

Welcome to the JEA Awards Meeting

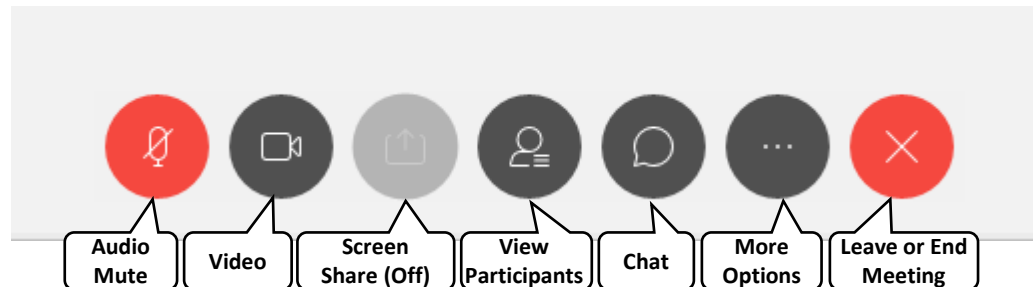
You have been joined to the meeting with your **audio muted** by default.

We will unmute your lines during the public comment time and provide opportunity for you to speak.

During the meeting, interested persons can also email **Aileen Cruz** at **cruza@jea.com** to submit public comments to be read during the meeting regarding any matter on the agenda for consideration. Public comments by e-mail must be received no later than 9:00 a.m. to be read during the public comment portion of the meeting.

Please contact **Aileen Cruz** by telephone at **(904) 703-0996** or by email at **cruza@jea.com** if you experience any technical difficulties during the meeting.

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



AWARDS COMMITTEE AGENDA

DATE: Thursday, August 4, 2022

TIME: 10:00 A.M.

PLACE: JEA, Customer Center, Bid Office, 1st Floor, 21 West Church Street, Jacksonville, FL32202
OR
WebEx/Teleconference
WebEx Meeting Number (access code): 2309 526 2709
WebEx Password: cQMmJPHA823

Public Comments:

Awards:

1. Approval of the minutes from the last meeting(07/28/2022)
2. 1410722046 - Request approval to award a contract to GE-Prolec Waukesha Inc. for the supply of 1 - 50 MVA transformer for the Imeson Substation in the amount of \$1,355,045.00, subject to the availability of lawfully approved funds.
3. 1410587046– Request approval to award a contract to Securely Managed for Managed Security Service Provider (MSSP) in the amount of \$580,440.00, subject to the availability of lawfully appropriated funds.
4. Request approval to award a five (5) year contract to Office of the Sheriff for an Interagency Special Investigations (JSO) Detective in the amount of \$2,221,108.01, subject to the availability of lawfully appropriated funds.
5. 1410766446 – Request approval to award a five (5) year contract to Universal Security Services LLC, DBA Allied Universal Security Services for security services for JEA in the amount of \$22,755,616.00, subject to the availability of lawfully appropriated funds.

Informational Items: N/A

Open Discussion: N/A

Public Notice: N/A

General Business: N/A

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

08-04-2022 Awards Committee

	<u>Type of Award</u>	<u>Business Unit</u>	<u>Estimated/Budgeted Amount</u>	<u>Amount</u>	<u>Awardee</u>	<u>Term</u>	<u>Summary</u>
1	Minutes	N/A	N/A	N/A	N/A	N/A	Approval of minutes from the 7/28/2022 meeting.
2	INVITATION TO NEGOTIATE (ITN) 3 RESPONENTS	ERIXTON	\$1,200,000.00	\$1,355,045.00	PROLEC – GE WAUKESHA INC.	Project Completion (Estimate 12/30/2024)	<p>One (1) – 138 kV Delta / 27 kV 50 MVA Transformer, Imeson</p> <p>JEA is soliciting Responses for the equipment design, fabrication, and delivery of the Supply of One (1) – 138 kV Delta / 27 kV 50 MVA Transformer (the "Work" or "Services").</p> <p>Please note, this solicitation has an updated approach to total evaluated price to develop the ranking. This revised approach includes lead-time. Additionally, this solicitation includes liquidated damages associated with meeting lead time submitted by the responding company.</p> <p>Delivery shall be F.O.B transformer pad. Manufacturer is responsible for offloading. Delivery Location: Imeson substation, 601 Zoo Pkwy, Jacksonville, FL 32218.</p> <p>Prolec GE's Original submission had a thirty-six (36) month lead time, which was non-responsive to JEA's need date by Q4 of 2024. JEA issued an intent to disqualify Prolec GE due to exception. Prolec GE responded noting they had a production slot open up and that they would withdraw that exception due to a production slot opening up. Prolec GE also noted they would need an Order by August 10, 2022 to hold the slot. As a result and due to the significant cost avoidance of \$451,444.00 by awarding to Prolec GE, JEA elected to announce its intent to award without processing a Best and Final Offer to meet the order placement need. Prolec GE's Revision 1 proposal with the updated lead time is attached with this request.</p> <p>The award amount is 12.9% above the budget estimate. It is also noted this transformer has price adjustment through the release to manufacturer. JEA understands this not the best case scenario for procurements, however, market indices are used and 50% of the price is subject to price adjustment. For reference, the 2021 PPI for Large Specialty transformers was up approximately 30% in 2021 and price is deemed reasonable.</p> <p>1410722046 - Request approval to award a contract to GE-Prolec Waukesha Inc. for the supply of 1 - 50 MVA transformer for the Imeson</p>

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							Substation in the amount of \$1,355,045.00, subject to the availability of lawfully approved funds.
3	INVITATION TO NEGOTIATE (ITN) 4 RESPONDENTS	MCELROY	\$500,000.00	\$580,440.00	SECURELY YOURS LLC	Two (2) Years w/ Three (3) - 1 Yr. Renewals	<p><u>Managed Security Service Provider (MSSP)</u></p> <p>The purpose of this Invitation to Negotiate (the "ITN") is to solicit competitive proposals for JEA's Department of Information Security for the purpose of engaging a partnership with a professional Managed Security Service Provider (MSSP) to deliver 24/7/365 security operations center monitoring and other security services for JEA's information and information systems including a virtual Chief Information Security Officer (vCISO). The MSSP will need to deliver services consisting of but not limited to:</p> <ul style="list-style-type: none"> • Security Operations Center • Threat Intelligence • Threat Hunting • Incident Response Support • Reporting • vCISO <p>This award is for a Managed Security Service Provider (MSSP) to deliver 24/7/365 Security Operations Center (SOC) monitoring and other security services to complement JEA's Information Security Team including a virtual Chief Information Security Officer (vCISO). The contract includes threat Intelligence, threat hunting, incident response support, and reporting. The awardee shall not install any hardware or software within JEA's network without explicit approval from the Director of Information Security or designee. Any such hardware or software required to support services associated with this engagement must be explicitly mentioned before any contracts are signed. Provider resources supporting the MSSP will be able to meet the NERC CIP, AWIA, PCI DSS, HIPAA, FACTA, NACHA, and FIPA regulations. This is the first time JEA has bundled these services to include SOC expertise and advanced analysis 24/7/365 with vCISO. Since this is a new service, we are choosing to engage in a two-year commitment with three one-year renewal options to account for setup, tuning and process alignment that will ensure the technical services along with strategic services represented by the vCISO work well for JEA.</p> <p>1410587046– Request approval to award a contract to Securely Yours LLC for Managed Security Service Provider (MSSP) in the amount of \$580,440.00, subject to the availability of lawfully appropriated funds.</p>
4	SINGLE SOURCE	MCELROY	\$2,221,108.01	\$2,221,108.01	OFFICE OF THE SHERIFF	Five (5) Years	<p>Interagency Special Investigations (JSO) Detective</p> <p>The scope and amount is the cost of providing one full-time Detective and one full-time office for the JEA lobby to JEA. JEA may request</p>

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							<p>additional officer support for special events. A JSO vehicle will be provided to the JSO Detective at JEA's cost. The Detective's responsibilities and tasks are assigned by JEA's Director of Security and Emergency Preparedness and include responding to, and investigation of crimes, perpetrated against JEA and its employees. Examples of the services provided include, but are not limited to:</p> <p>Investigation and coordination of prosecution of threats and assaults against employees in the course of their duties;</p> <p>Theft of equipment, material and/or services; destruction/vandalism of essential equipment;</p> <p>Environmental crimes, e.g. illegal dumping on JEA property; and</p> <p>Fraud committed by contractors or customers.</p> <p>The Detective also provides liaison with other agencies and organizations, addressing the difficulties inherent in the coordination of investigations that can involve multiple law enforcement agencies and circuit court jurisdictions</p> <p>Request approval to award a five (5) year contract to Office of the Sheriff for an Interagency Special Investigations (JSO) Detective in the amount of \$2,221,108.01, subject to the availability of lawfully appropriated funds.</p>
5	REQUEST FOR PROPOSAL (RFP) 5 BIDDERS	MCELROY	\$23,500,000.00	\$22,755,616.00	Univeral Security Services LLC, DBA Allied Universal Security Services	Five (5) Years w/One (1) – 1 Yr. Renewal	<p>Security Services for JEA</p> <p>The purpose of this Request for Proposal (RFP) is to solicit competitive Responses from Security services companies that can provide all materials, labor, equipment, supervision, for security services for armed and unarmed security service for JEA facilities.</p> <p>The scope of work consists of the services necessary to provide Contract security workforce, including stationary posts and foot and vehicle patrols, and workforce management. All maintenance and emergency services rendered under this contract shall be by uniformed employees of the Respondent and may be sub-contracted for supporting surge requests found in the Technical Specifications under the "Contingency and Emergency Surge Support Plan" or if the Participating Agency chooses to require the Respondent to subcontract to a Jacksonville Small and Emerging Business (JSEB) or Disadvantaged Business Enterprise (DBE) program firm.</p>

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							<p>The primary objective of the work is to facilitate the overall security of JEA and participating agency employees, facilities and activities by employing a Contractor workforce to perform various security functions. Service locations are primarily in Duval County with some sites in St Johns, Clay, and Nassau counties. Additional adjacent counties may be included upon mutual agreement.</p> <p>When comparing the incumbent current contract pricing with the new contract price, JEA's estimated spend forecast increase over the five-year term is \$4,719,587.60, or approximately twenty six percent (26%) higher than current pricing for the five (5) year term and is deemed reasonable considering market conditions. The FY23 budget for these services has been adjusted to accommodate the increase. The price comparison spreadsheet is attached as back-up.</p> <p>It should be noted that JEA began in March of 2022 to negotiate with First Coast Security (the incumbent) for a contract renewal. FCS told JEA they would not agree to renew the contract without significant rate increases, that did not follow CPI. FCS presented JEA with an average 27% percent price increase initially and after negotiation came down to an approximate 19% price increase. However, JEA & FCS have been working on performance issues for some months due to missing coverage, which FCS primarily presented as issues with retaining employees. Based on the presented pricing increases and performance issues, JEA ended negotiations and took immediate action to begin bid process.</p> <p>JSO participated in the bid process and their forecast spend was aggregated with JEA's spend for a five (5) year multi-agency Bid. The participating agency was approximately fifty percent (54%) of the forecast. The submitted Total Bid Price includes both agencies' forecasts. Price adjustment is CPI annually with a cap of six percent (6%). JEA is requiring a \$250,000.00 performance bond and has included performance reviews and incentives for performance.</p> <p>1410766446 – Request approval to award a five (5) year contract to Universal Security Services LLC, DBA Allied Universal Security Services for security services for JEA in the amount of \$22,755,616.00, subject to the availability of lawfully appropriated funds.</p>
Total Award				\$26,912,209.01			

JEA AWARDS COMMITTEE JULY 28, 2022, MEETING MINUTES

The JEA procurement Awards Committee met on July 28, 2022, in person with a WebEx option.

WebEx Meeting Number (access code): 2309 526 2709

WebEx Password: cQMmJPHA823

Members in attendance were Jenny McCollum as Chief Procurement Officer, Stephen Datz Chairperson (onsite), Hai Vu as Vice Chairperson (onsite), Laure Whitmer as Budget Representative, Regina Ross as Office of General Counsel Representative; Gabor Acs for Ricky Erixton, and Joe Orfano (onsite), Laura Schepis. Unless otherwise indicated, all attendees were via WebEx.

Chair Datz called the meeting to order at **10:01** a.m., introduced the Awards Committee Members, and confirmed that there was an in-person quorum of the Committee membership present.

Public Comments:

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

Awards:

1. Approval of the minutes from the last meeting (07/21/2022). Chair Datz verbally presented the Committee Members the proposed July 21, 2022, minutes as presented.

MOTION: **Joe Orfano** made a motion to approve the July 21, 2022, minutes (Award Item 1). The motion was seconded by **Hai Vu** and approved unanimously by the Awards Committee (5-0).

The Committee Members reviewed and discussed the following Awards Items 2 – 3:

2. Request approval to award a contract to the developer, Mattamy Jacksonville, LLC for the installation of a sewer force main and a duplex lift station by Grimes Utilities, Inc. for the RiverTown Parcel 35 project in the amount of \$834,750.00, subject to the availability of lawfully appropriated funds.

MOTION: **Hai Vu** made a motion to approve Award Item 2 as presented in the committee packet. The motion was seconded by **Joe Orfano** and approved unanimously by the Awards Committee (5-0).

3. Request approval to award a contract increase to Gate Fleet Services for Fuel Supply, Fuel Cards, & Related Services in the amount of \$408,224.44, for a new total not-to-exceed amount of \$11,334,291.21, subject to the availability of lawfully appropriated funds.

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

Informational Item:

No informational items were presented to the Awards Committee.

Ratifications:

No ratifications were presented to the Awards Committee

Public Comments:

No additional public comment speaking period was taken.

Adjournment:

Vice Chair Vu adjourned the meeting at 10:12 a.m.

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



Formal Bid and Award System

Award #2 August 4, 2022

Type of Award Request: INVITATION TO NEGOTIATE (ITN)
Requestor Name: Szoke, Ryan
Requestor Phone: (904) 665-4098
Project Title: One (1) – 138 kV Delta / 27 kV 50 MVA Transformer, Imeson
Project Location: JEA
Project Number: 8007831
Funds: Capital
Award Estimate: \$1,200,000.00

Scope of Work:

JEA is soliciting Responses for the equipment design, fabrication, and delivery of the Supply of One (1) – 138 kV Delta / 27 kV 50 MVA Transformer (the "Work" or "Services").

Please note, this solicitation has an updated approach to total evaluated price to develop the ranking. This revised approach includes lead-time. Additionally, this solicitation includes liquidated damages associated with meeting lead time submitted by the responding company.

Delivery shall be F.O.B transformer pad. Manufacturer is responsible for offloading. Delivery Location: Imeson substation, 601 Zoo Pkwy, Jacksonville, FL 32218.

The scope of services the company will provide includes, however, is not limited to:

- Equipment Design
- Equipment Engineering
- Materials procurement
- Fabrication
- Drawings
- Delivery - offload & set on the pad

JEA IFB/RFP/State/City/GSA#: 1410722046
Purchasing Agent: Lovgren, Rodney D.
Is this a Ratification?: NO

RECOMMENDED AWARDEE(S):

Name	Contact Name	Address	Phone	Amount
PROLEC – GE WAUKESHA INC.	Marianna Escobedo	Mariana.escobedo@prolec.energy.com	262-446-8499	\$1,355,045.00

Amount for entire term of Contract/PO: \$1,355,045.00
Award Amount for remainder of this FY: \$67,752.25
Length of Contract/PO Term: Project Completion
Begin Date (mm/dd/yyyy): 08/10/2022

End Date (mm/dd/yyyy):

Project Completion (Estimate 12/30/2024)

JSEB Requirement:

N/A - Specialty Services

RESPONDENTS:

Name	Unit Price	Evaluated Price
GE – PROLEX WAUKESHA INC.	\$1,355,045.00	\$1,993,733.22
PTI TRANSFORMERS LP	\$1,806,489.00	\$2,177,989.00
HITACHI ENERGY USA INC.	\$1,952,000.00	\$2,218,554.27

Background/Recommendations:

Advertised on 05/12/2022. At response opening on 07/19/2022, JEA received three (3) Responses. Due the shifting lead times and significant price delta, JEA elected to not process a Best and Final Offer. The evaluation is based 100% on the evaluated price (which takes into account load losses and lead-time). GE – Prolec Waukesha Inc. was deemed the lowest priced responsible and responsive Respondent. A copy of the Bid Form and Bid Workbook is attached as backup.

The Bidders submit their unit price (actual equipment price) and are evaluated on an evaluated price, which takes into account load losses and lead-time to determine the Awardee. The load losses were determined by the equipment designer and input into a cost of ownership calculation, the lead-time calculation was based on supplier lead-time and a price / month calculation to arrive at the evaluated price.

Prolec GE’s Original submission had a thirty-six (36) month lead time, which was non-responsive to JEA’s need date by Q4 of 2024. JEA issued an intent to disqualify Prolec GE due to exception. Prolec GE responded noting they had a production slot open up and that they would withdraw that exception due to a production slot opening up. Prolec GE also noted they would need an Order by August 10, 2022 to hold the slot. As a result and due to the significant cost avoidance of \$451,444.00 by awarding to Prolec GE, JEA elected to announce its intent to award without processing a Best and Final Offer to meet the order placement need. Prolec GE’s Revision 1 proposal with the updated lead time is attached with this request.

The award amount is 12.9% above the budget estimate. It is also noted this transformer has price adjustment through the release to manufacturer. JEA understands this not the best case scenario for procurements, however, market indices are used and 50% of the price is subject to price adjustment. For reference, the 2021 PPI for Large Specialty transformers was up approximately 30% in 2021 and price is deemed reasonable.

1410722046 - Request approval to award a contract to GE-Prolec Waukesha Inc. for the supply of 1 - 50 MVA transformer for the Imeson Substation in the amount of \$1,355,045.00, subject to the availability of lawfully approved funds.

Manager: Hamilton, Darrell D. - Mgr Transmission and Substation Projects

Director: Acs, Gabor – Sr. Dir. Engineering & Projects

VP: Erixton, Ricky D. - VP Electric Systems

APPROVALS:

Chairman, Awards Committee

Date

Budget Representative

Date

waukesha®

JEA

Prolec GE Waukesha Quotation 70011919

06/14/2022

REV.	DESCRIPTION
0	Initial Release
1	Change lead times

CREATED BY
Mariana Escobedo
Mariana Escobedo

DATE
07/19/2022
07/25/2022





Quotation # 70011919
07/25/2022

Prolec-GE Waukesha, Inc. Quotation

07/25/2022

JEA
21 WEST CHURCH STREET
JACKSONVILLE, FL 32201

Inquiry	Imeson
Quote Number	70011919 R1
Specification Document(s)	Technical Specifications 50 MVA



TEAM CONTACT INFORMATION

Channel Partner Richard DeLizza Electric Sales Associates TEL 954-385-8885 FAX 954-385-3266 richardd@electricsalesinc.com	Application Engineer Mariana Escobedo Prolec-GE Waukesha, Inc. TEL 262-446-8449 FAX 262-521-0198 mariana.escobedo@prolec.energy	Product Sales Specialist Matthew Webb GE Grid Solutions TEL 919-330-7705 FAX matthew.webb@ge.com	Proposal & Order Coordinator Meredith Adams Prolec-GE Waukesha, Inc. TEL 919-580-3255 FAX 262-521-0198 meredith.adams@prolec.energy
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QUOTE SUMMARY

Item Number	10
Price Per Unit	\$1,355,045.00
Quantity	1
Warranty	Prolec GE Waukesha's 5 Year Power Transformer Warranty
Rating Information	30/40/50 MVA, ONAN/ONAF/ONAF 3 Phase, 60 Hz., 65 Degree C rise 138 kV DELTA To 27 kV GRDY with UZD Reduced Capacity LTC
Ship To Destination	Jacksonville, FL
Ship To Location	Address or To Be Determined

If the Ship To Location is not known as of the bid issue date, then the quoted freight and rigging costs may be subject to adjustment based upon final delivery location.

Confidential and Proprietary

This document contains proprietary information of Prolec-GE Waukesha, Inc. and may not be disclosed, copied, modified or used without the written permission of Prolec-GE Waukesha, Inc.

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Shipment Lead Time

Waukesha offer 1 shipment with a PO receipt no later than 08/10/2022, If PO is not received by the date listed above, consider shipment slots of 36-37 months after Waukesha Order Acknowledgment issue date, subject to plant loading at the time of receipt of order.

- Unit 1: shipment 26 months from PO date.

Please consult the Channel Partner, Application Engineer or Product Sales Specialist identified in the CONTACT INFORMATION shown in this quotation if an alternate lead time is preferred.

ADDERS

- | | |
|--|------------------------|
| • One (1) HV bushing | \$3,600.00 each |
| • One (1) LV bushing | \$1,900.00 each |
| • One (1) HV arrester | \$1,700.00 each |
| • One (1) LV arrester | \$ 457.00 each |
| • Gaskets | \$ 958.00 per set |
| • Fan Assembly | \$ 711.00 per assembly |
| • SFRA Testing (shipping configuration/fully assembled on pad) | \$2,000.00 per test |
| • Field Assembly, Vacuum Fill and Test | \$43,450.00 per unit |

Customer requested Adders shall be added to the Transformer Price and they shall be payable in accordance with agreed upon Payment Terms unless otherwise stated by Waukesha in writing.

PRICE & PAYMENT TERMS POLICY

Price Adjustment Policy

At the time of final invoicing, Waukesha will provide an updated selling price based on the change in material costs for copper, core steel, plate steel, mineral oil, paper insulation and labor since the time of quotation. The final selling price will be (adjusted upwards or downwards) using the indices identified below 3 months prior to shipment.

The following material indices are the base indices for this quotation:

Material	Name	Value	Unit	Index Date	% of Transformer Sales Price
Copper	HG-Comex	\$424.93	\$/cwt	May – 22	10.0%
Core Steel	Waukesha Internal Pricing Index	\$150.00	--	May – 22	8.0%
Plate Steel	AMM Cut-to-length Plate Carbon Grade FOB mill US\$/CWT	\$94.76	gross ton	May – 22	6.0%
Oil	Brent Crude Futures, Continuous Contract #1 (B1) (Front Month)	\$111.96	42-gal barrel	May – 22	2.0%
Insulation	PIX U.S. NBSK Index	\$1655.80	ton	May – 22	2.0%
Labor	U.S. BLS NAICS Code 335 - Mfg Labor Cost Index	\$24.36	--	May – 22	22.0%

Note: The Quoted Item Price(s) does not include sales, use, excise or any other taxes. Any taxes imposed shall be the responsibility of customer and will be invoiced accordingly, unless Prolec GE Waukesha is presented with a valid exemption certificate.

PAYMENT TERMS & MILESTONES

Payment milestones, subject to credit approval, are as follows:

- 5% to be invoiced at Order Acknowledgement
- 10% to be invoiced at Design Approval (not to exceed 2 weeks after release of drawing design)
- 60% to be invoiced at time of Release to Manufacturing
- 20% to be invoiced Delivery to pad/site
- 5% to be invoiced at Final Acceptance by JEA (not to exceed 30 days after delivery)

Note: All payments are Due Net 30 days from date of invoice.

LATE PAYMENT POLICY

If payment is more than 10 days past the due date of the applicable invoice, Prolec GE Waukesha may:

1. Charge interest of 1-½% per month of the unpaid balance, and/or;
2. Withhold shipment of the affected Transformer until Customer is current on all payment obligations as set forth under the applicable Purchase Order.

For the avoidance of doubt, any delay in shipment due to Customer's late payment shall be credited to Prolec GE Waukesha in regards to the calculation of any liquidated damages. Any additional costs incurred due to postponed shipment under this section shall be the responsibility of Customer.



DRAWINGS

Approval drawings will be provided 30 weeks before ship date. Please contact the Application Engineer if an earlier date is required. Quoted Shipment Lead Time includes 2 weeks for customer to review and return approval drawings.

For orders requiring drawing approval, a release to immediately proceed with production must be returned to Waukesha within 2 weeks after drawing submittal to maintain scheduled date(s).



MINERAL OIL

Mineral Oil is included in the quoted transformer price. If mineral oil is shipped separately, pricing includes shipment/delivery of the oil within sixty (60) days of shipment of the transformer. After that date, any additional costs will be charged to the customer.



SHIPMENT

The above quoted transformer(s) will be **shipped dry by truck to your specified pad.**

Quoted freight and rigging prices are based on the delivery location and site conditions known as of the bid issue date and based on the free access required for Waukesha to unload the equipment without obstruction. Prices are subject to adjustment to the extent that there are changes to the delivery location, the delivery location's transportation route, or the site conditions ("Conditions") that would complicate the movement of the transformer(s).

Such Conditions that would complicate the movement of the transformer(s), include, but are not limited to: lack of existing roads; impassable conditions; extreme grade or any other condition that would prevent Waukesha from delivering to the specified site with a single crane lift; if clearance is not available due to highway construction; changes in state regulations; changes in bridge limitations; needed repairs to, but not limited to, roadway, delivery site access, or railways (customer or non-customer owned); obstructions such as existing fencing, or removal or reinstallation of any overhead or adjacent structures; insufficiently compacted soil (necessitating matting); oil containment pits or dikes around pad; debris or other condition beyond Waukesha's control or unknown at the time of bid.

Any additional costs associated with such Conditions will be charged to the customer.



WARRANTY VALIDATION / FIELD SERVICE

Services for **Warranty Validation / Field Supervision** ("Field Services") as identified in this quotation are included in the quoted transformer price. Other Field Services may be identified as an ADDER. Field Services standard work scope is included as an attachment. Quoted Field Service prices are based on free access to the site required to perform the field services and on the anticipated schedule with a single trip to the site. Quoted Field Service prices do not include any site specific or customer required access and/or safety training, any special and/or site-specific safety, PPE or environmental requirements, use of union labor or any local Sales or Use tax. Any additional direct costs associated with deviations from the proposed field service schedule will be charged to the Customer on a time and material basis.

Any Field Service offered in this quote, either as part of the quoted price or which can be elected as an adder, shall be subject to the terms of purchase of the transformer. In no event shall Waukesha have any obligation to identify, correct, abate, clean up, control, or remove from customer's premises any toxic or hazardous material.



TERMS & CONDITIONS

Prolec-GE Waukesha, Inc. offers this Quotation #70011919 (the "Quote") subject to:

A. The commercial terms of *JEA Contract #168953, between JEA and SPX Transformer Solutions, Inc., effective October 18th, 2017*, which shall apply to any order placed against this Quote, as modified by the following provisions of this Quote:

1. Price Per Unit;
2. Price & Payment Terms Policy; and
3. All technical content.

B. Prolec-GE Waukesha, Inc. takes exception to the liquidated damages in the RFQ documents and offers the following

Liquidated damages shall be in the amount of five hundred dollars (\$500.00) per day, not to exceed five percent (5%) of the purchase price of the unit upon which such claims are made, and shall begin thirty (30) days after the mutually agreed upon delivery date. Any demand for liquidated damages must be submitted to Waukesha within six (6) months after the date of delivery of the impacted unit.

After execution of a Purchase Order, should the United States of America or any state or local government authority impose any new tariff, legislation, regulation, or other remedy related to commodities or inputs affecting the work, the parties agree to equitably adjust the pricing under such Purchase Order as necessary to account for the financial effects or other direct or indirect effects of any such remedy that cannot be reasonably avoided by either party. Any adjustment subject to this clause will be reflected on the final invoice.

Prolec-GE Waukesha, Inc. reserves the right to correct clerical and administrative errors in this quotation, and other related documents.



WARRANTY

The above transformer is quoted with the **Waukesha Five Year Power Transformer Warranty** in lieu of all others specified, expressed or implied. To qualify for the Five Year Warranty, a Waukesha Service representative **must be** present at the time the transformer is dressed out, and both the primary and secondary must be protected from surges with arresters mounted on the transformer tank.

In addition to the above, full compliance to the Waukesha Instruction Manual is required to validate the warranty. A complete Instruction Manual is provided in the control box of every Waukesha Power Transformer.

CUSTOMER ACKNOWLEDGES THAT THIS WARRANTY MAY BE DEEMED VOID BY PROLEC-GE WAUKESHA, INC. UNTIL PAYMENT IS RECEIVED IN FULL FOR ALL UNDISPUTED INVOICES RELATED TO THE TRANSFORMER, STORAGE OF THE TRANSFORMER, AND ANY RELATED SERVICES.



TECHNICAL NOTES & COMMENTS

1. This proposal is based on the information provided in the Request for Quote documentation (RFQ) and, if applicable, any addendum to the RFQ received prior to proposal submittal. Customer requested changes after proposal submittal or at the time of order placement will be subject to commercial and technical review and acceptance by Waukesha. Acceptable impacts to scope, schedule, or cost may require a Waukesha Change Order Request Proposal. Implementation of the mutually agreed upon changes will commence after written acceptance by the Customer.
2. For units shipping Twenty-Four (24) months after approval drawing submittal, Waukesha may require design changes to ensure compliance with current industry, customer, or manufacturer standards, as well as available components. If applicable, these design changes, and potential cost impacts, will be reviewed with the customer by the project manager at time of manufacturing.
3. **Spec 6.0.** Short Circuit Design: A reference list of transformers short circuit tested successfully is attached, confirming that the proposed design(s) meet(s) the ANSI/IEEE short circuit requirements.
 - 3.1.1. The Short circuit force and stress calculations are performed using Rabin's method which has high accuracy for the B-fields inside the windings. The magnetic field is calculated for 100 axial and radial subdivisions of each winding. The short circuit currents are obtained for the most severe fault condition. The magnetic field and force densities, $J \times B$, are calculated along a fine grid-work of points throughout each winding. These are integrated (summed) appropriately to get net forces, which are required for calculating the stress. For axial forces especially, an offset is placed in one of the windings. Output includes: maximum hoop/buckling stresses in each winding, maximum radial and axial bending stresses, maximum compressive stresses on the key spacers, maximum tie-plate stress, and minimum pressure ring thickness needed to withstand the end thrust for offset windings. A flag is raised when material or buckling limits are exceeded. Stress limits are based on the proof stress of the material including an adequate margin.
 - 3.1.2. This analysis provides complete short circuit withstand requirements and design data for each specific design – a methodology preferred in the industry today.
4. **Spec 9.0.** No Design review is included.
5. **Spec 13.8.** The SEL 2414 is being provided with the device manufacturer's factory default settings. No programming will be supplied by Waukesha. If programming is required, please consult the Application Engineer for the adder.
6. **Spec 21.** Waukesha uses inhibited mineral oil (ANSI/ASTM D-3487) from Waukesha approved sources [see attached oil specification].
7. **Spec 22.** The quoted price includes the Waukesha standard paint finish system. The paint finish meets and exceeds C57.12.28 and C57.12.29 standards. Radiators will be hot-dipped galvanized steel construction and not painted. See the Transformer Paint Systems attachment for additional clarification.



TECHNICAL EXCEPTIONS

1. **Spec 33.** The Prolec-GE Waukesha, Inc. Five Year Power Transformer Warranty, as attached to this quotation, shall apply in lieu of all other warranties, express or implied.



LOSS GUARANTEE

In accordance with latest revision of IEEE Standard C57.12.00, Section 5.9, No-load (core) loss guarantee on the enclosed performance specification(s) is based on the standard reference temperature of 20°C. Load (winding) loss guarantee is at the standard reference temperature of 85°C on 65°C rise rated transformers (or 75°C on 55/65°C rise rated transformers).

Waukesha tests no-load and load losses with less than 1.0% measurement error. These measurement errors are determined by a calibration system that is traceable to the National Institute of Standards and Technology (formerly the National Bureau of Standards) using methods described in NIST's Technical Note 1204.



AWARD OF CONTRACT

In the event that the transformer contract is awarded to Prolec-GE Waukesha, Inc., please provide the following text on the purchase order to help expedite order processing: **Unit(s) will be Designed, Manufactured, Tested, Shipped, Sold and Invoiced in accordance with Prolec-GE Waukesha, Inc. Quotation 70011919 R1, dated 07/25/2022.**



Quotation # 70011919
07/25/2022

30
DAYS **VALIDITY**

This bid will remain in effect for 30 days unless changed in the interim by written notice from Waukesha. Extensions to the 30-day validity may be considered, as required, to facilitate the order process.

Sincerely,
Prolec-GE Waukesha, Inc.

Mariana Escobedo

Mariana Escobedo
Application Engineer

Confidential and Proprietary

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Quotation # 70011919
07/25/2022

ENCLOSURES

Performance Specification(s)

Cancellation/Delay Policy

Waukesha Five Year Power Transformer Warranty

Waukesha Warranty Validation

Assembly Vacuum Filling & Testing: Units Shipped Without Oil

Waukesha Service Solutions

Transformer Oil Specification

Transformer Paint Systems

Transformer Tank Design & Construction

Short Circuit Test Results

Waukesha UZD

Load Tap Changer Filtration Systems

Proposal Form / Data Sheets

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FOR: 294 JEA

70011919

Item No: 000010

Project Name: 30/40/50 MVA. 138-27 KV UZD

TRANSFORMER RATINGS										
Phase	3	Cooling Class	HV Volts		XV Volts		YV Volts		ZV (TV) Volts	
Frequency	60	Class	138,000	--	27,000	--	--	--	--	--
Temp Rise °C	65		Delta	--	GrdY	--	--	--	--	--
Insulating Oil	Oil	ONAN	30.00	--	30.00	--	--	--	--	--
		ONAF	40.00	--	40.00	--	--	--	--	--
		ONAF	50.00	--	50.00	--	--	--	--	--

ADDITIONAL TAP VOLTAGES				
Terminal	Style	Taps or KV		Capacity
HV	DETC	+ 2 / - 2	@ 2.500 %	FULL REDUCED
XV	UZD	+ 16 / - 16	@ 0.625 %	

PERCENT IMPEDANCE VOLTS		
%	Windings	At MVA
9.00	H-X	30.0
--	H-Y	--
--	X-Y	--

AUXILIARY LOSSES AND SOUND LEVEL			
MVA	Class	Cooling	Sound Level dB
30.00	ONAN	--	75
40.00	ONAF	3,000	77
50.00	ONAF	6,000	78

The above values for cooling loss do not include ancillary equipment (heaters, control devices, etc.) losses of 3,000 watts

INSULATION LEVELS (KV)			
Terminal	Winding	Bushings	
HV Line	550	--	650
HV Neutral	--	--	--
XV Line	200	--	200
XV Neutral	110	--	200
YV Line	--	--	--
YV Neutral	--	--	--
ZV (TV) Line	--	--	--
ZV (TV) Neutral	--	--	--

PERFORMANCE BASED ON A LOADING OF				
HV Winding	138,000	Volts @	30.00	MVA
XV Winding	27,000	Volts @	30.00	MVA
YV Winding	--	Volts @	--	MVA
ZV (TV) Winding	--	Volts @	--	MVA

EFFICIENCIES				
Base MVA (ONAN) = 100%				
Load	100%	75%	50%	25%
Percent	99.60	99.66	99.70	99.65

REGULATION	
Power Factor	Percent Regulation
1.0	0.73
0.9	4.52
0.8	5.89

PERFORMANCE DATA No Load Temp: 20 °C/ Load Loss Temp: 85 °C				
Exciting Current (Percent) and Loss (Watts)				
Excitation	Exciting Current(%)	No Load Loss	Load Loss	Total Loss
100%	.500	20,000	99,500	120,000

MECHANICAL DATA - Not for Construction				Dimensions are in inches & weights are in pounds (approx.values)	
Outline Drawing Number:			Shipping: Dry by Truck		
	Base	Assembled	Shipping	Weight (lbs)	
Height (A)	--	220	153	Core and Coils	83,489
Width (B)	167	300	225	Tank and Fittings	64,874
Depth (C)	87	236	114	Liquid (7,900 gallons)	59,250
Height Over Cover (D)	--	153	153	Total Weight	207,613
				Shipping Weight, Heaviest Piece	137,238

APPENDIX B PROPOSAL FORM

Supply of One (1) – 138kV / 27 kV Grounded Wye Transformer

COMPANY INFORMATION:

COMPANY NAME: Prolec-GE Waukesha, Inc
BUSINESS ADDRESS: 400 South Prairie Avenue
CITY, STATE, ZIP CODE: Waukesha, Wisconsin. 53186
TELEPHONE: 262-446-8449
EMAIL OF CONTACT: mariana.escobedo@prolec.energy

Total evaluated Bid Price

Description	Total Evaluated Bid Price
Total Evaluated Price from the Bid Workbook	1,820,014.98

Upload 1 electronic signed copy of this Proposal your Proposal Submission

I have read and understood the Sunshine Law/Public Records clauses contained within this solicitation. I understand that in the absence of a redacted copy my proposal will be disclosed to the public “as-is”.

Company's Certification

By submitting this Proposal, the Proposer certifies that it has read and reviewed all of the documents pertaining to this RFP and agrees to abide by the terms and conditions set forth therein, that the person signing below is an authorized representative of the company, that the company is legally authorized to do business in the State of Florida, and that the company maintains in active status an appropriate license for the work. The company certifies that its recent, current, and projected workload will not interfere with the company's ability to Work in a professional, diligent and timely manner.

The Proposer certifies, under penalty of perjury, that it holds all licenses, permits, certifications, insurances, bonds, and other credentials required by law, contract or practice to perform the Work. The Proposer also certifies that, upon the prospect of any change in the status of applicable licenses, permits, certifications, insurances, bonds or other credentials, the Company shall immediately notify JEA of status change.

We have received addenda 1 through 3

mariana escobedo
Signature of Authorize Officer of Company or Agent

07/19/2022

Date

Mariana Escobedo/ Application Engineer
Printed Name & Title

262-446-8449
Phone Number



Building Community®

Procurement Bid Office
Customer Center 1st Floor, Room 002
21 W. Church Street
Jacksonville, Florida 32202

June 10, 2022

Addendum Number: **One (1)** _____

Title: **Supply of One (1) – 138 kV Delta / 27 kV 50 MVA Transformer** _____

JEA Solicitation Number: **1410722046** _____

Response Due Date: **June 28, 2022** _____

Due Date Time: **12:00 PM (NOON EST)** _____

Time of Opening: **2:00 PM** _____

This addendum is for the purpose of making the following additions, deletions and changes.

CHANGE: The Bid Due Date has been changed to **June 28, 2022**, 12:00 PM Noon (EST).

Acknowledge receipt of this addendum on the Response Form



Building Community®

Procurement Bid Office
Customer Center 1st Floor, Room 002
21 W. Church Street
Jacksonville, Florida 32202

June 22, 2022

Addendum Number: **Two (2)**

Title: **Supply of One (1) – 138 kV Delta / 27 kV 50 MVA Transformer**

JEA Solicitation Number: **1410722046**

Response Due Date: **July 19, 2022**

Due Date Time: **12:00 PM (NOON EST)**

Time of Opening: **2:00 PM**

This addendum is for the purpose of making the following additions, deletion or changes.

CHANGE: The Bid Due Date has been changed to **July 19, 2022**, 12:00 PM Noon (EST).

Acknowledge receipt of this addendum on the Response Form



Building Community®

Procurement Bid Office
Customer Center 1st Floor, Room 002
21 W. Church Street
Jacksonville, Florida 32202

June 30, 2022

Addendum Number: **Three (3)**

Title: **Supply of One (1) – 138 kV Delta / 27 kV 50 MVA Transformer**

JEA Solicitation Number: **1410722046**

Response Due Date: **July 19, 2022**

Due Date Time: **12:00 PM (NOON EST)**

Time of Opening: **2:00 PM**

This addendum is for the purpose of making the following additions, deletion or changes.

ADD: JEA's Delivery need date is 09/02/2024. JEA will accept all proposals from companies however, Supplier will add Lead time in Weeks to the bid workbook, which will be converted into months. For evaluation purposes, for a company that has a lead time over 23 months, the lead time will be evaluated starting at an initial \$30,000.00 penalty in price evaluation and then incrementally at \$30,000.00 / month (prorata) and will be included in the Total Evaluated Bid Price.. In no instance will JEA accept a Delivery Date later than 12/02/2024.

REPLACE: The Bid Workbook issued with the original solicitation has been replaced by the Bid Workbook issued in this Addendum 3.

CHANGE: The following Supplier has been added to the Approved Supplier List

- Delta Star (US & CANADA)

CHANGE:

The transformer technical specification issued with the original solicitation, Line 17.15.1 currently reads as: *“The power transformer control cabinet shall be designed in order to accommodate a connection to JEA installed synchro transmitter (Incon model #1292) and a programmable position monitor (Incon model #1250B). These devices will be provided/installed by JEA in the relay control panel located in the control house.”*

Line 17.15.1 has been changed to:

“The power transformer shall be designed by the manufacturer with a synchro transmitter installed (Incon model #1292) and make accommodations in the transformer control cabinet to connect with a JEA programmable position monitor (Incon model #1250B) located at a JEA relay panel in the control house.”



Cancellation / Delay Policy

Up to 35 MVA Base Rating

1. Cancellation of an order will be accepted after the purchaser has given written notice. If the cancellation occurs during the period from the date of order entry to twelve (12) weeks after order acknowledgement, the cancellation charges will be the actual work hours expended on the job performed at a rate of \$250 per hour or a minimum of five percent (5%) of the purchase price, whichever is greater.
2. If the cancellation occurs after approval drawings have been issued by Waukesha, the termination charge will be thirty percent (30%) of the purchase price.
3. Notwithstanding items 1 and 2 above, if the order is cancelled twenty-six (26) weeks or less prior to shipment, the cancellation charge shall be one hundred percent (100%) of the purchase price.
4. If the order is suspended or shipment is delayed twenty-six (26) weeks or less prior to the scheduled ship date, the equipment will be completed and invoiced. Storage at Waukesha's site shall be subject to availability and any related costs shall be at the customer's expense.
5. If a request to delay shipment changes the scheduled ship date, a mutually agreed upon adjustment to the base price may be necessary.



Five Year Power Transformer Warranty

Prolec-GE Waukesha, Inc. (Waukesha), warrants to the original purchaser that the complete transformer, together with all parts included in the original purchase (the "Transformer"), has been designed in accordance with the specifications of the original purchaser and that the Transformer will be free from defects in material and workmanship under normal use and service for a period of five (5) years from the date of arrival of the Transformer at its destination from the factory. Waukesha's liability under this warranty does not extend to defects caused by vandalism, improper installation, improper maintenance, alterations by purchaser, purchaser-furnished materials, or improper operation. For this warranty to be valid, Waukesha requires that all transformer windings shall be protected from surges with arresters mounted on the transformer tank or an insulation coordination study may be required.

A customer service representative must be present during field assembly, vacuum filling (if required) and inspection of the installation prior to energization. In the event that the Transformer is relocated, a customer service representative must be present during field re-assembly, vacuum-filling (if required) and inspection of the re-installation prior to re-energization.

Purchaser forfeits the provisions of the Five Year Warranty if either of these service requirements is not followed.

If any part is found to contain defects in material and/or workmanship during the five year warranty period, Waukesha's liability and Purchaser's remedies under this warranty shall be limited solely to repair or replacement, at Waukesha's option, of the defective part. Decision on the method and extent of repairs rests solely with Waukesha. Purchaser shall give Waukesha prompt written notice of any claim hereunder. Waukesha shall be given a reasonable opportunity to investigate all claims, and no parts may be returned to Waukesha without authorization and instructions from the Customer Service Department.

During the first year, this warranty covers any freight within the 48 contiguous states by common carrier in full. This warranty also covers the cost of removal from the site and reinstallation after repair, subject to a limit of 10% of the original selling price. Costs of moving structures or associated equipment are excluded. During the last four (4) years, transportation, moving and reinstallation costs are excluded from this warranty.

Under no circumstances will Waukesha be responsible for damage in excess of the sale price to Purchaser for the goods and/or services for which damages are claimed.

THIS WARRANTY IS EXCLUSIVE AND IS IN LIEU OF ALL OTHER WARRANTIES, EXPRESS OR IMPLIED, INCLUDING, BUT NOT LIMITED TO, ANY IMPLIED WARRANTY OF MERCHANTABILITY OR FITNESS FOR A PARTICULAR PURPOSE. WAUKESHA SHALL NOT BE LIABLE FOR ANY INCIDENTAL OR CONSEQUENTIAL DAMAGES OR EXPENSES OF ANY KIND, INCLUDING LOSS OF PROFITS.

In the event a performance bond is provided as part of the contract to which this warranty applies, the Surety's liability shall be limited to one (1) year from the date of delivery of the Transformer. The remaining four (4) year warranty period is solely the obligation of Waukesha.

CUSTOMER ACKNOWLEDGES THAT THIS WARRANTY MAY BE DEEMED VOID BY WAUKESHA UNTIL PAYMENT IS RECEIVED IN FULL FOR ALL UNDISPUTED INVOICES RELATED TO THE TRANSFORMER, STORAGE OF THE TRANSFORMER, AND ANY RELATED SERVICES.

Goldsboro, NC 800.758.4384 | Waukesha, WI 800.835.2732 | www.waukeshatransformers.com

TC04-0122H



Prolec GE Waukesha Warranty Validation (<100MVA)

Waukesha® Service personnel are required to provide assistance to a customer during installation of the transformer and verify proper assembly to facilitate activation of the applicable warranty.

Minimum requirements for warranty validation are as follows:

- Waukesha® Service personnel will perform internal inspection of transformer and witness the installation and connection of bushings.
- Waukesha® Service personnel will complete service warranty validation checklist.
- Customer will provide vacuum filling records, where applicable.
- Customer will perform electrical acceptance tests and provide copies of test results to Waukesha; as specified in Waukesha's Pre-operational Testing Instruction Booklet 2012, the minimum acceptance tests include:
 - Core Insulation Resistance (Megger)
 - Winding Insulation Resistance
 - Transformer Turns Ratio
 - Insulation Power Factor of Bushings and Windings (Doble)
 - General Oil Chemistry Tests – Dielectric Strength, Power Factor and Moisture Content

Pricing is based upon a single mobilization to jobsite during standard work hours. When requested assistance lasts longer than 5 days, requires overtime assistance or multiple mobilizations to the site, the extra work will be billed in accordance with rates designated on the current Waukesha® Service Technician & Specialist Rate Schedule sheet.

Assembly, Vacuum Filling & Testing: Units Shipped Without Oil

applicable for transformers < 100 MVA base rating and < 345kV

If included in the quoted price or selected as an “adder” as outlined in the proposal, Waukesha® Service crews and equipment will perform transformer installation once the transformer has been placed on the pad. Assembly and testing work will include the following:

ASSEMBLY

- Install, connect and tape, as necessary, all bushings
- Hang and brace radiators and/or fans
- Mount oil preservation system, if required
- Mount lightning arresters, if required
- Mount control cabinet, if required
- Mount any miscellaneous items removed for shipment
- Check all internal clearances including DETC and LTC (if equipped) for proper alignment and timing
- Hang any conduit removed for shipment; pull and terminate associated wiring

OIL FILLING

- Elevate core/coil temperature, if necessary
- Conduct vacuum leak test
- Vacuum fill in accordance with Waukesha's Instruction Leaflet Document No. 2011
- Pull vacuum at a level of 1 Torr (1,000 micron, 1mm of Hg) or less and hold for a minimum of 8 hours
- Vacuum fill transformer oil while maintaining a vacuum level of 5 Torr or less
- Fill conservator tank or activate nitrogen system, as appropriate for transformer design

TESTING

As specified in Waukesha's Pre-operational Testing Instruction Booklet No. 2012, the minimum acceptance tests include the following:

- Bushing power factor and capacitance
- Core megger
- Transformer turns ratio
- Insulation power factor
- Insulation resistance
- Functional check of unit control cabinet
- Oil test after filling
 1. Moisture content
 2. Power factor
 3. Dielectric strength
 4. Flash and fire point (natural ester fluid filled units only)

See next page for Scope Clarifications.



SCOPE CLARIFICATIONS

For all transformer installations, the following apply:

- Purchaser shall be responsible for switching, lock out and grounding of any equipment necessary to establish safe work area.
- Purchaser shall provide suitable, free, clear, unlimited and compacted access route, roads and area around work location for access of service equipment.
- Purchaser shall connect all external protection, control and relay wiring, as required.
- Purchaser shall connect all external bushing terminations or bus work, as required.
- Purchaser shall assemble any deluge systems, as required.
- Waukesha® Service crews will compile all crating and waste material in designated area; however, purchaser shall be responsible for disposal of solid wastes.
- Purchaser shall provide one open top drum and one closed top drum for disposal of all waste, flush and scrap oil generated in execution of work.
- Purchaser shall provide communication and sanitation facilities.
- No provisions have been included for secondary oil containment as may be required for compliance to local site SPCC programs.
- No provisions have been included for Union Labor requirements.
- Any site specific or customer required access and/or safety training is not included in pricing and would be billed at applicable field service rates.
- If a natural ester fluid is included in this quotation, acceptance test results of that fluid will differ from the typical values of transformers filled with mineral oil. Insulation power factor values are expected to increase and insulation resistance values are expected to decrease when compared to test values with mineral oil insulation system.
- If a natural ester fluid is included in this quotation, Purchaser shall be responsible for disposal of all totes/drums utilized for make-up and flush oil that is generated during course of project. Waukesha can arrange for disposal upon request at additional cost.

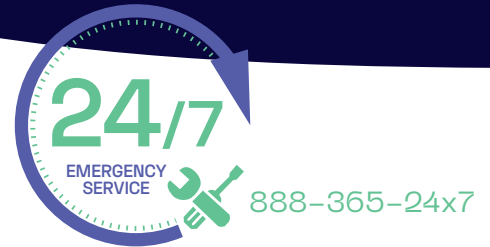
Should additional requirements, tests and/or processing procedures apply, please contact Waukesha® Service for pricing at 800.758.4384.

Goldsboro, NC 800.758.4384 | Waukesha, WI 800.835.2732 | www.waukeshatransformers.com

TC09-0122E

Transformer Service Solutions to 765kV

Available for ALL Manufacturers' Units



Waukesha's service team focuses on maintaining performance quality, reliability and life of transformers and load tap changers throughout your electric power system — whether manufactured by Prolec GE Waukesha or other suppliers. Our mission is simple: to keep your transformers up and running with responsive and cost-effective service and maintenance support 24/7/365.

TRANSFORMER INSTALLATION & LOGISTICS

- Heavy Hauling
- Rigging
- Assembly
- Oil Filling
- Acceptance Testing
- Relocation

TRANSFORMER TESTING SERVICES

- Insulation Resistance
- Power Factor
- Transformer Turns Ratio
- Winding Resistance
- CT Testing
- Leakage Reactance
- Winding Excitation & Alarm Checks
- Gauge Calibration
- Sweep Frequency Response Analysis
- Dissolved Gas Analysis & General Chemistry
- Materials Analysis

TRANSFORMER MAINTENANCE

- Inspections
- Component Addition & Replacement
- Regasketing
- Leak Repairs
- Life Extension
- Oil Preservation System Upgrades
- Control Upgrades
- Retrofits
- Removal, Sourcing and Installation of Conservator Aircells, Regardless of OEM

TRANSFORMER OIL PROCESSING

- Field Dry Out
- Vacuum Filling
- Hot Oil Processing
- Cryogenic Drying (Cold Traps)
- Fullers Earth Reclamation
- Natural Ester Retrofills

SPARE PARTS

- Bushings/Arresters
- Cooling Equipment
- Gauges/Controls
- Gaskets
- Transformer Health Products®
- LTC Parts

TRAINING SERVICES

- LTC Training
- Maintenance Training
- Testing Training
- Print Reading
- Oil Processing Training

LTC MAINTENANCE

- All Manufacturers
- Inspections
- Overhauls
- Upgrade Kits
- Filtration Installation
- Core Replacement
- Vacuum Retrofits

TECHNICAL SERVICES

- Condition Assessment Studies
- Life Assessment Studies
- Thermal Uprate Studies
- Component Retrofits
- Failure Analysis
- Feasibility Studies
- Technical Supervision



LOCATION

Prolec-GE Waukesha, Inc.
2701 US Hwy 117 South
Goldsboro, NC 27530
800-758-4384

waukeshaservice.com



Transformer Oil Specification

(as received from refiner)

Waukesha's standard is **inhibited mineral oil with 0.3% max DBPC (oxidation inhibitor)**. Oil meeting other specific customer requirements may be available upon request.

Oil is purchased only from approved domestic sources, and for each approved source, oil has been tested and proven to meet the following specification values:

KEY PROPERTIES	ASTM TEST METHOD	IEEE / ASTM D-3487 LIMITS
Physical Properties		
Color	D1500	0.5 max
Flash point, °C	D92	145 min
Interfacial tension @ 25°C (dynes/centimeter)	D971	40 min
Pour point, °C	D97	-40 max
Specific gravity @ 15°C/15°C	D1298	0.91 max
Viscosity, SSU/cSt @	D88 / D445	
100°C		36 / 3.0 max
40°C		60 / 11 max
0°C		350 / 76.0 max
Polychlorinated Biphenyls (PCBs) ppm	D-4059	Not Detectable
Visual appearance	D1524	Clear and Bright
Chemical Properties		
Aniline point, °C	D611	63 min
Approved antioxidant content, wt %	D2668, D1473	0.30 max
Corrosive sulfur ¹ Test to be run for 48 hours @ 150°C	D1275	Non-Corrosive
Moisture, ppm	D1533	35 max*
Neutralization number, mg KOH/g of oil	D974	0.03 max
Oxidation stability Method A (acid / sludge test)	D2440	
72 hours sludge, wt %		0.10 max
Neutralization value, mg KOH/g		0.30 max
164 hours sludge, wt %		0.20 max
Neutralization value, mg KOH/g		0.40 max

*35 ppm max as received from refiner; Waukesha dehumidifies to lower value for installation in transformer.

Continued on next page...

KEY PROPERTIES	ASTM TEST METHOD	IEEE / ASTM D-3487 LIMITS
Electrical Properties		
Dielectric breakdown voltage at 60 hertz Disc electrodes, kV VDE electrodes, kV @ 0.040-in. gap or @ 0.080-in. gap	D877 D1816* D1816*	30 min 28 min 56 min
Dielectric breakdown voltage 25°C impulse conditions, kV Needle (negative)-to-sphere (grounded) @ 1-in gap	D3300	145 min
Power factor at 60 hertz, % at: 25°C 100°C	D924 D924	0.05 max 0.30 max
Gassing Tendency @ 80°C (µL/min)	D-2300 B	+ 30 max

*D1816 only applies to new oil that has been filtered, dehumidified and degasified.

Oil shall be PCB-free to existing current law. Properties as listed are only attainable on new oil as received from the refinery. It is expected that oil contained in equipment as received from the manufacturer when properly sampled from such equipment usually exhibits characteristics slightly different from those obtained from new oil, which has not been in contact with apparatus constructional materials. In such cases, the oil, as drawn from the transformer, should be evaluated per IEEE C57.106 latest revision for acceptance and maintenance of insulating oil in equipment.

IN-PLANT QUALITY CONTROL

In addition to extensive testing by an independent testing laboratory to determine approved sources of supply, Waukesha performs acceptance tests on each shipment of oil received.

Waukesha receives oil at its plants in dedicated tank cars and trucks. Upon arrival, acceptance testing is performed before the oil is unloaded into a Waukesha storage tank. Prior to filling a transformer, oil is degasified and dehumidified, passed through Fullers Earth and re-filtered at various points in the process.

Transformer Paint Systems

Waukesha provides as standard a coating system that exceeds the requirements of IEEE C57.12.29, “Enclosure Integrity—Above-Ground Pad-Mounted Enclosures” specification (the specification for pad-mounted equipment). The coating system consists of an epoxy primer with a polyurethane topcoat. This process has been both lab tested and field evaluated.

Coating system processes used for the transformer are as follows:

SUBSTRATE

Hot rolled low alloy steel.

SURFACE PREPARATION

The performance of a coating system is highly dependent upon the condition of the surface to which the coating is applied. All sharp edges, scale, weld spatter and surface irregularities shall be removed by shot blasting, hand grinding, sanding or other appropriate manufacturing procedures.

Shot blasted per SSPC-SP6 (Commercial Blast Cleaning) then detergent washed with an iron phosphate conversion coating and a non-chrome seal.

-or-

Blast to SSPC-SP10 (near white) condition and apply paint within 24 hours.

COATING PROCEDURE

Interior of tank and tank cover are coated using a white, two-part, oil-resistant epoxy enamel. The exterior surfaces are first painted using a two-part epoxy primer then top coated using a two-part urethane enamel. All coating materials are applied using plural component equipment that automatically measures and mixes the paint systems to eliminate operator error. The coatings are then force cured to produce a uniform cured coating.

COATING RESULT

Interior coating compatible with transformer oil per ASTM 3455; 3 mil exterior coating capable of meeting IEEE C57.12.29.

The two-component coatings used for painted surfaces have a high crosslink density and an exceptional barrier property characteristic. Two-component systems develop full corrosion resistance at a 2 mil total film thickness (primer and topcoat); in fact, the mechanical properties of any organic coating will deteriorate as the thickness approaches 5 mils. For these reasons, the Waukesha paint system exhibits optimal performance at a nominal 3 mil thickness (range 3–5 mils).

NOTE: Radiators are purchased from an outside supplier and are hot dip galvanized or painted to meet the customer's specification.

See next page for paint system test results.



EXTERIOR PAINT SYSTEM PERFORMANCE

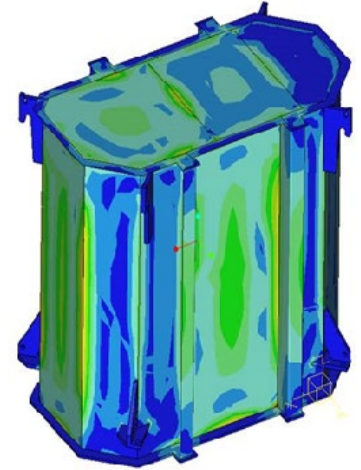
TEST	ASTM TEST METHOD	RESULTS
Adhesion	D-3359-B	No Removal
Salt Spray	B-117	1500 Hrs, 1/32" Loss of Adhesion
Humidity	D2247	1000 Hrs @ 40°C; No Blisters
Impact	D-2794	160 in/lbs., No Chipping
U-V Resistance	G-53	500 Hrs, Less than 15% Gloss Change
Taber Abrasion	D-4060	More than 3,000 Cycles @ 3 Mils
Oil Resistance	72 Hrs @ 100°C	No Effect
Thermal Aging	1,000 Hrs @ 120°C	No Effect
Pencil Hardness	D-3363	2-H After 2 Weeks
VOCs	D-2369	3.5 #/gal.

Transformer Tank Design and Construction

Tank integrity is essential for reliability and long transformer life. To help ensure a perfect fit to the application, Waukesha designs all transformer tanks to high internal standards while taking customer specifications into account.

All Waukesha® transformer tanks feature the following:

- Hot-rolled, low carbon steel plates plasma cut to critical tolerances then joined via submerged arc welding to ensure against cracked seams and irregularities
- Formed tank corners which eliminates high stress corner welds
- Jack pads and lifting hooks for lifting, jacking or pulling, meeting the criteria of C57.12.10
- Guides used to solidly "fit" and brace the completed core and coil assembly inside the tank to prevent shifting during shipment
- Slightly domed covers to help prevent water accumulation
- Raised flanges with machined gasket grooves in cover openings
- Conveniently located hand holes and/or manholes for easy access to the lower end of bushings, terminal boards and upper portion of core and coil assembly



Finite Element Analysis

Additionally, Waukesha's standard coating system exceeds the requirements of ANSI/IEEE C57.12.28, the specification for pad-mounted equipment.

TANK DESIGN STYLES

Waukesha uses several tank design styles to optimize the use of tank steel, transformer oil and lead time. All are designed to withstand full vacuum and pressures 25% greater than achieved during normal operation. The tank design shown on the preliminary bid outline is an initial estimate and *subject to change based on the optimum design criteria*. The best tank design is chosen based on unit specifications, including overall dimensions, equipment location, cooling requirements and shipping profile.

Octagonal Tank Design

Octagonal end walls are used when possible to optimize total oil volume and installed transformer weight, resulting in lower overall footprint.



Rectangular Tank Design

Horizontal stiffener designs can be used where full length walls are necessary for mounting various accessories. This configuration can also be used for air expansion on N2 and sealed tank designs to reduce tank height for improved shipping clearances.



Vertical Stiffener Design

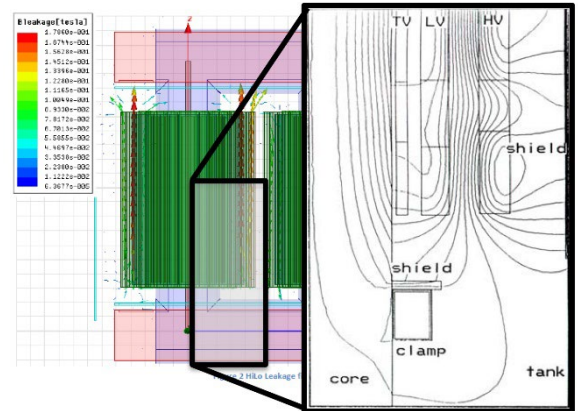
Vertical stiffeners are used on larger units when necessary to reduce shipping profile width by using multiple vertical stiffeners. This design is also used on some longer units to produce an optimum tank design with minimal tank wall deflection.



Short Circuit Testing

DESIGN

All Waukesha® transformers are designed with state-of-the-art tools and manufactured in our factories per strict quality assurance plans to ensure survival through even the worst-case faults. To start, worst-case fault currents are determined assuming infinite bus supply (zero system impedance) for single line to ground as well as three phase faults at the transformer terminals. Using this fault current, all designs are analyzed with detailed stress calculations for worst case combinations of tap positions (LTC and DETC) for all known failure modes. These stresses are then compared to known strengths for each of the failure modes and must have acceptable design margins as set by Waukesha.



MANUFACTURING

All windings are manufactured with rectangular, electrolytic-grade copper conductor or epoxy-bonded, continuously transposed cable (CTC). Radial spacers are locked to strips fastened to the winding cylinders. These radial spacers and other support blocks in the pressure column are manufactured from high density, pre-compressed pressboard or laminated wood. Other specialized components—angle/cap rings, coil collars and static ring insulation—are manufactured from molded grade, soft pressboard as required.



Fully Distributed Regulating Voltage Winding

After the windings are completed, they are thoroughly dried using hot air. After removal from the dryout chamber, coils are hydraulically pressed successively using a predetermined force then pressed again using the clamping force they will experience when fully assembled. When required, radial spacers are adjusted to achieve the required design height, maintaining the design's "electrical center" of the windings for ampere-turn balance, stray flux and axial force mitigation.

The coils are clamped in place by first applying a precise, hydraulic force which compresses the windings to the design height as verified in the coil sizing operation (as described in the paragraph above). In this condition, the coils are fastened in place to maintain a compressive force as specified by Waukesha engineering. Verifying exact clamping pressure and winding height in this manner helps guarantee a finished product that conforms to what was designed in engineering.

The entire clamping technique and underlying scientific principles on which it is based are major contributors to the outstanding Waukesha service record.

See next page for a list of transformers tested for short-circuit at high power laboratories.

WAUKESHA SHORT CIRCUIT TEST LIST:

MVA RATING	HV RATING	LV RATING
0.833	67 kV Delta	12.47 kV Wye
5 / 6.25	24.4 kV Delta	4.16 kV Wye
5 / 6.25	26.4 kV Delta	4.16 kV Wye
5 / 6.25	59.58 kV Wye	10.66 kV Wye
5 / 6.25	67 kV Delta	12.47 kV Wye
7.5 / 9.375	69 kV Delta	12.47 kV Wye
7.5 / 9.375	138 x 69 kV Delta	26.4 X 13.2 kV Wye
12 / 16 / 20	66 kV Delta	14.4 kV Wye
15 / 20	67 kV Delta	12.47 kV Wye
15 / 20 / 25	69 kV Delta	12.47 kV Wye
1.0	12.47 kV Delta	4.8 kV Wye
3.75	23 kV Delta	4.8 kV Wye
5.0	34.4 kV Delta	12.47 kV Delta
5.0	69 kV Delta	12.47 kV Delta
7.5	23 kV Delta	12.47 kV Wye
7.5	115 kV Delta	13.2 kV Wye
10.0	43.8 kV Delta	24.9 X 12.47 kV Wye
5 / 6.2	34.5 kV Delta	12.47 kV Wye
15 / 20	67 kV Delta	12.5 kV Wye
15 / 20	67 kV Delta	12.5 kV Wye
15 / 20 / 25	120 kV Delta	13.2 kV Wye
15 / 20 / 25	120 kV Delta	13.2 kV Wye
18	39.5 kV Delta	4.8 kV Delta
30	230 kV Delta	55.2 kV Delta



Helical Winding with CTC

Continuous
Disk
Winding
with
Copper
Magnet
Wire



Waukesha® UZD®

The Service-Proven Load Tap Changer!

With more than 7,000 units installed, Waukesha's UZD load tap changers boast an excellent field performance record. Design improvements made in the 1990s reduced the already low failure rate to one of the lowest in our industry, reduced maintenance costs and increased maintenance intervals. When compared to the cost of downtime, out-of-service operation and costly repairs, the UZD LTC system is a cost-effective way to keep your transformer operating as smoothly as the day it was installed!

A load tap changer, regardless of manufacturer, is a complex engineered device with numerous moving parts requiring precise engineering, correct material selection and controlled manufacturing to operate reliably for a long period of time.

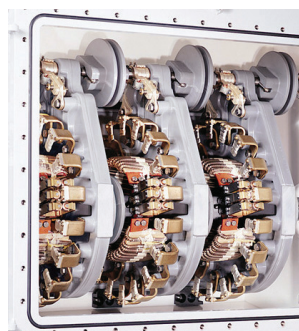
In many cases, the true reliability of a load tap changer becomes evident only when a transformer has been in service for several years and the load tap changer accumulates 100,000 plus mechanical operations.

Since the UZD's initial introduction in 1970, it has accumulated in excess of 110,000 YEARS of operational service and an estimated 550 MILLION switching operations. Ongoing continuous improvement programs, in coordination with our customers, resulted in several design enhancements that help increase overall operational life as well as virtually eliminate the need to perform maintenance inside the oil.

KEY ADVANTAGES OF THE WAUKESHA® UZD® LOAD TAP CHANGER

Re-Engineered Reversing Switch and Current Collector ("Bow-tie") System

Since the re-engineered reversing switch and current collector system were introduced in 1997, no known failures due to coking have occurred.



Silver-Plated Copper Contacts with Tungsten Copper Inserts
Stationary contacts for long life and low temperature rise.

Resistive Bridging

High-speed operation results in extremely low contact wear and manageable levels of arcing by-products. For optimal results, we recommend applying an oil filtration system.

LTC and Series Transformer System

For applications with greater than 600 ampere current ratings, a series transformer is recommended to allow for an optimal volts/turn design of the main transformer windings, even step regulation and smaller leads, while facilitating a reduction in current through the LTC contacts for less contact wear and longer life; a power-class series transformer design is recommended for high reliability.

Spring Drive Mechanism

Stored energy system delivers split-second operation for minimum arcing time. In addition, each tap change is uniform and unaffected by possible auxiliary voltage fluctuations.

OTHER NOTABLE FEATURES OF THE WAUKESHA® UZD® LTC

Single Set of Spare Contact Parts

Due to the design flexibility of the series transformer, we utilize a single model LTC across a wide range of transformer voltage and power ratings.

Easy to Maintain with Few Moving Parts

A single collector arm incorporates both the arcing contacts and tap selector contacts which reduces linkages, wear points and potential maintenance.

RECOMMENDED ACCESSORIES

Clean, dry oil increases dielectric strength, thereby reducing arcing time. The accessories below help keep carbon particles, metal particles and moisture out of tap changer oil:

OF2 Oil Filtration System

Designed to remove carbon and metallic particles produced during normal LTC operation. The system includes an adjustable timer for customized configuration and a 1/2 HP, fully enclosed, continuous run rated, auto-thermal resetting motor.



Another feature of the OF2 is a tilt-out, tool-free filter replacement system which allows the filter cartridge to be changed without disconnecting oil lines or reversing the pump—dirty oil stays in the filter while LTC compartment oil stays clean. Additionally, our OF2 ships standard with a unique, high-efficiency, depth-type filter that offers long element life and provides the capability to filter more efficiently than pleated-type models. The system is also adaptable to a variety of industry standard filters. Other features include low flow and high pressure alarms, anti-condensation cabinet heater and remote system shut down relay.

Single and Dual Column Breathers

An economical solution for LTCs, our single column breather efficiently dehydrates the air coming into your transformer then regenerates the desiccant while the transformer is not “inhaling,” keeping moisture out.

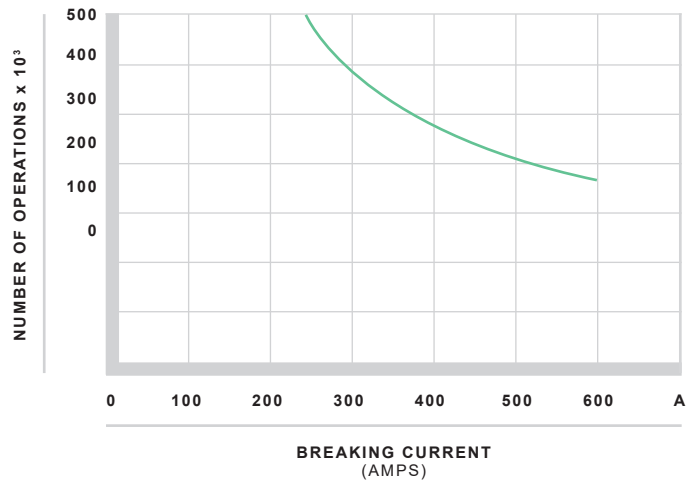
The dual column design provides a continuous stream of dry air to a transformer, regardless of the amount of moisture being absorbed. This feature allows customers to standardize on one breather to support every transformer on their system, maximizing spend and limiting the number of parts needed to manage inventory and/or new orders.



CONTACT LIFE

Predicted contact life of the selector switches' fixed and moving contacts is shown below. Since most transformers are not consistently operated at maximum nameplate rating, some tap changes will be made at lower currents. These lower currents allow for less contact erosion due to arcing, so contact life may be longer than what is illustrated on this curve.

PREDICTED CONTACT LIFE WITH BREAKING CURRENTS



WAUKESHA® UZD® LOAD TAP CHANGER SYSTEM DESIGNED FOR HIGH RELIABILITY AND LOW TOTAL OPERATING COST

- Economical LTC solution to total transformer cost
- Well accepted in the US market
- Now available for sale to transformer manufacturers

Contact us for more information. To download a technical manual, field maintenance manual and/or technical paper, visit our website.

To continually improve its products and services, Prolec-GE Waukesha, Inc., reserves the right to change specifications and features without notice. Please contact us for certified dimensions and drawings.

transformers | service | training | components

© Prolec-GE Waukesha, Inc. | COMP-UZD-1204 (Rev. 04/22)

LOCATION

Prolec-GE Waukesha, Inc.
9011 Governors Row
Dallas, TX 75247
800-338-5526

waukeshacomponents.com



2ND GENERATION

Load Tap Changer Oil Filtration Systems

Reduce Oil-Related Maintenance Costs
and Improve Reliability

Second generation oil filtration systems are designed to be installed on most LTC models to remove carbon and metallic particles produced during normal LTC operation, keeping oil in peak condition with minimal maintenance.

For flexible operation, the system includes an adjustable timer which allows customers to configure the system to their specifications — daily, every other day, weekly or every other week in intervals of two, four, eight and 24 hours. Since filter replacement does not require pump reversal or any disconnection of oil lines, the dirty oil stays in the filter while system oil stays clean and in peak condition (a convenient filter canister drain valve is included).

2ND GENERATION OIL FILTRATION SYSTEM: OF2

Easier to Install and Maintain

Our standard OF2 system's design allows for easy installation and is equipped with a swing-out filter canister that makes filter replacements a quicker task.

Unique High-Efficiency Filter Design with Tilt-Out Easy Filter Change System

Our depth-type filter uses a flow path parallel with the center tube instead of the conventional outside-to-inside flow. This flow path forces oil through a greater depth of filter material for more efficient filtration. *See back side for more information on this unique filter design and photo to the right demonstrating easy filter change-out process.*



Minimum Turbulence in Reservoir

Pump maintains a flow rate of 1.0 GPM to minimize turbulence in the tank.

Filter Adapter Kit Available for Alternate Style Manufacturer Cartridges

More Economical

High efficiency filter reduces LTC mechanical wear which can minimize equipment failure and downtime. Economical purchase price combined with less frequent filter replacement can save you money.*

* Actual filter life varies depending on transformer loading and frequency of LTC operations and tap changer model.



CUSTOMIZE YOUR OWN SYSTEM

OF2 oil filtration systems have been designed to meet the filtration demands of higher oil volume load tap changers while providing customization flexibility to meet individual customer specifications. The system is adaptable to a variety of industry standard filters and always ships complete with the following:

- 1/2 HP, fully enclosed, continuous run rated, auto-thermal, resetting motor
- High performance depth filter
- 5+ gallon leak-catch sump with sump alarm
- Low flow alarm
- High pressure alarm
- Anti-condensation cabinet heater
- Tilt-out, tool-free filter change system
- Visual flow indicator which can be monitored without opening the cabinet
- 0-160 psi, oil-filled pressure gauge
- Customer selectable run-time and interval timer
- Run-time bypass switch
- Remote system shutdown relay
- Heavy duty circuit breaker on incoming power
- 120 VAC operation

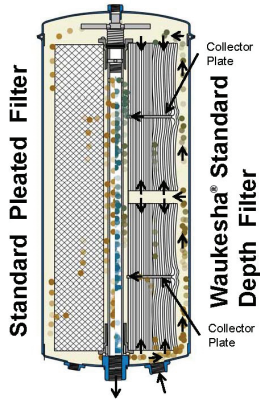
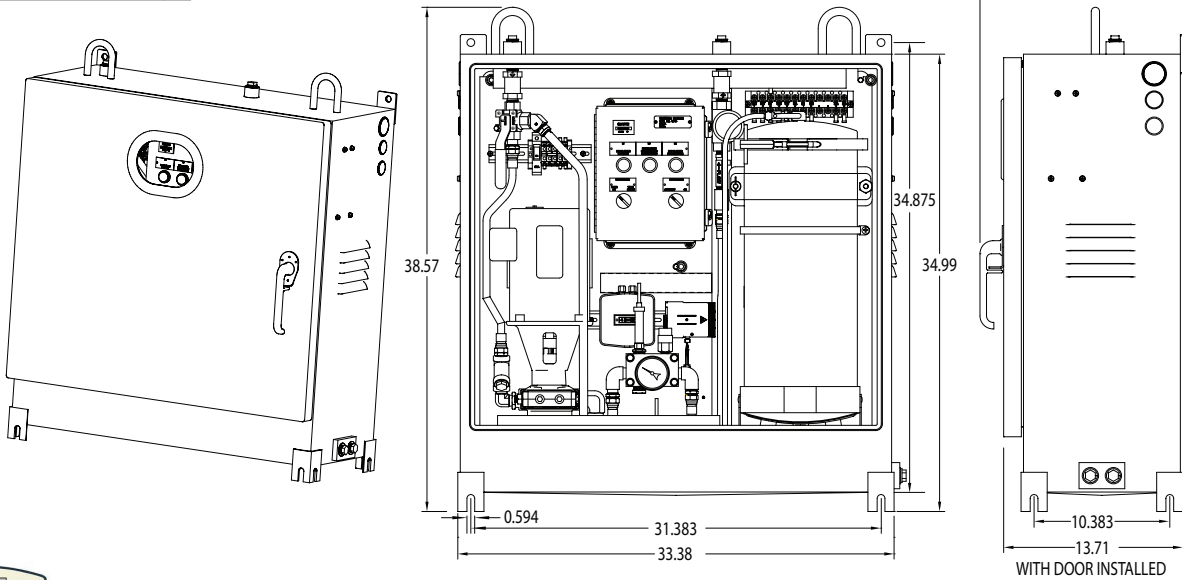
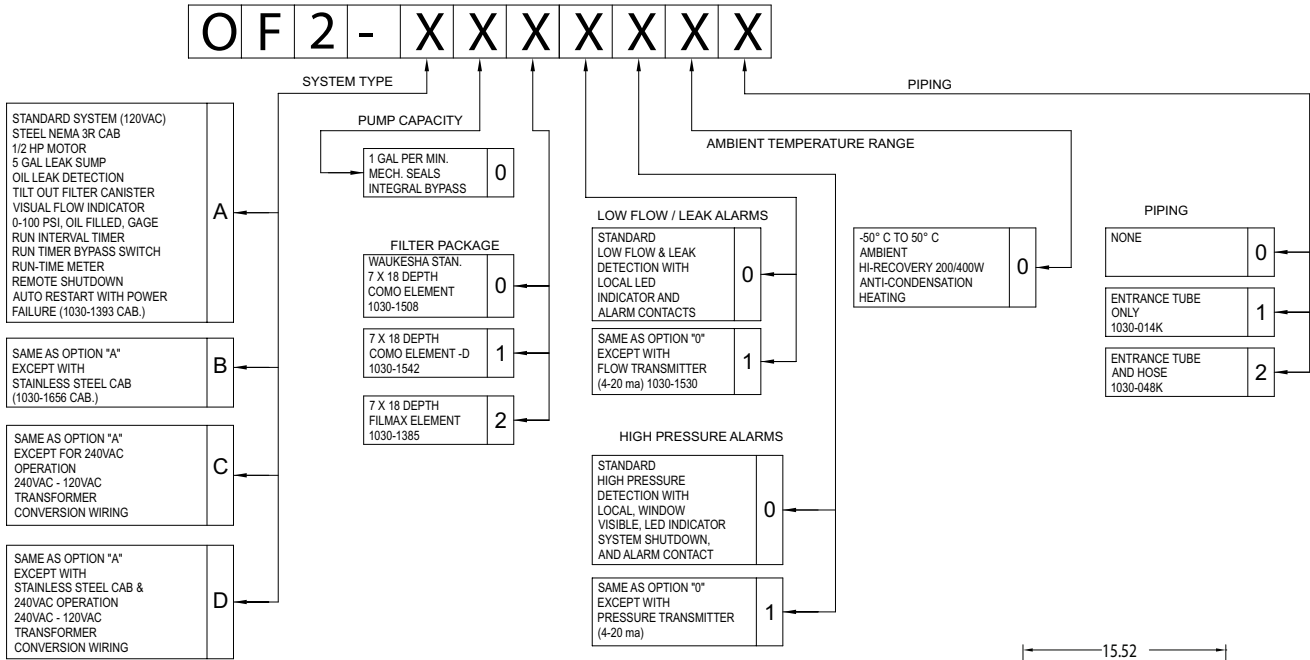
OPTIONAL FEATURES

- 240 VAC operation
- Alternate filter selection
- Additional 4-20 mA flow transmitter
- Additional 4-20 mA pressure transmitter
- Filter canister heater system
- LTC entrance tube with or without hose
- Stainless steel cabinet

Particle/Moisture removal performance is dependent on make/model of customer-specified oil filter cartridge.

With the appropriate filter installed, the OF2 system can remove dissolved water, extremely fine carbon and metallic particles to maintain peak performance of LTC oil, extend the life of your equipment and lengthen the period between maintenance intervals.

Build Your Own Part Number Using Configuration Below



WAUKESHA® STANDARD FILTER OFFERS LONG FILTER ELEMENT LIFE

Waukesha® Components depth-type filter element (in Standard OF2 System) features a unique fluid flow path: fluid runs parallel with the center tube (axial flow) rather than the conventional outside-to-inside flow (radial flow) of most pleated-type filters. The depth of fluid flow is optimized and provides the capability to filter more efficiently than pleated-type filters. Filter media is constructed as four rolls of filter paper. Oil flows between the layers of media until it reaches one of two collector plates. The collector plates route oil to the center of the element where it is discharged out of the element. The depth filter media has a much greater resistance to flow from outside to center (radial flow) than it does between the layers (axial flow) of filter material. Integrity of the filter element is maintained even as it accumulates contaminants and the Delta-p [pressure across the filter] goes up. Hydraulic pressure of the fluid compressing the layers of media together prevents a channel from forming that could allow oil to pass through the element unfiltered.

Removes Both Dirt and Moisture

- Filter material: Dried cellulose fiber
- Filter can decrease water to < 5 PPM
- Micron rating: 1.0; rated for particulates as well as free and emulsified water
- Beta X rating: 75 at 3 microns
- Total water holding capacity: 0.5 kg
- High rate of absorption enables oil to be reduced from 200 to less than 5 PPM in one pass

Contact us for more information. To download a technical manual, field maintenance manual and/or technical paper, visit our website.

To continually improve its products and services, Prolec-GE Waukesha, Inc., reserves the right to change specifications and features without notice. Please contact us for certified dimensions and drawings.

LOCATION
Prolec-GE Waukesha, Inc.
9011 Governors Row
Dallas, TX 75247
800-338-5526

waukeshacomponents.com

transformers | service | training | components



1410722046 Addendum 3 Supply of One (1) –138kV / 27 kV Grounded Wye Transformer (BIDDER SHALL FILL IN YELLOW CELLS)

Bidder Name		Prolec GE Waukesha, Inc		Manufacturer Name		Prolec GE Waukesha, Inc				
#	Item	Description	Unit Price (Base Price)	Guaranteed No-Load Losses		Guaranteed Load Losses		Guaranteed Auxiliary Losses		Calculated Unit Price
				kW	Amount	kW	Amount	kW	Amount	
1	50 MVA	138kV / 27 kV Grounded Wye Transformer	\$ 1,355,045.00	20	\$5,000	99.5	\$1,000	9	\$500	\$1,559,045.00
#	Item	Description	Lead Time evaluation # / Month	Low Lead Time (L) (in weeks)	Average Lead Time (Months) = ((L+H)/2)4.33	High Lead Time (H) (in weeks)	Need by Date 9/2/2024, No Later Than 12/2/2024			
2	LEAD TIME	Supplier will add Lead time in Weeks, which will be converted into months. For evaluation purposes, for a company that has a lead time over 23 months, the lead time will be evaluated starting at an initial \$30,000.00 penalty in price evaluation and then incrementally at \$30,000.00 / month (prorata) and will be included in the Total Evaluated Bid Price.	(\$30,000.00)	156	36.5	160	\$434,688.22			
Total Evaluated Bid Price (Enter this Price on the Response form. This will be the price used to evaluate responses for the purposes of Ranking. The highest evaluated Respondent will be the first to be negotiated with. This does not guarantee an Award, which is subject to successful negotiation of terms and conditions and approval of the JEA awards committee and lawfully appropriated funds.									\$1,993,733.22	

MATERIALS AND SERVICE OPTIONS PRICING (BIDDER SHALL FILL IN YELLOW CELLS)

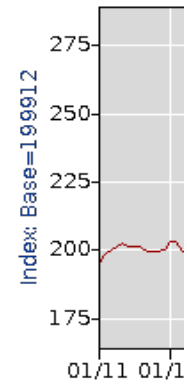
#	Material / Service Option	Description of Work	Unit Price	Qty
1	Field Service Technician	3 days of service during time period Monday - Friday, including travel and per diem.	\$ 7,325.00	1 Lot
2	Additional Optional Training	5 days of training, including travel, per diem	\$ 10,255.00	1 Lot
3	In and Out Costs	Move in and out of Storage		1 Lot
4	Storage Costs	If Delivery delayed > 30 days from Ready to Ship. Delivery delays < 30 days shall be absorbed by the Company		Per Month
5	Critical Spare Parts			
6	Critical Spare Parts			
7	Critical Spare Parts			

The following table will be used to calculate price adjustment based on the price adjustment for the unit price of the transformer listed in this Bid Workbook. Payment Milestones for uninvoiced progress payments will be included in the price adjustment.

Component	Index	Weight in %	Description
Electrical Steel (Core Steel)	PCU3353113353111	10%	There is no US BLS Index for electrical grade steel. Use an alternate index transformer specialty manufacturer's index - PCU3353113353111. The six month historical average of the index, for the date to be used shall be used to develop the Base Index and the Index number at the price adjustment date.
Carbon Steel	WPU101703	8%	This commodity category PPI Commodity data for Metals and metal products- Hot rolled steel sheet and strip, including tin mill products, not seasonally adjusted. The six month historical average of the index, for the date to be used shall be used to develop the Base Index and the Index number at the price adjustment date.
Copper	WPU10220131	12%	This commodity category PPI Commodity data for Metals and metal products- Copper cathode and refined copper, not seasonally adjusted. The six month historical average of the index, for the date to be used shall be used to develop the Base Index and the Index number at the price adjustment date.
Oil	WPU05610102	2%	This commodity category PPI Commodity data for Metals and metal products- Hot rolled steel sheet and strip, including tin mill products, not seasonally adjusted. The six month historical average of the index, for the date to be used shall be used to develop the Base Index and the Index number at the price adjustment date.
All Other	N/A	68%	Fixed Cost.
Price with Price Adjustment			

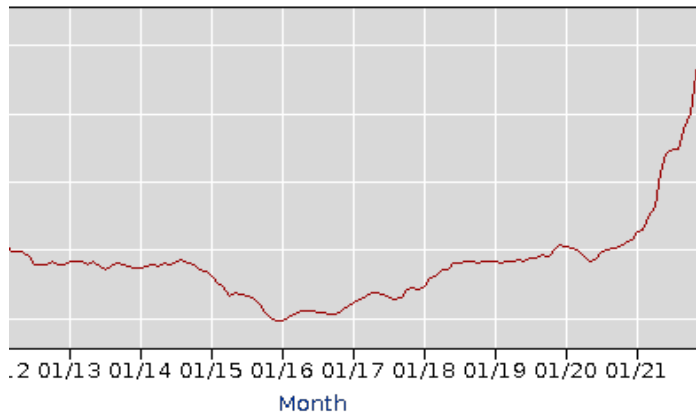
Index Developed on Bid Due Date (Base Date)	Unit Price, Base Date in Bid Due Date	Index at design Approval (Adjustment Date)	Adjustment Factor	Amount of Adjustment	New Totals
5/24/2022	\$ 1,355,045.00	10/24/2022	As Percentage of Increase	Dollar Amount of Adjustment	For Weighted Material
0	\$ 135,504.50	0	#DIV/0!	#DIV/0!	#DIV/0!
0	\$ 108,403.60	0	#DIV/0!	#DIV/0!	#DIV/0!
0	\$ 162,605.40	0	#DIV/0!	#DIV/0!	#DIV/0!
0	\$ 27,100.90	0	#DIV/0!	#DIV/0!	#DIV/0!
1	\$ 921,430.60	1	0	0	\$ 921,430.60
	\$ 1,355,045.00			#DIV/0!	#DIV/0!

Series Id: PCU3353113353111
 Series Title: PPI industry data for Electric power and specialty transformer mfg-Power and di
 Industry: Electric power and specialty transformer mfg
 Product: Power and distribution transformers, except parts
 Base Date: 199912
 Years: 2011 to 2021



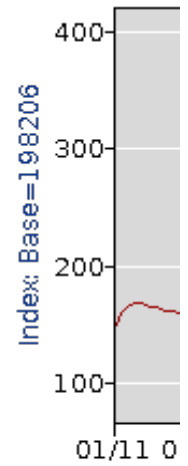
Year	Jan	Feb	Mar	Apr	May	Jun	Jul
2011	195.5	198.4	199.9	201.6	202.7	201.6	201.3
2012	203	203	199.5	199.8	199.3	197.9	194.7
2013	195.8	195.7	196	194.4	195.7	193.9	192.8
2014	193.7	194.1	194.8	194.3	195	194.9	196
2015	190.3	188	186.9	183.4	184.2	183.6	183.2
2016	174.4	175.1	176.5	177.6	177.5	177.5	177.3
2017	181	181.8	182.8	184.1	184.5	183.5	182.8
2018	186.6	189.8	190.2	192.6	192.6	195	195
2019	195.6	195.4	195.9	195.6	196.4	196	197.1
2020	201.5	201	199.9	197.5	195.8	196.4	199.3
2021	206.6	207.5	212	216	228.6	235.5	236.755

istribution transformers, except parts, not seasonally adjusted



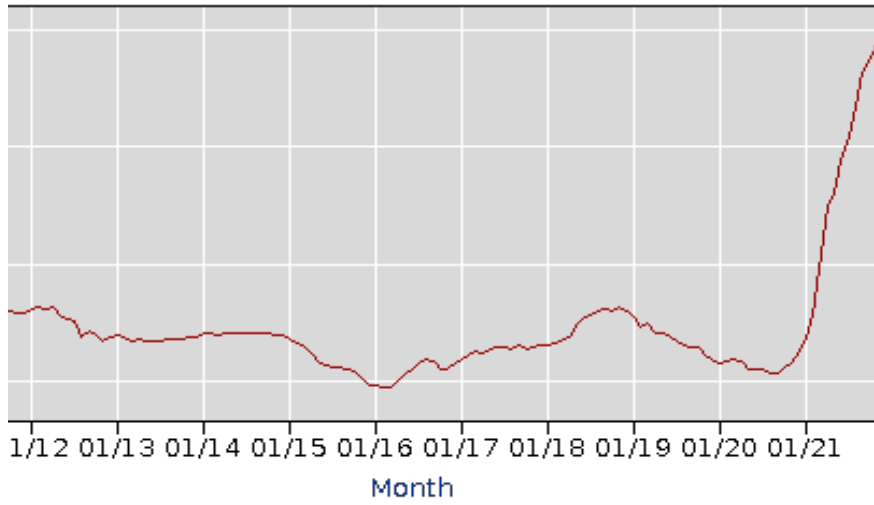
Aug	Sep	Oct	Nov	Dec	Annual
201.6	199.5	199.6	199.6	200.2	200.1
194.8	194.9	196	194.9	194.4	197.7
194.3	195.2	194.5	194.1	193.3	194.7
196.3	195.4	194.6	193.1	192.4	194.6
182.3	180.2	177	175.3	174.4	182.4
176.9	176.6	176.8	177.5	179.3	176.9
182.2	182.4	185.7	186.3	185.6	183.6
196.1	195.7	195.5	196	196.1	193.4
197.3	198.1	198	200	202.2	197.3
200.1	200.6	201.4	202.7	203.5	200
236.979	244.291	250.183	264.34	278.448	

Series Id: WPU101703
 Not Seasonally Adjusted
 Series Title: PPI Commodity data for Metals and metal products-Hot rolled steel sheet and st
 Group: Metals and metal products
 Item: Hot rolled steel sheet and strip, including tin mill products
 Base Date: 198206
 Years: 2011 to 2021



Year	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug
2011	145.4	160	165.8	169.1	168.1	164.7	164.6	162.3
2012	161	162.4	162.1	162.7	156.6	152.9	151.1	138
2013	140	137.5	134.4	135.7	134.4	134.4	134.7	135.4
2014	140.1	140.4	139.8	140.1	140.9	141.1	140.7	141
2015	135.5	131.8	131	123.2	116.3	112.9	111.4	111.2
2016	95.7	95.4	95.4	99.5	104.6	110.6	115.2	118.8
2017	119.3	122.6	126.1	124.2	128	128.4	128.7	127.7
2018	131.3	132.7	134.4	136.9	146.9	152.3	156.2	160.5
2019	154.2	146.8	149	140.3	141.6	138.4	134.3	129.9
2020	115.5	117.6	117.8	117.2	109.7	110.6	109.4	107.4
2021	137.1	156.2	195.6	249.1	260.9	289	309.363	334.985

rip, including tin mill products, not seasonally adjusted



Sep	Oct	Nov	Dec	Annual
161.4	160.6	158.7	158	161.6
143	138.7	133.5	137	149.9
135.7	135.6	137.3	138.1	136.1
140.6	140.4	139.6	138.6	140.3
110.5	107.5	103	96.7	115.9
116.1	110.2	110.2	114.5	107.2
131.1	127.4	128.3	131.1	126.9
161.9	159.1	163.5	159	149.6
128.8	128.1	122.3	117.9	136
107.3	112.2	115.3	125.1	113.8
364.056	376.768	390.512	385.482	

Series Id: **WPU10220131**

Not Seasonally Adjusted

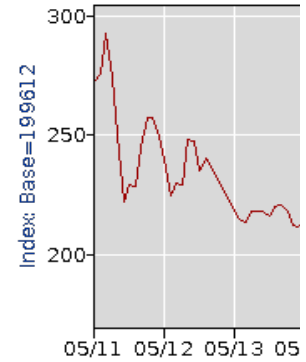
Series Title: PPI Commodity data for Metals and metal products-Copper cathode and refined

Group: Metals and metal products

Item: Copper cathode and refined copper

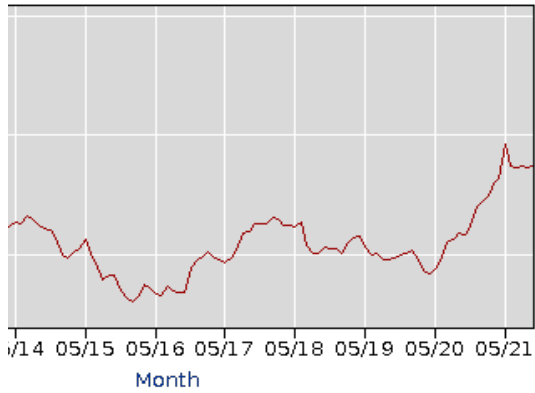
Base Date: 199612

Years: 2011 to 2021



Year	Jan	Feb	Mar	Apr	May	Jun	Jul
2011					272.3	275.4	293
2012	245.2	257.5	257.5	249.3	239.7	224.7	229.7
2013					218.5	215.3	213.8
2014	220.6	218.4	212.2	211.7	214	212.8	216.4
2015	199.7	198.4	201.4	202.7	206.8	200.7	194.8
2016	180.7	182.6	187.7	186	183.7	183.1	186.7
2017	199	201.2	199.6	197.7	196.7	198.4	202.2
2018	215.8	215.1	212.1	212.5	212	213.5	204.2
2019	200.5	205	207.4	208	203	200	200.4
2020	201.8	198.2	193.6	192.2	194	199.5	205
2021	222.1	225	230.3	231.7	246.5	237.4	236.718

copper, not seasonally adjusted



Aug	Sep	Oct	Nov	Dec	Annual
274.4	250.1	222.2	229.3	228.8	
229.4	248	247.4	235.5	240.6	242
218.4	218.2	218.3	216.3	219.9	
214.7	212.7	211	210.4	207.1	213.5
189.5	191.5	191.4	185.1	182.5	195.4
184.9	184.5	184.6	194.6	197.4	186.4
209	209.9	213.1	213.2	213	204.4
200.7	200.9	203	202.8	202.4	207.9
197.8	198.3	198.9	199.9	200.7	201.7
206.7	208.8	208.6	212.7	220	203.4
237.062	236.415	237.965			

Series Id: WPU05610102

Not Seasonally Adjusted

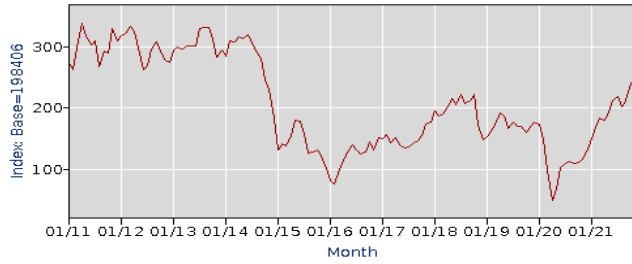
Series Title: PPI Commodity data for Fuels and related products and power-Crude petroleum (domestic production), not seasonally adjusted

Group: Fuels and related products and power

Item: Crude petroleum (domestic production)

Base Date: 198406

Year	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug
2011	274.3	263	309	338.7	316	302.5	309.5	267.1
2012	317.7	321.7	332.7	324.4	297.3	262.9	269.6	295.4
2013	294.1	299.5	295.8	301.2	301.5	301.2	330	331.2
2014	284.4	309.7	307.6	315.7	312.3	318.7	305.4	293.2
2015	130.8	141.9	138.9	155.7	180.1	179.3	156.2	125.7
2016	81.8	75.7	99.7	114.7	128.8	139.9	131.3	125.6
2017	150.7	156.1	142.6	152.1	140.4	134.8	135.8	142.2
2018	195	187.3	189.4	201.8	215.8	205.3	222.2	206.2
2019	154.1	164	173	192.4	186.2	167.1	176.7	170.9
2020	172.9	148.2	97.8	50.1	68.1	102.7	108.9	113.7
2021	150.6	169.2	184.2	180.3	192.8	211.3	218.094	202.321



Sep	Oct	Nov	Dec	Annual
292.8	288.8	329.6	308.8	300
307.5	292.3	279.5	274.9	298
332	311.3	283.3	294.2	306.3
280.2	245.8	230.5	183.9	282.3
128.1	132.3	121.7	101.6	141
128.2	144.7	131.9	151.1	121.1
146.9	155.1	173.2	177.3	150.6
212.6	222.3	171.5	148.9	198.2
170.1	159.2	169.8	177.3	171.7
110.1	112	116.3	133.5	111.2
211.427P	240.857P	245.32P	205.209P	



Formal Bid and Award System

Award #3 August 4, 2022

Type of Award Request: INVITATION TO NEGOTIATE (ITN)
Request #: 378
Requestor Name: Datz, Stephen H. - VP IT Infrastructure and Operations
Requestor Phone: (904) 665-8872
Project Title: Managed Security Service Provider (MSSP)
Project Number: (B0000 FY'22) (B0010 FY'23)
Project Location: JEA
Funds: O&M
Budget Estimate: \$500,000.00

Scope of Work:

The purpose of this Invitation to Negotiate (the "ITN") is to solicit competitive proposals for JEA's Department of Information Security for the purpose of engaging a partnership with a professional Managed Security Service Provider (MSSP) to deliver 24/7/365 security operations center monitoring and other security services for JEA's information and information systems including a virtual Chief Information Security Officer (vCISO). The MSSP will need to deliver services consisting of but not limited to:

- Security Operations Center
- Threat Intelligence
- Threat Hunting
- Incident Response Support
- Reporting
- vCISO

JEA IFB/RFP/State/City/GSA#: 1410587046
Purchasing Agent: Dambrose, Nickolas C.
Is this a Ratification?: NO

RECOMMENDED AWARDEE(S):

Name	Contact Name	Email	Address	Phone	Amount
SECURELY MANAGED	Sajay Rai	sajayrai@securelymanaged.com	131 Guilford Road, Bloomfield Hills, MI 48304	216-288-4727	\$580,440.00

Amount for entire term of Contract/PO: \$580,440.00
Award Amount for remainder of this FY: \$53,870.00
Length of Contract/PO Term: Two (2) Years w/ Three (3) - 1 Yr. Renewals
Begin Date (mm/dd/yyyy): 08/15/2022
End Date (mm/dd/yyyy): 08/14/2024

Renewal Options:

Three (3) - 1 Yr. Renewals

JSEB Requirement:

N/A – Specialty service

Respondents:

Name	Original Amount	Original Score	Original Rank	BAFO Amount	BAFO Score	BAFO Rank	Disqualification
SECURELY MANAGED	\$186,000.00	86	1	\$580,440.00	109	1	No
RELIAQUEST	\$774,000.00	61	2	\$2,115,984.00	93	2	No
INFOSIGHT	\$886,395.00	46	3	N/A	N/A	N/A	No
CYBERFORCEQ	N/A	N/A	N/A	N/A	N/A	N/A	Yes

Background/Recommendations:

Advertised 02/28/2022. Three (3) Companies attended the optional pre-response meeting held on 03/09/2022. On 03/29/2022, JEA extended the Response Due Date to 04/12/2022 to accommodate as much as competition as possible. At Response opening on 04/12/2022, JEA received four (4) Responses. The Responses were evaluated on price, past performance / company experience, design approach and work plan. Minimum qualification past performance references were also verified. CyberforceQ was disqualified due to failure to provide qualifying references. JEA shortlisted two (2) Respondents, Securely Managed and Reliaquest, for vendor presentations and submission of best and final offers (BAFO)s. During the Best and Final Offer (BAFO) request, JEA decided to include virtual Chief Information Security Officers (vCISO) with its service offering which increased the pricing offered. Securely Managed is deemed the highest ranking responsible and responsive Respondent. Note, Securely Managed response was also reviewed and approved by JEA Information Security and JEA CIP compliance. A copy of the evaluation matrix summary is attached as back-up.

This award is for a Managed Security Service Provider (MSSP) to deliver 24/7/365 Security Operations Center (SOC) monitoring and other security services to complement JEA’s Information Security Team including a virtual Chief Information Security Officer (vCISO). The contract includes threat Intelligence, threat hunting, incident response support, and reporting. The awardee shall not install any hardware or software within JEA’s network without explicit approval from the Director of Information Security or designee. Any such hardware or software required to support services associated with this engagement must be explicitly mentioned before any contracts are signed. Provider resources supporting the MSSP will be able to meet the NERC CIP, AWIA, PCI DSS, HIPAA, FACTA, NACHA, and FIPA regulations. This is the first time JEA has bundled these services to include SOC expertise and advanced analysis 24/7/365 with vCISO. Since this is a new service, we are choosing to engage in a two-year commitment with three one -year renewal options to account for setup, tuning and process alignment that will ensure the technical services along with strategic services represented by the vCISO work well for JEA.

The support services rates were submitted as a fixed fee per month. The award amount also includes a one-time fee for setup as seen below. A copy of the BAFO Response Workbook is attached as backup.

Securely Managed					
Item Number	Item Name	Qty	UOM	Unit Price	Total Cost (((Unit Price)))*({Qty})
1	Setup Fees	1	One Time Flat Fee	\$ 6,000.00	\$ 6,000.00
2	Support Services	24	Flat Fee per Month	\$ 7,500.00	\$ 180,000.00
3	Total Bid Price				\$ 186,000.00
4	vCiso*	24	Flat Fee per Month	\$ 16,435.00	\$ 394,440.00
5	Total Bid Price (Optional)				\$ 580,440.00

The award amount is approximately \$80,000.00 higher than the budget estimate. The budget estimate was higher than the award request because these services have not been procured by JEA prior to this Solicitation.

1410587046– Request approval to award a contract to Securely Managed for Managed Security Service Provider (MSSP) in the amount of \$580,440.00, subject to the availability of lawfully appropriated funds.

VP: Datz, Stephen H. - VP IT Infrastructure and Operations

Chief: Krol, Bradley D. (Brad) - Chief Information Officer

APPROVALS:

Chairman, Awards Committee **Date**

Budget Representative **Date**

1410587046 ITN - Managed Security Service Provider (MSSP)
 Addendum 6 - Appendix B - Response Workbook (BAFO)

Securely Managed					
Item Number	Item Name	Qty	UOM	Unit Price	Total Cost (((Unit Price)))*({Qty})
1	Setup Fees	1	One Time Flat Fee	6000	\$ 6,000.00
2	Support Services	24	Flat Fee per Month	7500	\$ 180,000.00
3	Total Bid Price				\$ 186,000.00
4	vCiso*	24	Flat Fee per Month	16435	\$ 394,440.00
5	Total Bid Price (Optional)				\$ 580,440.00

**This item is informational and may be included in the Total Bid Price for evaluation at JEA's discretion.*

Type	S.No	Question	Weightage	Scorer	Scores		
					Reliaquest (pyounger@reliaquest.com)	INFOSIGHT, INC. (bids@infosightinc.com)	SECURELY MANAGED (sajayraj@securelymanaged.com)
					Weighted Scores	Weighted Scores	Weighted Scores
		Grand Total of Scores (BAFO)			93.4		109.0
Vciso		Supplier Rank (BAFO)			2		1
		Grand Total of Scores (BAFO)			93.4		109.0
Non-Vciso		Supplier Rank (BAFO)			2		1
		Grand Total of Scores (Round 1)			60.7	46	86
		Supplier Rank (Round 1)			2	3	1
	1	(40) Quotation of Rates	40		9.6	8.4	40
Vciso		(40) Quotation of Rates (BAFO) Vciso	40	Nick Dambrose	\$ 2,115,984.00 11.0		\$ 580,440.00 40
Non-Vciso		(40) Quotation of Rates (BAFO) Non-Vciso	40	Nick Dambrose	\$ 675,984.00 11.0		\$ 186,000.00 40
	2	Sum Qualifications - Past Performance/Company	20		16.33	12.67	14
	2.3	Reference 1			9	7.67	8
				Bill Kearson	8	8	7
				Robert Galvan	9	5	7
				Stephen Datz	10	10	10
	2.5	Reference 2			7.33	5	6
				Bill Kearson	8	6	6
				Robert Galvan	6	3	6
				Stephen Datz	8	6	6
	3	(40) Ability to Design an Approach and Workplan	40		34.8	24.93	32
	3.6	inquiry with a completed Appendix B - Managed Security Service Provider Questionnaire.			34.8	24.93	32
				Bill Kearson	34.4	30.4	34.4
				Robert Galvan	32	18	30
				Stephen Datz	38	26.4	31.6
	4	Vendor Presentation	40		31.3		23
				Bill Kearson	35		31
				Robert Galvan	29		15
				Stephen Datz	30		23



Formal Bid and Award System

Award #4 August 4, 2022

Type of Award Request: SINGLE SOURCE
Requestor Name: Edwards, Brandon L. - Dir Security & Emergency Preparedness
Requestor Phone: (904) 665-6584
Project Title: Interagency Special Investigations (JSO) Detective
Project Number: HE31000 with \$90K from HW30600
Project Location: JEA
Funds: O&M
Award Estimate: \$2,221,108.01

Scope of Work:

The scope and amount is the cost of providing one full-time Detective and one full-time office for the JEA lobby to JEA. JEA may request additional officer support for special events. A JSO vehicle will be provided to the JSO Detective at JEA’s cost. The Detective's responsibilities and tasks are assigned by JEA's Director of Security and Emergency Preparedness and include responding to, and investigation of crimes, perpetrated against JEA and its employees. Examples of the services provided include, but are not limited to:

- Investigation and coordination of prosecution of threats and assaults against employees in the course of their duties;
- Theft of equipment, material and/or services; destruction/vandalism of essential equipment;
- Environmental crimes, e.g. illegal dumping on JEA property; and
- Fraud committed by contractors or customers.

The Detective also provides liaison with other agencies and organizations, addressing the difficulties inherent in the coordination of investigations that can involve multiple law enforcement agencies and circuit court jurisdictions.

JEA IFB/RFP/State/City/GSA#: N/A
Purchasing Agent: Lovgren, Rodney Dennis
Is this a Ratification?: NO

RECOMMENDED AWARDEE(S):

Name	Address	Phone	Amount
OFFICE OF THE SHERIFF	501 E Bay St Jacksonville FL 32202	(904) 630-0500	\$2,221,108.01

Amount for entire term of Contract/PO: \$2,221,108.01
Award Amount for remainder of this FY: \$0.00
Length of Contract/PO Term: Five (5) Years
Begin Date (mm/dd/yyyy): 10/01/2022

End Date (mm/dd/yyyy): 09/30/2027
Renewal Options: No
JSEB Requirement: N/A – Single Source

BIDDER:

Name	Amount
OFFICE OF THE SHERIFF	\$2,221,108.01

Background/Recommendations:

This five (5) year award will replace the existing contract with JSO, which expires 09/30/2022. This award is a single source due to the City of Jacksonville / Duval County being the only sworn local law enforcement officers with county-wide jurisdiction. Accordingly, these officers are uniquely qualified to perform law enforcement-related functions in support of JEA's security program. Only the JSO can authorize and provide the services of these individuals, which will be documented with a Memorandum of Agreement (MOA) signed by both parties. Related needs in surrounding counties can be provided through the liaison with the JSO Detective assigned to JEA.

A draft MOA is attached to this award. JEA pays invoices submitted by JSO for hours worked and at rates based on the agreement between the City of Jacksonville and the Fraternal Order of Police. This COJ, FOP agreement expires September 30, 2024. Rates are paid on a pass through basis and are deemed reasonable.

JEA’s FY2023 budget is \$406,000.00. JEA has applied the 4.5% annual step increase from the COJ and FOP contract on an annual basis to the JEA’s project budget for the future years. The business will apply an annual increase to the future fiscal year budgets.

- FY23 - \$406,000.00
- FY24 – \$424,270.00
- FY25 – \$443,362.00
- FY26 – \$463,313.45
- FY27 - \$484,162.56

Request approval to award a five (5) year contract to Office of the Sheriff for an Interagency Special Investigations (JSO) Detective in the amount of \$2,221,108.01, subject to the availability of lawfully appropriated funds.

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

APPROVALS:

Chairman, Awards Committee **Date**

Budget Representative **Date**



Memorandum of Understanding

Between JSO and JEA



This Memorandum of Agreement is made and entered into this 1st day of October, 2022 by and between the Jacksonville Sheriff's Office ("the JSO") and ("JEA") is pursuant to the following referenced recitals:

1. JEA's employees, facilities and infrastructure provide and support the delivery of electric, water, wastewater and other life-sustaining services to the City of Jacksonville/Duval County. The services provided are critical to the citizens of the community, businesses and military operations within the City of Jacksonville / Duval County.
2. The reliability and continuity of these services is vital to the City of Jacksonville / Duval County's quality of life, economic viability and homeland security. The services provided by JEA requires the development and implementation of a security program designed to provide adequate and appropriate security to address threats, as well to ensure compliance with local, state and federal standards and regulations.
3. The geographic dispersion and variety of JEA's infrastructure, operations and properties results in a significant potential risk of criminal activity which could impact the ability to provide the services effectively.
4. The JSO has law enforcement authority throughout the City of Jacksonville/Duval County. Accordingly the officers of the JSO are uniquely qualified to perform law enforcement-related functions in support of JEA's security efforts.
5. The JSO is prepared to assist JEA in its efforts to protect its ability to provide services and to assist in the implementation of mandated security requirements.
6. Accordingly, the JSO and JEA desire to enter into this Memorandum of Agreement ("the Agreement") to memorialize their mutual understanding regarding the assignment of JSO personnel and equipment assigned at JEA.'

Therefore, in consideration of the mutual benefits accruing to the parties, the JSO and JEA agree as follows. The JSO and JEA will collectively be referred to as "the parties".

1. JSO Jurisdiction

It is understood by the parties that the JSO is lawfully empowered with law enforcement jurisdiction throughout Duval County, including the boundaries of all facilities and other properties owned/operated by JEA within Duval County.

2. Law Enforcement Presence

**MEMORANDUM OF AGREEMENT
JSO AND JEA**

The JSO and JEA recognize and agree that the assignment of a law enforcement officer at JEA will serve as a deterrent to criminal activity. The assignment of a law enforcement officer will aid in the proper investigation and appropriate prosecution of any criminal activity committed..

3. Assignment of Personnel

The JSO agrees that throughout the term of the Agreement, the JSO will provide one (1) sworn law enforcement officer (“ the Detective”) who will be assigned an office located at JEA’s corporate headquarters. JEA agrees to provide an office, a JEA computer, telephone, facsimile machine, and reasonable office supplies.

The JSO agrees that throughout the term of the Agreement, the JSO will provide one (1) JSO Officer to provide protection services in the lobby of the Downtown Customer Center and will also provide emergency support services. The additional JSO Officer will be charged to JEA in accordance with the City of Jacksonville’s overtime rate structure (average rate is \$45/hr).

JSO will provide upon request provide one (1) or more JSO officer(s) to provide assistance with the JEA 811 program approximately three (3) days per week. The pay rate is estimated at the JSO officer overtime rate of \$45.00 per hour. JEA is experiencing a reoccurring problem with contractors digging without proper locates and causing significant damage to JEA systems. This officer will ensure contractors have the proper locate tickets, respond to utility break and issue citations when applicable. The funds for these additional services will come out of the Water / Wastewater budget line item for law enforcement/traffic control.

4. Operational Assistance

While on duty at JEA, the Detective assigned to JEA by the JSO shall be provided full cooperation of all JEA employees and security personnel in the manner deemed necessary by the Detective. If called upon by the Detective, JEA’s employees and security personnel shall provide assistance in the investigation of offenses or suspicious activities or provide any other operational support requested by the Detective.

5. Selection and Assignment of Police Personnel

The Detective assigned to JEA by the JSO shall be selected in coordination with JEA’s Director of Security. The final selection, with regard to the assignment of the Detective, will be made by the JSO. The Detective’s work hours, as well as annual leave, in-service training and other time-off, will be coordinated with JEA’s Director of Security; however,

**MEMORANDUM OF AGREEMENT
JSO AND JEA**

the JSO shall have the exclusive authority to determine the officer assigned (Detective) and shift assignment for the Detective assigned to JEA.

6. Supervision and Control

The Detective assigned to JEA, pursuant to the Agreement, shall remain subject to the supervision and control of the JSO supervisory and command personnel at all times. JEA's Director of Security is responsible for development, implementation, and execution of JEA's security policies and operations, including the duties and responsibilities of the assigned Detective with regard to such policies and operations. The parties also agree that JEA security policies and procedures will be followed when the JEA policies and procedures do not conflict with JSO policies and procedures. In the event of a conflict, the Detective will follow JSO policies and procedures.

The parties agree that JEA shall be responsible for all aspects of the implementation of its security program and its compliance with applicable regulations. The JSO's responsibility is limited to the assignment of a Detective as set forth herein and the faithful performance of the law enforcement functions by that Detective.

7. Personnel Cost

JEA shall reimburse the JSO the cost of salary and benefits for the officer assigned to JEA pursuant to the Agreement. Although generally not expected, any overtime that may be required by JEA to provide relief while the Detective is on annual leave, holidays, in-service training, or other time off will be reimbursed by JEA. The cost of salary, overtime and benefits for the Detective shall not exceed the sum of Two Million, Two Hundred and twenty one thousand, one hundred eight and 01/100 Dollars (\$2,221,108.01) ("Maximum Indebtedness") for the term of the Agreement, except in the event of a concern to or occurrence at JEA of such magnitude that an amount of overtime in excess of that included in the Agreement is incurred. The salary of the Detective shall be adjusted annually in the same manner as is the salary of other JSO police officers and JEA shall assume the costs of such annual adjustments. In the event the amount indicated in this section is exceeded, the parties agree to amend the Agreement to reflect necessary adjustments.

8. Equipment Cost

Unless otherwise provided by JEA, the JSO agrees that throughout the term of the Agreement the JSO will assign to the Detective one (1) unmarked, four-wheel drive police vehicle capable of off-road travel ("JSO Vehicle"). All JSO vehicle related costs, including purchase and necessary maintenance, oil, fluids and tires for the JSO vehicle shall be provided by the JSO and invoiced to JEA by the JSO on a quarterly basis.

[payment]

**MEMORANDUM OF AGREEMENT
JSO AND JEA**

If JEA provides a vehicle to the Detective, the JEA vehicle would be operated within JSO's fleet policies for take home vehicles.

9. Payment

All sums to be paid the JSO by JEA, pursuant to the Agreement, shall be invoiced to JEA by the JSO on a quarterly basis. The JSO's invoices shall be hand-delivered or mailed to:

JEA Security Department, CC-6, 21 West Church Street Jacksonville, FL 32202

JEA shall remit its payment to the JSO within thirty (30) days of the receipt of each invoice.

10. Liability

Each party shall be responsible for its own acts including, its officials, employees, agents or representatives. Nothing herein, is intended to waive or alter either party's sovereign immunity as provided by law.

11. Independent Entities

The JSO and JEA are independent government entities and neither is an agent, employee, partner, joint venturer or representative of the other. Neither party has the authority to bind the other to any third party contract or to otherwise act in any way as the representative of the other party unless the JSO and JEA expressly agree, in writing, signed by the JSO and JEA.

12. Cancellation

This Agreement may be canceled by either party by providing advance written notice to the other party at least thirty (30) days prior to the date of cancellation.

13. Effective Date

This Agreement upon execution of the Agreement by the respective parties, shall take effect on **October 1, 2022**.

14. Term

This Agreement shall commence on the Effective Date, and continue and remain in full force and effect as to all its terms, conditions and provisions as set forth herein, for **five (5) years** (the "Initial Term") unless sooner terminated in accordance with the terms of the Agreement.

15. Entire Agreement

The Agreement constitutes the entire agreement of the parties and may not be amended or modified without written agreement executed by the respective parties.

**MEMORANDUM OF AGREEMENT
JSO AND JEA**

IN WITNESS WHEREOF, the parties hereto have executed this Memorandum of Agreement the day and year first above written.

JACKSONVILLE SHERIFF'S OFFICE

Mike Williams, Sheriff

Date

(Pursuant to the authority conveyed by Section
37.01 Jacksonville Municipal Ordinance Code)

Assistant General Counsel

Date

JEA

Jenny McCollum
Senior Director, Supply Chain Management
and Operations Support

Date

Certification of Single Source or Emergency Procurement

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

3-112 Single Source

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

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

3-113 Emergency Procurements

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

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

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

Please provide the following information:

1. **Vendor Name:**

_____ CITY OF JACKSONVILLE: JACKSONVILLE SHERIFFS OFFICE _____

2. **Description of Services or Supplies provide by Vendor:**

_____ LAW ENFORCEMENT SERVICES FOR VARIOUS JEA LOCATIONS AND DEPARTMENTS _____



Formal Bid and Award System

Award #5 August 4, 2022

Type of Award Request: REQUEST FOR PROPOSAL (RFP)
Requestor Name: Degraw, David - Manager Security Operations
Requestor Phone: (904) 665-6584
Project Title: Security Services for JEA
Project Number: HE31000
Project Location: JEA
Funds: O&M
Award Estimate: \$23,500,000.00

Scope of Work:

The purpose of this Request for Proposal (RFP) is to solicit competitive Responses from Security services companies that can provide all materials, labor, equipment, supervision, for security services for armed and unarmed security service for JEA facilities.

The scope of work consists of the services necessary to provide Contract security workforce, including stationary posts and foot and vehicle patrols, and workforce management. All maintenance and emergency services rendered under this contract shall be by uniformed employees of the Respondent and may be sub-contracted for supporting surge requests found in the Technical Specifications under the “Contingency and Emergency Surge Support Plan” or if the Participating Agency chooses to require the Respondent to subcontract to a Jacksonville Small and Emerging Business (JSEB) or Disadvantaged Business Enterprise (DBE) program firm.

The primary objective of the work is to facilitate the overall security of JEA and participating agency employees, facilities and activities by employing a Contractor workforce to perform various security functions. Service locations are primarily in Duval County with some sites in St Johns, Clay, and Nassau counties. Additional adjacent counties may be included upon mutual agreement.

JEA IFB/RFP/State/City/GSA#: 1410766446
Purchasing Agent: Lovgren, Rodney Dennis
Is this a Ratification?: NO

RECOMMENDED AWARDEE(S):

Name	Contact Name	Email	Address	Phone	JEA Amount
UNIVERSAL SECURITY SERVICES LLC, DBA ALLIED UNIVERSAL SECURITY SERVICES	Michael Dunn	Michael.dunn@aus.com	4190 Belfort Road, Suite 150, Jacksonville, FL 32216	904-399-1813	\$22,755,616.00

Amount for entire term of Contract/PO: \$22,755,616.00
Award Amount for remainder of this FY: \$0.00

Length of Contract/PO Term: Five (5) Years w/One (1) – 2 Yr. Renewal
Begin Date (mm/dd/yyyy): 08/30/2022
End Date (mm/dd/yyyy): 08/29/2027
Renewal Options: YES – One (1) – 2 Yr. Renewal
JSEB Requirement: JSEB Optional

BIDDERS:

***Total Comparison used in Award Evaluation**

Name	Total Bid Amount	JEA Bid Amount	Scores	Rank
UNIVERSAL SECURITY SERVICES LLC, DBA ALLIED UNIVERSAL SECURITY SERVICES	\$49,155,381.60	\$22,755,616.00	97.7	1
FIRST COAST SECURITY SERVICES INC.	\$53,822,542.80	\$24,988,111.20	92.9	2
GIDDENS SECURITY CORPORATION	\$63,187,277.40	\$29,719,196.00	87.4	3
PROSEGUR SERVICES GROUP, INC.	\$57,156,265.40	\$26,657,165.60	77.2	4
AMERICAN GUARD SERVICES	\$61,116,996.20	\$28,179,356.40	73.8	5

Background/Recommendations:

Advertised 05/24/2022. JEA elected to process this sourcing event in a two-step solicitation, with step 1 being minimum qualifications and step 2 submittal of proposals for evaluation. At step 1, the qualification package opening on 06/07/2022, JEA received seven (7) Responses. JEA disqualified one (1) company and qualified six (6). JEA issued the Request for Proposal on 06/17/2022. A mandatory pre-response meeting was held on 06/27/2022. At Response Opening on 07/19/2022, JEA received five (5) Responses. All five (5) companies were evaluated on billable rates, the approach to performing the services with regard to: transition plan, employee retention, schedule management, contingency & emergency response, and training plans. Allied Universal Security Services is the highest evaluated company and the has the lowest billable rates. A copy of the summary evaluation matrix, Bid Form and Rates Workbook is attached as back-up.

When comparing the incumbent current contract pricing with the new contract price, JEA’s estimated spend forecast increase over the five-year term is \$4,719,587.60, or approximately twenty six percent (26%) higher than current pricing for the five (5) year term and is deemed reasonable considering market conditions. The FY23 budget for these services has been adjusted to accommodate the increase. The price comparison spreadsheet is attached as back-up. JEA has budgeted \$4,700,000.00 for FY23.

It should be noted that JEA began in March of 2022 to negotiate with First Coast Security (the incumbent) for a contract renewal. FCS told JEA they would not agree to renew the contract without significant rate increases, that did not follow CPI. FCS presented JEA with an average 27% percent price increase initially and after negotiation came down to an approximate 19% price increase. However, JEA & FCS have been working on performance issues for some months due to missing coverage, which FCS primarily presented as issues with retaining employees. Based on the presented pricing increases and performance issues, JEA ended negotiations and took immediate action to begin bid process.

JSO participated in the bid process and their forecast spend was aggregated with JEA’s spend for a five (5) year multi-agency Bid. The participating agency was approximately fifty percent (54%) of the forecast. The submitted Total Bid Price includes both agencies’ forecasts. Price adjustment is CPI annually with a

cap of six percent (6%). JEA is requiring a \$250,000.00 performance bond and has included performance reviews and incentives for performance.

1410766446 – Request approval to award a five (5) year contract to Universal Security Services LLC, DBA Allied Universal Security Services for security services for JEA in the amount of \$22,755,616.00, subject to the availability of lawfully appropriated funds.

Director: Edwards, Brandon L. - Director Security & Emergency Preparedness

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

APPROVALS:

Chairman, Awards Committee	Date
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Budget Representative	Date
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APPENDIX B - RESPONSE FORM

1410766446 SECURITY SERVICES FOR JEA

The Respondent shall submit one (1) electronic copy on the JEA Sourcing platform by the Bid Due Date and Time.

RESPONDENT INFORMATION: Universal Security Services LLC
RESPONDENT’S COMPANY NAME: d/b/a Allied Universal Security Services
BUSINESS ADDRESS: 4190 Belfort Road, Suite 150
CITY, STATE, ZIP CODE: Jacksonville FL 32216
TELEPHONE: 904.399.1813
EMAIL OF CONTACT: michael.dunn@aus.com & govservices@aus.com

Description	Total Bid Price
Total Bid Price (from bid Workbook)	\$ 49,155,381.60
Payment & Performance Bond Amount (carried annually)	\$ 250,000.00


Respondent's Certification

By submitting this Response, the Respondent certifies (1) that it has read and reviewed all of the documents pertaining to this ITN and agrees to abide by the terms and conditions set forth therein, (2) that the person signing below is an authorized representative of the Respondent, (3) that the Respondent is legally authorized to do business and maintains an active status in the State of Florida. The Respondent certifies that its recent, current, and projected workload will not interfere with the Respondent's ability to work in a professional, diligent and timely manner, and (4) that their organization acts as an independent consultant. (5) it shall execute in good faith Piggyback contracts of the Participant Agencies which incorporate this Solicitation terms and conditions, including any requirements in section 8 of the solicitation on a Participant Agency basis. In addition to the affirmative statement, full disclosure must be provided of any ownership interests or affiliations with any insurance companies, third party administrative agencies or any direct services provider networks. The Respondent certifies, under penalty of perjury, that it holds all licenses, permits, certifications, insurances, bonds, and other credentials required by law, contract or practice to perform the Work. The Respondent also certifies that, upon the prospect of any change in the status of applicable licenses, permits, certifications, insurances, bonds or other credentials, the Respondent shall immediately notify JEA of status change.

By signing the Respondent’s Certification, the Respondent acknowledges that I have read and understood the Sunshine Law/Public Records clauses contained within this solicitation. I understand that in the absence of a redacted copy my proposal will be disclosed to the public “as-is”.

I have read and understood the Sunshine Law/Public Records clauses contained within this solicitation. I understand that in the absence of a redacted copy my proposal will be disclosed to the public “as-is”.

We have received addenda 3 through 5


Signature of Authorize Officer of Respondent or Agent

7/19/2022
Date

Bob Wood, President
Printed Name & Title

347-728-1702
Phone Number

BID BOND

STATE OF FLORIDA

COUNTY OF: Duval

KNOW ALL PERSONS BY THESE PRESENTS, That we, ~~dba Allied Universal Security Services~~ ^{Universal Protection Service, LLC} (hereinafter called "Principal"), and ~~Fidelity & Deposit Company of Maryland~~ as Surety (hereinafter called "Surety"), are held and firmly bound unto the JEA of the City of Jacksonville, Florida (hereinafter called the "JEA"), in the sum of \$ 12,500.00, lawful money of the United States of America, for the payment which sum well and truly to be made, we bind ourselves, our heirs, executors, administrators, and successors, jointly and severally, firmly by these presents:

WHEREAS, the Principal contemplates submitting or has submitted a Bid to the JEA for:

Security Services - Solicitation No. 1410766446

WHEREAS, it was a condition precedent to the submission of said Bid that a certified check or Bid Bond in the amount of \$ 12,500.00 be submitted with said Bid as a guaranty that the Principal would, if awarded the contract, enter into a written contract with the JEA and furnish a Section 255.05 Florida Statutes Contract Bond in an amount equal to \$ 250,000.00 for the performance of said contract, within ten consecutive calendar days after written notice being given of acceptance by the JEA.

NOW, THEREFORE, THE CONDITIONS OF THIS OBLIGATION ARE SUCH, that if the Bid of the Principal herein be accepted and said Principal, within ten consecutive calendar days after written notice being given of such acceptance, enters into a written contract with the JEA, and furnishes a Section 255.05, Florida Statutes Contract Bond in an amount equal to \$ 250,000.00 satisfactory to the JEA, then this obligation shall be void; otherwise, the sum herein stated shall be due and payable to the JEA, and the Surety herein agrees to pay said sum immediately upon demand of said JEA, in good and lawful money of the United States of America; as liquidated damages for failure thereof of said Principal.

IN WITNESS WHEREOF, the said Principal and the said Surety have duly executed this bond the 14th day of July, 2022.

ATTEST:

[Signature]
Signature
Andrew Daniels
Type/Print Name

[Signature]
Signature
Taylor McDonald
Type/Print Name

Signed, Sealed and Delivered
in the Presence of:

[Signature]
Signature
Melissa Lopez
Type/Print Name

[Signature]
Signature
Albert Melendez
Type/Print Name

Universal Protection Service, LLC
dba Allied Universal Security Services
(Principal Company Name)

[Signature]
Signature
PAUL R. LACONI
Type/Print Name

SVP, TREASURY
Title
AS PRINCIPAL

Fidelity & Deposit Company of Maryland
(Surety Company Name)

[Signature]
Signature
Erik Johanson
Type/Print Name

Attorney-in-Fact
Title
AS SURETY



Name of Agent: Performance Bonding Surety & Insurance Brokerage

Address: 15901 Red Hill Avenue, #100

Tustin CA 92780

Countersigned:

By [Signature]
Resident Agent Mary Martha Langley: #W084373
State of Florida

Name of Firm: BKS Partners
Address: 4211 W Boy Scout Blvd, Suite 800
Tampa, FL 33607

Form Approved.

Assistant General Counsel

PENNSYLVANIA WITNESSING OR ATTESTING A SIGNATURE

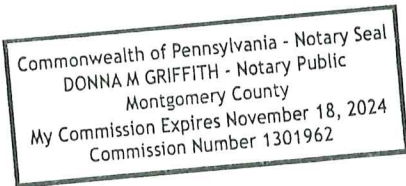
State of Pennsylvania

County of Montgomery

Signed (or attested) before me on July 15, 2022 by _____
Date

Paul Laconi

Name(s) of Individual(s)



Donna M. Griffith

Signature of Notarial Officer

Donna M. Griffith

Printed Name of Notarial Officer

Notary Public

Title of Office

Place Official Stamp/Notary Seal Above

My Commission Expires: 11/18/2024

OPTIONAL

Completing this information can deter alteration of the document or fraudulent reattachment of this form to an unintended document.

Description of Attached Document

Title or Type of Document: _____

Document Date: _____ Number of Pages: _____

Signer(s) Other Than Named Above: _____

CALIFORNIA ALL-PURPOSE ACKNOWLEDGEMENT

A Notary Public or other officer completing this certificate verifies only the identity of the individual who signed the document to which this certificate is attached, and not the truthfulness, accuracy, or validity of that document.

State of California }
County of Orange }

On JUL 14 2022, before me, Christina Marie Rogers, Notary Public,
personally appeared Erik Johansson

who proved to me on the basis of satisfactory evidence to be the person(s) whose name(s) is/are subscribed to the within instrument and acknowledged to me that he/she/they executed the same in his/her/their authorized capacity(ies), and that by his/her/their signature(s) on the instrument the person(s), or the entity upon behalf of which the person(s) acted, executed the instrument.

I certify under PENALTY OF PERJURY under the laws of State of California that the foregoing paragraph is true and correct.



WITNESS my hand and official seal.

SIGNATURE

Christina Marie Rogers

PLACE NOTARY SEAL ABOVE

Though the information below is not required by law, it may prove valuable to persons relying on the document and could prevent fraudulent removal and reattachment of this form to another document.

Description of attached document

Title or type of document: _____

Document Date: _____ Number of Pages: _____

Signer(s) Other than Named Above: _____

**ZURICH AMERICAN INSURANCE COMPANY
COLONIAL AMERICAN CASUALTY AND SURETY COMPANY
FIDELITY AND DEPOSIT COMPANY OF MARYLAND
POWER OF ATTORNEY**

KNOW ALL MEN BY THESE PRESENTS: That the ZURICH AMERICAN INSURANCE COMPANY, a corporation of the State of New York, the COLONIAL AMERICAN CASUALTY AND SURETY COMPANY, a corporation of the State of Illinois, and the FIDELITY AND DEPOSIT COMPANY OF MARYLAND a corporation of the State of Illinois (herein collectively called the "Companies"), by Robert D. Murray, Vice President, in pursuance of authority granted by Article V, Section 8, of the By-Laws of said Companies, which are set forth on the reverse side hereof and are hereby certified to be in full force and effect on the date hereof, do hereby nominate, constitute, and appoint, James W. JOHNSON, Frances LEFLER, Kevin S. BOGART, Scott M. MILNE, Erik JOHANSSON, Melissa LOPEZ, and Brittany ACEVES, all of Tustin, California, its true and lawful agent and Attorney-in-Fact, to make, execute, seal and deliver, for, and on its behalf as surety, and as its act and deed: any and all bonds and undertakings, and the execution of such bonds or undertakings in pursuance of these presents, shall be as binding upon said Companies, as fully and amply, to all intents and purposes, as if they had been duly executed and acknowledged by the regularly elected officers of the ZURICH AMERICAN INSURANCE COMPANY at its office in New York, New York, the regularly elected officers of the COLONIAL AMERICAN CASUALTY AND SURETY COMPANY at its office in Owings Mills, Maryland, and the regularly elected officers of the FIDELITY AND DEPOSIT COMPANY OF MARYLAND at its office in Owings Mills, Maryland, in their own proper persons.

The said Vice President does hereby certify that the extract set forth on the reverse side hereof is a true copy of Article V, Section 8, of the By-Laws of said Companies and is now in force.

IN WITNESS WHEREOF, the said Vice-President has hereunto subscribed his/her names and affixed the Corporate Seals of the said ZURICH AMERICAN INSURANCE COMPANY, COLONIAL AMERICAN CASUALTY AND SURETY COMPANY, and FIDELITY AND DEPOSIT COMPANY OF MARYLAND, this 5th day of November A.D. 2020



ATTEST:
ZURICH AMERICAN INSURANCE COMPANY
COLONIAL AMERICAN CASUALTY AND SURETY COMPANY
FIDELITY AND DEPOSIT COMPANY OF MARYLAND

By: Robert D. Murray
Vice President

By: Dawn E. Brown

Secretary

State of Maryland
County of Baltimore

On this 5th day of November, 2020, before the subscriber, a Notary Public of the State of Maryland, duly commissioned and qualified, Robert D. Murray, Vice President and Dawn E. Brown, Secretary of the Companies, to me personally known to be the individuals and officers described in and who executed the preceding instrument, and acknowledged the execution of same, and being by me duly sworn, depose and swear, that he/she is the said officer of the Company aforesaid, and that the seals affixed to the preceding instrument are the Corporate Seals of said Companies, and that the said Corporate Seals and the signature as such officer were duly affixed and subscribed to the said instrument by the authority and direction of the said Corporations

IN TESTIMONY WHEREOF, I have hereunto set my hand and affixed my Official Seal the day and year first above written



Constance A. Dunn, Notary Public
My Commission Expires July 9, 2023

EXTRACT FROM BY-LAWS OF THE COMPANIES

"Article V, Section 8, Attorneys-in-Fact. The Chief Executive Officer, the President, or any Executive Vice President or Vice President may, by written instrument under the attested corporate seal, appoint attorneys-in-fact with authority to execute bonds, policies, recognizances, stipulations, undertakings, or other like instruments on behalf of the Company, and may authorize any officer or any such attorney-in-fact to affix the corporate seal thereto; and may with or without cause modify or revoke any such appointment or authority at any time."

CERTIFICATE

I, the undersigned, Vice President of the ZURICH AMERICAN INSURANCE COMPANY, the COLONIAL AMERICAN CASUALTY AND SURETY COMPANY, and the FIDELITY AND DEPOSIT COMPANY OF MARYLAND, do hereby certify that the foregoing Power of Attorney is still in full force and effect on the date of this certificate; and I do further certify that Article V, Section 8, of the By-Laws of the Companies is still in force.

This Power of Attorney and Certificate may be signed by facsimile under and by authority of the following resolution of the Board of Directors of the ZURICH AMERICAN INSURANCE COMPANY at a meeting duly called and held on the 15th day of December 1998.

RESOLVED: "That the signature of the President or a Vice President and the attesting signature of a Secretary or an Assistant Secretary and the Seal of the Company may be affixed by facsimile on any Power of Attorney...Any such Power or any certificate thereof bearing such facsimile signature and seal shall be valid and binding on the Company."

This Power of Attorney and Certificate may be signed by facsimile under and by authority of the following resolution of the Board of Directors of the COLONIAL AMERICAN CASUALTY AND SURETY COMPANY at a meeting duly called and held on the 5th day of May, 1994, and the following resolution of the Board of Directors of the FIDELITY AND DEPOSIT COMPANY OF MARYLAND at a meeting duly called and held on the 10th day of May, 1990.

RESOLVED: "That the facsimile or mechanically reproduced seal of the company and facsimile or mechanically reproduced signature of any Vice-President, Secretary, or Assistant Secretary of the Company, whether made heretofore or hereafter, wherever appearing upon a certified copy of any power of attorney issued by the Company, shall be valid and binding upon the Company with the same force and effect as though manually affixed.

IN TESTIMONY WHEREOF, I have hereunto subscribed my name and affixed the corporate seals of the said Companies, this 14th day of July, 2022.



A handwritten signature in cursive script that reads "Brian M. Hodges".

Brian M. Hodges, Vice President

TO REPORT A CLAIM WITH REGARD TO A SURETY BOND, PLEASE SUBMIT A COMPLETE DESCRIPTION OF THE CLAIM INCLUDING THE PRINCIPAL ON THE BOND, THE BOND NUMBER, AND YOUR CONTACT INFORMATION TO:

Zurich Surety Claims
1299 Zurich Way
Schaumburg, IL 60196-1056
www.reports@chmnaus@zurichna.com
800-626-4577



ADDENDUM
Electronic Seals Approved for Surety Bonds

To ensure business continuity during the COVID-19 pandemic, Zurich American Insurance Company and its related companies authorize their Attorneys-in-Fact within all 50 U.S. States, territories and possessions, to affix an electronic seal to all bond documents as if it were a raised corporate seal.

Effective this 2nd day of April, 2020.

Zurich American Insurance Company
Fidelity and Deposit Company of Maryland
Colonial American Insurance Company

A handwritten signature in black ink, appearing to be 'R. Murray', is written above a horizontal line.

Robert D. Murray
Executive Vice President
Head of Surety



1410766446 Appendix B Bid Workbook Security Services for JEA (includes COJ, JAXPORT, JTA AND ISO forecasts)
 Respondents will only enter percentage or dollar amounts in the yellow cells

Job Title	JEA - Hours per week	JSO - Hours per Week	Estimated weekly Hours per Post	Billable Rate (Fully Burdened Labor including Overhead & Profit Margin)	JEA Bid Amount (weekly Subtotal)	JEA Annual Subtotal	JEA Five Year Subtotal	JSO Bid Amount (weekly Subtotal)	JSO Annual Subtotal	JSO Five Year Subtotal
Account Manager	40	79	119	\$ 49.05	\$ 1,962.00	\$ 102,024.00	\$ 510,120.00	\$ 3,874.95	\$ 201,497.40	\$ 1,007,487.00
Site Manager	40	40	80	\$ 35.97	\$ 1,438.80	\$ 74,817.60	\$ 374,088.00	\$ 1,438.80	\$ 74,817.60	\$ 374,088.00
Shift Supervisor	168	313	481	\$ 29.25	\$ 4,914.00	\$ 255,528.00	\$ 1,277,640.00	\$ 9,155.25	\$ 476,073.00	\$ 2,380,365.00
Dispatch Officer	376	158	534	\$ 23.80	\$ 8,948.80	\$ 465,337.60	\$ 2,326,688.00	\$ 3,760.40	\$ 195,540.80	\$ 977,704.00
Security Officer - Armed	2900	2418	5318	\$ 23.12	\$ 67,048.00	\$ 3,486,496.00	\$ 17,432,480.00	\$ 55,904.16	\$ 2,907,016.32	\$ 14,535,081.60
Security Officer - Unarmed	0	1300	1300	\$ 21.08	\$ -	\$ -	\$ -	\$ 27,404.00	\$ 1,425,008.00	\$ 7,125,040.00
Hours Subtotals	3524	4308	7832		\$ 84,311.60	\$ 4,384,203.20	\$ 21,921,016.00	\$ 101,537.56	\$ 5,279,953.12	\$ 26,399,765.60

Vehicles	JEA - # of vehicles per Week	JSO - # of Vehicles per Week	Estimated Weekly Totals	Bill Rate / Each Vehicle Type / week	JEA Bid Amount (weekly Subtotal)	JEA Annual Subtotal	JEA Five Year Subtotal	JSO Bid Amount (weekly Subtotal)	JSO Annual Subtotal	JSO Five Year Subtotal
Passenger Vehicle	6	0	6	\$ 395.00	\$ 2,370.00	\$ 123,240.00	\$ 616,200.00	\$ -	\$ -	\$ -
Golf Cart	8	0	8	\$ 105.00	\$ 840.00	\$ 43,680.00	\$ 218,400.00	\$ -	\$ -	\$ -
Vehicles Subtotals	14	0	14		\$ 3,210.00	\$ 166,920.00	\$ 834,600.00	\$ -	\$ -	\$ -

Annual Spend Incentives discount Respondents will enter discounts on a percentage basis the reductions to the Overhead and profit margin for aggregate spend for interagencies (JEA, JPA, JAXPORT, COJ, JSO, JAA) spend (from ERP systems) exceeds the following. If spend on a Contract Year basis exceeds the spend level, the Company shall discount the billable rates by the listed percentage.	If interagency agg spend breaks	Next Year Discount	following years discount	Total Evaluated Bid Price (enter this amount on the proposal form)		\$ 49,155,381.60						
	>6M annually	0.00%	\$ -	Estimated Award by Agency		<table border="1"> <tr> <td></td> <td>JEA</td> <td>JSO</td> </tr> <tr> <td>\$</td> <td>22,755,616.00</td> <td>26,399,765.60</td> </tr> </table>		JEA	JSO	\$	22,755,616.00	26,399,765.60
		JEA	JSO									
	\$	22,755,616.00	26,399,765.60									
	>10M annually	0.00%	\$ -									
>14M annually	0.00%	\$ -										
>18M annually	0.00%	\$ -										

1410766446 Security Services - Evaluation Summary

Supplier	Edwards	Summer	Steele	Total	Rank	Company	Total Bid Price		
American Guard Services	67.1	88.1	66.2	73.8	5	American	\$ 61,116,996.20	Incument Price (BASE)	\$ 38,586,360.80
First Coast Security Services Inc	87.8	94.8	96.0	92.9	2	FCS	\$ 53,822,542.80	Total Bid Increase	\$ 10,569,020.80
Giddens Security Corporation	87.4	91.4	83.4	87.4	3	Giddens	\$ 63,187,277.40	As Percentage	27%
Prosegur Services Group, Inc	72.5	87.5	71.6	77.2	4	Prosegur	\$ 57,156,265.40	JEA's Portion	4719587.6
Universal Security Services LLC	100.0	98.0	95.2	97.7	1	Universal	\$ 49,155,381.60		
Company	Price Points (25)	Transition Plan (10)	Contract Retention (20)	Schedule Management (15 points)	Contingency & Emergency Support (15)	Contractor Training Programs (15)	Total		Estimated Annual Spend
American Guard Services	20.1	7	15	10	5	10	67.1	5	\$ 3,607,205.68
First Coast Security Services Inc	22.8	10.0	20.0	10.0	10.0	15.0	87.8	2	
Giddens Security Corporation	19.4	10	20	15	10	13	87.4	3	
Prosegur Services Group, Inc	21.5	5.0	15.0	8.0	8.0	15.0	72.5	4	
Universal Security Services LLC	25.0	10.0	20.0	15.0	15.0	15.0	100	1	
Company	Price Points (25)	Transition Plan (10)	Contract Retention (20)	Schedule Management (15 points)	Contingency & Emergency Support (15)	Contractor Training Programs (15)	Total		
American Guard Services	20.1	8	18	14	13	15	88.1	4	
First Coast Security Services Inc	22.8	9.0	20.0	14.0	14.0	15.0	94.8	2	
Giddens Security Corporation	19.4	10	20	15	12	15	91.4	3	
Prosegur Services Group, Inc	21.5	8.0	18.0	10.0	15.0	15.0	87.5	5	
Universal Security Services LLC	25.0	9.0	20.0	14.0	15.0	15.0	98	1	
Company	Price Points (25)	Transition Plan (10)	Contract Retention (20)	Schedule Management (15 points)	Contingency & Emergency Support (15)	Contractor Training Programs (15)	Total		
American Guard Services	20.1	5	14.2	15	0	11.9	66.2	5	
First Coast Security Services Inc	22.8	10.0	20.0	15.0	14.0	14.2	96	1	
Giddens Security Corporation	19.4	10	17.14	15	10	11.84	83.38	3	
Prosegur Services Group, Inc	21.5	5.0	20.0	6.4	10.0	8.7	71.59	4	
Universal Security Services LLC	25.0	10.0	19.0	11.2	15.0	15.0	95.2	2	

