	Ev	/aluation	Matrix					
	Solicitation 127-19 ITN for Strategic Alternatives	Firm:		ply 1	Evaluator:		Juli Crawford	
Proposal to Achieve JEA's Goals in this ITN (20% Weighted Value)	Proposal to Achie 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
	Experience and	(4 points) Customer Com	(3 points) mitment (15%	(2 points) Weighted Valu	(1 point)	(0 points)		
Experience and Customer Commitmer	A summary of experience managing related or similar operations of comparable size and scope to IEA 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. Actions of course of the straining 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)	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
_	Employee Po	(4 points)	(3 points) nefits (10% W	(2 points)	(1 point)	(0 points)		
tention and Benefits (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	3	7.50
ш	Inno	(4 points)	(3 points) 5% Weighted \	(2 points) /alue)	(1 point)	(0 points)		
(15% Weighted	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 (4 points)	Good (3 points)	Adequate (2 points)	Poor (1 point)	Inadequate (0 points)	3	11,25
pa	Environmental,							
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 (4 points)	Good (3 points)	Adequate (2 points)	Poor (1 point)	Inadequate (0 points)	0	0.00
%0	Commun		p (10% Weight		(1 point)	(o ponits)		
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 (4 points)	Good (3 points)	Adequate (2 points)	Poor (1 point)	Inadequate (0 points)	3	7.50
%	Finar	icial Stability (L0% 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 (4 points)	Good (3 points)	Adequate (2 points)	Poor (1 point)	Inadequate (0 points)	3	7.50
		, , , , , , , , , , , , , , , , , , , ,	, , , , , , , , , , , , , , , , , , , ,	, , , , , , , , , , , , , , , , , , , ,	, , , , , , , , , , , , , , , , , , , ,		Total Score	67.50

	Ev	/aluation	Matrix							
	Solicitation 127-19 ITN for Strategic Alternatives	Firm:		ply 3	Evaluator:		Juli Crawford			
Proposal to Achieve JEA's Goals in this ITN (20% Weighted Value)	Proposal to Achie 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	4	20.00		
	Experience and	(4 points) Customer Com	(3 points) mitment (15%	(2 points) Weighted Valu	(1 point)	(0 points)				
Experience and Customer Commitmer	A summary of experience managing related or similar operations of comparable size and scope to IEA 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	4	15.00		
		(4 points)	(3 points)	(2 points)	(1 point)	(0 points)				
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	4	10.00		
_	Employee Po	(4 points) tention and Be	(3 points)	(2 points)	(1 point)	(0 points)				
tention and Benefits (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	4	10.00		
ш	Inno	(4 points) vation Plan (1	(3 points) 5% Weighted \	(2 points) /alue)	(1 point)	(0 points)				
(15% Weighted	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 (4 points)	Good (3 points)	Adequate (2 points)	Poor (1 point)	Inadequate (0 points)	3	11.25		
- P	Environmental,					1.1.				
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 (4 points)	Good (3 points)	Adequate (2 points)	Poor (1 point)	Inadequate (0 points)	3	7.50		
%	Commun	ity Stewardsh			(1 point)	(o ponits)				
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 (4 points)	Good (3 points)	Adequate (2 points)	Poor (1 point)	Inadequate (0 points)	4	10.00		
%	Finar	cial 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 (4 points)	Good (3 points)	Adequate (2 points)	Poor (1 point)	Inadequate (0 points)	4	10.00		
							Total Score	93.75		
	Total Score 93.75									

	Ev	/aluation	Matrix							
	Solicitation 127-19 ITN for Strategic Alternatives	Firm:		ply 4	Evaluator:		Juli Crawford			
Proposal to Achieve JEA's Goals in this ITN (20% Weighted Value)	Proposal to Achie 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	4	20.00		
	Experience and	(4 points) Customer Com	(3 points) mitment (15%	(2 points) Weighted Value	(1 point)	(0 points)				
Experience and Customer Commitmer	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. Attrong 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	4	15.00		
		(4 points)	(3 points)	(2 points)	(1 point)	(0 points)				
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		
	Employee Re	(4 points)	(3 points) enefits (10% W	(2 points)	(1 point)	(0 points)				
tention and Benefits (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. doi:not not 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	3	7.50		
ū	Inne	(4 points)	(3 points) 5% Weighted \	(2 points)	(1 point)	(0 points)				
(15% Weighted	Respondents should provide initiatives under which they will be committed to provide innovative services or investments that leverage the tangible and intangible assets of IEA 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 (3 points)	Adequate (2 points)	Poor (1 point)	Inadequate (0 points)	3	11.25		
P	Environmental,	Social and Gov	vernance (10%	Weighted Valu	e)					
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 (4 points)	Good (3 points)	Adequate (2 points)	Poor (1 point)	Inadequate (0 points)	3	7.50		
%0	Commun		ip (10% Weight		(1 point)	(o ponits)				
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 (4 points)	Good (3 points)	Adequate (2 points)	Poor (1 point)	Inadequate (0 points)	3	7.50		
%	Finar	cial 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 (4 points)	Good (3 points)	Adequate (2 points)	Poor (1 point)	Inadequate (0 points)	3	7.50		
		, , , , , , , , , , , , , , , , , , , ,	, , , , , , , , , , , , , , , , , , , ,	, , , , , , , , , , , , , , , , , , , ,	, , , , , , , , , , , , , , , , , , , ,		Total Score	83.75		
	I OTAL SCORE 83.75									

	Ev	/aluation	Matrix						
	Solicitation 127-19 ITN for Strategic Alternatives	Firm:		oly 5	Evaluator:		Juli Crawford		
Proposal to Achieve JEA's Goals in this ITN (20% Weighted Value)	Proposal to Achie 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	4	20.00	
	Experience and	(4 points) Customer Com	(3 points)	(2 points) Weighted Valu	(1 point)	(0 points)			
Experience and Customer Commitmer	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)	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	2	5.00	
_	Employee Po	(4 points)	(3 points) enefits (10% W	(2 points)	(1 point)	(0 points)			
tention and Benefits (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	3	7.50	
ш	Inno	(4 points)	(3 points) 5% Weighted \	(2 points) /alue)	(1 point)	(0 points)			
(15% Weighted	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 (4 points)	Good (3 points)	Adequate (2 points)	Poor (1 point)	Inadequate (0 points)	3	11,25	
pa	Environmental,								
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 (4 points)	Good (3 points)	Adequate (2 points)	Poor (1 point)	Inadequate (0 points)	3	7.50	
%0	Commun		ip (10% Weight		(1 point)	(o ponits)			
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 (4 points)	Good (3 points)	Adequate (2 points)	Poor (1 point)	Inadequate (0 points)	3	7.50	
%	Finar	cial 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 (4 points)	Good (3 points)	Adequate (2 points)	Poor (1 point)	Inadequate (0 points)	3	7.50	
							Total Score	77.50	
10tal Score 77.50									

	Ev	/aluation	Matrix						
	Solicitation 127-19 ITN for Strategic Alternatives	Firm:		ply 6	Evaluator:		Juli Crawford		
Proposal to Achieve JEA's Goals in this ITN (20% Weighted Value)	Proposal to Achie 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	4	20.00	
	Experience and	(4 points) Customer Com	(3 points) mitment (15%	(2 points) Weighted Value	(1 point)	(0 points)			
Experience and Customer Commitmer	A summary of experience managing related or similar operations of comparable size and scope to IEA 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.Longovity of utility generation, transmission, and distribution operations greater than 5 years; 2.Successful customer relations demonstrated through customer outreach, surveys such as 1D 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 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	4	10.00	
	Employee Po	(4 points)	(3 points) enefits (10% W	(2 points)	(1 point)	(0 points)			
tention and Benefits (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	3	7.50	
ш	Inno	(4 points)	(3 points) 5% Weighted \	(2 points) /alue)	(1 point)	(0 points)			
(15% Weighted	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 (4 points)	Good (3 points)	Adequate (2 points)	Poor (1 point)	Inadequate (0 points)	3	11,25	
pa	Environmental,								
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 (4 points)	Good (3 points)	Adequate (2 points)	Poor (1 point)	Inadequate (0 points)	3	7.50	
%0	Commun		ip (10% Weight		(1 point)	(o ponits)			
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 (4 points)	Good (3 points)	Adequate (2 points)	Poor (1 point)	Inadequate (0 points)	3	7.50	
%	Finar	cial 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 (4 points)	Good (3 points)	Adequate (2 points)	Poor (1 point)	Inadequate (0 points)	3	7.50	
					, ,,		Total Score	82.50	
lotal Score 82.50									

	Ev	/aluation	Matrix						
	Solicitation 127-19 ITN for Strategic Alternatives	Firm:		ply 7	Evaluator:		Juli Crawford		
Proposal to Achieve JEA's Goals in this ITN (20% Weighted Value)	Proposal to Achie 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	
	Experience and	(4 points) Customer Com	(3 points)	(2 points) Weighted Value	(1 point)	(0 points)			
Experience and Customer Commitmer	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)	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	
_	Employee Re	(4 points)	(3 points) enefits (10% W	(2 points) eighted Value)	(1 point)	(0 points)			
tention and Benefits (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	3	7.50	
ū	Inno	(4 points)	(3 points) 5% Weighted \	(2 points) /alue)	(1 point)	(0 points)			
(15% Weighted	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 (3 points)	Adequate (2 points)	Poor (1 point)	Inadequate (0 points)	3	11,25	
p Pa	Environmental,								
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 (4 points)	Good (3 points)	Adequate (2 points)	Poor (1 point)	Inadequate (0 points)	3	7.50	
%	Commun		ip (10% Weight		(1 point)	(o ponits)			
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 (4 points)	Good (3 points)	Adequate (2 points)	Poor (1 point)	Inadequate (0 points)	3	7.50	
%	Finar	cial 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 (4 points)	Good (3 points)	Adequate (2 points)	Poor (1 point)	Inadequate (0 points)	3	7.50	
				, , , , , , , , , , , , , , , , , , , ,	, , , , , , , , , , , , , , , , , , , ,		Total Score	75.00	
10tal score 75.00									

	Ev	/aluation	Matrix					
	Solicitation 127-19 ITN for Strategic Alternatives	Firm:		oly 8	Evaluator:	Scor	ed assuming partr	ership
Proposal to Achieve JEA's Goals in this ITN (20% Weighted Value)	Proposal to Achie 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
	Experience and	(4 points)	(3 points)	(2 points)	(1 point)	(0 points)		
Experience and Customer Commitmer	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 entitles. Specific information regarding experience in other customer service areas, including customer billing, complaint management and resolution history, experience with purchases of other utility systems, ustomer 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)	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
	Employee Re	(4 points)	(3 points) enefits (10% W	(2 points) eighted Value)	(1 point)	(0 points)		
tention and Benefits (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	3	7.50
ш	Inno	(4 points) vation Plan (1	(3 points) 5% Weighted \	(2 points) /alue)	(1 point)	(0 points)		
(15% Weighted	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 (4 points)	Good (3 points)	Adequate (2 points)	Poor (1 point)	Inadequate (0 points)	3	11.25
pa	Environmental,							
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 (4 points)	Good (3 points)	Adequate (2 points)	Poor (1 point)	Inadequate (0 points)	3	7.50
%0	Commun		ip (10% Weight		(1 point)	(o ponits)		
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 (4 points)	Good (3 points)	Adequate (2 points)	Poor (1 point)	Inadequate (0 points)	3	7.50
%	Finar	cial 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 (4 points)	Good (3 points)	Adequate (2 points)	Poor (1 point)	Inadequate (0 points)	3	7.50
							Total Score	75.00

	Ev	/aluation	Matrix					
	Solicitation 127-19 ITN for Strategic Alternatives	Firm:		ply 9	Evaluator:		Juli Crawford	
Proposal to Achieve JEA's Goals in this ITN (20% Weighted Value)	Proposal to Achie 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	4	20.00
	Experience and	(4 points) Customer Com	(3 points) mitment (15%	(2 points) Weighted Value	(1 point)	(0 points)		
Experience and Customer Commitmer	A summary of experience managing related or similar operations of comparable size and scope to IEA 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. Actions of course of the straining 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	4	15.00
		(4 points)	(3 points)	(2 points)	(1 point)	(0 points)		
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	2	5.00
_	Employee Po	(4 points)	(3 points) enefits (10% W	(2 points)	(1 point)	(0 points)		
tention and Benefits (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	3	7.50
ш	Inno	(4 points)	(3 points) 5% Weighted \	(2 points) /alue)	(1 point)	(0 points)		
(15% Weighted	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 (4 points)	Good (3 points)	Adequate (2 points)	Poor (1 point)	Inadequate (0 points)	2	7.50
pa	Environmental,							
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 (4 points)	Good (3 points)	Adequate (2 points)	Poor (1 point)	Inadequate (0 points)	3	7.50
%0	Commun		ip (10% Weight		(1 point)	(o ponits)		
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 (4 points)	Good (3 points)	Adequate (2 points)	Poor (1 point)	Inadequate (0 points)	3	7.50
*	Finar		10% Weighted					
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 (4 points)	Good (3 points)	Adequate (2 points)	Poor (1 point)	Inadequate (0 points)	3	7.50
							Total Score	77.50
lotal Score 77.50								

	Ev	/aluation	Matrix						
	Solicitation 127-19 ITN for Strategic Alternatives	Firm:		oly 10	Evaluator:		Juli Crawford		
Proposal to Achieve JEA's Goals in this ITN (20% Weighted Value)	Proposal to Achie 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	
	Experience and	(4 points) Customer Com	(3 points) mitment (15%	(2 points) Weighted Valu	(1 point)	(0 points)			
Experience and Customer Commitmer	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. Attrong 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)	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	
_	Employee Re	(4 points) tention and Be	(3 points) nefits (10% W	(2 points) eighted Value)	(1 point)	(0 points)			
tention and Benefits (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	3	7.50	
ū	Inno	(4 points) evation Plan (1	(3 points) 5% Weighted \	(2 points) /alue)	(1 point)	(0 points)			
(15% Weighted	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 (4 points)	Good (3 points)	Adequate (2 points)	Poor (1 point)	Inadequate (0 points)	2	7.50	
p Pa	Environmental,								
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 (4 points)	Good (3 points)	Adequate (2 points)	Poor (1 point)	Inadequate (0 points)	0	0.00	
%0	Commun	ity Stewardsh			(1 point)	(o ponits)			
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 (4 points)	Good (3 points)	Adequate (2 points)	Poor (1 point)	Inadequate (0 points)	3	7.50	
%	Finar	cial 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 (4 points)	Good (3 points)	Adequate (2 points)	Poor (1 point)	Inadequate (0 points)	3	7.50	
		, , , , , , , , , , , , , , , , , , , ,	, , , , , , , , , , , , , , , , , , , ,		, , , , , , , , , , , , , , , , , , , ,		Total Score	63.75	
I OTAL SCORE 63.75									

	Ev	/aluation	Matrix						
	Solicitation 127-19 ITN for Strategic Alternatives	Firm:		oly 11	Evaluator:		Juli Crawford		
Proposal to Achieve JEA's Goals in this ITN (20% Weighted Value)	Proposal to Achie 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	
	Experience and	(4 points) Customer Com	(3 points)	(2 points) Weighted Value	(1 point)	(0 points)			
Experience and Customer Commitmer	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	4	15.00	
		(4 points)	(3 points)	(2 points)	(1 point)	(0 points)			
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	4	10.00	
_	Employee Re	(4 points)	(3 points) enefits (10% W	(2 points) eighted Value)	(1 point)	(0 points)			
tention and Benefits (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	3	7.50	
ш	Inno	(4 points)	(3 points) 5% Weighted \	(2 points) /alue)	(1 point)	(0 points)			
(15% Weighted	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 (4 points)	Good (3 points)	Adequate (2 points)	Poor (1 point)	Inadequate (0 points)	4	15.00	
pa	Environmental,								
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 (4 points)	Good (3 points)	Adequate (2 points)	Poor (1 point)	Inadequate (0 points)	3	7.50	
%	Commun		ip (10% Weight		(1 point)	(o ponits)			
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 (4 points)	Good (3 points)	Adequate (2 points)	Poor (1 point)	Inadequate (0 points)	3	7.50	
%	Finar	cial 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 (4 points)	Good (3 points)	Adequate (2 points)	Poor (1 point)	Inadequate (0 points)	3	7.50	
				, , , , , , , , , , , , , , , , , , , ,	, , , , , , , , , , , , , , , , , , , ,		Total Score	85.00	
lotal Score 85.00									

	Ev	/aluation	Matrix					
	Solicitation 127-19 ITN for Strategic Alternatives	Firm:		oly 13	Evaluator:		Juli Crawford	
Proposal to Achieve JEA's Goals in this ITN (20% Weighted Value)	Proposal to Achie 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	4	20.00
	Experience and	(4 points) Customer Com	(3 points) mitment (15%	(2 points) Weighted Valu	(1 point)	(0 points)		
Experience and Customer Commitmer	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)	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)		
tention and Benefits (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	nefits (10% W	Adequate	Poor	Inadequate	3	7.50
ū	Inno	(4 points)	(3 points) 5% Weighted \	(2 points) /alue)	(1 point)	(0 points)		
(15% Weighted	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 (4 points)	Good (3 points)	Adequate (2 points)	Poor (1 point)	Inadequate (0 points)	4	15.00
T 2	Environmental,							
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 (4 points)	Good (3 points)	Adequate (2 points)	Poor (1 point)	Inadequate (0 points)	3	7.50
%	Commun		p (10% Weight		(± ponit)	(o ponits)		
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 (4 points)	Good (3 points)	Adequate (2 points)	Poor (1 point)	Inadequate (0 points)	3	7.50
*	Finar		L0% Weighted					
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 (4 points)	Good (3 points)	Adequate (2 points)	Poor (1 point)	Inadequate (0 points)	3	7.50
							Total Score	83.75
Total Score 83.75								

	Evaluation Matrix									
	Solicitation 127-19 ITN for Strategic Alternatives	Firm:		ly 14	Evaluator:		Juli Crawford			
Proposal to Achieve JEA's Goals in this ITN (20% Weighted Value)	Proposal to Achie Respondents must indicate clearly and specifically how their Reply would allow JEA to achieve the goals outlined in this ITN	Exceptional (4 points)	Good (3 points)	% Weighted Va Adequate (2 points)	Poor (1 point)	Inadequate (0 points)	3	15.00		
	Experience and					(o points)				
Experience and Customer Commitment (15% We	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 entitles. 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.tongevity 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; at 4. Strong focus on maintaining reliability and minimizing time of disruptions; and 5. Focus on maintaining reliability 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		
e) ts	Economic Developme	(4 points)	(3 points)	(2 points)	(1 point)	(0 points)				
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	2	5.00		
	Employee Re	(4 points)	(3 points)	(2 points)	(1 point)	(0 points)				
enefits (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	2	5.00		
ш	Inno	(4 points) ovation Plan (1	(3 points) 5% Weighted \	(2 points) 'alue)	(1 point)	(0 points)				
(15% Weighted	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 (4 points)	Good (3 points)	Adequate (2 points)	Poor (1 point)	Inadequate (0 points)	2	7.50		
- R	Environmental,					4-1				
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 (4 points)	Good (3 points)	Adequate (2 points)	Poor (1 point)	Inadequate (0 points)	3	7.50		
%	Commun	nity Stewardshi			(2 point)	(o ponits)				
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 (4 points)	Good (3 points)	Adequate (2 points)	Poor (1 point)	Inadequate (0 points)	3	7.50		
%	Finar	cial 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 (4 points)	Good (3 points)	Adequate (2 points)	Poor (1 point)	Inadequate (0 points)	3	7.50		
							Total Score	66.25		
	Total Score 66.25									

	Ev	valuation	Matrix							
	Solicitation 127-19 ITN for Strategic Alternatives	Firm:		oly 15	Evaluator:		Juli Crawford			
A's	Proposal to Achie	eve JEA's Goals	in this ITN (209	% Weighted Val	ue)					
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 Com	mitment (15%	Weighted Valu	e)					
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 reliability and minimizing time of disruptions; and 5.Focus on maintaining reliability and minimizing time of disruptions; and 5.Focus on maintaining reliability and minimizing time of disruptions; and 5.Focus on maintaining reliability and minimizing time of disruptions; and 5.Focus on maintaining repondents 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	(2 : .)	(2 : .)	(4 : 1)	(0 : .)				
ie)	Economic Developme	(4 points) nt and Benefits	(3 points)	(2 points) e (10% Weighte	(1 point) d Value)	(0 points)				
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	4	10.00		
	Facilities De	(4 points)	(3 points)	(2 points)	(1 point)	(0 points)				
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	2	5.00		
ш	Inn	(4 points) ovation Plan (1	(3 points)	(2 points)	(1 point)	(0 points)				
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 (4 points)	Good (3 points)	Adequate (2 points)	Poor (1 point)	Inadequate (0 points)	3	11.25		
_	Environmental,									
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 (4 points)	Good (3 points)	Adequate (2 points)	Poor (1 point)	Inadequate (0 points)	3	7.50		
*	Commu	nity Stewardsh			(1 point)	(o points)				
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 (4 points)	Good (3 points)	Adequate (2 points)	Poor (1 point)	Inadequate (0 points)	3	7.50		
	Final	ncial Stability (1								
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)				
	(4 points) (3 points) (2 points) (1 point) (0 points) Total Score 75.00									

	Ev	/aluation	Matrix					
	Solicitation 127-19 ITN for Strategic Alternatives	Firm:		ply 1	Evaluator:		Shawn Eads	
Proposal to Achieve JEA's Goals in this ITN (20% Weighted Value)	Proposal to Achie 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
	Experience and	(4 points) Customer Com	(3 points) mitment (15%	(2 points) Weighted Value	(1 point)	(0 points)		
Experience and Customer Commitmer	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)	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
	Employee Po	(4 points)	(3 points) enefits (10% W	(2 points)	(1 point)	(0 points)		
tention and Benefits (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	3	7.50
ш	Inno	(4 points)	(3 points) 5% Weighted \	(2 points) /alue)	(1 point)	(0 points)		
(15% Weighted	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 (3 points)	Adequate (2 points)	Poor (1 point)	Inadequate (0 points)	3	11.25
T 2	Environmental,							
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 (4 points)	Good (3 points)	Adequate (2 points)	Poor (1 point)	Inadequate (0 points)	3	7.50
26	Commun		ip (10% Weight		(± point)	(o points)		
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 (4 points)	Good (3 points)	Adequate (2 points)	Poor (1 point)	Inadequate (0 points)	3	7.50
*	Finar		10% Weighted					
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 (4 points)	Good (3 points)	Adequate (2 points)	Poor (1 point)	Inadequate (0 points)	3	7.50
							Total Score	75.00

	Ev	/aluation	Matrix						
	Solicitation 127-19 ITN for Strategic Alternatives	Firm:		ply 3	Evaluator:		Shawn Eads		
Proposal to Achieve JEA's Goals in this ITN (20% Weighted Value)	Proposal to Achie 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	
	Experience and	(4 points) Customer Com	(3 points)	(2 points) Weighted Value	(1 point)	(0 points)			
Experience and Customer Commitmer	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)	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	4	10.00	
_	Employee Po	(4 points)	(3 points) enefits (10% W	(2 points)	(1 point)	(0 points)			
tention and Benefits (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	3	7.50	
ш	Inno	(4 points)	(3 points) 5% Weighted \	(2 points) /alue)	(1 point)	(0 points)			
(15% Weighted	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 (3 points)	Adequate (2 points)	Poor (1 point)	Inadequate (0 points)	1	3.75	
P	Environmental,	Social and Gov	vernance (10%	Weighted Valu	e)				
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 (4 points)	Good (3 points)	Adequate (2 points)	Poor (1 point)	Inadequate (0 points)	3	7.50	
%	Commun		ip (10% Weight		(1 point)	(o ponits)			
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 (4 points)	Good (3 points)	Adequate (2 points)	Poor (1 point)	Inadequate (0 points)	3	7.50	
%	Finar	cial 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 (4 points)	Good (3 points)	Adequate (2 points)	Poor (1 point)	Inadequate (0 points)	3	7.50	
							Total Score	70.00	
Total Score 70.00									

	Ev	/aluation	Matrix					
	Solicitation 127-19 ITN for Strategic Alternatives	Firm:		ply 4	Evaluator:		Shawn Eads	
Proposal to Achieve JEA's Goals in this ITN (20% Weighted Value)	Proposal to Achie 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
	Experience and	(4 points) Customer Com	(3 points) mitment (15%	(2 points) Weighted Value	(1 point)	(0 points)		
Experience and Customer Commitmer	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; at 6. 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 30 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)	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
	Employee Re	(4 points)	(3 points) enefits (10% W	(2 points)	(1 point)	(0 points)		
tention and Benefits (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	3	7.50
ш	Inno	(4 points)	(3 points) 5% Weighted \	(2 points) /alue)	(1 point)	(0 points)		
(15% Weighted	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 (3 points)	Adequate (2 points)	Poor (1 point)	Inadequate (0 points)	4	15.00
P	Environmental,	Social and Gov	vernance (10%	Weighted Valu	e)			
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 (4 points)	Good (3 points)	Adequate (2 points)	Poor (1 point)	Inadequate (0 points)	3	7.50
%0	Commur		ip (10% Weight		(2 point)	(o polito)		
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 (4 points)	Good (3 points)	Adequate (2 points)	Poor (1 point)	Inadequate (0 points)	3	7.50
%	Finar	cial 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 (4 points)	Good (3 points)	Adequate (2 points)	Poor (1 point)	Inadequate (0 points)	3	7.50
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	Ev	/aluation	Matrix					
	Solicitation 127-19 ITN for Strategic Alternatives	Firm:		ply 5	Evaluator:		Shawn Eads	
Proposal to Achieve JEA's Goals in this ITN (20% Weighted Value)	Proposal to Achie 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
	Experience and	(4 points) Customer Com	(3 points) mitment (15%	(2 points) Weighted Value	(1 point)	(0 points)		
Experience and Customer Commitmer	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. Attrong 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)	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
_	Employee Re	(4 points)	(3 points) enefits (10% W	(2 points) eighted Value)	(1 point)	(0 points)		
tention and Benefits (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	3	7.50
ū	Inno	(4 points)	(3 points) 5% Weighted \	(2 points) /alue)	(1 point)	(0 points)		
(15% Weighted	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 (3 points)	Adequate (2 points)	Poor (1 point)	Inadequate (0 points)	3	11.25
p Pa	Environmental,							
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 (4 points)	Good (3 points)	Adequate (2 points)	Poor (1 point)	Inadequate (0 points)	3	7.50
%	Commun		ip (10% Weight		(1 point)	(o ponits)		
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 (4 points)	Good (3 points)	Adequate (2 points)	Poor (1 point)	Inadequate (0 points)	3	7.50
%	Finar	cial 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 (4 points)	Good (3 points)	Adequate (2 points)	Poor (1 point)	Inadequate (0 points)	3	7.50
							Total Score	75.00

	Ev	/aluation	Matrix					
	Solicitation 127-19 ITN for Strategic Alternatives	Firm:		ply 6	Evaluator:		Shawn Eads	
Proposal to Achieve JEA's Goals in this ITN (20% Weighted Value)	Proposal to Achie 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
	Experience and	(4 points) Customer Com	(3 points) mitment (15%	(2 points) Weighted Valu	(1 point)	(0 points)		
Experience and Customer Commitmer	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)	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	4	10.00
	Employee Po	(4 points)	(3 points) nefits (10% W	(2 points)	(1 point)	(0 points)		
tention and Benefits (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	3	7.50
ш	Inno	(4 points)	(3 points) 5% Weighted \	(2 points) /alue)	(1 point)	(0 points)		
(15% Weighted	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 (4 points)	Good (3 points)	Adequate (2 points)	Poor (1 point)	Inadequate (0 points)	3	11.25
T 2	Environmental,							
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 (4 points)	Good (3 points)	Adequate (2 points)	Poor (1 point)	Inadequate (0 points)	3	7.50
%0	Commur		p (10% Weight		(2 point)	(o polito)		
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 (4 points)	Good (3 points)	Adequate (2 points)	Poor (1 point)	Inadequate (0 points)	3	7.50
%(Finar	icial Stability (L0% 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 (4 points)	Good (3 points)	Adequate (2 points)	Poor (1 point)	Inadequate (0 points)	3	7.50
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	Ev	/aluation	Matrix						
	Solicitation 127-19 ITN for Strategic Alternatives	Firm:		ply 7	Evaluator:		Shawn Eads		
Proposal to Achieve JEA's Goals in this ITN (20% Weighted Value)	Proposal to Achie 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	
	Experience and	(4 points) Customer Com	(3 points)	(2 points) Weighted Value	(1 point)	(0 points)			
Experience and Customer Commitmer	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. Attrong 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)	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	
_	Employee Re	(4 points)	(3 points) enefits (10% W	(2 points) eighted Value)	(1 point)	(0 points)			
tention and Benefits (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	3	7.50	
ш	Inno	(4 points)	(3 points) 5% Weighted \	(2 points) /alue)	(1 point)	(0 points)			
(15% Weighted	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 (4 points)	Good (3 points)	Adequate (2 points)	Poor (1 point)	Inadequate (0 points)	4	15.00	
pa	Environmental,								
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 (4 points)	Good (3 points)	Adequate (2 points)	Poor (1 point)	Inadequate (0 points)	3	7.50	
%	Commun		ip (10% Weight		(1 point)	(o ponits)			
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 (4 points)	Good (3 points)	Adequate (2 points)	Poor (1 point)	Inadequate (0 points)	3	7.50	
%	Finar	cial 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 (4 points)	Good (3 points)	Adequate (2 points)	Poor (1 point)	Inadequate (0 points)	3	7.50	
				, , , , , , , , , , , , , , , , , , , ,	, , , , , , , , , , , , , , , , , , , ,		Total Score	78.75	
lotal Score 78.75									

	Ev	/aluation	Matrix							
	Solicitation 127-19 ITN for Strategic Alternatives	Firm:		ply 8	Evaluator:		Shawn Eads			
Proposal to Achieve JEA's Goals in this ITN (20% Weighted Value)	Proposal to Achie 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	2	10.00		
	Experience and	(4 points) Customer Com	(3 points) mitment (15%	(2 points) Weighted Value	(1 point)	(0 points)				
Experience and Customer Commitmer	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)	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)				
tention and Benefits (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	2	5.00		
ш	Inno	(4 points)	(3 points) 5% Weighted \	(2 points) /alue)	(1 point)	(0 points)				
(15% Weighted	Respondents should provide initiatives under which they will be committed to provide innovative services or investments that leverage the tangible and intangible assets of IEA 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 (3 points)	Adequate (2 points)	Poor (1 point)	Inadequate (0 points)	4	15.00		
T 2	Environmental,									
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 (4 points)	Good (3 points)	Adequate (2 points)	Poor (1 point)	Inadequate (0 points)	3	7.50		
%0	Commun		ip (10% Weight		(1 point)	(o politis)				
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 (4 points)	Good (3 points)	Adequate (2 points)	Poor (1 point)	Inadequate (0 points)	3	7.50		
%	Finar	cial 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 (4 points)	Good (3 points)	Adequate (2 points)	Poor (1 point)	Inadequate (0 points)	3	7.50		
		, , , , , , , , , , , , , , , , , , , ,	, , , , , , , , , , , , , , , , , , , ,	, , , , , , , , , , , , , , , , , , , ,	, , , , , , , , , , , , , , , , , , , ,		Total Score	71.25		
	Total Score 71.25									

	Ev	/aluation	Matrix							
	Solicitation 127-19 ITN for Strategic Alternatives	Firm:		ply 9	Evaluator:		Shawn Eads			
Proposal to Achieve JEA's Goals in this ITN (20% Weighted Value)	Proposal to Achie 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	4	20.00		
	Experience and	(4 points) Customer Com	(3 points) mitment (15%	(2 points) Weighted Value	(1 point)	(0 points)				
Experience and Customer Commitmer	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)	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		
	Employee Re	(4 points)	(3 points) enefits (10% W	(2 points) eighted Value)	(1 point)	(0 points)				
tention and Benefits (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	3	7.50		
ш	Inno	(4 points)	(3 points) 5% Weighted \	(2 points) /alue)	(1 point)	(0 points)				
(15% Weighted	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 (3 points)	Adequate (2 points)	Poor (1 point)	Inadequate (0 points)	4	15.00		
P	Environmental,	Social and Gov	vernance (10%	Weighted Valu	e)					
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 (4 points)	Good (3 points)	Adequate (2 points)	Poor (1 point)	Inadequate (0 points)	3	7.50		
%0	Commur		ip (10% Weight		(2 point)	(o polito)				
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 (4 points)	Good (3 points)	Adequate (2 points)	Poor (1 point)	Inadequate (0 points)	3	7.50		
%	Finar	cial 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 (4 points)	Good (3 points)	Adequate (2 points)	Poor (1 point)	Inadequate (0 points)	3	7.50		
		, , , , , , , , , , , , , , , , , , , ,	, , , , , , , , , , , , , , , , , , , ,	, , , , , , , , , , , , , , , , , , , ,	, , , , , , , , , , , , , , , , , , , ,		Total Score	83.75		
	I OTAL SCORE 83.75									

	Ev	/aluation	Matrix							
	Solicitation 127-19 ITN for Strategic Alternatives	Firm:		oly 10	Evaluator:		Shawn Eads			
Proposal to Achieve JEA's Goals in this ITN (20% Weighted Value)	Proposal to Achie 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	1	5.00		
	Experience and	(4 points) Customer Com	(3 points)	(2 points) Weighted Value	(1 point)	(0 points)				
Experience and Customer Commitmer	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)	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		
	Employee Re	(4 points)	(3 points) enefits (10% W	(2 points) eighted Value)	(1 point)	(0 points)				
tention and Benefits (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	2	5.00		
ш	Inno	(4 points)	(3 points) 5% Weighted \	(2 points) /alue)	(1 point)	(0 points)				
(15% Weighted	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 (3 points)	Adequate (2 points)	Poor (1 point)	Inadequate (0 points)	3	11,25		
P	Environmental,									
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 (4 points)	Good (3 points)	Adequate (2 points)	Poor (1 point)	Inadequate (0 points)	3	7.50		
%0	Commun		ip (10% Weight		(1 point)	(o ponits)				
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 (4 points)	Good (3 points)	Adequate (2 points)	Poor (1 point)	Inadequate (0 points)	3	7.50		
%	Finar	cial 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 (4 points)	Good (3 points)	Adequate (2 points)	Poor (1 point)	Inadequate (0 points)	3	7.50		
				, , , , , , , , , , , , , , , , , , , ,	, , , , , , , , , , , , , , , , , , , ,		Total Score	62.50		
	Total Score 62.50									

	Ev	/aluation	Matrix					
	Solicitation 127-19 ITN for Strategic Alternatives	Firm:		oly 11	Evaluator:		Shawn Eads	
Proposal to Achieve JEA's Goals in this ITN (20% Weighted Value)	Proposal to Achie 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	4	20.00
	Experience and	(4 points) Customer Com	(3 points) mitment (15%	(2 points) Weighted Value	(1 point)	(0 points)		
Experience and Customer Commitmer	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)	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	4	10.00
	Employee Po	(4 points)	(3 points) enefits (10% W	(2 points)	(1 point)	(0 points)		
tention and Benefits (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	3	7.50
ш	Inno	(4 points)	(3 points) 5% Weighted \	(2 points) /alue)	(1 point)	(0 points)		
(15% Weighted	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 (3 points)	Adequate (2 points)	Poor (1 point)	Inadequate (0 points)	4	15.00
T 2	Environmental,							
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 (4 points)	Good (3 points)	Adequate (2 points)	Poor (1 point)	Inadequate (0 points)	3	7.50
%0	Commun		ip (10% Weight		(2 point)	(o ponits)		
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 (4 points)	Good (3 points)	Adequate (2 points)	Poor (1 point)	Inadequate (0 points)	3	7.50
%	Finar	cial 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 (4 points)	Good (3 points)	Adequate (2 points)	Poor (1 point)	Inadequate (0 points)	3	7.50
		, , , , , , , , , , , , , , , , , , , ,	, , , , , , , , , , , , , , , , , , , ,	, , , , , , , , , , , , , , , , , , , ,	, , , , , , , , , , , , , , , , , , , ,		Total Score	86.25

	Ev	/aluation	Matrix							
	Solicitation 127-19 ITN for Strategic Alternatives	Firm:		oly 13	Evaluator:		Shawn Eads			
Proposal to Achieve JEA's Goals in this ITN (20% Weighted Value)	Proposal to Achie 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		
	Experience and	(4 points) Customer Com	(3 points)	(2 points) Weighted Value	(1 point)	(0 points)				
Experience and Customer Commitmer	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)	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	4	10.00		
	Employee Re	(4 points)	(3 points) enefits (10% W	(2 points) eighted Value)	(1 point)	(0 points)				
tention and Benefits (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	3	7.50		
ū	Inno	(4 points)	(3 points) 5% Weighted \	(2 points) /alue)	(1 point)	(0 points)				
(15% Weighted	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 (3 points)	Adequate (2 points)	Poor (1 point)	Inadequate (0 points)	4	15.00		
P	Environmental,									
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 (4 points)	Good (3 points)	Adequate (2 points)	Poor (1 point)	Inadequate (0 points)	3	7.50		
%6	Commun		ip (10% Weight		(1 point)	(o ponits)				
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 (4 points)	Good (3 points)	Adequate (2 points)	Poor (1 point)	Inadequate (0 points)	3	7.50		
%	Finar	cial 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 (4 points)	Good (3 points)	Adequate (2 points)	Poor (1 point)	Inadequate (0 points)	3	7.50		
				, , , , , , , , , , , , , , , , , , , ,	, , , , , , , , , , , , , , , , , , , ,		Total Score	81.25		
	Total Score 81.25									

Evaluation Matrix									
	Solicitation 127-19 ITN for Strategic Alternatives	Firm:		ly 14	Evaluator:		Shawn Eads		
Proposal to Achieve JEA's Goals in this ITN (20% Weighted Value)	Proposal to Achie 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	2	10.00	
	Experience and	(4 points) Customer Com	(3 points) mitment (15%	(2 points) Weighted Valu	(1 point)	(0 points)			
Experience and Customer Commitment (15% We	A summary of experience managing related or similar operations of comparable size and scope to IEA 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.tongevity 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; at 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 3 Uyears. 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	
e) (s	Economic Developme	(4 points)	(3 points)	(2 points)	(1 point)	(0 points)			
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	
	Employee Re	(4 points)	(3 points)	(2 points)	(1 point)	(0 points)			
enefits (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. doi:not not 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	3	7.50	
ū	Inns	(4 points) ovation Plan (1	(3 points) 5% Weighted \	(2 points) /alue)	(1 point)	(0 points)			
(15% Weighted	Respondents should provide initiatives under which they will be committed to provide innovative services or investments that leverage the tangible and intangible assets of IFA 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 (4 points)	Good (3 points)	Adequate (2 points)	Poor (1 point)	Inadequate (0 points)	3	11.25	
_ P	Environmental,					(o points)			
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 (4 points)	Good (3 points)	Adequate (2 points)	Poor (1 point)	Inadequate (0 points)	3	7.50	
%	Commun	nity Stewardshi				, , , , , , , , , , , , , , , , , , , ,			
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 (4 points)	Good (3 points)	Adequate (2 points)	Poor (1 point)	Inadequate (0 points)	3	7.50	
*	Finar	cial Stability (
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 (4 points)	Good (3 points)	Adequate (2 points)	Poor (1 point)	Inadequate (0 points)	3	7.50	
		, pontaj	, pontaj	(= points)	(2 pont)	(= ponta)	Total Score	70.00	
	Total Score 70.00								

	Ev	valuation	Matrix					
	Solicitation 127-19 ITN for Strategic Alternatives	Firm:	Rep	oly 15	Evaluator:		Shawn Eads	
A's	Proposal to Achie	eve JEA's Goals	in this ITN (20%	% Weighted Val	ue)			
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	2	10.00
£ .		(4 points)	(3 points)	(2 points)	(1 point)	(0 points)		
	Experience and	Customer Com	mitment (15%	Weighted Valu	e)			
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 ID 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 reliability and minimizing time of disruptions; and 5.Focus on maintaining reliability and minimizing time of disruptions; and 5.Focus on maintaining reliability and minimizing time of disruptions; and 5.Focus on maintaining reliability and minimizing time of disruptions; and 5.Focus on maintaining repondents 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)	(2 : .)	(2, 1, 1)	(4 : 1)	(0 : .)		
ie)	Economic Developme	(4 points) nt and Benefits	(3 points)	(2 points) (10% Weighte	(1 point) d Value)	(0 points)		
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
	Facilities De	(4 points)	(3 points)	(2 points)	(1 point)	(0 points)		
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	2	5.00
ш	Inn	(4 points) ovation Plan (1	(3 points)	(2 points)	(1 point)	(0 points)		
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 (4 points)	Good (3 points)	Adequate (2 points)	Poor (1 point)	Inadequate (0 points)	3	11.25
_	Environmental,					1-1		
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 (4 points)	Good (3 points)	Adequate (2 points)	Poor (1 point)	Inadequate (0 points)	3	7.50
*	Commu	nity Stewardsh			(± point)	(o ponits)		
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 (4 points)	Good (3 points)	Adequate (2 points)	Poor (1 point)	Inadequate (0 points)	3	7.50
	Final	ncial Stability (1						
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

	Evaluation Matrix								
	Solicitation 127-19 ITN for Strategic Alternatives	Firm:		ply 1	Evaluator:		Jon Kendrick		
Proposal to Achieve JEA's Goals in this ITN (20% Weighted Value)	Proposal to Achie Respondents must indicate clearly and specifically how their Reply would allow JEA to achieve the goals outlined in this ITN	Exceptional (4 points)	Good (3 points)	% Weighted Va Adequate (2 points)	Poor (1 point)	Inadequate (0 points)	2	10.00	
	Experience and					(o points)			
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 entitles. 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 favorable: 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; and 5. 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	2	7.50	
ts (e)	Economic Developmer	(4 points)	(3 points)	(2 points)	(1 point)	(0 points)			
bme %	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	2	5.00	
	Employee Re	(4 points) tention and Be	(3 points) nefits (10% W	(2 points) eighted Value)	(1 point)	(0 points)			
tention and Benefits (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	2	5.00	
ū	Inno	(4 points)	(3 points) 5% Weighted \	(2 points) /alue)	(1 point)	(0 points)			
lan (15% Weighted	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 (4 points)	Good (3 points)	Adequate (2 points)	Poor (1 point)	Inadequate (0 points)	3	11.25	
p %	Environmental,					(5 5 - 1 - 1 - 1 - 1 - 1 - 1 - 1 - 1 - 1 -			
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 (4 points)	Good (3 points)	Adequate (2 points)	Poor (1 point)	Inadequate (0 points)	1	2.50	
%0:	Commur	nity Stewardshi			, point)	(2 ponits)			
y Ste ghte	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 (4 points)	Good (3 points)	Adequate (2 points)	Poor (1 point)	Inadequate (0 points)	2	5.00	
%	Finar	cial Stability (1							
Stal	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 (4 points)	Good (3 points)	Adequate (2 points)	Poor (1 point)	Inadequate (0 points)	3	7.50	
		, ,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,	, , , , , , , , , , , , , , , , , , , ,	, ,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,	, , , , , , , , , , , , , , , , , , , ,	, ,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,	Total Score	53.75	

Solicitation 127-19 ITN for Strategic Alternatives Firm: Reply 3 Evaluator: Proposal to Achieve JEA's Goals in this ITN (20% Weighted Value) Proposal to Achieve JEA's Goals in this ITN (20% Weighted Value)	Jon Kendrick	
Proposal to Achieve JEA's Goals in this ITN (20% Weighted Value)		
Proposal 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 achieve the goals outlined in this ITN Exceptional Good Adequate Poor Inadequate (4 points) (2 points) (1 points) (1 points) (1 points)	3	15.00
(4 points) (3 points) (2 points) (1 point) (0 points) 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 ID 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	e 4	15.00
(4 points) (3 points) (2 points) (1 point) (0 points) 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. Compared to the City of Jacksonville	e 4	10.00
(panta) (panta) (panta)		
Respondents will be evaluated on the basis of their willingness to make certain commitments to employees consistent with IEA's goals of: 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	e 4	10.00
(4 points) (3 points) (2 points) (1 point) (0 points) 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 (4 points) (3 points) (2 points) (1 point)	e 4	15.00
Environmental, Social and Governance (10% Weighted Value)		
Pure program of the maintenance of an equitable workforce and management team [Application of the maintenance of an equitable workforce and management team of the maintenance of an equitable workforce and management team of the maintenance of an equitable workforce and management team of the maintenance of an equitable workforce and management team of the maintenance of an equitable workforce and management team of the maintenance of an equitable workforce and management team of the maintenance of an equitable workforce and management team of the maintenance of an equitable workforce and management team of the maintenance of an equitable workforce and management team of the maintenance of an equitable workforce and management team of the maintenance of an equitable workforce and management team of the maintenance of an equitable workforce and management team of the maintenance of an equitable workforce and management team of the maintenance of an equitable workforce and management team of the maintenance of an equitable workforce and management team of the maintenance of an equitable workforce and management team of the maintenance of an equitable workforce and management team of the maintenance of an equitable workforce and management team of the maintenance of an equitable workforce and management team of the maintenance of an equitable workforce and management team of the maintenance of an equitable workforce and management team of the maintenance of an equitable workforce and management team of the maintenance of an equitable workforce and management team of the maintenance of an equitable workforce and management team of the maintenance of an equitable workforce and management team of the maintenance of an equitable workforce and management team of the maintenance of the maintenanc	e 3	7.50
Community Stawardship (109/ Waighted 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 [4 points] [4 points] [5 weighted Variety [6 Good Adequate Poor Inadequate Poo	e 4	10.00
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 [Application of the property of the propert	4	10.00
	Total Score	92.50

	Ev	/aluation	Matrix					
	Solicitation 127-19 ITN for Strategic Alternatives	Firm:	Rer	oly 4	Evaluator:		Jon Kendrick	
	*							
Proposal to Achieve JEA's Goals in this ITN (20% Weighted Value)	Proposal to Achie 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	4	20.00
	Experience and	(4 points)	(3 points)	(2 points)	(1 point)	(0 points)		
perience 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; at 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	4	15.00
N e	Economic Developmer	(4 points)	(3 points)	(2 points)	(1 point)	(0 points)		
e e e	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	4	10.00
	Employee Re	(4 points) tention and Be	(3 points) nefits (10% W	(2 points) eighted Value)	(1 point)	(0 points)		
tention and Benefits (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	4	10.00
ū	Inno	(4 points)	(3 points) 5% Weighted V		(1 point)	(0 points)		
ation Plan (15% Weighted	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 (4 points)	Good (3 points)	Adequate (2 points)	Poor (1 point)	Inadequate (0 points)	4	15.00
p P	Environmental,					(o points)		
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 (4 points)	Good (3 points)	Adequate (2 points)	Poor (1 point)	Inadequate (0 points)	4	10.00
%01	Commur	nity Stewardshi			(2 point)	(o ponits)		
y Stewa ghted V	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 (2 points)	Poor (1 point)	Inadequate	4	10.00
	Finar	(4 points) cial Stability (1	(3 points) 10% Weighted	(2 points) Value)	(1 point)	(0 points)		
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 (4 points)	Good (3 points)	Adequate (2 points)	Poor (1 point)	Inadequate (0 points)	4	10.00
		(- points)	(5 points)	(2 points)	(± point)	(o ponits)	Total Score	100.00

Evaluation Matrix								
	Solicitation 127-19 ITN for Strategic Alternatives	Firm:		ply 5	Evaluator:		Jon Kendrick	
Proposal to Achieve JEA's Goals in this ITN (20% Weighted Value)	Proposal to Achie 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
	Experience and	(4 points) Customer Com	(3 points) mitment (15%	(2 points) Weighted Value	(1 point)	(0 points)		
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
2 °	Economic Developmer	(4 points)	(3 points)	(2 points)	(1 point)	(0 points)		
bme %	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	4	10.00
	Fmnlovee Re	(4 points) tention and Be	(3 points)	(2 points)	(1 point)	(0 points)		
tention and Benefits (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	3	7.50
ū	Inno	(4 points)	(3 points) 5% Weighted \	(2 points)	(1 point)	(0 points)		
lan (15% Weighted	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 (4 points)	Good (3 points)	Adequate (2 points)	Poor (1 point)	Inadequate (0 points)	4	15.00
- P	Environmental,					(o points)		
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 (4 points)	Good (3 points)	Adequate (2 points)	Poor (1 point)	Inadequate (0 points)	3	7.50
%01	Commur	nity Stewardshi			. ,,	. ,,		
y Ste ghte	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 (4 points)	Good (3 points)	Adequate (2 points)	Poor (1 point)	Inadequate (0 points)	3	7.50
*	Finar	icial Stability (1						
Stal	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 (4 points)	Good (3 points)	Adequate (2 points)	Poor (1 point)	Inadequate (0 points)	4	10.00
		, , , , , , , , , , , , , , , , , , , ,	(2,23110)	,	(= = = = = = = = = = = = = = = = = = =		Total Score	83.75

Page		Ev	aluation	Matrix					
The proposed many beloads clarity and gent facts how their fieth yould should. A copyright of your proposed proposed and the proposed prop		-						Jon Kendrick	
A summary of experience managing reacted or distalt accordance of comparable 150 and accordance in the comparable 150 and	Proposal to Achieve JEA's Goals in this ITN (20% Weighted Value)	Respondents must indicate clearly and specifically how their Reply would allow JEA	Exceptional	Good	Adequate	Poor	·	4	20.00
The proposal control of the register of the September of the property of the p		Experience and					(o points)		
Economic Development and Senefits to Jacksonville (10% Weighted Value)	Experience and Customer Commit ment (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					Inadequate	4	15.00
The proportion of the control of the							(0 points)		
Repondents will be evaluated on the basis of their willingness to make certain commitments to employees consistent with LPA's goals of: 1. Protection of crain employees referentee breefiles; 1. Protection of the call by business of the transplant and crain employees to make commitments; 1. Protection of the call by business of the more and crain employees to make commitments; 1. Protection of the call by business of the crain employees to make commitments; 1. Protectio	conomic Development and Benefit o 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	Exceptional	Good	Adequate	Poor		4	10.00
Bespondents should provide initiatives under which they will be committed to provide innovative services or investments that leverage the tangible and intangible assets of 15 Ain order to achieve the following: 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 Environmental, Social and Governance (10% Weighted Value) Community Stewardship (10% Weighted Value) Community Stewardship (10% Weighted Value) For Inadequate Poor Ina		Employee Re				(1 point)	(0 points)		
Bespondents should provide initiatives under which they will be committed to provide innovative services or investments that leverage the tangible and intangible assets of 15 Ain order to achieve the following: 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 Environmental, Social and Governance (10% Weighted Value) Community Stewardship (10% Weighted Value) Community Stewardship (10% Weighted Value) For Inadequate Poor Ina	mployee Retention and Benefits (10% Weigh Value)	commitments to employees consistent with IEA'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	Exceptional	Good	Adequate	Poor	Inadequate	4	10.00
Respondents should provide initiatives under which they will be committed to provide innovative services or investments that leverage the tangelie and intangible and intan	ij.	Inno	(4 points)	(3 points) 5% Weighted V	(2 points) /alue)	(1 point)	(0 points)		
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 Community Stewardship (10% Weighted Value) Community Stewardship (10% Weighted Value) Exceptional Good Adequate Poor Inadequate (10% Weighted Value) Community Stewardship (10% Weighted Value) Exceptional Good Adequate Poor Inadequate (10% Weighted Value) Exceptional Good Adequate (10% Weighted Value) Financial Stability (10% Weighted Value) Exceptional Good Adequate (10% Weighted Value) Financial Stability (10% Weighted Value) Exceptional Good Adequate (10% Weighted Value) Financial Stability (10% Weighted	Innovation Plan (15% Weighted Value)	provide innovative services or investments that leverage the tangible and intangible assets of IFA 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 IFA's business are strongly	·					4	15.00
Second composition Community Stewardship (10% Weighted Value)	Pa	Environmental,							
Respondents will be treated favorably for their willingness to make commitments to the City of Jacksonwille and surrounding communities, including, but not limited to, volunteer activities, charitable contributions, an ongoing community relationship plan and comprehensive storm responsiveness plans	Environmental, Social an Governance (10% Weight Value)	including, but not limited to, sustainability initiatives, renewable energy goals and			,			4	10.00
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 (4 points) (3 points) (2 points) (1 point) (0 points)	%6	Commun				(± point)	(o points)		
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 Good Adequate Poor Inadequate Poor Inadequate Poor Poor	Community Stewardship (10 Weighted Value)	the City of Jacksonville and surrounding communities, including, but not limited to, volunteer activities, charitable contributions, an ongoing community relationship	·					4	10.00
(4 points) (3 points) (2 points) (1 point) (0 points)	%	Finan							
	Financial Stability (10 Weighted Value)	capital availability. Additional merit will be placed on willingness and demonstrated						4	10.00
								Total Score	100.00

Evaluation Matrix								
	Solicitation 127-19 ITN for Strategic Alternatives	Firm:		ply 7	Evaluator:		Jon Kendrick	
Proposal to Achieve JEA's Goals in this ITN (20% Weighted Value)	Proposal to Achie Respondents must indicate clearly and specifically how their Reply would allow JEA to achieve the goals outlined in this ITN	Exceptional (4 points)	Good (3 points)	% Weighted Va Adequate (2 points)	Poor (1 point)	Inadequate (0 points)	4	20.00
	Experience and					(o points)		
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 entitles. 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 favorable: 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	4	15.00
ts (e)	Economic Developmer	(4 points)	(3 points)	(2 points)	(1 point)	(0 points)		
bme ×	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	4	10.00
	Fmnlovee Re	(4 points) tention and Be	(3 points)	(2 points)	(1 point)	(0 points)		
tention and Benefits (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	3	7.50
ū	Inno	(4 points)	(3 points) 5% Weighted \	(2 points)	(1 point)	(0 points)		
lan (15% Weighted	Respondents should provide initiatives under which they will be committed to provide innovative services or investments that leverage the tangible and intangible assets of IEA 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 (4 points)	Good (3 points)	Adequate (2 points)	Poor (1 point)	Inadequate (0 points)	4	15.00
_ 5	Environmental,					(o points)		
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 (4 points)	Good (3 points)	Adequate (2 points)	Poor (1 point)	Inadequate (0 points)	3	7.50
%6	Commur	nity Stewardshi			. ,,	. ,,		
y Ste ghte	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 (4 points)	Good (3 points)	Adequate (2 points)	Poor (1 point)	Inadequate (0 points)	4	10.00
*	Finar	icial Stability (1						
Stal	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 (4 points)	Good (3 points)	Adequate (2 points)	Poor (1 point)	Inadequate (0 points)	4	10.00
		, politoj	, (o ponito)	,_ ponitoj	, , , , point)	(ponta)	Total Score	95.00
								33.30

	Ev	/aluation	Matrix					
	Solicitation 127-19 ITN for Strategic Alternatives	Firm:	Reg	oly 8	Evaluator:		Jon Kendrick	
	Proposal to Achie	vo IEA's Goals			luo)			
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
	Experience and	(4 points) Customer Com	(3 points) mitment (15%	(2 points) Weighted Valu	(1 point)	(0 points)		
perience 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 entitles. 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; at 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	4	15.00
8 (a)	Economic Developmer	(4 points)	(3 points)	(2 points)	(1 point)	(0 points)		
e e e	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
	Employee Re	(4 points) tention and Be	(3 points) nefits (10% W	(2 points) eighted Value)	(1 point)	(0 points)		
tention and Benefits (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	2	5.00
ū	Inno	(4 points)	(3 points) 5% Weighted V		(1 point)	(0 points)		
ation Plan (15% Weighted	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 (4 points)	Good (3 points)	Adequate (2 points)	Poor (1 point)	Inadequate (0 points)	4	15.00
p P	Environmental,					(o points)		
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 (4 points)	Good (3 points)	Adequate (2 points)	Poor (1 point)	Inadequate (0 points)	3	7.50
%01	Commur	nity Stewardshi			(2 point)	(o ponits)		
y Stewa ghted V	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 (2 points)	Adequate (2 points)	Poor (1 point)	Inadequate	4	10.00
	Finar	(4 points) cial Stability (1	(3 points) 10% Weighted	(2 points) Value)	(1 point)	(0 points)		
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 (4 points)	Good (3 points)	Adequate (2 points)	Poor (1 point)	Inadequate (0 points)	3	7.50
		, (+ points)	(5 points)	(2 points)	(± point)	(o ponits)	Total Score	82.50

	Evaluation Matrix								
	Solicitation 127-19 ITN for Strategic Alternatives	Firm:		oly 9	Evaluator:		Jon Kendrick		
Proposal to Achieve JEA's Goals in this ITN (20% Weighted Value)	Proposal to Achie Respondents must indicate clearly and specifically how their Reply would allow JEA to achieve the goals outlined in this ITN	Exceptional (4 points)	Good (3 points)	% Weighted Va Adequate (2 points)	Poor (1 point)	Inadequate (0 points)	3	15.00	
	Experience and					(o points)			
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 entitles. 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 favorable: 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	4	15.00	
ts (e)	Economic Developmer	(4 points)	(3 points)	(2 points)	(1 point)	(0 points)			
bme %	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	
	Employee Re	(4 points) tention and Be	(3 points) nefits (10% W	(2 points)	(1 point)	(0 points)			
tention and Benefits (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	4	10.00	
ū	Inno	(4 points)	(3 points) 5% Weighted \	(2 points) /alue)	(1 point)	(0 points)			
lan (15% Weighted	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 (4 points)	Good (3 points)	Adequate (2 points)	Poor (1 point)	Inadequate (0 points)	4	15.00	
- B	Environmental,								
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 (4 points)	Good (3 points)	Adequate (2 points)	Poor (1 point)	Inadequate (0 points)	3	7.50	
%01	Commur	nity Stewardshi			. ,,				
y Ste ghte	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 (4 points)	Good (3 points)	Adequate (2 points)	Poor (1 point)	Inadequate (0 points)	3	7.50	
*	Finar	icial Stability (1							
Stal	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 (4 points)	Good (3 points)	Adequate (2 points)	Poor (1 point)	Inadequate (0 points)	4	10.00	
							Total Score	87.50	

	Evaluation Matrix								
	Solicitation 127-19 ITN for Strategic Alternatives	Firm:		ly 10	Evaluator:		Jon Kendrick		
Proposal to Achieve JEA's Goals in this ITN (20% Weighted Value)	Proposal to Achie Respondents must indicate clearly and specifically how their Reply would allow JEA to achieve the goals outlined in this ITN	Exceptional (4 points)	Good (3 points)	% Weighted Va Adequate (2 points)	Poor (1 point)	Inadequate (0 points)	2	10.00	
	Experience and					(o points)			
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 entitles. 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 favorable: 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; at 4.Strong focus on maintaining reliability and minimizing time of disruptions; and 5.Focus on maintaining reliability 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	4	15.00	
ts ie)	Economic Developmer	(4 points)	(3 points)	(2 points)	(1 point)	(0 points)			
elopme (10% W	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	2	5.00	
	Employee Re	(4 points)	(3 points)	(2 points)	(1 point)	(0 points)			
tention and Benefits (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	2	5.00	
ū	Inno	(4 points) ovation Plan (1	(3 points) 5% Weighted V	(2 points) /alue)	(1 point)	(0 points)			
ation Plan (15% Weighted	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 (4 points)	Good (3 points)	Adequate (2 points)	Poor (1 point)	Inadequate (0 points)	2	7.50	
- P	Environmental,					(o points)			
Environmental, Social and Gover nance (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 (4 points)	Good (3 points)	Adequate (2 points)	Poor (1 point)	Inadequate (0 points)	1	2.50	
%01	Commur	nity Stewardshi				. ,,			
y Stewa ghted V	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 (4 points)	Good (3 points)	Adequate (2 points)	Poor (1 point)	Inadequate (0 points)	2	5.00	
*	Finar	ncial Stability (1							
ő									
Stal	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 (4 points)	Good (3 points)	Adequate (2 points)	Poor (1 point)	Inadequate (0 points)	4	10.00	
inancial Stability (1) Weighted Value)	capital availability. Additional merit will be placed on willingness and demonstrated	Exceptional	Good	Adequate	Poor	Inadequate	4	10.00	

	Evaluation Matrix								
	Solicitation 127-19 ITN for Strategic Alternatives	Firm:		ly 11	Evaluator:		Jon Kendrick		
Proposal to Achieve JEA's Goals in this ITN (20% Weighted Value)	Proposal to Achie Respondents must indicate clearly and specifically how their Reply would allow JEA to achieve the goals outlined in this ITN	Exceptional (4 points)	Good (3 points)	% Weighted Va Adequate (2 points)	Poor (1 point)	Inadequate (0 points)	4	20.00	
	Experience and					(o points)			
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 entitles. 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 favorable: 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	4	15.00	
e ts	Economic Developmer	(4 points)	(3 points)	(2 points)	(1 point)	(0 points)			
bme %	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	4	10.00	
	Employee Re	(4 points) tention and Be	(3 points)	(2 points)	(1 point)	(0 points)			
tention and Benefits (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	4	10.00	
ū	Inno	(4 points)	(3 points) 5% Weighted \	(2 points) /alue)	(1 point)	(0 points)			
lan (15% Weighted	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 (4 points)	Good (3 points)	Adequate (2 points)	Poor (1 point)	Inadequate (0 points)	4	15.00	
p Pi	Environmental,								
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 (4 points)	Good (3 points)	Adequate (2 points)	Poor (1 point)	Inadequate (0 points)	3	7.50	
%0	Commur	nity Stewardshi			, , , , , , , , , , , , , , , , , , , ,	, , , , , , , , , , , , , , , , , , , ,			
y Ste ghte	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 (4 points)	Good (3 points)	Adequate (2 points)	Poor (1 point)	Inadequate (0 points)	4	10.00	
*	Finar	cial Stability (1							
Stal	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 (4 points)	Good (3 points)	Adequate (2 points)	Poor (1 point)	Inadequate (0 points)	4	10.00	
					. , , ,		Total Score	97.50	
	Total Score 97.								

	Ev	/aluation	Matrix					
	Solicitation 127-19 ITN for Strategic Alternatives	Firm:		oly 13	Evaluator:		Jon Kendrick	
Proposal to Achieve JEA's Goals in this ITN (20% Weighted Value)	Proposal to Achie Respondents must indicate clearly and specifically how their Reply would allow JEA to achieve the goals outlined in this ITN	Exceptional (4 points)	Good (3 points)	% Weighted Va Adequate (2 points)	Poor (1 point)	Inadequate (0 points)	4	20.00
	Experience and					(o points)		
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 entitles. 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 favorable: 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	4	15.00
e ts	Economic Developmer	(4 points)	(3 points)	(2 points)	(1 point)	(0 points)		
bme ×	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	4	10.00
	Employee Re	(4 points) tention and Be	(3 points)	(2 points)	(1 point)	(0 points)		
tention and Benefits (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	4	10.00
ū	Inno	(4 points)	(3 points) 5% Weighted \	(2 points) /alue)	(1 point)	(0 points)		
lan (15% Weighted	Respondents should provide initiatives under which they will be committed to provide innovative services or investments that leverage the tangible and intangible assets of IEA 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 (4 points)	Good (3 points)	Adequate (2 points)	Poor (1 point)	Inadequate (0 points)	4	15.00
_ 5	Environmental,					(o points)		
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 (4 points)	Good (3 points)	Adequate (2 points)	Poor (1 point)	Inadequate (0 points)	3	7.50
%6	Commur	nity Stewardshi			. ,,			
y Ste ghte	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 (4 points)	Good (3 points)	Adequate (2 points)	Poor (1 point)	Inadequate (0 points)	4	10.00
*	Finar	icial Stability (1						
Stal	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 (4 points)	Good (3 points)	Adequate (2 points)	Poor (1 point)	Inadequate (0 points)	4	10.00
		, , , , , , , , , , , , , , , , , , , ,	, , , , , , , , , , , , , , , , , , , ,		, , , , , , , , , , , , , , , , , , , ,		Total Score	97.50
								37.30

	Ev	/aluation	Matrix					
	Solicitation 127-19 ITN for Strategic Alternatives	Firm:		ly 14	Evaluator:		Jon Kendrick	
Proposal to Achieve JEA's Goals in this ITN (20% Weighted Value)	Proposal to Achie Respondents must indicate clearly and specifically how their Reply would allow JEA to achieve the goals outlined in this ITN	Exceptional (4 points)	Good (3 points)	% Weighted Va Adequate (2 points)	Poor (1 point)	Inadequate (0 points)	3	15.00
	Experience and					(o points)		
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 favorable: 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; at 5.Focus on maintaining reliability and minimizing time of disruptions; and 5.Focus on maintaining reliability 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	4	15.00
e ts	Economic Developmer	(4 points)	(3 points)	(2 points)	(1 point)	(0 points)		
bme %	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
	Employee Re	(4 points) tention and Be	(3 points)	(2 points)	(1 point)	(0 points)		
tention and Benefits (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	4	10.00
ū	Inno	(4 points)	(3 points) 5% Weighted \	(2 points) /alue)	(1 point)	(0 points)		
lan (15% Weighted	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 (4 points)	Good (3 points)	Adequate (2 points)	Poor (1 point)	Inadequate (0 points)	3	11.25
- P	Environmental,					(o points)		
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 (4 points)	Good (3 points)	Adequate (2 points)	Poor (1 point)	Inadequate (0 points)	4	10.00
%01	Commur	nity Stewardshi			. ,,			
y Ste ghte	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 (4 points)	Good (3 points)	Adequate (2 points)	Poor (1 point)	Inadequate (0 points)	3	7.50
*	Finar	icial Stability (1						
Stal	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 (4 points)	Good (3 points)	Adequate (2 points)	Poor (1 point)	Inadequate (0 points)	3	7.50
		, points)		pointsj	, point)	(a ponita)	Total Score	83.75
								305

Evaluation Matrix									
	Solicitation 127-19 ITN for Strategic Alternatives	Firm:		oly 15	Evaluator:		Jon Kendrick		
Proposal to Achieve JEA's Goals in this ITN (20% Weighted Value)	Proposal to Achie 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	
_	Experience and	(4 points)	(3 points) mitment (15%	(2 points) Weighted Valu	(1 point)	(0 points)			
Experience and Customer Commitment (15% Waghted Value)	A summary of experience managing related or similar operations of comparable size and scope to IEA 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 10 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 relability 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	4	15.00	
N @	Face and a Development	(4 points)	(3 points)	(2 points)	(1 point)	(0 points)			
Economic Development and Benefits to Jacksonville (10% Weighted Value)	Economic Developme: 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	4	10.00	
_	Employee Re	(4 points)	(3 points) nefits (10% We	(2 points)	(1 point)	(0 points)			
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	2	5.00	
ū	Inns	(4 points) ovation Plan (1	(3 points) 5% Weighted V	(2 points)	(1 point)	(0 points)			
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 (4 points)	Good (3 points)	Adequate (2 points)	Poor (1 point)	Inadequate (0 points)	4	15.00	
_ 0	Environmental,					(o points)			
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 (4 points)	Good (3 points)	Adequate (2 points)	Poor (1 point)	Inadequate (0 points)	4	10.00	
%0	Commu	nity Stewardshi			, , , , po., it;	(2 points)			
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 (4 points)	Good (3 points)	Adequate (2 points)	Poor (1 point)	Inadequate (0 points)	3	7.50	
8	Final	ncial Stability (1	.0% Weighted	Value)					
Finan dal 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 (4 points)	Good (3 points)	Adequate (2 points)	Poor (1 point)	Inadequate (0 points)	4	10.00	
							Total Score	87.50	
							i i		

	Ev	/aluation	Matrix					
	Solicitation 127-19 ITN for Strategic Alternatives	Firm:		ply 1	Evaluator:		Joe Orfano	
Proposal to Achieve JEA's Goals in this ITN (20% Weighted Value)	Proposal to Achie 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	2	10.00
	Experience and	(4 points) Customer Com	(3 points)	(2 points) Weighted Value	(1 point)	(0 points)		
Experience and Customer Commitmer	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. Attrong 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	4	15.00
		(4 points)	(3 points)	(2 points)	(1 point)	(0 points)		
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	1	2.50
_	Employee Re	(4 points)	(3 points) enefits (10% W	(2 points)	(1 point)	(0 points)		
tention and Benefits (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	2.50
ш	Inno	(4 points)	(3 points) 5% Weighted \	(2 points) /alue)	(1 point)	(0 points)		
(15% Weighted	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 (3 points)	Adequate (2 points)	Poor (1 point)	Inadequate (0 points)	1	3.75
P	Environmental,	Social and Gov	vernance (10%	Weighted Valu	e)			
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 (4 points)	Good (3 points)	Adequate (2 points)	Poor (1 point)	Inadequate (0 points)	1	2.50
%0	Commur		ip (10% Weight		(2 point)	(o polito)		
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 (4 points)	Good (3 points)	Adequate (2 points)	Poor (1 point)	Inadequate (0 points)	1	2.50
%	Finar	cial 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 (4 points)	Good (3 points)	Adequate (2 points)	Poor (1 point)	Inadequate (0 points)	2	5.00
							Total Score	43.75

Solicitation 127-19 TIM for Strategic Alternatives Proposal to Achieve JEA's Goals in this ITIN (20% Weighted Value) Proposal to Achieve JEA's Goals in this ITIN (20% Weighted Value) Proposal to Achieve JEA's Goals in this ITIN (20% Weighted Value) Exceptional A dequate Poor Inadequate (4 points) (5 points) (1 point) (0 points) Experience and Customer Commitment (15% Weighted Value) Exceptional A summany of experience managing related or similar operations of comparable size and scope to IEA is required. The Respondent must provide information regarding its experience, howeveloge, skills, and abilities for commitment commitment (15% Weighted Value) Exceptional A summany of experience managing related or similar operations of comparable size and scope to IEA is required. The Respondent must provide information regarding its experience with the provide of weight generation, utanismission, and distribution operations greater than 5 generation. Transmission, and distribution operations greater than 5 generation and the provide generation of t	20.00
Respondents must indicate clearly and specifically how their Reply would allow JEA to achieve the goals outlined in this ITN 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, skils, and abilities for owning, operating, and managing ustomer billing, complaint management and resolution history, experience with the properties of the complex business entities. 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, skils, and abilities for owning, operating, and managing ustomer billing, complaint management and resolution history, experience with use for overally. It is a should be included. Replies demonstrating the following will be treated floorwing. It is played, the proporties of the relative floor of the customer relations demonstrated through customer outreach, surveys such as JD Power or other comparable sources; 2. Successful customer relations demonstrated through customers outreach, surveys such as JD Power or other comparable sources; 3. Surveys such as JD Power or other comparable sources; 4. Strong focus on maintaining relatibility for customers, as illustrated through historical rates A strong focus on maintaining relatibility and minimizing time of disruptions; and formation they be lieve relevant to demonstrate their experience and customer commitment A spring focus on maintaining relatibility and minimizing time of disruptions; and formation they be lieve relevant to demonstrate their experience and customer commitment A spring focus on maintaining relatibility for customers, as illustrated through historical rates A strong focus on maintaining relatibility for customers, as illustrated through historical rates A strong focus on maintaining relatibility and minimizing time of disruptions; and formation they b	
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 traced flavorably: 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 rale 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 should also include a history of their customer rates for the past 10 years. Respondents should also include a history of their customer rates for the past 10 years. Respondents should also include a history of their customer rates for the past 10 years. Respondents should also include a history of their customer rates for the past 10 years. Respondents should also include a history of their customer rates for the past 10 years. Respondents should also include a history of their customer rates for the past 10 years. Respondents should also include a history of their customer rates for the past 10 years. Respondents should also include a history of their customer rates for the past 10 years. Respondents should also include a history of their customer rates for the past 10 years. Respondents should also include a hi	15.00
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. Successful customer relations demonstrated through customer outreach, surveys such as JD Power or other comparable sources; 4. Strong focus on maintaining reliability and minimizing time of disruptions; and 5. Focus on maintaining reliability and minimizing time of disruptions; and 5. Focus on maintaining reliability or customers, as illustrated through historical rates Where available, Respondents should also include a history of their customer rates for the past 10 years. 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 (4 points) (3 points) (2 points) (1 point) (0 points)	15.00
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 Exceptional Good Adequate Poor Inadequate	
in the City of Jacksonville	10.00
(pane) (pane) (pane)	
Respondents will be evaluated on the basis of their willingness to make certain commitments to employees consistent with IEA's goals of: 1. Protection of certain employee retriement 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	10.00
(4 points) (3 points) (2 points) (1 point) (0 points)	
Respondents should provide initiatives under which they will be committed to provide innovative services or investments that leverage the tangible and intangible assets of IEA 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. 3. Separately, Respondents only interested in providing Replies related to potential necouraged to do so [4 points] [4 points] [5 points] [6 points] [7 points] [8 points] [9 points]	3.75
Environmental, Social and Governance (10% Weighted Value)	
Program of the maintenance of an equitable workforce and management team [Application of the maintenance of an equitable workforce and management team of the maintenance of an equitable workforce and management team of the maintenance of an equitable workforce and management team of the maintenance of an equitable workforce and management team of the maintenance of an equitable workforce and management team of the maintenance of an equitable workforce and management team of the maintenance of an equitable workforce and management team of the maintenance of an equitable workforce and management team of the maintenance of an equitable workforce and management team of the maintenance of an equitable workforce and management team of the maintenance of an equitable workforce and management team of the maintenance of an equitable workforce and management team of the maintenance of an equitable workforce and management team of the maintenance of an equitable workforce and management team of the maintenance of an equitable workforce and management team of the maintenance of an equitable workforce and management team of the maintenance of an equitable workforce and management team of the maintenance of an equitable workforce and management team of the maintenance of an equitable workforce and management team of the maintenance of an equitable workforce and management team of the maintenance of an equitable workforce and management team of the maintenance of an equitable workforce and management team of the maintenance of an equitable workforce and management team of the maintenance of an equitable workforce and management team of the maintenance of an equitable workforce and management team of the maintenance of an equitable workforce and management team of the maintenance of an equitable workforce and management team of the maintenance of an equitable workforce and management team of the maintenance of an equitable workforce and management team of the maintenance of an equitable workforce and management team of the ma	10.00
Community Stowardship (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 [4 points] [5 wardship (20 weighted Value) [6 ood Adequate Poor Inadequate Adequate Poor Inadequate Poor Inadeq	10.00
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 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	
(4 points) (3 points) (2 points) (0 points)	10.00

Solicitation 127-19 ITN for Strategic Alternatives Proposal 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 (4 points) (3 points) (2 points) (1 point) (0 points) 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 systems believe remainst management and resolution bittors, experience and the following separation and provide including systems and resolution bittors, experience and the following separation and resolution bittors are separation and resolu	20.00
Respondents must indicate clearly and specifically how their Reply would allow JEA to achieve the goals outlined in this ITN 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	20.00
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	
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 ID 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	11.25
(4 points) (3 points) (2 points) (1 point) (0 points) 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. Adequate Poor Inadequate Poor Inadeq	7.50
(panta) (panta) (panta)	
Respondents will be evaluated on the basis of their willingness to make certain commitments to employees consistent with IEA's goals of: 1. 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 of Current base compensation, as provided in the Employee Protection and Retention Agreement approved by the Board of Directors on July 23, 2019	10.00
(4 points) (3 points) (1 point) (0 points)	
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 (4 points) (3 points) (2 points) (1 point) (0 points)	15.00
Environmental, Social and Governance (10% Weighted Value)	
Program of the maintenance of an equitable workforce and management team [Application of the maintenance of an equitable workforce and management team of the maintenance of an equitable workforce and management team of the maintenance of an equitable workforce and management team of the maintenance of an equitable workforce and management team of the maintenance of an equitable workforce and management team of the maintenance of an equitable workforce and management team of the maintenance of an equitable workforce and management team of the maintenance of an equitable workforce and management team of the maintenance of an equitable workforce and management team of the maintenance of an equitable workforce and management team of the maintenance of an equitable workforce and management team of the maintenance of an equitable workforce and management team of the maintenance of an equitable workforce and management team of the maintenance of an equitable workforce and management team of the maintenance of an equitable workforce and management team of the maintenance of an equitable workforce and management team of the maintenance of an equitable workforce and management team of the maintenance of an equitable workforce and management team of the maintenance of an equitable workforce and management team of the maintenance of an equitable workforce and management team of the maintenance of an equitable workforce and management team of the maintenance of an equitable workforce and management team of the maintenance of an equitable workforce and management team of the maintenance of an equitable workforce and management team of the maintenance of an equitable workforce and management team of the maintenance of an equitable workforce and management team of the maintenance of an equitable workforce and management team of the maintenance of an equitable workforce and management team of the maintenance of an equitable workforce and management team of the maintenance of an equitable workforce and management team of the ma	7.50
Community Stayyardshin (10% Waighted 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 [Adequate Poor Inadequate Poor In	7.50
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 (4 points) (3 points) (1 point) (0 points)	10.00
Total St	ore 88.75

	Ev	/aluation	Matrix					
	Solicitation 127-19 ITN for Strategic Alternatives	Firm:		ply 5	Evaluator:		Joe Orfano	
Proposal to Achieve JEA's Goals in this ITN (20% Weighted Value)	Proposal to Achie 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	4	20.00
	Experience and	(4 points) Customer Com	(3 points) mitment (15%	(2 points) Weighted Valu	(1 point)	(0 points)		
Experience and Customer Commitmer	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)	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	e (10% Weighte	Poor	Inadequate	2	5.00
_	Employee Po	(4 points)	(3 points) enefits (10% W	(2 points)	(1 point)	(0 points)		
tention and Benefits (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	4	10.00
ш	Inno	(4 points)	(3 points) 5% Weighted \	(2 points) /alue)	(1 point)	(0 points)		
(15% Weighted	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 (3 points)	Adequate (2 points)	Poor (1 point)	Inadequate (0 points)	4	15.00
n 2	Environmental,							
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 (4 points)	Good	Adequate (2 points)	Poor (1 point)	Inadequate	3	7.50
26	Commun	(4 points) nity Stewardsh	(3 points) ip (10% Weight	(2 points) ted Value)	(± point)	(0 points)		
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 (4 points)	Good (3 points)	Adequate (2 points)	Poor (1 point)	Inadequate (0 points)	2	5.00
*	Finar		10% Weighted					
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 (4 points)	Good (3 points)	Adequate (2 points)	Poor (1 point)	Inadequate (0 points)	4	10.00
							Total Score	83.75

	Ev	/aluation	Matrix					
	Solicitation 127-19 ITN for Strategic Alternatives	Firm:		oly 6	Evaluator:		Joe Orfano	
Proposal to Achieve JEA's Goals in this ITN (20% Weighted Value)	Proposal to Achie 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	4	20.00
	Experience and	(4 points) Customer Com	(3 points) mitment (15%	(2 points) Weighted Valu	(1 point)	(0 points)		
Experience and Customer Commitmer	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. Attrong 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	4	15.00
		(4 points)	(3 points)	(2 points)	(1 point)	(0 points)		
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
_	Employee Re	(4 points)	(3 points) enefits (10% W	(2 points) eighted Value)	(1 point)	(0 points)		
tention and Benefits (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	4	10.00
ū	Inno	(4 points)	(3 points) 5% Weighted \	(2 points) /alue)	(1 point)	(0 points)		
(15% Weighted	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 (3 points)	Adequate (2 points)	Poor (1 point)	Inadequate (0 points)	4	15.00
p Pa	Environmental,							
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 (4 points)	Good (3 points)	Adequate (2 points)	Poor (1 point)	Inadequate (0 points)	4	10.00
%	Commun		ip (10% Weight		(1 point)	(o ponits)		
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 (4 points)	Good (3 points)	Adequate (2 points)	Poor (1 point)	Inadequate (0 points)	3	7.50
%	Finar	cial 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 (4 points)	Good (3 points)	Adequate (2 points)	Poor (1 point)	Inadequate (0 points)	4	10.00
							Total Score	95.00

	Ev	/aluation	Matrix					
	Solicitation 127-19 ITN for Strategic Alternatives	Firm:		ply 7	Evaluator:		Joe Orfano	
Proposal to Achieve JEA's Goals in this ITN (20% Weighted Value)	Proposal to Achie 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	4	20.00
	Experience and	(4 points) Customer Com	(3 points) mitment (15%	(2 points) Weighted Valu	(1 point)	(0 points)		
Experience and Customer Commitmer	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	4	15.00
		(4 points)	(3 points)	(2 points)	(1 point)	(0 points)		
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
_	Employee Po	(4 points)	(3 points) enefits (10% W	(2 points)	(1 point)	(0 points)		
tention and Benefits (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	4	10.00
ш	Inno	(4 points)	(3 points) 5% Weighted \	(2 points) /alue)	(1 point)	(0 points)		
(15% Weighted	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 (3 points)	Adequate (2 points)	Poor (1 point)	Inadequate (0 points)	4	15.00
- P	Environmental,							
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 (4 points)	Good (3 points)	Adequate (2 points)	Poor (1 point)	Inadequate (0 points)	4	10.00
%	Commun		ip (10% Weight		(± ponit)	(o ponits)		
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 (4 points)	Good (3 points)	Adequate (2 points)	Poor (1 point)	Inadequate (0 points)	3	7.50
*	Finar		10% Weighted					
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 (4 points)	Good (3 points)	Adequate (2 points)	Poor (1 point)	Inadequate (0 points)	3	7.50
							Total Score	92.50

	Ev	/aluation	Matrix					
	Solicitation 127-19 ITN for Strategic Alternatives	Firm:		oly 8	Evaluator:		Joe Orfano	
Proposal to Achieve JEA's Goals in this ITN (20% Weighted Value)	Proposal to Achie 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	1	5.00
	Experience and	(4 points) Customer Com	(3 points) mitment (15%	(2 points) Weighted Valu	(1 point)	(0 points)		
Experience and Customer Commitmer	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	4	15.00
		(4 points)	(3 points)	(2 points)	(1 point)	(0 points)		
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	2	5.00
_	Employee Re	(4 points)	(3 points) enefits (10% W	(2 points) eighted Value)	(1 point)	(0 points)		
tention and Benefits (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	2.50
ū	Inno	(4 points)	(3 points) 5% Weighted \	(2 points) /alue)	(1 point)	(0 points)		
(15% Weighted	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 (3 points)	Adequate (2 points)	Poor (1 point)	Inadequate (0 points)	4	15.00
p Pa	Environmental,							
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 (4 points)	Good (3 points)	Adequate (2 points)	Poor (1 point)	Inadequate (0 points)	3	7.50
8	Commur		ip (10% Weight		(1 point)	(o points)		
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 (4 points)	Good (3 points)	Adequate (2 points)	Poor (1 point)	Inadequate (0 points)	2	5.00
%	Finar	cial 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 (4 points)	Good (3 points)	Adequate (2 points)	Poor (1 point)	Inadequate (0 points)	4	10.00
							Total Score	65.00

	Ev	/aluation	Matrix					
	Solicitation 127-19 ITN for Strategic Alternatives	Firm:	Rej	ply 9	Evaluator:		Joe Orfano	
	Proposal to Achie	ve IFA's Goals	in this ITN (20)	% Weighted Va	lue)			
Proposal to Achieve JEA's Goals in this ITN (20% Weight ed 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
	Experience and	(4 points) Customer Com	(3 points) mitment (15%	(2 points) Weighted Valu	(1 point)	(0 points)		
nd Customer Commitment (15% Weight	A summary of experience managing related or similar operations of comparable size and scope to IEA 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 rate stability for customers, as illustrated through historical rates Where available, Respondents hould 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)	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	2	5.00
	Fmnlovee Re	(4 points) tention and Be	(3 points)	(2 points)	(1 point)	(0 points)		
mployee 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	4	10.00
<u> </u>	Inno	(4 points) evation Plan (1		(2 points) /alue)	(1 point)	(0 points)		
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 (4 points)	Good (3 points)	Adequate (2 points)	Poor (1 point)	Inadequate (0 points)	4	15.00
_ 5	Environmental,					(o points)		
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	4	10.00
*	Commur	(4 points) nity Stewardshi	(3 points) p (10% Weight	(2 points) ted Value)	(1 point)	(0 points)		
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 (4 points)	Good	Adequate (2 points)	Poor (1 point)	Inadequate	3	7.50
	Finar	(4 points) icial Stability (1	(3 points) L0% Weighted	(2 points) Value)	(1 point)	(0 points)		
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 (4 points)	Good (3 points)	Adequate (2 points)	Poor (1 point)	Inadequate (0 points)	4	10.00
		(· points)	(O points)	(2 points)	(2 point)		Total Score	83.75

	Ev	/aluation	Matrix					
	Solicitation 127-19 ITN for Strategic Alternatives	Firm:		oly 10	Evaluator:		Joe Orfano	
Proposal to Achieve JEA's Goals in this ITN (20% Weighted Value)	Proposal to Achie 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	2	10.00
	Experience and	(4 points) Customer Com	(3 points) mitment (15%	(2 points) Weighted Value	(1 point)	(0 points)		
ē	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. Attrong 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	4	15.00
		(4 points)	(3 points)	(2 points)	(1 point)	(0 points)		
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	1	2.50
_	Employee Re	(4 points)	(3 points) enefits (10% W	(2 points)	(1 point)	(0 points)		
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	2.50
ш	Inno	(4 points)	(3 points) 5% Weighted \	(2 points) /alue)	(1 point)	(0 points)		
% Weigh	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 (4 points)	Good (3 points)	Adequate (2 points)	Poor (1 point)	Inadequate (0 points)	1	3.75
P	Environmental,	Social and Gov	vernance (10%	Weighted Valu	e)			
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 (4 points)	Good (3 points)	Adequate (2 points)	Poor (1 point)	Inadequate (0 points)	1	2.50
%0	Commun		ip (10% Weight		(2 point)	(o ponits)		
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 (4 points)	Good (3 points)	Adequate (2 points)	Poor (1 point)	Inadequate (0 points)	1	2.50
%	Finar	cial 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 (4 points)	Good (3 points)	Adequate (2 points)	Poor (1 point)	Inadequate (0 points)	2	5.00
							Total Score	43.75

Part		Ev	/aluation	Matrix					
Page								Joe Orfano	
A summary of agent-extra managing related or settine operation of companies of the control of control of companies of the control of contro	Proposal to Achieve JEA's Goals in this ITN (20% Weighted Value)	Respondents must indicate clearly and specifically how their Reply would allow JEA	Exceptional	Good	Adequate	Poor		3	15.00
Assumency of appointment amongs printed or shifts operated at the company and the company of the		Experience and					(0 points)		
Respondents will be treated favorably for their willingness to make commitments to (Cry of incidence) in the City of Jacksonville Respondents will be treated favorably large excessors development and pile treated in the City of Jacksonville Respondents will be treated favorably large excessors development and pile treated in the City of Jacksonville Respondents will be research development and pile treated in the City of Jacksonville Respondents will be resident on the basis of their willingness to make certain commitments to the City of Jacksonville Respondents will be evaluated on the basis of their willingness to make certain commitments to employees consistent with JEA's goals of: 1. Postection of creates employee development and pile treated favorably large employees or JEA's and certain commitments to employees consistent with JEA's goals of: 1. Postection of creates employees or promote benefits to a complete and contained in the create benefits. 1. Postection of creates employees or promote benefits to a complete and contained in the create benefits. 1. Postection of creates employees or promote benefits to a complete and contained in the create benefits. 1. Postection of creates employees or promote benefits to a complete and contained in the create benefits. 1. Postection of creates employees or promote benefits to a complete and contained to a complete benefit to a complete and contained to a complete benefit to a complete and contained to a complete benefit to a complete and contained to a complete benefit to a complete and contained to a complete benefit to a complete and contained to a complete benefit to a complete and contained to a complete benefit to a complete and contained to a complete benefit to a complete benefit to a complete and contained to a complete benefit	Experience and Customer	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					Inadequate	4	15.00
Treatment and provided internate surface related for protein for the willingness to make commitments to the City of Jacksonnille. Additionally, Respondents will be treated favorably for their willingness to make commitments to the City of Jacksonnille. Additionally, Respondents will be treated favorably for their willingness to make commitments to the City of Jacksonnille. Additionally, Respondents will be treated favorably for their willingness to make commitments to the City of Jacksonnille. Additionally, Respondents will be treated favorably for their willingness to make commitments to employee contenues to employee commitments to employee com			(4 points)	(3 points)	(2 points)	(1 point)	(0 points)		
Employee Retention and Benefits (10% Weighted Value)	onomic Development and Benefits 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					Inadequate	4	10.00
Respondents should provide initiatives under which they will be committed to provide innovative services or investments that leverage the tangible and intangible and intangible and intensity of the future; 2.2 Case new revenue channels; and 3.7-turure proof the utility business. 2.5 Separately, Respondents only interested in providing Regiles related to potential new business opportunities or innovation or disruption of JEA's business are strongly and the maintenance of an equitable workforce and management team Tomorous and the maintenance of an equitable workforce and management team Tomorous and the maintenance of an equitable workforce and management team Tomorous and the maintenance of an equitable workforce and management team Tomorous and the maintenance of an equitable workforce and management team Tomorous and the maintenance of an equitable workforce and management team Tomorous and the maintenance of an equitable workforce and management team Tomorous and the maintenance of an equitable workforce and management team Tomorous and the maintenance of an equitable workforce and management team Tomorous and the maintenance of an equitable workforce and management team Tomorous and the maintenance of an equitable workforce and management team Tomorous and the maintenance of an equitable workforce and management team Tomorous and the maintenance of an equitable workforce and management team Tomorous and the maintenance of an equitable workforce and management team Tomorous and the maintenance of an equitable workforce and management team Tomorous and the maintenance of an equitable workforce and management team Tomorous and the maintenance of an equitable workforce and management team Tomorous and the maintenance of an equitable workforce and management team Tomorous and the maintenance of an equitable workforce and management team Tomorous and the maintenance of an equitable workforce and management team Tomorous and the maintenance of an equitable workforce and management team Tomorou		Employee Po				(1 point)	(0 points)		
Respondents should provide initiatives under which they will be committed to provide innovative services or investments that leverage the tangible and intangible and intangible and intensity of the future; 2.2 Case new revenue channels; and 3.7-turure proof the utility business. 2.5 Separately, Respondents only interested in providing Regiles related to potential new business opportunities or innovation or disruption of JEA's business are strongly and the maintenance of an equitable workforce and management team Tomorous and the maintenance of an equitable workforce and management team Tomorous and the maintenance of an equitable workforce and management team Tomorous and the maintenance of an equitable workforce and management team Tomorous and the maintenance of an equitable workforce and management team Tomorous and the maintenance of an equitable workforce and management team Tomorous and the maintenance of an equitable workforce and management team Tomorous and the maintenance of an equitable workforce and management team Tomorous and the maintenance of an equitable workforce and management team Tomorous and the maintenance of an equitable workforce and management team Tomorous and the maintenance of an equitable workforce and management team Tomorous and the maintenance of an equitable workforce and management team Tomorous and the maintenance of an equitable workforce and management team Tomorous and the maintenance of an equitable workforce and management team Tomorous and the maintenance of an equitable workforce and management team Tomorous and the maintenance of an equitable workforce and management team Tomorous and the maintenance of an equitable workforce and management team Tomorous and the maintenance of an equitable workforce and management team Tomorous and the maintenance of an equitable workforce and management team Tomorous and the maintenance of an equitable workforce and management team Tomorous and the maintenance of an equitable workforce and management team Tomorou	mployee Retention and Benefits (10% Weighte 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				Poor	Inadequate	4	10.00
Respondents should provide initiatives under which they will be committed to provide innovative services or investments that leverage the tangble and intangible and intang	ш	Inno	(4 points) vation Plan (1	(3 points) 5% Weighted \	(2 points) /alue)	(1 point)	(0 points)		
Page 1 Pa	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	Exceptional	Good	Adequate			4	15.00
Community Stewardship (10% Weighted Value) Community Stewardship (10% Weighted Value)	pa p	Environmental,							
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 Good Adequate Poor Inadequate	Environmental, Social an Governance (10% Weighti Value)	including, but not limited to, sustainability initiatives, renewable energy goals and						3	7.50
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 (4 points) (3 points) (2 points) (1 point) (0 points) (5 points) (1 point) (0 points) (1 point) (1 poi	%0	Community Stawardshin (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 (4 points) (3 points) (1 points) (1 points)	Community Stewardship (1. Weighted Value)	the City of Jacksonville and surrounding communities, including, but not limited to, volunteer activities, charitable contributions, an ongoing community relationship	·					4	10.00
(4 points) (3 points) (2 points) (1 point) (0 points)	%	Finar	icial Stability (10% Weighted	Value)				
	Financial Stability (10 Weighted Value)	capital availability. Additional merit will be placed on willingness and demonstrated						4	10.00
.52.756016 32.30								Total Score	92.50

	Ev	/aluation	Matrix					
	Solicitation 127-19 ITN for Strategic Alternatives	Firm:		oly 13	Evaluator:		Joe Orfano	
Proposal to Achieve JEA's Goals in this ITN (20% Weighted Value)	Proposal to Achie 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	4	20.00
	Experience and	(4 points) Customer Com	(3 points) mitment (15%	(2 points) Weighted Valu	(1 point)	(0 points)		
Experience and Customer Commitmer	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	4	15.00
		(4 points)	(3 points)	(2 points)	(1 point)	(0 points)		
nefits 'alue)	Economic Developmen	nt and Benefits		e (10% Weighte	ed 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
_	Employee Re	(4 points) tention and Be	(3 points) nefits (10% W	(2 points) eighted Value)	(1 point)	(0 points)		
tention and Benefits (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	4	10.00
ш	Inno	(4 points) vation Plan (1	(3 points) 5% Weighted \	(2 points) /alue)	(1 point)	(0 points)		
(15% Weighted	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 (4 points)	Good (3 points)	Adequate (2 points)	Poor (1 point)	Inadequate (0 points)	4	15.00
- P	Environmental,							
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 (2 points)	Poor (1 point)	Inadequate	3	7.50
*	(4 points) (3 points) (1 points) (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 (4 points)	Good (3 points)	Adequate (2 points)	Poor (1 point)	Inadequate (0 points)	3	7.50
%	Finar	icial Stability (
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 (4 points)	Good (3 points)	Adequate (2 points)	Poor (1 point)	Inadequate (0 points)	4	10.00
		(*points)	(5 points)	(L polito)	(1 point)		Total Score	92.50
								J=.J0

	Ev	/aluation	Matrix					
	Solicitation 127-19 ITN for Strategic Alternatives	Firm:		oly 14	Evaluator:		Joe Orfano	
Proposal to Achieve JEA's Goals in this ITN (20% Weighted Value)	Proposal to Achie 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	2	10.00
	Experience and	(4 points) Customer Com	(3 points) mitment (15%	(2 points) Weighted Value	(1 point)	(0 points)		
Experience and Customer Commitmer	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)	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)		
tention and Benefits (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	3	7.50
ш	Inno	(4 points)	(3 points) 5% Weighted \	(2 points) /alue)	(1 point)	(0 points)		
(15% Weighted	Respondents should provide initiatives under which they will be committed to provide innovative services or investments that leverage the tangible and intangible assets of IEA 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 (3 points)	Adequate (2 points)	Poor (1 point)	Inadequate (0 points)	2	7.50
T 2	Environmental,							
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 (4 points)	Good (3 points)	Adequate (2 points)	Poor (1 point)	Inadequate (0 points)	3	7.50
26	Community Stawardshin (10% Waighted 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 (4 points)	Good (3 points)	Adequate (2 points)	Poor (1 point)	Inadequate (0 points)	3	7.50
*	Finar		10% Weighted					
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 (4 points)	Good (3 points)	Adequate (2 points)	Poor (1 point)	Inadequate (0 points)	4	10.00
							Total Score	68.75
							_	

	Evaluation Matrix									
	Solicitation 127-19 ITN for Strategic Alternatives	Firm:	Rep	ily 15	Evaluator:		Joe Orfano			
ave JEA's V (20% ilue)	Proposal to Achie	eve JEA's Goals	in this ITN (209	% Weighted Val	ue)					
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		
Prop		(4 points)	(3 points)	(2 points)	(1 point)	(0 points)				
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; 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	mitment (15%	Weighted Valu	Poor	Inadequate	4	15.00		
		(4 :)	(2 :)	(2 :)	(4 : 1)	(0. : .)				
efits alue)	Economic Developme	(4 points) nt and Benefits	(3 points) to Jacksonville	(2 points) e (10% Weighte	(1 point) d Value)	(0 points)				
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		
	Employee Re	(4 points)	(3 points)	(2 points)	(1 point)	(0 points)				
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	2	5.00		
ū	Inn	(4 points) ovation Plan (1	(3 points) 5% Weighted V	(2 points)	(1 point)	(0 points)				
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 (4 points)	Good	Adequate	Poor	Inadequate	4	15.00		
_ 0	Environmental		(3 points) vernance (10%	(2 points) Weighted Value	(1 point)	(0 points)				
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 (2 points)	Poor (1 point)	Inadequate	4	10.00		
*	Commu	(4 points) nity Stewardsh	(3 points) p (10% Weight	(2 points) ed Value)	(1 point)	(0 points)				
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 (4 points)	Good (3 points)	Adequate (2 points)	Poor (1 point)	Inadequate (0 points)	3	7.50		
39	Fina	ncial Stability (1			, , , , , , , , , , , , , , , , , , , ,	, , , , , , , , , , , , , , , , , , , ,				
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 (4 points)	Good (3 points)	Adequate (2 points)	Poor (1 point)	Inadequate (0 points)	4	10.00		
		(- points)	(O points)	(2 points)	(2 point)	(o ponits)	Total Score	85.00		

Evaluation Matrix									
	Solicitation 127-19 ITN for Strategic Alternatives	Firm:		ply 1	Evaluator:		Jordan Pope		
Proposal to Achieve JEA's Goals in this ITN (20% Weighted Value)	Proposal to Achie Respondents must indicate clearly and specifically how their Reply would allow JEA to achieve the goals outlined in this ITN	Exceptional (4 points)	Good (3 points)	% Weighted Va Adequate (2 points)	Poor (1 point)	Inadequate (0 points)	1	5.00	
	Experience and					(o points)			
	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 entitles. 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.tongevity 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	0	0.00	
s (i	Economic Developme	(4 points)	(3 points)	(2 points)	(1 point)	(0 points)			
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	1	2.50	
	Employee Re	(4 points)	(3 points)	(2 points)	(1 point)	(0 points)			
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	2.50	
ū	Inno	(4 points) ovation Plan (1	(3 points) 5% Weighted \	(2 points)	(1 point)	(0 points)			
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 (4 points)	Good (3 points)	Adequate (2 points)	Poor (1 point)	Inadequate (0 points)	1	3.75	
p Pi	Environmental,								
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 (4 points)	Good (3 points)	Adequate (2 points)	Poor (1 point)	Inadequate (0 points)	1	2.50	
%	Community Stawardshin (10% Waighted 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 (4 points)	Good (3 points)	Adequate (2 points)	Poor (1 point)	Inadequate (0 points)	1	2.50	
*	Finar	ncial Stability (1							
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 (4 points)	Good (3 points)	Adequate (2 points)	Poor (1 point)	Inadequate (0 points)	1	2.50	
			, , , , , , , , , , , , , , , , , , , ,	, ,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,	, , , , , , , , , , , , , , , , , , , ,		Total Score	21.25	

	Evaluation Matrix								
	Solicitation 127-19 ITN for Strategic Alternatives	Firm:		ply 3	Evaluator:		Jordan Pope		
Proposal to Achieve JEA's Goals in this ITN (20% Weighted Value)	Proposal to Achie 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	
	Experience and	(4 points) Customer Com	(3 points) mitment (15%	(2 points) Weighted Valu	(1 point)	(0 points)			
Experience and Customer Commitment (15% WV	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 3. 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	4.00	15.00	
2 G	Economic Developme	(4 points)	(3 points)	(2 points)	(1 point)	(0 points)			
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	4	10.00	
	Employee Re	(4 points)	(3 points)	(2 points)	(1 point)	(0 points)			
	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	4	10.00	
ū	Inno	(4 points) ovation Plan (1	(3 points) 5% Weighted \	(2 points)	(1 point)	(0 points)			
(15% Weighted	Respondents should provide initiatives under which they will be committed to provide innovative services or investments that leverage the tangible and intangible assets of IFA 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 (4 points)	Good (3 points)	Adequate (2 points)	Poor (1 point)	Inadequate (0 points)	2	7.50	
- P	Environmental,					(o points)			
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 (4 points)	Good (3 points)	Adequate (2 points)	Poor (1 point)	Inadequate (0 points)	4	10.00	
%	Community Staylordship (10% Maighted 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 (4 points)	Good (3 points)	Adequate (2 points)	Poor (1 point)	Inadequate (0 points)	4	10.00	
*	Finar	ncial Stability (1							
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 (4 points)	Good (3 points)	Adequate (2 points)	Poor (1 point)	Inadequate (0 points)	3	7.50	
		(- points)	(5 points)	(~ points)	(2 point)	(o points)	Total Score	85.00	

	Ev	/aluation	Matrix							
	Solicitation 127-19 ITN for Strategic Alternatives	Firm:		ply 4	Evaluator:		Jordan Pope			
Proposal to Achieve JEA's Goals in this ITN (20% Weighted Value)	Proposal to Achie 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		
	Experience and	(4 points) Customer Com	(3 points) mitment (15%	(2 points) Weighted Valu	(1 point)	(0 points)				
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)	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	4	10.00		
	Employee Po	(4 points)	(3 points) nefits (10% W	(2 points)	(1 point)	(0 points)				
tention and Benefits (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. dorinfirmation 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	4	10.00		
ш	Inno	(4 points)	(3 points) 5% Weighted \	(2 points) /alue)	(1 point)	(0 points)				
(15% Weighted	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 (4 points)	Good (3 points)	Adequate (2 points)	Poor (1 point)	Inadequate (0 points)	3	11.25		
- P	Environmental,					,	1			
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 (4 points)	Good (3 points)	Adequate (2 points)	Poor (1 point)	Inadequate (0 points)	3	7.50		
%0	Commun		ip (10% Weight		(I point)	(o points)				
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 (4 points)	Good (3 points)	Adequate (2 points)	Poor (1 point)	Inadequate (0 points)	4	10.00		
*	Finar		10% Weighted							
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 (4 points)	Good (3 points)	Adequate (2 points)	Poor (1 point)	Inadequate (0 points)	4	10.00		
		, . points)	, c pontoj	, v= points)	, , , , point)		Total Score	85.00		
	Total score 85.00									

	Ev	/aluation	Matrix						
	Solicitation 127-19 ITN for Strategic Alternatives	Firm:		ply 5	Evaluator:		Jordan Pope		
Proposal to Achieve JEA's Goals in this ITN (20% Weighted Value)	Proposal to Achie 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	
	Experience and	(4 points) Customer Com	(3 points) mitment (15%	(2 points) Weighted Valu	(1 point)	(0 points)			
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 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	Exceptional	to Jacksonville Good	e (10% Weighte	Poor	Inadequate	3	7.50	
	in the City of Jacksonville	(4 points)	(3 points)	(2 points)	(1 point)	(0 points)			
ighted	Employee Re	tention and Be	nefits (10% W	eighted Value)					
tention and Benefits (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	3	7.50	
ā	Inne	(4 points)	(3 points) 5% Weighted \	(2 points)	(1 point)	(0 points)			
(15% Weighted	Respondents should provide initiatives under which they will be committed to provide innovative services or investments that leverage the tangible and intangible assets of I.E.A. 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 (4 points)	Good (3 points)	Adequate (2 points)	Poor (1 point)	Inadequate (0 points)	3	11.25	
- P	Environmental,					(5 5 - 1 - 1 - 1 - 1 - 1 - 1 - 1 - 1 - 1 -			
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 (2 points)	Poor (1 paint)	Inadequate	3	7.50	
*	Commur	(4 points) nity Stewardsh	(3 points) ip (10% Weight	(2 points) ted Value)	(1 point)	(0 points)			
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 (4 points)	Good (3 points)	Adequate (2 points)	Poor (1 point)	Inadequate (0 points)	2	5.00	
\ 0	Finar		10% Weighted		, , , , potrj	(2 ponits)			
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 (2 points)	Adequate	Poor	Inadequate	з	7.50	
		(4 points)	(3 points)	(2 points)	(1 point)	(0 points)	Total Score	72 50	
	Total Score 72.50								

Evaluation Matrix									
	Solicitation 127-19 ITN for Strategic Alternatives	Firm:		ply 6	Evaluator:		Jordan Pope		
Proposal to Achieve JEA's Goals in this ITN (20% Weighted Value)	Proposal to Achie Respondents must indicate clearly and specifically how their Reply would allow JEA to achieve the goals outlined in this ITN	Exceptional (4 points)	Good (3 points)	% Weighted Va Adequate (2 points)	Poor (1 point)	Inadequate (0 points)	3	15.00	
	Experience and					(O points)			
	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 favorable: 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. Suroprate 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	
e)	Economic Developme	(4 points)	(3 points)	(2 points)	(1 point)	(0 points)			
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	4	10.00	
	Employee Re	(4 points)	(3 points)	(2 points) eighted Value)	(1 point)	(0 points)			
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	4	10.00	
ш	Inno	(4 points) ovation Plan (1	(3 points) 5% Weighted \	(2 points) /alue)	(1 point)	(0 points)			
% Weighted	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 (4 points)	Good (3 points)	Adequate (2 points)	Poor (1 point)	Inadequate (0 points)	3	11.25	
- P	Environmental,								
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 (4 points)	Good (3 points)	Adequate (2 points)	Poor (1 point)	Inadequate (0 points)	3	7.50	
%0	Commun	nity Stewardsh			(2 point)	(o points)			
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 (4 points)	Good (3 points)	Adequate (2 points)	Poor (1 point)	Inadequate (0 points)	4	10.00	
*	Finar	cial Stability (
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 (4 points)	Good (3 points)	Adequate (2 points)	Poor (1 point)	Inadequate (0 points)	3	7.50	
		, Janes	, ,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,	,,	(- punt)		Total Score	82.50	
Total Score 82.50									

	Ev	/aluation	Matrix					
	Solicitation 127-19 ITN for Strategic Alternatives	Firm:		ply 7	Evaluator:		Jordan Pope	
Proposal to Achieve JEA's Goals in this ITN (20% Weighted Value)	Proposal to Achie 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	2	10.00
	Experience and	(4 points) Customer Com	(3 points)	(2 points) Weighted Valu	(1 point)	(0 points)		
Ē	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)		
Benefits ed Value)	Economic Developmen							
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
	Employee Re	(4 points) tention and Be	(3 points) enefits (10% W	(2 points) eighted Value)	(1 point)	(0 points)		
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	3	7.50
ш	Inno	(4 points)	(3 points) 5% Weighted \	(2 points)	(1 point)	(0 points)		
% Weigh	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 (4 points)	Good (3 points)	Adequate (2 points)	Poor (1 point)	Inadequate (0 points)	2	7.50
_ 0	Environmental,					(
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 (1 point)	Inadequate	3	7.50
*	Commur	(4 points) nity Stewardsh	(3 points) ip (10% Weight	(2 points) ted Value)	(1 point)	(0 points)		
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 (4 points)	Good (3 points)	Adequate (2 points)	Poor (1 point)	Inadequate (0 points)	3	7.50
<u>,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,</u>	Finar		10% Weighted					
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 (3 points)	Adequate	Poor (1 point)	Inadequate	3	7.50
		(4 points)	(3 points)	(2 points)	(1 point)	(0 points)	Total Score	66.25
							i otal score	66.25

	Ev	/aluation	Matrix							
	Solicitation 127-19 ITN for Strategic Alternatives	Firm:		oly 8	Evaluator:		Jordan Pope			
Proposal to Achieve JEA's Goals in this ITN (20% Weighted Value)	Proposal to Achie 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	2	10.00		
	Experience and	(4 points) Customer Com	(3 points) mitment (15%	(2 points) Weighted Valu	(1 point)	(0 points)				
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	2	7.50		
		(4 points)	(3 points)	(2 points)	(1 point)	(0 points)				
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	2	5.00		
	Employee Po	(4 points)	(3 points) enefits (10% W	(2 points)	(1 point)	(0 points)				
tention and Benefits (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	2	5.00		
ū	Inno	(4 points)	(3 points) 5% Weighted \	(2 points)	(1 point)	(0 points)				
(15% Weighted	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 (3 points)	Adequate (2 points)	Poor (1 point)	Inadequate (0 points)	3	11.25		
P	Environmental,									
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 (4 points)	Good (3 points)	Adequate (2 points)	Poor (1 point)	Inadequate (0 points)	2	5.00		
%	Commun		ip (10% Weight		(1 point)	(o points)				
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 (4 points)	Good (3 points)	Adequate (2 points)	Poor (1 point)	Inadequate (0 points)	3	7.50		
*	Finar		10% Weighted							
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 (4 points)	Good (3 points)	Adequate (2 points)	Poor (1 point)	Inadequate (0 points)	2	5.00		
				, ,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,	, , , , , , , , , , , , , , , , , , , ,		Total Score	56.25		
	Total score 55.25									

	Evaluation Matrix								
	Solicitation 127-19 ITN for Strategic Alternatives	Firm:		ply 9	Evaluator:		Jordan Pope		
Proposal to Achieve JEA's Goals in this ITN (20% Weighted Value)	Proposal to Achie Respondents must indicate clearly and specifically how their Reply would allow JEA to achieve the goals outlined in this ITN	Exceptional (4 points)	Good (3 points)	% Weighted Va Adequate (2 points)	Poor (1 point)	Inadequate (0 points)	3	15.00	
	Experience and					(o points)			
	A summary of experience managing related or similar operations of comparable size and scope to IEA 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.tongevity 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; at 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 3 to years. Respondents are encouraged to provide any incremental information they believe relevant to demonstrate their experience and customer commitment	Exceptional	Good	Adequate	Poor	Inadequate	2	7.50	
ts (e)	Economic Developme	(4 points)	(3 points)	(2 points)	(1 point)	(0 points)			
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	2	5.00	
	Employee Re	(4 points)	(3 points)	(2 points)	(1 point)	(0 points)			
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. doi:not not 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	3	7.50	
ш	Inno	(4 points) ovation Plan (1	(3 points) 5% Weighted \	(2 points) /alue)	(1 point)	(0 points)			
% Weighted	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 (4 points)	Good (3 points)	Adequate (2 points)	Poor (1 point)	Inadequate (0 points)	2	7.50	
- P	Environmental,					,			
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 (4 points)	Good (3 points)	Adequate (2 points)	Poor (1 point)	Inadequate (0 points)	3	7.50	
%	Commun	nity Stewardsh			(2 point)	(o ponits)			
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 (4 points)	Good (3 points)	Adequate (2 points)	Poor (1 point)	Inadequate (0 points)	1	2.50	
*	Finar	ncial Stability (
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 (4 points)	Good (3 points)	Adequate (2 points)	Poor (1 point)	Inadequate (0 points)	2	5.00	
		, pontaj	, c pontoj	, v= points)	, pointy		Total Score	57.50	
Total Score 57.50									

Evaluation Matrix								
	Solicitation 127-19 ITN for Strategic Alternatives	Firm:		ly 10	Evaluator:	or: Jordan Pope		
Proposal to Achieve JEA's Goals in this ITN (20% Weighted Value)	Proposal to Achie 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	1	5.00
	Experience and	(4 points) Customer Com	(3 points) mitment (15%	(2 points) Weighted Valu	(1 point)	(0 points)		
Experience and Customer Commitment (15% WV	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; and 5. 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	0	0.00
z e	Economic Developme	(4 points)	(3 points)	(2 points)	(1 point)	(0 points)		
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	1	2.50
	Fmnlovee Re	(4 points)	(3 points)	(2 points)	(1 point)	(0 points)		
	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	2	5.00
ū	Inno	(4 points) ovation Plan (1	(3 points) 5% Weighted \	(2 points)	(1 point)	(0 points)		
(15% Weighted	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 (4 points)	Good (3 points)	Adequate (2 points)	Poor (1 point)	Inadequate (0 points)	1	3.75
- P	Environmental,					(o points)		
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 (4 points)	Good (3 points)	Adequate (2 points)	Poor (1 point)	Inadequate (0 points)	0	0.00
%	Commun	nity Stewardsh			(± pont)	(o points)		
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 (4 points)	Good (3 points)	Adequate (2 points)	Poor (1 point)	Inadequate (0 points)	1	2.50
*	Finar	ncial Stability (
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 (4 points)	Good (3 points)	Adequate (2 points)	Poor (1 point)	Inadequate (0 points)	1	2.50
		(- points)	(S points)	(2 points)	(2 point)	(o ponits)	Total Score	21.25
101a13001e 21.25								

	Ev	/aluation	Matrix					
	Solicitation 127-19 ITN for Strategic Alternatives	Firm:		oly 11	Evaluator:		Jordan Pope	
Proposal to Achieve JEA's Goals in this ITN (20% Weighted Value)	Proposal to Achie 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	2	10.00
	Experience and	(4 points) Customer Com	(3 points)	(2 points) Weighted Valu	(1 point)	(0 points)		
ē	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)		
Benefits ed Value)	Economic Developmen							
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	4	10.00
	Employee Re	(4 points) tention and Be	(3 points) enefits (10% W	(2 points) eighted Value)	(1 point)	(0 points)		
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	3	7.50
ш	Inno	(4 points)	(3 points) 5% Weighted \	(2 points) /alue)	(1 point)	(0 points)		
% Weigh	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 (4 points)	Good (3 points)	Adequate (2 points)	Poor (1 point)	Inadequate (0 points)	3	11.25
7 P	Environmental,							
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 (4 points)	Good	Adequate (2 points)	Poor (1 point)	Inadequate	4	10.00
*	Commur	(4 points) nity Stewardsh	(3 points) ip (10% Weight	(2 points) ted Value)	(1 point)	(0 points)		
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 (4 points)	Good (3 points)	Adequate (2 points)	Poor (1 point)	Inadequate (0 points)	3	7.50
> º	Finar		10% Weighted		. ,,	. ,,		
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 (4 points)	Good (3 points)	Adequate (2 points)	Poor (1 point)	Inadequate (0 points)	3	7.50
		(+ points)	(2 boults)	(2 points)	(± ponit)		Total Score	75.00
Total Score 75.00								

Evaluation Matrix								
Solicitation 127-19 ITN for Strategic Alternatives				ly 13	Evaluator:	Jordan Pope		
Proposal to Achieve JEA's Goals in this ITN (20% Weighted Value)	Proposal to Achie Respondents must indicate clearly and specifically how their Reply would allow JEA to achieve the goals outlined in this ITN	Exceptional (4 points)	Good (3 points)	% Weighted Va Adequate (2 points)	Poor (1 point)	Inadequate (0 points)	3	15.00
	Experience and					(o points)		
Experience and Customer Commitment (15% WV	A summary of experience managing related or similar operations of comparable size and scope to IEA 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 favorabley: 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
e)	Economic Developmen	(4 points)	(3 points)	(2 points)	(1 point)	(0 points)		
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	2	5.00
	Employee Re	(4 points)	(3 points)	(2 points)	(1 point)	(0 points)		
	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	4	10.00
ū	Inno	(4 points) ovation Plan (1	(3 points) 5% Weighted \	(2 points) /alue)	(1 point)	(0 points)		
(15% Weighted	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 (4 points)	Good (3 points)	Adequate (2 points)	Poor (1 point)	Inadequate (0 points)	4	15.00
_ 0	Environmental,					(o points)		
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 (4 points)	Good (3 points)	Adequate (2 points)	Poor (1 point)	Inadequate (0 points)	4	10.00
%	Commun	nity Stewardsh			(± pont)	(o points)		
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 (4 points)	Good (3 points)	Adequate (2 points)	Poor (1 point)	Inadequate (0 points)	3	7.50
*	Finar	ncial Stability (
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 (4 points)	Good (3 points)	Adequate (2 points)	Poor (1 point)	Inadequate (0 points)	4	10.00
		(- points)	(S points)	(2 points)	(2 point)	(o ponits)	Total Score	83.75
								303

	Ev	/aluation	Matrix					
	Solicitation 127-19 ITN for Strategic Alternatives	Firm:		oly 14	Evaluator:		Jordan Pope	
Proposal to Achieve JEA's Goals in this ITN (20% Weighted Value)	Proposal to Achie Respondents must indicate clearly and specifically how their Reply would allow JEA to achieve the goals outlined in this ITN	Exceptional (4 points)	Good (3 points)	% Weighted Va Adequate (2 points)	Poor (1 point)	Inadequate (0 points)	2	10.00
	Experience and					(O points)		
	A summary of experience managing related or similar operations of comparable size and scope to IEA 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.tongevity of utility generation, transmission, and distribution operations greater than 5 years; 2.Successful customer relations demonstrated through customer outreach, surveys such as 10 Power or other comparable sources; 3.Corporate culture demonstrating a long-term commitment to operations; at 4.Strong focus on maintaining reliability and minimizing time of disruptions; and 5.Focus on maintaining reliability 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	2	7.50
(er	Economic Developmen	(4 points)	(3 points)	(2 points) e (10% Weighte	(1 point)	(0 points)		
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	2	5.00
	Employee Re	(4 points)	(3 points)	(2 points)	(1 point)	(0 points)		
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. doi:not not 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	3	7.50
ш	Inno	(4 points) ovation Plan (1	(3 points) 5% Weighted \	(2 points) /alue)	(1 point)	(0 points)		
% Weighted	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 (4 points)	Good (3 points)	Adequate (2 points)	Poor (1 point)	Inadequate (0 points)	2	7.50
- P	Environmental,							
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 (4 points)	Good (3 points)	Adequate (2 points)	Poor (1 point)	Inadequate (0 points)	2	5.00
%	Commun	nity Stewardsh			(2 point)	(o ponits)		
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 (4 points)	Good (3 points)	Adequate (2 points)	Poor (1 point)	Inadequate (0 points)	3	7.50
*	Finar	ncial Stability (
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 (4 points)	Good (3 points)	Adequate (2 points)	Poor (1 point)	Inadequate (0 points)	1	2.50
			, , , , , , , , , , , , , , , , , , , ,	, , , , , , , , , , , , , , , , , , , ,	, , , , , , , , , , , , , , , , , , , ,		Total Score	52.50
lotal score 52.								

	Ev	/aluation	Matrix					
	Solicitation 127-19 ITN for Strategic Alternatives			oly 15	Evaluator:	Jordan Pope		
EA's	Proposal to Achie	eve JEA's Goals	in this ITN (209	% Weighted Val	ue)			
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	2	10.00
Prc		(4 points)	(3 points)	(2 points)	(1 point)	(0 points)		
	Experience and	Customer Com	mitment (15%	Weighted Valu	e)			
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; such as JF own on maintaining reliability and minimizing time of disruptions; and 5. Focus on maintaining reliability and minimizing time of disruptions; and 5. Focus on maintaining reliability and minimizing time of disruptions; and 5. Focus on maintaining reliability and minimizing time of disruptions; and 5. Focus on supplies the past 10 years. 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	2	7.50
		(4 :)	(2 : .)	(2 : .)	(4 : 1)	(0 : .)		
fits Le)	Economic Developme	(4 points) nt and Benefits	(3 points) to Jacksonville	(2 points) e (10% Weighte	(1 point) d Value)	(0 points)		
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
	Employee Pe	(4 points)	(3 points) enefits (10% We	(2 points)	(1 point)	(0 points)		
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	2	5.00
ш	Inn	(4 points)	(3 points) 5% Weighted V	(2 points)	(1 point)	(0 points)		
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 (1 point)	Inadequate	2	7.50
	Environmental	(4 points) , Social and Gov	(3 points) vernance (10%	(2 points) Weighted Value		(0 points)		
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 (4 points)	Good (3 points)	Adequate (2 points)	Poor (1 point)	Inadequate (0 points)	3	7.50
%	Commu		ip (10% Weight		, point)	(a ponta)		
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 (4 points)	Good (3 points)	Adequate (2 points)	Poor (1 point)	Inadequate (0 points)	3	7.50
,0	Final		10% Weighted					
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	60.00
Total Score 60.00								