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**From:** Selders, Elaine L. <seldel@jea.com>  
**Sent:** Thursday, July 19, 2018 8:20 AM  
**To:** 'Edurado.balbis@accenture.com' <Edurado.balbis@accenture.com> >;  
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'todd.bricker@cognizant.com' <todd.bricker@cognizant.com> >;  
'christopher.bowen@cognizant.com' <christopher.bowen@cognizant.com> >;  
'mallen@cornerstone.com' <mallen@cornerstone.com> >;  
'gleonard@cornerstone.com' <gleonard@cornerstone.com> >;  
'jhendrickson@deloitte.com' <jhendrickson@deloitte.com> >; 'tkinrade@deloitte.com'  
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'gary.thrash@northhighland.com' <gary.thrash@northhighland.com> >;  
'scott.sidney@paconsulting.com' <scott.sidney@paconsulting.com> >;  
'ron.norman@paconsulting.com' <ron.norman@paconsulting.com> >;  
'patrick.mcmullan@pwc.com' <patrick.mcmullan@pwc.com> >;  
'julia.d.spalter@pwc.com' <julia.d.spalter@pwc.com> >;  
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'alaffoon@kpmg.com' <alaffoon@kpmg.com> >; 'Kish.Khemani@atkearney.com';  
'Aaron Bielenberg'; Scott Perl  
**Cc:** McCollum, Jenny G. - Dir Procurement Services; Pleasants, Lisa L. - Procurement  
Category Manager  
**Subject:** Addendum 1 JEA RFI - Strategic Planning and Implementation Consulting Services  
**Attachments:** RFI - Strategic Planning and Implementation.docx; Addendum 1 - RFI - Strategic  
Planning and Implementation Consulting Services.docx

Good morning,

Please see the attached Addendum 1 for the Request for Information for Strategic Planning and Implementation Consulting Services. Please refer to the information attached when submitting your response.

All responses are due no later than **Friday, July 20, 2018, 12:00 P.M. EST via email** to Elaine Selders at [seldel@jea.com](mailto:seldel@jea.com).

Thank you!

**Elaine Selders**

Purchasing Agent Senior

Direct: (904) 665-6133



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**From:** Selders, Elaine L.

**Sent:** Thursday, July 12, 2018 5:21 PM

**To:** 'Edurado.balbis@accenture.com' <Edurado.balbis@accenture.com>; 'miles.cook@bain.com' <miles.cook@bain.com>; 'brennan.jim@bcg.com' <brennan.jim@bcg.com>; 'sarsangpp@bv.com' <sarsangpp@bv.com>; 'ryan.hledik@brattle.com' <ryan.hledik@brattle.com>; 'williamfoster@bridgespan.org' <williamfoster@bridgespan.org>; 'Annie.trudeau@capgemini.com' <Annie.trudeau@capgemini.com>; 'todd.bricker@cognizant.com' <todd.bricker@cognizant.com>; 'christopher.bowen@cognizant.com' <christopher.bowen@cognizant.com>; 'mallen@cornerstone.com' <mallen@cornerstone.com>; 'gleonard@cornerstone.com' <gleonard@cornerstone.com>; 'jhendrickson@deloitte.com' <jhendrickson@deloitte.com>; 'tkinrade@deloitte.com' <tkinrade@deloitte.com>; 'wkemp@novationpartners.com' <wkemp@novationpartners.com>; 'Ladams@excergy.com' <Ladams@excergy.com>; 'mdellolio@KPMG.com' <mdellolio@KPMG.com>; 'brucereeves@KPMG.com' <brucereeves@KPMG.com>; 'pmaheo@kpmg.com' <pmaheo@kpmg.com>; 'Selvin.h.dottin@leidos.com' <Selvin.h.dottin@leidos.com>; 'alastair\_green@mckinsey.com' <alastair\_green@mckinsey.com>; 'thomas\_dohrmann@mckinsey.com' <thomas\_dohrmann@mckinsey.com>; 'derkach@mckinsey.com' <derkach@mckinsey.com>; 'toben.galvin@navigant.com' <toben.galvin@navigant.com>; 'william.mccarrick@navigant.com' <william.mccarrick@navigant.com>; 'karen.mahoney@navigant.com' <karen.mahoney@navigant.com>; 'barbara.ray@northhighland.com' <barbara.ray@northhighland.com>; 'gary.thrash@northhighland.com' <gary.thrash@northhighland.com>; 'scott.sidney@paconsulting.com' <scott.sidney@paconsulting.com>; 'ron.norman@paconsulting.com' <ron.norman@paconsulting.com>; 'patrick.mcmullan@pwc.com' <patrick.mcmullan@pwc.com>; 'julia.d.spalter@pwc.com' <julia.d.spalter@pwc.com>; 'sbkitchens@scottmadden.com' <sbkitchens@scottmadden.com>; 'alaffoon@kpmg.com' <alaffoon@kpmg.com>

**Cc:** Pleasants, Lisa L. - Procurement Category Manager <pleall@jea.com>; McCollum, Jenny G. - Dir Procurement Services <gleejs@jea.com>

**Subject:** JEA RFI - Strategic Planning and Implementation Consulting Services

Good afternoon,

JEA is seeking responses for the attached Request for Information for Strategic Planning and Implementation Consulting Services. Please refer to the information attached when submitting your response.

All responses are due no later than **Friday, July 20, 2018, 12:00 P.M. EST via email** to Elaine Selders at [seldel@jea.com](mailto:seldel@jea.com).

Questions regarding this solicitation must be submitted via email to Elaine Selders at [seldel@jea.com](mailto:seldel@jea.com) by **Tuesday, July 17, 2018 12:00 P.M. EST**.

Thank you!

**Elaine Selders**

Purchasing Agent Senior

Direct: (904) 665-6133



# **Request for Information (RFI)**

## **Strategic Planning and Implementation Consulting Services**



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## **1 INTRODUCTION AND PURPOSE OF THE RFI**

With this RFI we request information regarding your company and your products/services. The same information will be gathered from different companies to learn available service delivery options for Strategic Planning and Implementation Consulting Services. This RFI is for informational and planning purposes and is not to be construed as solicitation or a commitment to issue a solicitation.

### **General**

Article I, Section 24, Florida Constitution, guarantees every person access to all public records and Chapter 119, Florida Statutes, provide a broad definition of public records. JEA is a body politic, corporate, and subject to these laws and related statutes ("Florida's Public Records Laws"). All responses to this RFI are public records and available for public inspection unless specifically exempt by law.

## **IF A PROPOSER HAS QUESTIONS REGARDING THE APPLICATION OF CHAPTER 119, FLORIDA STATUTES, TO THE CONTRACTORS DUTY TO PROVIDE PUBLIC RECORDS RELATING TO THIS CONTRACT, CONTACT THE CUSTODIAN OF PUBLIC RECORDS AT:**

### **JEA**

**Attn: Public Records**  
**21 West Church Street**  
**Jacksonville, Florida 32202**  
**Ph: 904-665-8606**  
**[publicrecords@jea.com](mailto:publicrecords@jea.com)**

### **Redacted Submissions**

If a Proposer believes that any portion of the documents, data or records submitted in response to this RFI are exempt from Florida's Public Records Law, Proposer must (1) clearly segregate and mark the specific sections of the document, data or records as "Confidential," (2) cite the specific Florida Statute or other legal authority for the asserted exemption, and (3) provide JEA with a separate redacted copy of its response (the "Redacted Copy"). The cover of the Redacted Copy shall contain JEA's title and number for this RFI and Respondent's name, and shall be clearly titled "Redacted Copy." Respondent should only redact those portions of records that Proposer claims are specifically exempt from disclosure under Florida's Public Records Laws. If Respondent fails to submit a redacted copy of information it claims is confidential, JEA is authorized to produce all documents, data and other records submitted to JEA in answer to a public records request for such information.

In the event of a request for public records to which documents that are marked as confidential are responsive, JEA will provide the Redacted Copy to the requestor. If a requestor asserts a right to any redacted information, JEA will notify Respondent that such an assertion has been made. It is Respondent's responsibility to respond to the requestor to assert that the information in question is exempt from disclosure under applicable law. If JEA becomes subject to a demand for discovery or disclosure of Respondent's redacted information under legal process, JEA shall give Respondent prompt notice of the demand prior to releasing the information (unless otherwise prohibited by applicable law.) Respondent shall be responsible for defending its determination that the redacted portions of its response are not subject to disclosure.

By submitting a response to this RFI, Respondent agrees to protect, defend and indemnify JEA from and against all claims, demands, actions, suits, damages, liabilities, losses, settlements, costs and expenses (including but not limited to reasonable attorney fees and costs) arising from or relating to Respondent's determination that the redacted portions of its response to this Solicitation are not subject to disclosure.

## **2 BACKGROUND AND SCOPE**

### **2.1 Background**

JEA owns, operates and manages the electric system established by the City of Jacksonville, Florida in 1895. In June 1997, JEA also assumed operation of the water and sewer system previously managed by the City. JEA is located in Jacksonville, Florida, where we proudly serve an estimated 458,000 electric, 341,000 water and 264,000 sewer customers. JEA is Florida's largest community owned utility and the eighth largest municipal in the United States.

JEA last conducted a comprehensive strategic planning exercise in 2012 and 2013 and is seeking to re-envision its strategic plan to reflect the changing environment in which it does business. Technology and the industry are changing so fast that JEA needs to change its strategy in order to continue to generate value for our customers and community.

### **2.2 Scope**

The purpose of this Request for Information (RFI) is to determine interest in participation for an upcoming solicitation seeking a consultant that provides strategic planning and implementation services, as well as feedback on the current scope of work as stated below.

JEA is seeking a Consultant (also referred to as the “Company”) that provides strategic planning & implementation services. The Consultant will be required to work directly with the JEA Board (both collectively and individually), JEA’s Chief Executive Officer (CEO), Chief Operating Officer (COO) and the entire Senior Leadership Team (SLT) in order to develop and implement a Strategic Plan for JEA (the “Work” or “Services”).

The Services will be comprised of two (2) phases.

The following services will be considered Phase One of the work and will include, but not be limited to:

#### **Senior Leadership Sessions**

September 2018 – Two (2) full day meetings to review external market and ten (10) year vision.

Day one should include process overview and build on previous internal work around core competencies, competency gaps, organizational structure, values, culture, change management.

Day two should work toward finalizing one (1) year, three (3) year and ten (10) year goals, prioritization of goals, gaps to close in order to meet goals, change management, strategic alignment of each business to corporate goals, corporate metrics and business metrics.

#### **Board sessions**

Design strategic planning process to meaningfully engage Board of Directors in construction of new strategic plan for JEA to complement the strategic planning work undertaken by the Senior Leadership Team.

#### **Planning -**

Prior to, and between each session listed above, the Consultant will be responsible for the following:

- Prepare and meet with Senior Leadership and Board Members as individuals or groups to understand specific challenges, goals, concerns and desires
- Evaluate engagement and risks to achieve a strategic plan
- Prepare and meet with community and city stakeholders to assess concerns and desires. Preparing and disseminating all pre-meeting materials
- Preparing meeting notes and observations and provide recommendations to improve JEA’s planning process

Phase Two services may include, but not limited to:

- Facilitation for partial and full day meetings with the Board, CEO and COO, over an expected 4-6 month period
- With the Board, CEO and COO, develop a comprehensive strategic plan document that contains Board Policy direction on the major issues
- Develop Action Plans with specific objectives and/or strategic initiatives
- Develop Business Plans for new business opportunities
- Track progress of strategic initiatives through the work of company-wide initiative teams
- Coach the CEO, COO, Initiative Teams, etc.
- Design and conduct SLT quarterly performance checkpoint meetings
- Conduct mid-course assessment and assess need for changes in process of organization
- Assist in fiscal year 2019 Launch (October 1, 2018)
- Conduct tactical action reviews as needed (e.g., what worked, what isn't working)
- Capture and share leading practices
- Assist in strategic analyses and strategic implementation projects as requested

### 3 GENERAL INSTRUCTIONS

Please note that this RFI is issued solely for the purpose of obtaining information. Nothing in this RFI shall be interpreted as a commitment on the part of JEA to enter into a contract with any respondent thereof to make any procurement.

#### 3.1 Response Instructions

##### 3.1.1 Response Submission

All responses to this RFI are due no later than 12:00 p.m. EST on Friday, July 20, 2018.

Respondents should submit an electronic copy via e-mail to Elaine Selders at: [seldel@jea.com](mailto:seldel@jea.com).

All responses must include on the first page the official name of the firm or entity submitting the response. Please consecutively number all pages of the response.

##### 3.1.2 Response Content

Vendors should include a response to each of the questions set forth under Question and Vendor Responses (Section 5) of this RFI.

##### 3.1.3 Response Format

JEA requests that all responses be submitted with a point-by-point response to each question in every section. If a respondent opts not to respond to any item(s) please include an explanation for the lack of response.

#### 3.2 Contacts

##### 3.2.1 Questions

Potential respondents who have questions regarding this RFI may e-mail them to the contact listed below by **Tuesday, July 17, 2018**. Respondents may only make inquiries and request clarification concerning this RFI by written questions via e-mail. Responses to inquiries and clarification questions will be provided electronically to all interested parties.

**Note:** There will be no informational sessions associated with this RFI.

##### 3.2.2 Contact Information

Please direct all communications, questions and responses to the following contact:

Elaine Selders, Purchasing Agent Senior  
JEA  
21 West Church Street



Jacksonville, FL 32202  
904.665.7217  
E-mail: seldel@jea.com

### 3.3 Timeframe

CALENDAR EVENT	DATE	TIME
RFI Posting and Release	July 12, 2018	5:30 PM EST
Questions Due	July 17, 2018	12:00 PM EST
RFI Responses Due	July 20, 2018	12:00 PM EST

## 4 ADDITIONAL INFORMATION

### 4.1 Requests for Additional Information

JEA retains the right to request additional information from respondents.

### 4.2 Cost Incurred

By submitting a response, respondents agree that any cost incurred in responding to this RFI, or in support of activities associated with this RFI, shall be the sole responsibility of respondent. JEA shall not be held responsible for any costs incurred by respondents in preparing their respective responses to this RFI.

### 4.3 Review Rights

Responses to this RFI may be reviewed and evaluated by any person(s) at the discretion of the JEA, including independent consultants retained now or in the future. JEA reserves the right to request a demonstration from one or more companies.

### 4.4 Public Record

All responses to this RFI will be public record under the State of Florida's Sunshine Law regardless of confidentiality notices set forth on such writings to the contrary.

## 5 QUESTIONS AND VENDOR RESPONSES

See General Instructions in Section 3 for information on response format and submission. **Note:** Please describe any assumptions you make in answering these questions as part of each response.

### 5.1 Questions / Vendor Responses

#### 5.1.1 Company Information

1. Company name, mailing address, phone number, fax number, and phone/e-mail of designated point of contact for RFI.
2. Corporate web site address.
3. Number years on the market.
4. Company location(s).

#### 5.1.2 Questions

Based off the current scope of work, please provide the following feedback:

1. Any clarifications needed on the scope of work as written, to respond to this solicitation?
2. Can lump sum pricing be submitted for Phase One and Phase Two based off of the current scope of work?  
If not, please provide feedback.
3. Are the timeframes to complete Phase One obtainable?
4. Any issue meeting the minimum qualification as written:

Request for Information  
Strategic Planning and Implementation Consulting Services

- The Respondent shall provide two (2) account references for work similar to the services described in the scope of work for this ITN. References should cover work within the last two (2) years ending June 30, 2018.
  - The account references must include the reference company name, contact person, phone number, email address and a summary of the scope of work provided, and the name of the Lead Consultant utilized by the Respondent to service the account. JEA will contact and verify the account references.

5. Any additional feedback?



Procurement Department Bid Section  
Customer Center 1<sup>st</sup> Floor, Room 002  
21 W. Church Street  
Jacksonville, Florida 32202

December 9, 2020

ADDENDUM NUMBER: ONE (1)

TITLE: RFI Strategic Planning and Implementation Consulting Services

RESPONSE DUE DATE: July 20, 2018

TIME OF RECEIPT: 12:00 PM EST

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

- 1. Question:** In the planning section, the RFI notes that the scope of work would include meeting with community and city stakeholders to assess concerns and desires. Can you provide further detail on who these stakeholders might be, the for and the total number of community events?

**Answer:** There would be at least two (2) community meetings (one (1) with the general public and one (1) with the community leaders). There would be private meetings with the mayor and city council.

- 2. Question:** Can any information provided regarding the two requested references be protected from public disclosure? We usually are subject to NDAs that prohibit us from even disclosing the client's name. Any suggestions on how to meet your reference requests?

**Answer:** The references are not required for the RFI so please include your concerns in response to that question on your RFI response and we will take it into consideration. As a community owned utility, we are subject to Florida Public Records Clauses and Chapter 119 in the Florida Statutes. We do allow redacted submissions for confidential records and there are details regarding that process included in the RFI.