelia R. - VP & Chief Human Resources Officer; Hobson, Ted E. - VP & Chief Compliance Officer; Hightower, Mike R. - Chief Public & Stakeholder Affairs Officer; Cosgrave, Paul J. - VP & Chief Information Officer; Stewart, Kerri - VP & Chief Customer Officer; Calhoun Jr., Deryle I. - VP/GM Water Wastewater Systems

**Subject:** Future of JEA SLT Workshop

<u>Agenda Item</u>	<u>Owner</u>	<u>Goal(s)</u>
Core competencies Finalization (See notes from July 9 <sup>th</sup> )	Aaron Zahn	1. Consensus on draft framework for Core Competencies of JEA
External market review and 2030 vision exercise	Aaron Zahn	1. What does JEA look like in 2030? 2. What could the "key metrics" (See July 9 <sup>th</sup> meeting output) look like in 2030? 3. What is JEA doing in 2030 that is different from today?

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# Future of JEA Workshop

## June 26, 2018

### Competition for Electric Revenue – Team Dykes

**Problem:** “Get bigger or die” - Charter restrictions limit business type & service territory.

**Success:** Increased revenue while maintaining competitive rates and service levels; partner with customers on trusted advisor

**Measurement:** Increased operating and FCF, rates at or below median, J.D. Power

Charter Changes – Broader business types and service areas

- Engage in strategic partnerships
- Public records flexibility/modifications
- Cultural changes internally – sales culture

#### Solution

- State and local charter and public-private partnership rules to protect customer privacy.
- Gas LDC, DG, electrification, monetize customer relationship

#### Next Step

- Vet revenue opportunities
- Maintain community support
- Begin to define charter and state changes
- Review TEA and SJRPP for structural opportunity, brainstorm partnership with other industries

#### Competition for Workers

**Problem:** Competing for the same talent by other industries coupled with lack of technically skilled workers results in shortage of workers today, increasing risk in the future.

**Success:** Enough workers to fill **attrition** positions with qualified workers results in working more efficiently, doing more with less. Lower cost?

Low turnover rate, employees with vested interest in organization increases employee satisfaction and engagement, time to fill decrease

## Step 2

- Re-think structure of JEA and how it fits into COJ.
- Enhance partnerships with local trade schools and universities – FSCJ technical certifications, for example.
- Funnel back to high schools to get it to be part of their curriculum.

## Change Management

1. Engage in political process to change structures
2. Construct a campaign to educate employees about benefits to them from changing employment structure.

# Team Customer Experience

Brian Roche, John McCarthy, Paul Cosgrave

Problem:

a) First Call Resolution

- Improve across all mediums
- Customer Care Consultants
- Troubleshooters
- jea.com/IVE
- Account Executives

b) Negative Media Perception

Measurement: %

Success:

- Continuous Improvement
- Ranking in JDP (or other)
- More positive media stories

Changes/Solutions:

Most desirable call center in Jacksonville

- Facilities
- Compensation
- Work Environment
- Hiring Model

Field Staff

- Uniforms (professional look)
- Tools to address all issues in the field first time/contact

CCC's

- More cross-training and field staff
- Do we really have a definition of optimal customer service?

# Culture & Employees

(Jody Brooks, Kerri Stewart, Mike Brost)

## Problem

- Inconsistency in accountability
- Perception of retaliation and retribution

## Causing

- When they have ideas, they don't share, and
- When they see problems, they don't fix them.
- When ideas are shared, they go nowhere
- Not having appropriate resources to do their jobs (IT)
- We have Core Values that we don't 'live'

## Measure

Surveys

Focus groups

Safety Recordables ↓

Productivity ↑

Retention ↑/Turnover ↓

Absenteeism ↓

Diversity ↑

Non-technical Training ↑

Employee Suggestions ↑

1. Changes required to move from problem to success:
  - a. Hold people (management) accountable to clearly defined and agreed upon behavior
  - b. Act upon changes that are requested by employees
  - c. Ability to individually reward union/civil service employees
  - d. Investment in Technology Services field systems
2. Employee-driven recognition/safety
  - a. Provide growth opportunities for the "whole" employee

Meet them where they are at:

- Mentally
- Physically
- Professionally

b. Management Accountability Strategy

- Safety
- Training
- Competition
- Establish Consequences

c. Employee suggestion program with appropriate commitment to action/response

Communication strategy based on employee feedback (like we do with customers)

# Four Lenses

## 4-Temperament Discovery

### Gold

#### **What do you value?**

Faith  
Family  
Friends

#### **What brings you joy?**

Children  
Travel  
Walking in gifts given  
Husbands

#### **What are your strengths?**

Organized  
Communication  
Relationships  
Driven/Focused  
Personality  
Willingness to try something new

#### **Weakness**

Dealing with confrontation  
Letting "Go"  
Being willing to fail  
Bossy  
Not Flexible

#### **Needs**

Being challenged  
Good working environment  
Money/benefits  
Ability to be creative

## Green

### **What do you value?**

Intelligence  
Productivity  
Intrinsic Logic  
Results  
Challenge  
Family  
People

### **What brings you joy?**

Winning  
Accomplishments  
Family/Collective Celebration  
Unique insights (others don't see)  
Solutions  
Thinking  
Meditate

### **What are your strengths?**

Intelligence  
>135  
Innovation  
Outside of the box  
Drive/Grit  
Ability to Organize  
Conceptualize  
Create/Develop Processes

### **What are your weaknesses?**

Following the process  
Lack of patience  
Perception of lack of empathy  
May not realize that others "Don't Get It"  
Not detailed

### **What are your needs?**

"Just do it!"  
Good implementers/partners preferable Golds and Oranges



Collective understanding  
Goals/metrics

## Orange

### **What do you value?**

Integrity  
Loyalty  
Honesty  
Success  
Win  
Plan  
Growth  
Accomplishments  
Goals  
Fun

### **What brings you joy?**

Lots of money  
Winning  
Accomplishments  
Autonomy  
Independence  
Watching Excellence  
Laughter  
Happiness  
Family and relationships  
Team success > individual  
Humor

### **What are your strengths?**

Getting stuff done  
Making decisions  
Winning  
Calm in a storm  
Accepting a situation and moving forward  
Overcoming obstacles  
Influential  
Persuasive  
Optimism  
Tenacity/Grit

Inspiring  
Mentally tough  
Loyal

What are your needs?

Action  
Functioning team  
Continuously improve  
Next challenge  
Goals  
Diversity of thought  
Challenged/confronted  
Need for change  
Improve/Be better

What are your weaknesses?

Push too hard/fast  
Impulsiveness  
Hate to be embarrassed  
Hate to be betrayed  
Need to bring people along  
Stubborn  
Inflexible  
Opinionated  
Disorganized  
Insensitive