

# **REQUEST FOR PROPOSAL**

## **Enterprise Asset Management System (EAMS) Software and Services**

**Solicitation # 2025-SWB-48**



**Proposal Due Date: July 18, 2025**  
**Proposal Due Time: 11:00 AM CST**

**Sewerage and Water Board of New Orleans**  
**Request for Proposal**  
**Enterprise Asset Management System (EAMS) Software and Services**  
**2025-SWB-48**

The Sewerage and Water Board of New Orleans (SWBNO) is soliciting proposals from qualified Vendors for a vendor-hosted/cloud GIS-based Enterprise Asset Management System (EAMS) to serve the current and projected work order and asset management needs of SWBNO, including software, hardware specifications, implementation and project management, and other technology services. The purpose of this RFP is to find the best-fit solution and implementation partner to meet the current and future needs of the Board.

RFP will be available **June 18, 2025**, for download at the following websites:

SWBNO: [https://www2.swbno.org/business\\_bidspecifications.asp](https://www2.swbno.org/business_bidspecifications.asp)

LAPAC: <https://wwwcfprd.doa.louisiana.gov/OSP/LaPAC/dspBid.cfm?search=department&term=181>

A **mandatory** pre-proposal conference for this RFP will be held on **June 30, 2025**, at **11:00 a.m. (CST)** at the SWBNO Administration Building, 625 St. Joseph St. – Executive Boardroom, New Orleans, LA 70165 or if you are unable to attend this in-person meeting, you can also join via teleconference call:

## **Microsoft Teams**

### **Join the meeting now**

Meeting ID: 299 112 465 362 5

Passcode: pX9PJ68L

### **Dial in by phone**

[+1 504-224-8698](tel:+15042248698), 586331063# United States, New Orleans

Phone conference ID: 586 331 063#

At this meeting, staff will discuss the scope of work, proposal requirements and respond to questions from the attendees. Any prospective proposer who fails to attend shall be prohibited from submitting a proposal.

Inquiries and/or Requests for Clarification are due to **Connor Metcalf, on July 2, 2025, no later than 5:00 p.m. (CST)** via in writing or email to [cmetcalf@swbno.org](mailto:cmetcalf@swbno.org). All responses will be posted on or before **July 8, 2025**.

Proposals will be received by the Sewerage and Water Board of New Orleans Procurement Department by **July 18, 2025, at 11:00 a.m.** local time. For submission instructions, see proposal documents.

**LATE PROPOSALS WILL NOT BE ACCEPTED.**

## Table of Contents

<b>PART I. ADMINISTRATIVE INFORMATION</b>	6
1.1 Request for Proposals	6
1.2 Proposal Preparation	6
1.3 Point of Contact/ Inquiries/ Requests for Information:	6
1.4 Questions and Answers	6
1.5 Submission of Proposals	6
1.6 Changes, Addendum, or Withdrawal of Proposals	7
1.7 Prohibition of Communication	8
1.8 Ownership	8
1.9 Effect	8
1.10 Errors or Omissions	8
1.11 Cost of Preparation	8
1.12 RFP Schedule Summary	8
1.13 Bid Protest Procedures	9
1.14 Public Records Request	9
<b>PART II. GENERAL INFORMATION</b>	10
2.1 Overview of the SWBNO	10
2.2 Scope of Work	10
Current Enterprise Asset Management System Application Environment	10
<b>Current Technical Environment</b>	11
<b>Expected Scope of System Solution</b>	12
<b>Software Scope</b>	12
<b>Services Scope - Required Services</b>	12
Summary of Organization Metrics	13
2.3 Contract Terms and Compensation	13
2.4 Payment	13
2.5 Information	13
2.6 Non-Collusion Statement	13
2.7 Non-Solicitation Statement	13
2.8 Convicted Felon Statement	14
2.9 Insurance Requirements	14
2.10 Right to Audit	15
2.11 Confidential Information	16
2.12 Confidentiality Statement	16
2.13 Subcontractor	16

2.14 Living Wage .....	16
2.15 Economically Disadvantaged Business Program .....	17
<b>PART III. PROPOSAL EVALUATION AND SELECTION .....</b>	<b>18</b>
3.1 Selection Committee .....	18
3.2 Technical Evaluation.....	18
3.2.1 Round 1 Evaluation: .....	19
3.2.2 Round 2 Evaluation: .....	19
3.3 Price Evaluation .....	20
3.5 Best and Final Offer (BAFO) .....	20
3.6 Notification.....	21
<b>PART IV. PROPOSAL SUBMISSION REQUIREMENTS .....</b>	<b>22</b>
4.1 TITLE PAGE .....	22
4.2 TABLE OF CONTENTS .....	22
4.3 Executive Summary (Section 1).....	22
<b>4.4 Company Background (Section 2) .....</b>	<b>23</b>
<b>4.5 Application Software (Section 3).....</b>	<b>23</b>
<b>4.6 Technical and Vendor-Hosted/Cloud Information (Section 4) .....</b>	<b>23</b>
<b>4.7 Implementation Plan (Section 5).....</b>	<b>23</b>
4.7.1 General Implementation Approach (Subsection 5.1).....	24
4.7.2 Project Management Approach (Subsection 5.2) .....	24
4.7.3 Data Conversion and Migration (Subsection 5.3) .....	25
4.7.4 Data Analytics, Report and Form Development (Subsection 5.4) .....	25
4.7.5 Integrations and Interfaces (Subsection 5.5) .....	25
4.7.6 Training (Subsection 5.6).....	28
4.7.7 Organizational Change Management Approach (Subsection 5.7) .....	28
4.7.8 Testing (Subsection 5.8) .....	29
4.7.9 Operational Redesign Approach (Subsection 5.9).....	29
4.7.10 System Documentation and Manuals (Subsection 5.10) .....	29
4.7.11 Disaster Recovery Plan (Subsection 5.11) .....	29
4.7.12 Knowledge Transfer (Subsection 5.12).....	30
4.7.13 Go-Live and Post-Go-Live (Subsection 5.13).....	30
<b>4.8 Functional and Technical System Requirements (Section 6) .....</b>	<b>30</b>
<b>4.9 Staffing Plan (Section 7).....</b>	<b>31</b>
<b>4.10 Ongoing Support Services (Section 8) .....</b>	<b>31</b>
<b>4.11 Client References (Section 9).....</b>	<b>31</b>
<b>4.12 Subscription and Maintenance Agreements (Section 10) .....</b>	<b>32</b>

<b>4.13 Exceptions and Deviations (Section 11)</b> .....	32
<b>4.14 Cost Proposal</b> .....	32
<b>ATTACHMENT</b> .....	34
<b>COVER SHEET</b> .....	34

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## **PART I. ADMINISTRATIVE INFORMATION**

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### **1.1 Request for Proposals**

The Sewerage and Water Board of New Orleans (“SWBNO” or “the Board”) is soliciting proposals from qualified Vendors for a vendor-hosted/cloud GIS-based Enterprise Asset Management System (EAMS) to serve the current and projected work order and asset management needs of SWBNO, including software, hardware specifications, implementation and project management, and other technology services. In addition to replacing its RJN Cassworks work order system, which currently houses workorders and infrastructure information for both underground and plant assets, the Board also desires to include building maintenance in the new asset management system. The purpose of this RFP is to find the best-fit solution and implementation partner to meet the current and future needs of the Board.

### **1.2 Proposal Preparation**

Proposals submitted for consideration should follow the format and order of presentation provided in Part IV - Proposal Submission Requirements.

### **1.3 Point of Contact/ Inquiries/ Requests for Information:**

All correspondence and other communications regarding this RFP shall be directed to **Connor Metcalf, Procurement Specialist**, Sewerage and Water Board of New Orleans, 625 St. Joseph Street, Room 133, New Orleans, Louisiana 70165, **504-585-2153**, [cmetcalf@swbno.org](mailto:cmetcalf@swbno.org).

Inquiries and/or Requests for Information are due to the Board’s Procurement Department via email to [cmetcalf@swbno.org](mailto:cmetcalf@swbno.org) no later than timeline stated in the **Anticipated Proposal Timetable**. Any request received after that time may not be reviewed for inclusion in this RFP. The request shall contain the requester’s name, address, and telephone number.

The Procurement Department will issue a response to any inquiry if it deems it necessary, by written addendum to the RFP, posted on Board’s website, and issued prior to the RFP’s Delivery Deadline. The Respondents shall not rely on any representation, statement or explanation other than those made in this RFP or in any addenda issued. Where there appears to be a conflict between this RFP and any addendum issued, the last addendum issued will prevail.

### **1.4 Questions and Answers**

Inquiries and/or Requests for Clarification are due to **Connor Metcalf, on July 1, 2025, no later than 5:00 p.m. CST** via in writing or email to [cmetcalf@swbno.org](mailto:cmetcalf@swbno.org). All responses will be posted on or before **July 7, 2025**. Do not contact any other SWBNO program personnel with questions regarding this RFP.

The Procurement Department will issue a response to any inquiry if it deems it necessary, by written addendum to the RFP, posted on SWBNO’s website, and issued prior to the RFP’s Delivery Deadline. The Proposers shall not rely on any representation, statement or explanation other than those made in this RFP or in any addenda issued. Where there appears to be a conflict between this RFP and any addendum issued, the last addendum issued will prevail.

### **1.5 Submission of Proposals**

Proposers who are interested in providing services requested under this RFP can submit a proposal via email.

## **Submitting a response:**

### **Electronic Submission:**

(1) Digitally signed technical proposal and (1) digitally signed cost proposal in searchable PDF format to [bids@swbno.org](mailto:bids@swbno.org)

Subject Line: **2025-SWB-48 – Enterprise Asset Management System (EAMS) Software and Services**

– [Proposer Name]”. If the file size of the email submission exceeds server requirements, the email submission may be broken into smaller emails with “Part 1 of #” included at the end of each original Subject Line (e.g. RFP# marked “**2025-SWB-48 – Enterprise Asset Management System (EAMS) Software and Services** – [Proposer Name] – Part 1 of 3”).

**Email:** If the Proposer intends to submit the response by email, the date and time of the email received by the Procurement Dept. constitutes the time stamp of receipt. The date and time of the email sent by Vendor does NOT constitute a proof of receipt. The Procurement Dept. encourages Vendors to confirm that the response was received timely.

Board assumes no liability for assuring accurate/complete e-mail transmission and receipt. The responsibility solely lies with each Proposer to ensure their proposal is received at the specified email address prior to the deadline for submission. Proposals received after the deadline, corrupted files, and incomplete submissions (e.g. Part 1 and Part 2 of 3 are received, but Part 3 is not) may not be considered.

Fax submission will not be acceptable. Proposers e-mailing their proposals should allow sufficient time to ensure receipt of their proposal by the time specified.

Proposers must complete all required attachments and submit along with proposal submission. Failure to complete and submit the required documents and attachments may result in your proposal being deemed non-responsive.

Proposals should clearly demonstrate the Proposer’s qualifications to perform the needed services and attend all factors applicable in a professional relationship.

All proposals must be received by Board on or before the Delivery Deadline. Proposals delivered after the said deadline will not be accepted.

### **1.6 Changes, Addendum, or Withdrawal of Proposals**

Any changes or addenda to a proposal must be submitted in writing, signed by an authorized representative of the proposer, cross-referenced clearly to the relevant proposal section, and received by SWBNO prior to the proposal due date and time. All changes and addenda must meet all requirements for the proposal. Any proposer choosing to withdraw its proposal must submit a written withdrawal request to SWBNO prior to the proposal due date and time.

The Board reserves the right to reject any and all responses to the RFP (with reasonable explanation) and/or to waive any informalities in evaluating the RFP responses if it deems this to be in the best interest of the Board, its customers, and the general public. The Board reserves the right to qualify Proposers as it deems in its best interest.

### **1.7 Prohibition of Communication**

From the time of advertising, and until the final award, there is a prohibition on communication by Respondents (or anyone on their behalf) with Board's staff, Selection Committee members and elected officials. This does not apply to oral presentations before selection committees, contract negotiations, or communications at any time with any Board employee or elected official regarding matters not concerning this RFP. Breaking the established prohibition on communication may result in a disqualification of the proposal.

### **1.8 Ownership**

All Responses, including any submitted documents, to this RFP or any resulting solicitation are the property of the Board for all purposes. Respondents must clearly mark individual documents or information that the applicant claims are exempt from public record disclosure and specifically justify the exemption. The Board does not guarantee the confidentiality of submissions.

### **1.9 Effect**

This RFP and any related discussions, evaluations, qualifications, or resulting solicitations by the Board or any person on its behalf create no rights or obligations whatsoever except as provided in this RFP. The Board may cancel or modify this RFP or any resulting solicitation at any time at will, with or without notice. Anything to the contrary notwithstanding, any professional services agreement executed by the Board will be issued the exclusive statement of rights and obligations extending from this solicitation.

### **1.10 Errors or Omissions**

The Board will not be liable for any error in any proposal. Respondent will not be allowed to alter proposal documents after the deadline for proposal submission, except under the following condition: The Board reserves the right to make corrections or clarifications due to patent errors identified in proposals by the Board or the Respondent. The Board, at its option, has the right to require clarification or additional information from the Respondent.

### **1.11 Cost of Preparation**

The Board is not liable for any costs incurred by prospective Respondents or Contractors prior to issuance of or entering into a Contract. Costs associated with developing the proposal, preparing for oral presentations, and any other expenses incurred by the Respondent in responding to the RFP are entirely the responsibility of the Respondent, and shall not be reimbursed in any manner by the Board.

### **1.12 RFP Schedule Summary**

The events and dates summarized in Table 1 represent milestones in SWBNO's RFP process; however, SWBNO reserves the right to deviate from this schedule.



**Table 1. Anticipated RFP Schedule Summary**

Event	Date	Local Time
RFP Release	June 18, 2025	
Mandatory Pre-Proposal Meeting	June 30, 2025	11:00am
Written questions deadline	July 2, 2025	5:00pm
Responses to questions/clarification	July 8, 2025	
Proposal due date and time	July 18, 2025	11:00am
Evaluation Committee Meeting	TBD	
Award of Contract(s)	TBD	

**1.13 Bid Protest Procedures**

Any formal protest against the recommendation of award which is to be made by an aggrieved Proposer must be submitted in writing to the Procurement Director, Cashanna K Moses at [cmoses@swbno.org](mailto:cmoses@swbno.org) according to Sewerage and Water Board of New Orleans Policy 83(R): Procedural Rules for Bid Appeals.

**1.14 Public Records Request**

To request a public record for the proposal documents, please submit to the following website:  
<https://swbno.nextrequest.com/>

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## PART II. GENERAL INFORMATION

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### **Sewerage and Water Board of New Orleans Request for Proposals Enterprise Asset Management System (EAMS) Software and Services**

#### **2.1 Overview of the SWBNO**

The SWBNO operates and maintains infrastructure through Orleans Parish to provide safe drinking water to support fire protection and the public health of all residents, improve sewerage collection services to support public safety and sanitation, and more effectively collect and convey stormwater out of the City of New Orleans to reduce the risk from flood events. The SWBNO remains diligent in improving public safety for the citizens of New Orleans continuously at a reasonable cost to the community.

#### **2.2 Scope of Work**

The Sewerage and Water Board of New Orleans has a need to replace its current work order / asset management system, RJN Cassworks, due to its age and not being supported by the original manufacturer. The Board is responsible for a variety of assets, including but not limited to the following:

- Underground linear assets – water and sewer mains and related valves, stormwater drainage laterals, and underground box canals, as well as electrical duct banks and feeders
- Above ground linear assets - stormwater canals, catch basins, and overhead electrical feeders
- Mechanical and electrical systems – including two major water treatment plants, raw and potable water pumps, 24 stormwater pump stations, and 84 sewer pump stations, including both rotating and stationary equipment dating back to the early 1900's
- Power generation and distribution systems – including power turbines, gas compressors, bulk fuel storage facilities, and auxiliary electrical equipment, as well as permanent and mobile diesel generators
- Facilities – office buildings, warehouses, fuel islands, and other occupied and unoccupied structures
- Other items including water meters, distributed green infrastructure, and portable pumps
- Fleet – including heavy and light vehicles, as well as machinery (cranes, boom trucks, etc.)

#### **Current Enterprise Asset Management System Application Environment**

Description	
Replacement	The Board intends to replace this application with the selected solution.
Interface	The Board intends to keep the application and interface/integrate it with the selected solution.
Consider/Interface	The Board is considering replacing this application with the selected solution based on the strength of the finalist Vendor offering and cost/benefit of the replacement module. In the event the Vendor does not include this in their software, it would require an interface to the EAMS. Therefore, the vendor must provide interface experience and pricing for these applications.

Current Application	Application Notes/Description	Departmental Owner	Likely Future of System? *
ESRI ArcGIS Enterprise	GIS mapping and analytics	GIS	Interface
RJN Cassworks	Work Order Management System	Cassworks Support	Replace
Future Cloud HCM [Currently GPHR – Microsoft Dynamics GP Human Resources/Payroll]	Human Resources & Payroll System	Human Resources, Payroll, & Finance	Interface, planned replacement 2026/2027
Oracle Fusion Cloud ERP	Enterprise Financial and Resource Planning	Payroll, & Finance, & inventory management	Interface
Future Cloud CIS [Currently Cogsdale CSM – Microsoft Dynamics GP]	Utility Billing System, Meter Service Orders	Customer Service / Billing	Interface
Future Fleet Software [If vendor solution does not include capability]	Fleet Work and Maintenance Management System	Support Services	Consider/Interface

### Current Technical Environment

Technology Standards	Current
Backup solution	Veeam
Desktop operating system	Windows 10/11
Email system	Office 365
Firewall	Only provided as needed
Geographic information system (GIS)	ESRI
Handheld devices	Windows, Apple iOS and Android
Internet Connectivity	Redundant with automated failover
Internet browser	Google Chrome preferred; Edge supported
Relational databases	MS SQL
Remote access	GlobalProtect VPN
User authentication	MS Active Directory (Azure) Single Sign On

As part of the proposal process, Vendors will be required to submit significant technical detail about the proposed solution detailed in Technical and Vendor-Hosted/Cloud Information – Section 4.6 of this RFP.

## **Expected Scope of System Solution**

The Board is requiring that responding vendors propose a fully integrated, vendor-hosted/cloud solution for an enterprise asset management system, including software, hardware specifications, implementation and project management, and other technology services for the entire scope of the project that may or may not include components owned by the vendor. The Board recognizes that this project will have a significant impact on the Board's staff and is looking to minimize that impact insofar as possible. To the extent vendor is able, the Board is looking for the vendor to conduct a thorough business analysis at the start of each module and to provide the Board with a pre-configured system using its best practices and experience as a model. The Board is expecting to review and test this pre-configured system, requesting minimal changes as required.

## **Software Scope**

Core/Required Application Software:

- Service/Work Requests
- Work Orders
- Inspections
- Calendar
- Ad-Hoc Reporting
- Asset Management
- Mobile capability
- Inventory Management to work hand-in-hand with Oracle Cloud Fusion ERP System
- Fleet (optional)
- Any other necessary software components to support the proposed Core Application Software solution

## **Services Scope - Required Services**

- Task 1: Project Management
- Task 2: Software Installation / Set-up
- Task 3: Security Design and Configuration
- Task 4: Business Design / Software Configuration
- Task 5: Technical Design and Standards and System Documentation Development
- Task 6: Data Conversion and Migration
- Task 7: Business Analytics, Report and Form Development
- Task 8: Integration and Interface Development
- Task 9: Testing
- Task 10: Training
- Task 11: Deployment
- Task 12: Ongoing Support and Maintenance Services
- Task 13: Ongoing Hosting Services

Additional details and descriptions related to the specifics of the expected scope can be found in **Proposal Response Format – Section 4** in this RFP.

### **Summary of Organization Metrics**

A summary of organization metrics and standards is included below. These volumes and standards reflect actual and estimated amounts for the current environment.

Metric	Current
Population	384,458
Jurisdictional Area (Square Miles)	364 Square Miles
Total Staff (Full time: 1.0 FTE)	~1,300
Total Staff (Part-time: 0.5 FTE)	18
Anticipated number of Users	500

### **2.3 Contract Terms and Compensation**

The contract period is five (5) years and is scheduled with initiation of the contract period following approval by the SWBNO Board of Directors (Board) and issuance of Notice to Proceed and Purchase Order.

Proposal prices shall be firm and shall not be amended after the date and time of the proposal opening. Any attempt by the proposer to amend proposal prices shall constitute default as outlined in this specification.

Prices quoted in the proposal response shall include all shipping and delivery costs.

### **2.4 Payment**

The Board shall pay Proposer in accordance with the contracted prices. The Proposer will invoice the agency at the billing address designated by the agency. Payments will be made by the Agency within approximately forty-five (45) calendar days after receipt of a properly executed invoice, and approval by the Department or designee. Invoices submitted without the referenced documentation will not be approved for payment until the required information is provided.

### **2.5 Information**

All reports, surveys, tables, charts, diagrams, product recordings and other data (including electronic, audio and video) or documentation prepared or compiled by Proposer in connection with the performance of its obligations under the contract, shall be the sole and exclusive property of the SWBNO. Proposer shall retain in its files, sufficiently detailed working papers relevant to its engagement with the SWBNO. Proposer further agrees that its working papers will be held in the strictest confidence and will not be disclosed or otherwise made available to outside sources, except as required by law, without the written consent of the SWBNO.

### **2.6 Non-Collusion Statement**

The Contractor confirms that this Agreement is entered into with the Board without any connection with any person or persons making a proposal for the same services, and that it is in all respects fair and without collusion or fraud; also that no member of the Board or public official of the City, who are by law are excluded from participation herein, is directly or indirectly interested herein or in furnishing the services to which it relates or in any portion of the profits thereof.

### **2.7 Non-Solicitation Statement**

The Contractor has not employed or retained any company or person, other than a bona fide employee working solely for it, to solicit or secure this Agreement. The Contractor has not paid or agreed to pay any person, other

than a bona fide employee working for it, any fee, commission, percentage, gift, or any other consideration contingent upon or resulting from this Agreement.

## **2.8 Convicted Felon Statement**

The Contractor confirms that no principal, member, or officer of the Contractor has, within the preceding 5 years, been convicted of, or pled guilty to, a felony under state or federal statutes for embezzlement, theft of public funds, bribery, or falsification or destruction of public records.

## **2.9 Insurance Requirements**

Contractor shall maintain at his own expense and in good standing, such insurance as will protect the Board, the City of New Orleans, their officers, officials, employees, boards, commissions, and volunteers, and the Contractor himself, from and against any and all claims or damages to public or private property or personal injury, including death, to employees or the public, which may arise from any operations under this contract or any of its subcontracts. The coverage shall contain no special limitations on the scope of protection afforded to the Board or the City. Both the Board and the City shall appear as "Additional Insured" on all Commercial General Liability and Business Automobile Insurance. Any failure to comply with reporting provisions of the policy shall not affect coverage provided to the Board and the City, their officers, officials, employees, boards and commissions, and volunteers. The Contractor's insurance shall apply separately to each insured against whom claim is made or suit is brought, except with respect to the limits of the insurer's liability.

If this transaction requires the Contractor or subcontractor's employees to enter the Board's facilities or job sites, a senior employee of the Contractor and/or any subcontractor will review the Board's Safety Orientation Notice (Notice) and will explain this Notice to every employee who will enter Board facilities. This Notice is included as a part of the specifications for this contract.

Contractor and its insurers shall agree to waive all rights of subrogation, except on their Professional Liability Policy, against the Board, the City, and their officers, officials, employees, boards and commissions, and volunteers for losses arising from work performed by the Contractor for the Board and the City. Each insurance policy required by this contract shall be endorsed to state that coverage shall not be suspended, voided or canceled by either party, or reduced in coverage or in limits except after thirty (30) days prior written notice by certified mail, return receipt requested, that has been given to the Risk Manager of the Board. In general, insurance is to be placed with insurers with a Best's rating of at least A- V, although this requirement may be reviewed and modified by the Risk Manager of the Board in the best interest of the Board. The Risk Manager may also consider performing such review upon written request from Contractor. Contractor shall furnish the Board with certificates of insurance affecting coverage required by this contract. The certificates for each insurance policy are to be signed by a person authorized by that insurer to bind coverage on its behalf.

The certificates of insurance are to be received and approved by the Risk Manager of the Board before work commences. In the event of a claim, Contractor shall make applicable insurance policies available for review by the Board. Contractor shall retain its rights to restrict disclosure of Contractor's proprietary information.

The following are the types of insurance policies and the minimum limits of insurance coverage which shall be maintained by Contractor during the entire term of the Contract:

### **a) WORKERS' COMPENSATION AND EMPLOYERS' LIABILITY**

**INSURANCE**, as will protect him from claims under Workers' Compensation Laws. The Workers' Compensation section of the policy shall afford statutory limits and be in accordance with all Louisiana Workers' Compensation Statutes. The Employers' Liability limit shall not be less than \$1,000,000 each

accident for bodily injury by accident and \$1,000,000 each employee/policy limit for bodily injury by disease. Whenever any vessel or floating equipment is involved, the insurance shall afford coverage under the Federal Longshoremen's and Harbor Workers' Act, and shall also include protection for injuries and/or death to Masters and Members of the crews of vessels with statutory limits in accordance with the Jones Act.

b) **COMMERCIAL GENERAL LIABILITY INSURANCE**, with a limit of not less than \$1,000,000 each occurrence and \$2,000,000 general aggregate, including Explosion, Collapse, and Underground Property Damage Hazards. The Products-Completed Operations aggregate limit shall not be less than \$1,000,000 each occurrence. The general aggregate limit shall apply separately to this project.

c) **BUSINESS AUTOMOBILE INSURANCE**, which shall cover liability arising from any auto (including owned, hired, and non-owned vehicle). The limit of liability shall not be less than \$1,000,000 combined with each accident for all injuries, property damage, and/or death resulting from one occurrence.

d) **ERRORS AND OMISSIONS/PROFESSIONAL LIABILITY INSURANCE**, whichever is applicable to the particular profession or service to be provided, with limit of not less than \$1,000,000 each Claim, with a \$2,000,000 annual aggregate, without any restrictive "negligent act, negligent error, or negligent omission" clause, and sufficient to protect the Contractor, the Board, and the City, for a five (5) year period from completion of this contract, against any and all claims which may arise from the Contractor's negligent performance of work described herein.

In addition, Contractor shall be required to furnish to the Risk Manager of the Board all copies of investigative reports with regard to any and all claims filed with the Contractor and his insurance carriers relative to the contract, with the exception of claims filed against his Workers' Compensation Insurance. Such reports shall include date, location, and description of loss as well as amounts of settlements or judgments in order that annual aggregate limits may be monitored by the Board for Contractor's compliance with these specifications.

The furnishing of insurance as provided above shall not relieve Contractor of its responsibility for losses not covered by insurance. Prior to the signing of the contract, evidence of all such applicable insurance satisfactory to the Board shall be filed with the Risk Manager of the Board. All policies shall be in insurance companies authorized to do business in Louisiana and shall remain in full force and effect until the final completion of the work and acceptance thereof by the authority of the Board. Contractor and/or his insurer shall notify the Risk Manager of the Board at least thirty (30) days in advance of any insurance coverage to be canceled or of any insurance coverage that will expire. Contractor shall simultaneously furnish the Board evidence of new coverage to be effective the same day and hour of the expired or canceled coverage. In the event Contractor fails to submit this evidence of new coverage five (5) days prior to cancellation date or expiration date of any policy or policies, the Board will obtain the required coverage to become effective on date of cancellation or expiration of said policies. The cost of such new coverage shall be at the expense of Contractor and any expenditure incurred by the Board of this coverage will be deducted from any balance due to Contractor.

## **2.10 Right to Audit**

The Board shall have the right to audit by its personnel or its authorized representative at all reasonable times any and all records pertaining to the administration of this contract by the contractor, including its records of any subcontractor(s) employed on the contract. Such records shall be made and kept by the contractor in accordance with generally accepted accounting principles and practices. Records shall include, but are not limited to, accounting records, daily reports, correspondence and subcontract files (hard copies as well as computer readable data, if it can be made available). Records subject to audit shall also include but not be limited to those records necessary to evaluate and verify direct and indirect costs (including overhead allocations) as they may apply to

cost and/or change order requests associated with this contract. The Board also reserves the right to interview employees, make photocopies, and inspect any and all records at a reasonable time for a minimum of three (3) years after completion of the project or formal acceptance of the contract by the Board. Contractors shall be required to retain such files of the project as described herein for a minimum of three (3) years after completion of the project or formal acceptance of the contract by the Board.

### **2.11 Confidential Information**

Information contained in the Vendor's proposal that it deems proprietary or trade secret must be clearly identified in the proposal as described below in the Louisiana Revised Statute 44:3.2.D.(1). The Board will be free to use all information in the Vendor's proposal for the Board's purposes. Vendor proposals shall remain confidential until the Board's Proposal Selection Committee makes its recommendation to SWBNO Board of Directors. The Vendor understands that any material supplied to the Board may be subject to public disclosure pursuant to the Louisiana Public Records Law (LA R.S. 44:1, et seq.).

**Louisiana Revised Statute 44:3.2 D.(1)** All records containing proprietary or trade secret information submitted by a developer, owner, or manufacturer to a public body pursuant to Subsection A, B, or C of this Section shall contain a cover sheet that provides in bold type "DOCUMENT CONTAINS CONFIDENTIAL PROPRIETARY OR TRADE SECRET INFORMATION". The developer, owner, or manufacturer shall clearly mark each instance of information which is, in his opinion, proprietary or trade secret information.

### **2.12 Confidentiality Statement**

Any information, including materials, drawings, designs, documentation, and other property or data, disclosed to the proposal responder shall not be used, reproduced, appropriated, or otherwise disseminated to anyone other than SWBNO.

### **2.13 Subcontractor**

If the proposer intends to subcontract portions of the work or to satisfy any of the Proposer Requirements and/or Scope of Work through the use of a subcontractor, the proposer shall include the name of the subcontractor and specific designations of the tasks to be performed or Vendor requirements to be met by respective subcontractor(s). The information requested of the proposer under the terms of this RFP shall also be supplied for each subcontractor and shall be included in the proposal. The proposer will retain full control over this contract and will not assign or subcontract said contract without the prior written consent of SWBNO. Failure to request consent shall be grounds for default under this contract. The Proposer further agrees that assigning or subcontracting any portion or feature of the work shall not relieve the Proposer from its full obligations under this contract.

### **2.14 Living Wage**

The Contractor agrees to abide by City Code sections 70-801, et seq., which requires payment of a wage to covered employees equal to the amounts defined in the Code ("**Living Wage**"). If the Contractor fails to comply with the requirements of the Living Wage during the term of the Agreement, said failure may result in termination of the Agreement or the pursuit of other remedies by the Sewerage and Water Board.

Under the city's new [Living Wage Ordinance](#), covered employees are required to receive a living wage and receive compensated leave. To comply with the ordinance, Covered Employers are required to:

1. Pay living wage of \$15.56 an hour to its covered employees
2. Permit covered employees to take at least seven days per year of compensated leave
3. Post notice in a prominent place regarding the applicability of the Living Wage Ordinance in every workplace in which covered employees are working that is within the employer's custody and control.



### Living Wage Ordinance Rules and Regulations

In accordance with the Living Wage Ordinance, the current living wage per the Consumer Price Index data is \$15.56 per hour.

### **2.15 Economically Disadvantaged Business Program**

To ensure the full participation of DBE's in all phases of SWBNO's procurement activities, all Proposers at time of proposal submission shall complete and submit an Economically Disadvantaged Business Participation Summary Sheet along with Acknowledgement Form.

A DBE goal of **six (6%) percent** has been established for this RFP. The Proposer shall agree to use its best efforts to assure that all Proposers comply with the factors set forth in the DBE Program, to meet the goal for DBE participation in the performance of this solicitation.

Contractor agrees to use its best efforts to carry out this policy by utilizing the current listings of approved DBE vendors available at the Board's website at <https://www.swbno.org/Business/DisadvantagedBusinesses>

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## **PART III. PROPOSAL EVALUATION AND SELECTION**

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### **3.1 Selection Committee**

Pursuant to Policy Memorandum No. 95, SWBNO must establish a Selection Committee with relevant subject-matter expertise in reviewing and evaluating proposals to the RFP. Each proposal to the RFP must be evaluated by a committee of five individuals consisting of:

- General Superintendent, or designee
- Deputy Director, or designee
- Department Head requestor, or designee
- Employee who will manage and monitor the contract
- An Expert (Employee or Non-Employee) in the field as determined by the Executive Director

The Selection Committee will first evaluate the proposals based on qualitative criteria rather than quantitative price. The members on the Selection Committee will complete the numerical grading and provide a written explanation stating the reasons for the rating for each criteria.

### **3.2 Technical Evaluation**

SWBNO will select a Proposer generally according to the procedures described in Policy Memorandum No: 95. The Selection Committee will first evaluate and score responsive RFP Responses on the criteria listed below and provide an assessment of that score.

Consensus Scoring:

The Selection Committee will review each qualified technical proposal then score by consensus. The members on the Selection Committee will complete the numerical grading (0-5) with the criteria weighted as shown below and provide a written explanation stating the reasons for the rating for each criteria.

The Selection Committee shall first evaluate the proposals based on criteria other than price. The members on the Selection Committee shall utilize consensus scoring and discuss each proposal to complete the numerical grading.

The Board reserves the right to reject any and all proposals. As part of the evaluation process, the Selection Committee will interview Proposer references and other parties to confirm Proposer's performance on previous projects. The Board reserves the right to terminate this process at any time, and no guarantee is expressed or implied that obligates the Board to contract for the proposed project. The Board will negotiate its agreement with the highest evaluated proposer, as determined by the Selection Committee.

Proposers shall be treated fairly and equally with respect to any opportunity for discussion and revision of their offer. To obtain the best and final value offers, revisions may be requested after submissions and before award of the Contract.

A Proposer may receive the maximum points, a portion of this score, or no points at all, depending upon the merit of its response, as judged by the Selection Committee in accordance with the qualitative criteria below:

### 3.2.1 **Round 1 Evaluation:**

For those vendors whose proposals pass the minimum criteria, the following categories of criteria will be used to further evaluate the proposals:

<b>Round 1 Evaluation Criteria</b>	
Ability to meet functional and technical requirements – This will be measured on:	<b>40</b>
<ul style="list-style-type: none"><li>• Responses to RFP 2025-SWB-48 EAMS – Specifications.xlsx</li><li>• Responses to RFP 2025-SWB-48 EAMS – Vendor Forms.docx – Section 5.3</li><li>• Section 4.3 – Application Software</li><li>• Section 4.4 – Technical and Vendor Hosted/Cloud Information</li><li>• Section 4.5.5 – Integrations and Interfaces</li></ul>	
Implementation approach and ongoing support – This will be measured on:	<b>30</b>
<ul style="list-style-type: none"><li>• Responses to RFP 2025-SWB-48 EAMS - Vendor Forms.docx</li><li>• Section 4.5, 4.7, 4.8, 4.10</li></ul>	
Analysis of service hours	
DBE requirements -This will be measured on:	<b>10</b>
Vendor proposal	
Vendor viability, including number and quality of comparable references, financial stability, completeness of response, proposed project team, and quality of proposal response – This will be measured on:	<b>20</b>
<ul style="list-style-type: none"><li>• Whole proposal</li><li>• Section 4.1, 4.2, 4.7, 4.9</li></ul>	
<b>Total</b>	<b>100</b>

### 3.2.2 **Round 2 Evaluation:**

SWBNO at its sole discretion may recommend a selection of Proposers for a short list based on the overall ranking by the Selection Committee.

During the review of any proposal, the Selection Committee may:

- Conduct reference checks relevant to the solicitation to verify any and all information, and rely on or consider any relevant information from such cited references or from any other sources in the evaluation of proposals;
- Seek clarification of a proposal or additional information from any or all proposers and consider same in the evaluation of proposals;
- Waive any requests or requirements if such waiver is in the best interest of the SWBNO; and
- Request interviews/presentations with any, some or all proposers to clarify any questions or considerations based on the information included in proposals, Proposals during the evaluation process, and consider any supplementary information from interviews/presentations in the evaluation

At the conclusion of the round two activities, the short-listed proposers will be evaluated by the Evaluation Selection Committee on all information collected to date against the following criteria:

## Round 2 Evaluation Criteria

Ability to meet functional & technical requirements -This will be measured on: Vendor demonstrations Integrations between solutions Follow-up questions and answers	40
Implementation approach and ongoing support -This will be measured on: Vendor demonstrations	30
Vendor Viability, including number and quality of comparable references, financial stability, and proposed staff -This will be measured on: Vendor demonstrations Vendor proposal Reference checking	20
Cost	10
<b>Total Technical Score</b>	<b>100</b>

### **3.3 Price Evaluation**

**Cost proposals must be submitted in a separate envelope or file (if emailed) marked “Cost Proposal”.** A Proposer may receive the maximum points, a portion of this score, or no points at all, depending upon the merit of its Price Proposal:

The proposer with the lowest cost shall receive the highest cost evaluation score.  
Other proposers will receive a cost score computed as follows:

$$CS = (LPC/PC*10)$$

Where:

CS = Computed cost score for Proposer

LPC = Lowest proposed cost of all Proposers

PC = Proposer's cost

X = 10 of the total number of points assigned

### **3.5 Best and Final Offer (BAFO)**

The Selection Committee, at its request, may ask for a Best and Final Offer from the top proposers.

Written notification is sent to the selected proposers that will include a list of the specific items to be addressed, instructions and deadline for submittal, and the evaluation criteria and scoring methodology, if different from the RFP.

If requested, when evaluating BAFO responses, if BAFO cost is requested, this will replace the original cost and the technical proposal may be re-evaluated.

### **3.6 Notification**

Once the Selection Committee recommends a proposal, the Procurement Department notifies the selected firm by a Recommendation of Award letter. The unsuccessful proposer(s) will be notified as well. The Award Letter will contain the name and contact information of the representative of the department responsible for administering the future contract.

IMPORTANT: The Recommendation of Award letter is not a contract award notification. The contract award is subject to the successful satisfaction by the selected respondent of all additional requirements in the solicitation.

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## PART IV. PROPOSAL SUBMISSION REQUIREMENTS

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To achieve a uniform review process and obtain the maximum degree of comparability, it is required that the proposals be organized in the manner specified below.

Proposals shall be prepared to satisfy the requirements of the RFP. *EMPHASIS SHOULD BE CONCENTRATED ON ACCURACY, COMPLETENESS, AND CLARITY OF CONTENT.* All parts, pages, figures, and tables should be numbered and labeled clearly.

### **4.1 TITLE PAGE**

Title Page should contain the following information:

- RFP Number and Name
- Proposer's Name and Address
- Proposer's Contact Person and Information (email address, telephone number(s), etc.)

### **4.2 TABLE OF CONTENTS**

Section #	Title	In addition to specified content, provide
1	Executive Summary	
2	Company Background	<b>ATTACHMENT – Company Background Form</b>
3	Application Software	
4	Technical and Vendor Hosted / Cloud Information	<b>ATTACHMENT – TECHNICAL/VENDOR HOSTED FORM</b>
5	Implementation Plan	<b>ATTACHMENT – IMPLEMENTATION FORM</b>
6	Functional System Requirements	<b>2025-SWB-48 – Functional Specifications (In Excel)</b>
7	Staffing Plan	<b>ATTACHMENT – STAFFING PLAN FORM</b>
8	Ongoing Support Services	<b>ATTACHMENT – ONGOING SUPPORT SERVICES FORM</b>
9	Client References	<b>ATTACHMENT – CLIENT REFERENCES</b>
10	Subscription and Maintenance Agreements	
11	Exceptions and Deviations	
<b>Required Attachments</b>		
	Cost Proposal	<b>2025-SWB-48 – Pricing Forms (In Excel)</b>

### **4.3 Executive Summary (Section 1)**

This part of the response to the RFP should be limited to a brief narrative that does not exceed two (2) pages describing the proposed solution. The summary should contain as little technical jargon as possible and be oriented toward non-technical personnel. The executive summary should not include cost quotations.

#### **4.4 Company Background (Section 2)**

Proposers must provide information about their company so that the Board can evaluate the Proposer's stability and ability to support the commitments set forth in response to the RFP. In addition to providing responses to the following items, the Vendor must complete the **ATTACHMENT - Company Background Form** of this RFP. Information that Proposers should provide in this section is as follows:

- The company's background includes a brief description (e.g., history, present status, future plans, company size) and organization charts.

#### **4.5 Application Software (Section 3)**

The Proposer is required to provide a general description of the application program product and how it will meet the requirements of this RFP. This section must address, at a minimum, the following items:

- Describe your overall proposed technology solution.
- Describe the company's product direction, including time frames.
- Describe unique aspects of the Proposer's solution in the marketplace.
- Describe components of the solution that are industry standards versus being proprietary to the Proposer.
- For all Third-party products:
  - List all third-party products proposed,
  - The reason that this product is a third-party product versus being part of the software Proposer's solution,
  - The extent to which this third-party product is integrated with the Proposer's solution.

#### **4.6 Technical and Vendor-Hosted/Cloud Information (Section 4)**

Please describe your vendor-hosted model, including hosting, integration, minimum hardware requirements for computers, deployment model (dedicated servers, shared environment, etc.), impact to and requirements of the Board's network and bandwidth, and any partners involved in service delivery.

The Proposer must complete the **ATTACHMENT - Technical and Vendor-Hosting / Cloud Form**. The information will be used in the evaluation process. Proposers should identify where conflicts may exist between their solution and current technologies being used in the Board as described in this RFP in **Section 2.3 Current Application Environment**. As the Board is exploring vendor-hosted / cloud solutions, Proposers should clearly define if their software product is a private or public vendor-hosted / cloud solution in the sections below.

#### **4.7 Implementation Plan (Section 5)**

The Proposer is to provide an implementation plan in narrative format supported by an activity-level project plan (e.g., Microsoft Project, or Microsoft Excel work breakdown structure) that details the tasks and activities for implementing the proposed solution. This implementation plan should include a narrative on the following elements using the subsection reference numbers below:

- Subsection 5.1: General Implementation Approach
- Subsection 5.2: Project Management Approach
  - Include ATTACHMENT - Project Management Approach
- Subsection 5.3: Data Conversion and Migration Plan
- Subsection 5.4: Data Analytics, Report, and Form Development
  - Include ATTACHMENT – Report Development Form
- Subsection 5.5: Integrations and Interfaces
- Subsection 5.6: Training
  - Include ATTACHMENT – Training Form

- Subsection 5.7: Organizational Change Management Approach
- Subsection 5.8: Testing
- Subsection 5.9: Operational Redesign Approach
- Subsection 5.10: System Documentation and Manuals
- Subsection 5.11: Disaster Recovery Plan
- Subsection 5.12: Knowledge Transfer

The Proposer should include additional elements in the proposal response if the Proposer feels it may add value to the overall implementation.

**It is expected that the Proposer will lead the efforts in each of the implementation areas described below unless stated otherwise.** Further details on what is to be provided as part of the Proposers proposed implementation plan are included in the following subsections.

#### **4.7.1 General Implementation Approach (Subsection 5.1)**

Provide a general overview of the implementation approach you plan to use that includes addressing the following items:

- Provide a detailed work plan or schedule as part of the proposal response in a work breakdown structure format.
- Describe key differentiators of the approach as they relate to implementing a solution on time, within budget, and with the ability to meet the needs of a diverse client like the Board.
- Describe how you determine the preferred implementation phasing of software modules.
- Describe your recommended approach for this implementation. Describe your approach towards running parallel systems, if necessary. Describe your approach to frequent data updates between systems while new Billing and Fleet software is implemented. Any unique tools, techniques, or methods that you use should be described in this section

#### **4.7.2 Project Management Approach (Subsection 5.2)**

As part of any significant engagement, the Board desires a project management approach based on the Project Management Institute's *Project Management Body of Knowledge* (PMBOK). The Board expects responding Proposers to adhere to PMBOK standards as part of the project. The Board expects the Proposer to provide project management resources leading to the system's successful deployment.

Briefly describe the contents and approach of each of these components:

- Project kickoff
- Project management plan
- Resource management plan
- Quality management plan
- Scope management plan
- Risk management plan
- Budget management plan
- Change control plan.
- Describe the approach to managing the project, such as a collaboration tool for document management.

The project manager will work as a team member with the Board's project management office ("PMO"). This project manager can be an employee of the Proposer or a partner of the Proposer. In



either case, the costs for the project manager should be clearly denoted in the pricing section of this RFP.

In addition to responding to the following items, the Proposer must complete the **ATTACHMENT - Project Management Approach** and include it in this section of the response.

- Provide an overall description of the Proposer project management approach towards this type of engagement and projected timing for major phases.
- Provide a high-level work plan for successfully deploying your proposed system.

#### **4.7.3 Data Conversion and Migration (Subsection 5.3)**

Data conversion will occur when migrating to the new applications. The Proposer will assist the Board in converting electronic and essential manual data to the new system. The Board will be responsible for data extraction; however, assistance is expected from the Proposer with data scrubbing and pre-data processing from current systems. The Board would also want the Proposer to lead overall data conversion coordination, define file layouts, and import and validate data into the new EAMS. Please provide pricing for data conversions in the associated Microsoft Excel pricing spreadsheet.

- All data from Cassworks should be migrated to the new EAMS. The data is comprised of:
  - work orders and associated detailed data
  - service/work requests
  - inspections
  - assets
  - inventory
- Describe your general approach towards data conversion and how you would work with the Board to conclude on the new system's data structure, including what should be converted, based on industry standards and best practices.
- Please describe your organization's recommended approach toward retention of legacy data.

#### **4.7.4 Data Analytics, Report and Form Development (Subsection 5.4)**

For specific reporting requirements, the Proposer will lead the development of any reports required as part of the system's initial deployment. The Proposer is expected to provide specialized knowledge and information to the Board staff during the development of needed reports via technical training on the tools used for report development, database schema and architecture, etc. In addition to providing responses to the following items, the Proposer must complete the **ATTACHMENT - Report Development Form** of this RFP and include it in this section of the response.

Provide information on your reporting approach, including:

- A representative list of out-of-the-box reports
- Description of various methods of reporting, including Business Intelligence
- Methods for the Board to identify, specify, and develop required custom SWBNO reports during the implementation.
- Provide support hours for custom report development, dashboard development, custom queries, etc.

#### **4.7.5 Integrations and Interfaces (Subsection 5.5)**

Information generally needs to be entered only once into the system. Modules within the system should be integrated in real-time with each other such that batch processes are not required to transfer information from one area of the system to another unless that is the preference of the Board.

Source System (Sending Data)	Destination System (Receiving Data)	Data Flow / Integration Description	
<b>Future HR System  (Cogsdale GPHR Replacement)</b>	EAMS	Software Description:	Used to manage employee data
		Brief Description:	Push employee data (name, average rate per hour/title, job title) to EAMS.
		Trigger:	Automated at midnight
		Frequency:	Daily
<b>GIS</b>	EAMS	Software Description:	Geographic Information System used for asset creation, updates, and decommissioning
		Brief Description:	Read asset information
		Trigger:	Real-time entered
		Frequency:	Real-time entered
<b>EAMS</b>	NEW Fleet Software  (Disregard if bidding software has appropriate Fleet capabilities)	Software Description:	Fleet management software used for creating and managing work orders for fleet operations
		Brief Description:	Asset information updated from work orders
		Trigger:	On work order or task close status
		Frequency:	Real-time entered
<b>NEW Fleet Asset Management Software  (Disregard if bidding software has appropriate Fleet capabilities)</b>	EAMS	Software Description:	Fleet management software used for creating and managing work orders for fleet operations
		Brief Description:	Asset information including cost for use to be added to work orders and requests
		Trigger:	Real-time entered
		Frequency:	Real-time entered
<b>EAMS</b>	Future CIS/Utility Billing Software [Cogsdale CSM Replacement]	Software Description:	Customer Service and Meter Billing Management system
		Brief Description:	Push meter turn on/turn off data from work orders
		Trigger:	On work order or task close status
		Frequency:	Real-time entered
<b>Future CIS/Utility Billing Software</b>	EAMS	Software Description:	Customer Service Management System used for creating and managing

Source System (Sending Data)	Destination System (Receiving Data)	Data Flow / Integration Description	
<b>[Cogsdale CSM Replacement]</b>			Meter Account numbers, Meter information (location)
		Brief Description:	Push customer data from the Future CIS/Utility Billing Solution to the EAMS to add to service requests and work orders.
		Trigger:	Real-time entered
		Frequency:	Real-time entered
<b>811</b>	EAMS	Software Description:	National call-before-you-dig platform
		Brief Description:	811 locate tickets will be added to CMMS work order or work/service request.
		Trigger:	Execute as event comes in
		Frequency:	As needed
<b>EAMS</b>	811	Software Description:	National call-before-you-dig platform
		Brief Description:	As the work order is closed in the CMMS, the 811 tickets is closed in the 811 system.
		Trigger:	When work order status or task status changes.
		Frequency:	As needed
<b>Oracle Fusion Cloud ERP</b>	EAMS	Software Description:	ERP
		Brief Description:	As inventory moves from Construction in Progress to Completed or Accepted, needs to be tracked in EAM.
		Trigger:	Completed or accepted.
		Frequency:	As needed
<b>EAMS</b>	Oracle Fusion Cloud ERP	Description:	Write off Asset
		Brief Description:	As Assets are removed from service, need to notify ERP system.

Source System (Sending Data)	Destination System (Receiving Data)	Data Flow / Integration Description	
		Trigger:	When Asset status changes.
		Frequency:	As needed

The Microsoft Excel pricing sheet contains a listing of the desired application interfaces. Please provide pricing for interface development in the associated Microsoft Excel pricing spreadsheet.

In addition:

- Describe the extent to which the various modules are integrated together versus being purchased separately and interfaced
- Describe your approach towards interfacing and integration with other solutions including use of specific tools, methods and standards.
- Describe data exchange standards (e.g., XML, Web Services, or EDI) supported or provided by your product.
- As it pertains to the Board's current technical environment described previously, identify potential issues for integrating with specific technologies that are used within the Board.
- If local customizations are made, do you provide any tools or assistance to easily incorporate customizations into new version/releases of your software?
- Describe your approach to interfacing SWBNO applications that are listed in the Current Application Environment (Section-Software Scope) as well as in the System Map depicted above. The System Map illustrates what the software systems would ideally look like after the EAMS implementation while Table below it identifies the data push/pulls that the Board has identified.

#### 4.7.6 Training (Subsection 5.6)

This task involves the development and execution of a training plan.

- Development of a comprehensive training plan that includes training materials and the delivery of end-user, tester, and system administrator training. The plan must include modules, user group levels, course duration, course description, and any prerequisites. Also include new team member training after implementation, annual refresher training opportunities, and updated training materials after major software updates.
- Include comprehensive face-to-face, onsite, end-user-specific training for each group (i.e., system administrator, supervisor, maintenance workers, and IT-related training to be delivered at the Board's facilities.

In addition, the Proposer must complete the **ATTACHMENT - Training Form** of this RFP and include it in this section of the response.

#### 4.7.7 Organizational Change Management Approach (Subsection 5.7)

The Board recognizes that moving from the current environment to a new solution will require an active change management program. The Proposer should clearly identify their approach towards Organizational Change Management, including any unique approaches or tools that will be used.

#### **4.7.8 Testing (Subsection 5.8)**

The Proposer should describe their recommended approach to the following types of testing that are anticipated to be performed on the project and the type of assistance they anticipate providing to the Board related to such testing:

- Provide a testing plan that includes system, performance, and Integration Testing.
- Perform system and stress/performance testing and support.
- Perform integration testing and support
- Provide a User Acceptance Test (UAT) plan that will include test scenarios with variables, and entrance and exit criteria.
- Support the Board with User Acceptance Test execution, including tester training, completed end-user security, workflows, converted data, 3<sup>rd</sup> party integrations, and reports.

#### **4.7.9 Operational Redesign Approach (Subsection 5.9)**

With the deployment of a new application, the Board wishes to take advantage of capabilities within the software that provide support for operational improvements. Proposers are requested to describe their approach towards operational redesign, including a discussion on the optimal time to conduct redesign as it relates to the implementation of the new software.

#### **4.7.10 System Documentation and Manuals (Subsection 5.10)**

The Proposer shall provide user manuals and online help for the Board to use as part of the initial training and on-going operational support. Additionally, the Proposer shall provide a configuration document of the fully integrated solution, workflows, configuration, and data logical models, including entity-relationship diagrams, complete documentation for scripts or stored procedures for data interfaces, and data directories where appropriate. The documentation format for the logical data model should include illustrations.

Explain the process and options for data exchanges with systems outside the EAMS. Describe how and what system data (assets, inventory, work orders, condition, documents, etc.) can be consumed and worked with on mobile devices. Determine and deliver all interface requirements and provide interface methodology and any integration software required in the proposal.

This document will be considered a living document and used as a reference for the Board to continue improving its EAMS.

Describe what documentation (user guide, technical guide, training materials, etc.) is available on the system proposed and any related costs.

Describe what types of documentation you anticipate developing during the project.

Describe the process of providing customized documentation for the Board's specific processes.

#### **4.7.11 Disaster Recovery Plan (Subsection 5.11)**

Please describe the services you provide around disaster recovery, if any, as part of your proposed solution.

#### 4.7.12 Knowledge Transfer (Subsection 5.12)

The Proposer should describe their process for ensuring that a transfer of knowledge occurs back to the Board staff so that staff can support and maintain the application in the most proficient manner once the Proposer implementation engagement is complete.

Include:

- Methodologies to ensure that training has been successful, and the Board staff know how to use the new system.
- Approach to ensuring that the Board personnel can operate, maintain, configure, and modify the new system, including operation of the testing tools, supporting infrastructure, and security.

#### 4.7.13 Go-Live and Post-Go-Live (Subsection 5.13)

- Provide go-live procedures and support and provide a Production Cutover plan for each new EAMS process configuration. The Cutover Plan should include the time required, the Board group(s)/team member(s) affected, potential impacts to the affected groups/team members during the cutover, and safeguards to prevent data loss if a problem is encountered during the cutover.

### 4.8 Functional and Technical System Requirements (Section 6)

Requirements are identified in the attached Excel spreadsheet labeled, **2025-SWB-48 EAMS-Functional Specifications**. These must be addressed in the Proposer’s proposal.

Proposers should review the specifications listed and respond with their availability within the Proposer’s proposed solution. The responses should be entered under the **Supported** column of each form as follows:

Valid Responses	Description	Comments Column
S	Supported in current version	No comment required
F	Supported in future version	Provide additional information
C	Supported with configuration	Provide additional information
R	Support through custom report development	Provide additional information
M	Supported with modification (customization)	Provide additional information
T	Supported with 3rd party or partner product	Provide additional information including complete descriptive information on the 3rd party or partner product being provided.
N	Not supported by systems included in this proposal	

Proposers proposing a multi-vendor solution should complete a General and Technical module specification response for each vendor.

**Note:** The response to these requirements should be provided in the exact format as provided (e.g., no additional macros, formulas, additional columns, modifications, passwords, etc.). Failure to do so can result in disqualification of the entire proposal.

#### **4.9 Staffing Plan (Section 7)**

In addition to responding to the following items, the Proposer must complete the **ATTACHMENT - Staffing Plan Form** to this RFP and include it in this section of the response.

Provide an Onsite Staffing Plan for the anticipated time your team will need to be onsite during the implementation and go live of the software. The Board will provide office space for the implementation team (Proposer and SWBNO Staff).

The Proposer must detail the type and amount of implementation support to be provided (e.g., number of personnel required per month, level of personnel, time commitment, etc.) by the Proposer(s) and SWBNO staff. Include resumes for all personnel that will be assigned to the project. If the Proposer is using a subcontractor, include information on the subcontracting staff being used and their specific role in the project.

Please provide an overall organizational structure for the involvement of the Board staff during the project. Identify the roles, responsibilities, and time needed of each component of this structure.

#### **4.10 Ongoing Support Services (Section 8)**

In addition to responding to the following items, the Proposer must complete the **ATTACHMENT - Ongoing Support Services Form** to this RFP and include it in this section of the response.

Please specify the nature and conditions of any post-implementation support (minimum required of 3 months) options including:

- Post-go-live support that is included in the proposal response
- Onsite support (e.g., system tuning, application configuration, interface issues, report development, network optimization, user training and tips to optimize the user experience)
- Telephone support
- Online chat
- Remote system access capabilities
- Help Desk services (If there is a service level agreement for your help desk, provide a copy with your RFP response.) Specify days, hours, and escalation options
- Toll-free support line
- User groups
- Online knowledgebase (i.e., how it is accessed, who updates it)
- Describe your maintenance programs and pricing options.

#### **4.11 Client References (Section 9)**

The Proposer must provide at least **five (5)** references from clients similar in size and complexity to the Board. The format for Proposer references is provided in **ATTACHMENT - Client Reference Form**. In addition, the Board requests a listing of all utility clients, and at least **three (3)** references must be vendor-hosted / cloud deployments similar to the product and services proposed by the Proposer.

#### **4.12 Subscription and Maintenance Agreements (Section 10)**

Sample subscription and maintenance agreements must be provided in this part of the Proposer's response for all components of the recommended solution. Indicate the basis on how subscription fees are determined.

- How are local customizations or configurations maintained when installing new releases of the Proposer's software? Describe the level of support the Proposer provides to the Board for identifying, validating, and testing scripts related to the latest software release.

#### **4.13 Exceptions and Deviations (Section 11)**

If the Proposer finds it impossible or impractical to adhere to any portion of these specifications and all attachments, it shall be so stated in its proposal, with all deviations grouped together in a separate section entitled "Exceptions/deviations from proposal requirements." This section will be all-inclusive and contain a definition statement of every objection or deviation with adherence to specific RFP sections. Objections or deviations expressed only in other parts of the proposal, either directly or by implication, will not be accepted as deviations, and the Proposer, in submitting a proposal, will accept this stipulation without recourse.

#### **4.14 Cost Proposal**

The electronic copy of the cost proposal response shall include the completed cost worksheets submitted in Excel format.

- The Board will not consider time and materials pricing. Proposers shall provide firm and fixed pricing based on the functionality described. For each item, indicate if the cost is one-time, annual, or other.
- The Proposer shall provide price information for each separate component of the proposed solution, as well as the costs of any modifications necessary to fully comply with the RFP specifications.
- In the event the product or service is provided at no additional cost, the item should be noted as "no charge" or words to that effect.
- In the event the product or service is not included in the Proposer proposal, the item should be noted as "no bid".
- To the greatest extent possible, Proposers shall show any applicable discounts separately from the prices for products and services. The Proposer is encouraged to present alternatives to itemized costs and discounts, such as bundled pricing, if such pricing would benefit the Board.



## **RFP Technical and Cost Proposal Submittal Checklist**

Technical Proposal – In Sections

Cost Proposal (separate file in Excel format)

Required Attachments

## **Redacted RFP Technical and Cost Proposal Submittal**

Proposers may submit a separate redacted copy of their technical and cost proposal to provide in response to a public records request. This is not a requirement of the proposal submission documents, and it can be submitted anytime with the proposal submission or after.

## **Signed Documents and Forms (not included in page total)**

This section shall include the forms required for proposal submission and those required for the awarded proposer.

## **Attachments Checklist (REQUIRED AT PROPOSAL SUBMISSION):**

ATTACHMENT – COVER SHEET

ATTACHMENT – ECONOMICALLY DISADVANTAGED BUSINESS PARTICIPATION SUMMARY SHEET

ATTACHMENT – EDBP ACKNOWLEDGEMENT OF NEGOTIATED TERMS FORM

ATTACHMENT – COMPANY BACKGROUND FORM

ATTACHMENT – TECHNICAL AND VENDOR HOSTING REQUIREMENTS FORM

ATTACHMENT – PROJECT MANAGEMENT APPROACH FORM

ATTACHMENT – REPORT DEVELOPMENT FORM

ATTACHMENT – TRAINING FORM

ATTACHMENT – STAFFING PLAN FORM

ATTACHMENT – ONGOING SUPPORT SERVICES FORM

ATTACHMENT – CLIENT REFERENCE FORM

SEPARATE FILE – TECHNICAL SPECIFICATIONS (IN EXCEL FORMAT)

SEPARATE FILE – PRICING FORM (IN EXCEL FORMAT)

## **REQUIRED FOR AWARDED PROPOSER AT CONTRACT:**

ATTACHMENT – AFFIDAVITS

1. Conflict of Interest Disclosure Affidavit
2. Corporate Resolution or Proposer Organization
3. Convicted Felon Affidavit
4. Non-Solicitation Affidavit
5. Non-Collusion Affidavit

**Proposers not submitting the required documents and attachments will result in your response being deemed non-responsive.**

**ATTACHMENT**  
**COVER SHEET**

**Request for Proposal:** \_\_\_\_\_

Company Name: \_\_\_\_\_

Company Address: \_\_\_\_\_

\_\_\_\_\_

**Please provide the key contact person's information who will be responsible during the active event:**

**Primary Contact Person:**

Name: \_\_\_\_\_ Title: \_\_\_\_\_

Cell Phone: \_\_\_\_\_ Email Address: \_\_\_\_\_

**Secondary Contact Person:**

Name: \_\_\_\_\_ Title: \_\_\_\_\_

Cell Phone: \_\_\_\_\_ Email Address: \_\_\_\_\_

**This RFP must be signed by an authorized Representative of the Company/Firm for proposal to be valid. Signing indicates you have read and comply with the Instructions and Conditions.**

Name of Person Authorized to Sign: \_\_\_\_\_

Title of Person Authorized to Sign: \_\_\_\_\_

Signature of Person Authorized to Sign: \_\_\_\_\_

Email Address of Person Authorized to Sign: \_\_\_\_\_

Date: \_\_\_\_\_

**ECONOMICALLY DISADVANTAGED BUSINESS PARTICIPATION SUMMARY SHEET**

Minimum Percentage Goal Participation for this Contract is \_\_\_\_%

**Contract Name and Number #** \_\_\_\_\_

Name and Address of Disadvantaged Business Enterprise Company	Name of Contact Person	Scope of Work to be Performed	Dollar Amount of work to be performed	Percentage of Dollar Amount to Total Bid Price

**NOTE:** Signature required even if judged **NOT APPLICABLE** by the **BIDDER**

**Prime Representative Name:** \_\_\_\_\_

**Prime Company's Name:** \_\_\_\_\_

**Prime Address:** \_\_\_\_\_  
\_\_\_\_\_

**Prime Signature:** \_\_\_\_\_

**Date:** \_\_\_\_\_

**E-mail:** \_\_\_\_\_

**Telephone Number:** \_\_\_\_\_

**Revised October 30, 2024**

**ACKNOWLEDGEMENT  
OF NEGOTIATED TERMS BETWEEN  
PRIME CONTRACTOR AND DBE SUBCONTRACTOR**

Solicitation: \_\_\_\_\_

This form acknowledges that the

Prime \_\_\_\_\_

and

DBE Subcontractor \_\_\_\_\_ Certification: \_\_\_\_\_ SLDBE or \_\_\_\_\_ LAUCP

have agreed to the following terms of service:

Scope of Work:

--

*Please note: Scope of work should describe the agreed upon terms between the Prime and DBE.*

DBE Percentage of Total Contract: \_\_\_\_\_

Dollar Amount of DBE Work: \$\_\_\_\_\_

By signing this acknowledgement, the Prime Contractor and DBE Subcontractor affirm that it will perform the Scope of Work for the estimated total dollar value stated. Both parties hereby certify that the information contained herein is true and correct.

**PRIME CONTRACTOR:**

Printed Name: \_\_\_\_\_

Signature: \_\_\_\_\_

Date: \_\_\_\_\_

**DBE SUBCONTRACTOR:**

Printed Name: \_\_\_\_\_

Signature: \_\_\_\_\_

Date: \_\_\_\_\_

**SEWERAGE AND WATER BOARD OF NEW ORLEANS (SWBNO)**  
**Request for Proposals**  
**Enterprise Asset Management System and Implementation Services**  
**2025-SWB-48**

**ATTACHMENT**

**COMPANY BACKGROUND FORM**

<b>Vendor name:</b>			
<b>Software brand name:</b>			
<b>Software version proposed (years in production):</b>			
<b>Is Vendor prime contractor:</b>	Yes <input type="checkbox"/>	No <input type="checkbox"/>	
<b>1.</b>	<b>What are the top three differentiators of your company and its proposed solution?</b>		
<b>2.</b>	<b>What strategic alliance have you made to further strengthen your product and services?</b>		
<b>3.</b>	<b>How do you guarantee the services provided by your company?</b>		
<b>4.</b>	<b>What is your marketplace focus?</b>		
	<input type="checkbox"/> Utilities	<input type="checkbox"/> Large Government (e.g., counties /states)	
	<input type="checkbox"/> Small/Local Governments	<input type="checkbox"/> Other (specify):	
<b>5.</b>	<b>What is your preferred customer size (quantify in terms of budget, customers, population, etc.)?</b>		
<b>6.</b>	<b>Please describe the level of research and development investment you make in your products (i.e. – annual budget, head count, etc.).</b>		

**SEWERAGE AND WATER BOARD OF NEW ORLEANS (SWBNO)**  
**Request for Proposals**  
**Enterprise Asset Management System and Implementation Services**  
**2025-SWB-48**

<b>7.</b>	<b>How many years have you been selling your solution to the public sector?</b>	
<b>8.</b>	<b>How many fully operational customer installations of the version proposed in this RFP, currently in production, has the Vendor completed?</b>	
	Louisiana	Nationally
	Utilities	
	Other public sector	
	Other non-public sector	
	Overall:	
<b>9.</b>	<b>How many fully operational customer installations, in total, has the Vendor completed?</b>	
	Louisiana	Nationally
	Utilities	
	Other public sector	
	Other non-public sector	
	Overall:	
<b>10</b>	<b>How many current system implementations of your solution are in-process within the State of Louisiana or other utilities.</b>	
	Current in-process Implementations	
	Louisiana	
	Utilities	
	Total:	
<b>11.</b>	<b>Please state the year the Vendor started in the business of selling the proposed solution to the public sector.</b>	
<b>12.</b>	<b>Where is the Vendor's closest support facility/sales office to New Orleans?</b>	
<b>13.</b>	<b>Where is the Vendor's company headquarters?</b>	

**SEWERAGE AND WATER BOARD OF NEW ORLEANS (SWBNO)**  
**Request for Proposals**  
**Enterprise Asset Management System and Implementation Services**  
**2025-SWB-48**

<b>14.</b>	<b>Please list the Vendor's sales in the previous three years:</b>	
	<b>Year</b>	<b>Sales</b>
	<b>2023</b>	
	<b>2022</b>	
	<b>2021</b>	
<b>15.</b>	<b>How many total employees does the Vendor have in each of the following categories?</b>	
	<b>Area</b>	<b>Number</b>
	Sales/Marketing	
	Management/Administration	
	Help Desk Staff	
	Development Staff	
	Other (please list)	
	<b>Total:</b>	
<b>16.</b>	<b>What organization would the Vendor recommend for a site visit?</b>	
<b>17.</b>	<b>Please disclose any outstanding litigation against your company.</b>	
<b>18.</b>	<b>Please list any third-party vendors you're partnering with and proposing as part of your response, as well as the products and versions proposed, and the scope areas/functionality they will be providing.</b>	

**SEWERAGE AND WATER BOARD OF NEW ORLEANS (SWBNO)**  
**Request for Proposals**  
**Enterprise Asset Management System and Implementation Services**  
**2025-SWB-48**

**ATTACHMENT**

**TECHNICAL AND VENDOR HOSTING REQUIREMENTS FORM**

19.	Do you offer a “Gov-Cloud” hosting model? If so, please describe.
20.	Indicate Tier certification for design and operation of the hosting locations. Indicate if a private link (MPLS or EVPL) can be set up to the hosting locations.
21.	How do you track monthly usage for subscription-based services?
22.	Does the system interface support a browser interface with or without the help of additional components?
23.	Please describe the minimum commitment term (in years) for a vendor-hosted option and note the term assumed for determining the proposed costs.
24.	Please list the connectivity options and carriers available at your hosting facility.
25.	Estimate the bandwidth that your solution will require based upon users, application environment, and any other factors.
<b>System Performance</b>	
26.	How much notification will you give the Board in advance of any scheduled downtime?



**SEWERAGE AND WATER BOARD OF NEW ORLEANS (SWBNO)**  
**Request for Proposals**  
**Enterprise Asset Management System and Implementation Services**  
**2025-SWB-48**

<b>27.</b>	<b>What is your process for notifying the customer and fixing bugs once they have been identified?</b>

<b>28.</b>	<b>Please provide the total number of clients and corresponding number of end-users of hosted solutions currently supported by your proposed solution.</b>

<b>29.</b>	<b>What system/application availability and response time will your proposed system meet? How do you ensure this level of performance?</b>

<b>30.</b>	<b>How are hosted software applications deployed for use by numerous customers (dedicated servers for each hosted customer, or is a single set of applications utilized for all customers)?</b>

<b>Security</b>
-----------------

<b>31.</b>	<b>Describe the identification and authorization capabilities of your proposed solution for users.</b>

<b>32.</b>	<b>Indicate cybersecurity solutions that are in place to prevent, detect, contain and recover from security threats such as malware injection, side channel attacks, exploitation of API vulnerabilities, or distributed denial of service (DDoS) attacks.</b>

<b>33.</b>	<b>Confirm (Yes/No) that detailed logs will be provided for forensic investigation of security incidents, that can aid in identifying the nature and extent of the affectation, including the data that was exfiltrated or compromised.</b>
<div style="display: flex; justify-content: space-around;"> <span>YES <input type="checkbox"/></span> <span>NO <input type="checkbox"/></span> </div>	

<b>34.</b>	<b>Indicate what support will be provided to carry out forensic investigation of security incidents.</b>

**SEWERAGE AND WATER BOARD OF NEW ORLEANS (SWBNO)**  
**Request for Proposals**  
**Enterprise Asset Management System and Implementation Services**  
**2025-SWB-48**

<b>35.</b>	<b>Does the system interface support a browser interface with or without the help of additional components?</b>

<b>36.</b>	<b>Indicate if you comply or do not comply with the following:</b>		
<b>Requirement</b>		<b>Comply?</b>	
		<b>YES</b>	<b>NO</b>
The system shall be available 24 x 7 x 365 with a minimum of 99.95% uptime, measured on a monthly basis (excluding maintenance windows).		<input type="checkbox"/>	<input type="checkbox"/>
Data shall reside in the United States at all times.		<input type="checkbox"/>	<input type="checkbox"/>

<b>Requirement</b>		<b>Comply?</b>	
		<b>YES</b>	<b>NO</b>
All system data and files shall be regularly backed up to a secondary data center/disaster recovery site outside of the main data center's same weather pattern and power grid. Backups shall occur such that the Board loses no more than 2 hours of transactions due to an unexpected outage.		<input type="checkbox"/>	<input type="checkbox"/>
Hosting Providers/Respondents shall have a documented Security Incident Response Plan (SIRP) that addresses the Respondent's plan for preventing, detecting, and responding to security breaches or cyberattacks in which the Board's data or operations may be compromised.		<input type="checkbox"/>	<input type="checkbox"/>
Hosting Providers/Respondents shall have a documented Disaster Recovery Plan (DRP) that addresses recovery and maintenance of system data and operations in response to hazard or emergency scenarios. This plan shall be tested regularly to ensure that it is both tangible and actionable.		<input type="checkbox"/>	<input type="checkbox"/>

**SEWERAGE AND WATER BOARD OF NEW ORLEANS (SWBNO)**  
**Request for Proposals**  
**Enterprise Asset Management System and Implementation Services**  
**2025-SWB-48**

Hosting Providers /Respondents shall have a documented Business Continuity Plan (BCP) that addresses localized or system outages that create an impact to one or more business functions. The BCP should account for the rapid restoration of services and redundancies in technology or process.	<input type="checkbox"/>	<input type="checkbox"/>
Hosting Providers /Respondents shall undergo a SSAE 18 SOC2 Type 2 audit on an annual basis and must have no unaddressed material concerns. Respondent shall provide a copy of their most recent audit report prior to contract award.	<input type="checkbox"/>	<input type="checkbox"/>
<p>Hosting Providers/Respondents shall support and be compliant with all relevant regulations and requirements including, but not limited to:</p> <ul style="list-style-type: none"> <li>• PCI-DSS</li> <li>• FERPA,</li> <li>• IPAA/HITECH</li> <li>• GDPR.</li> </ul>	<input type="checkbox"/>	<input type="checkbox"/>

**SEWERAGE AND WATER BOARD OF NEW ORLEANS (SWBNO)**  
**Request for Proposals**  
**Enterprise Asset Management System and Implementation Services**  
**2025-SWB-48**

**ATTACHMENT**

**PROJECT MANAGEMENT APPROACH FORM**

<b>37.</b>	<b>How does the Vendor plan to manage the material that is produced during the project through potential solutions such as a collaboration environment?</b>
<b>38.</b>	<b>Provide specific information on project close-out activities in support to the Board.</b>
<b>39.</b>	<b>What percentage of the Project Manager's time will be devoted to the project?</b>
<b>40.</b>	<b>What percentage of the Project Manager's time will be spent on site?</b>
<b>41.</b>	<b>What is the total proposed duration of the implementation?</b>

**SEWERAGE AND WATER BOARD OF NEW ORLEANS (SWBNO)**  
**Request for Proposals**  
**Enterprise Asset Management System and Implementation Services**  
**2025-SWB-48**

**ATTACHMENT**

**REPORT DEVELOPMENT FORM**

42.	What is the query tool and report writer that Vendor is proposing?
43.	What reports are available out of the box? Provide a list here and samples at the end of this section.
44.	Describe your process for determining the scope of what reports will have to be developed (not out-of-the-box) and what effort it will take to develop and test them?
45.	It is expected that the system will provide the ability for end-user querying and reporting to be performed without impacting the performance of the transactional system. Does your proposal meet this expectation?

**SEWERAGE AND WATER BOARD OF NEW ORLEANS (SWBNO)**  
**Request for Proposals**  
**Enterprise Asset Management System and Implementation Services**  
**2025-SWB-48**

**ATTACHMENT**

**TRAINING FORM**

<b>46.</b>	<b>What is your recommended approach to training (End-user, train the trainer, hybrid approach), for the Board, and why?</b>
<b>47.</b>	<b>Please specify what types and the expected number of training documentation will be developed by the Vendor?</b>
<b>48.</b>	<b>Describe the opportunities for ongoing training.</b>
<b>49.</b>	<b>Describe online training options.</b>

**SEWERAGE AND WATER BOARD OF NEW ORLEANS (SWBNO)**  
**Request for Proposals**  
**Enterprise Asset Management System and Implementation Services**  
**2025-SWB-48**

**ATTACHMENT**

**STAFFING PLAN FORM**

<b>50.</b>	<b>Assuming health restrictions permit doing so, identify the degree to which Vendor staff will be onsite versus off-site during the project.</b>		
<b>51.</b>	<b>Use the table provided below to identify the number of the Board business staff expected to be committed to the project implementation. Initial identification of project roles should be supplemented by Vendors based on their experience in implementing their product in similar environments.</b>		
	<b>Project Role</b>	<b>Project Responsibilities</b>	<b>FTE</b>
	Executive Sponsor(s)		<input type="checkbox"/>
	Project Manager		<input type="checkbox"/>
	Project Administrator		<input type="checkbox"/>
	Functional Process Owners		<input type="checkbox"/>
	Functional Process Team Participants (per member involvement)		<input type="checkbox"/>
	Training Coordinator Team Lead		<input type="checkbox"/>
	Change Management Team Lead		<input type="checkbox"/>
	Communications Team Lead		<input type="checkbox"/>
	Other Roles		<input type="checkbox"/>
<b>52.</b>	<b>Use the table below to identify the number of technical resources expected to be committed to the project implementation. Initial identification of project roles has been provided but should be supplemented or revised by Vendors based on their experience in implementing their product in similar environments.</b>		

**SEWERAGE AND WATER BOARD OF NEW ORLEANS (SWBNO)**  
**Request for Proposals**  
**Enterprise Asset Management System and Implementation Services**  
**2025-SWB-48**

	<b>Project Role</b>	<b># of FTEs</b>	<b>Skill Set Required</b>	<b>Training Required?</b>	<b>Training Provided?</b>
	Help Desk				
	Trainer				

	DBA				
	Report Developer				
	Application Support				
	System Administrator				
	Security Administrator				
	Other Roles				



**SEWERAGE AND WATER BOARD OF NEW ORLEANS (SWBNO)**  
**Request for Proposals**  
**Enterprise Asset Management System and Implementation Services**  
**2025-SWB-48**

**ATTACHMENT**

**ONGOING SUPPORT SERVICES FORM**

<b>Support and Maintenance</b>		
<b>53.</b>	<b>Provide the minimum, maximum, and average response and resolution times (hours) provided as part of the basic support agreement and average response time for the past twelve (12) months.</b>	
<b>54.</b>	<b>Describe Help Desk services for technical support and end users. Specify days and hours and any escalation options and procedures.</b>	
<b>55.</b>	<b>Identify the party or business unit that is responsible for the support options provided above.</b>	
<b>56.</b>	<b>Provide the following regarding the number of business staff the Board should expect to be committed to providing on-going application support:</b>	
	<ul style="list-style-type: none"> <li>• Role</li> <li>• Responsibility</li> <li>• Estimated time commitment in terms of FTE time</li> </ul>	
	<b>Role</b>	<b>Estimated commitment in FTE</b>
	<b>Responsibility</b>	

**SEWERAGE AND WATER BOARD OF NEW ORLEANS (SWBNO)**  
**Request for Proposals**  
**Enterprise Asset Management System and Implementation Services**  
**2025-SWB-48**

<b>57.</b>	<b>For ongoing IT staff resources, please provide the following information:</b> <ul style="list-style-type: none"> <li>• Type of positions required (e.g., help desk, trainer, DBA, report developer, application support, system administrator, security administration, etc.)</li> <li>• Number of FTEs within each position</li> <li>• Skill sets required for each position</li> <li>• Training required and whether the Vendor provides this training</li> </ul>				
	<b>Position</b>	<b># FTE</b>	<b>Skill Sets Required</b>	<b>Training Required</b>	<b>Vendor Training</b>
<b>58.</b>	<b>It is anticipated that all system updates, security updates and release patches will be applied in a timely manner. For any on-premises components these should be easily downloadable, if applicable. An accumulation patch process is desired. Provide information on how software updates are received, processed, and distributed, including but not limited to:</b>				
	<ul style="list-style-type: none"> <li>• Backward version compatibility and support</li> </ul>				
	<ul style="list-style-type: none"> <li>• Timeframe/policy on moving to new versions</li> </ul>				
	<ul style="list-style-type: none"> <li>• Automatic product upgrades versus on-demand</li> </ul>				
	<ul style="list-style-type: none"> <li>• Ease of implementation for the Board staff versus need to contract for services</li> </ul>				
	<ul style="list-style-type: none"> <li>• Use of tools to deploy new versions and patches</li> </ul>				

**SEWERAGE AND WATER BOARD OF NEW ORLEANS (SWBNO)**  
**Request for Proposals**  
**Enterprise Asset Management System and Implementation Services**  
**2025-SWB-48**

	<ul style="list-style-type: none"> <li>Additional information</li> </ul>
--	--------------------------------------------------------------------------

<b>59.</b>	<b>Describe the product release cycle including:</b>																					
	<ul style="list-style-type: none"> <li>How long releases typically take to implement</li> </ul>																					
	<ul style="list-style-type: none"> <li>Frequency of upgrades/enhancements or new versions (major and minor version releases)</li> </ul>																					
<b>60.</b>	<b>Do you limit the number of the Board staff who can call in for support? If yes, explain your model and how additional staff can be included? If there is no limitation, the maintenance agreement should clearly state this fact. Are you agreeable to include such language in our contract?</b>																					
<b>61.</b>	<b>Describe the types of support needed to keep the product under current support and to keep the product enhanced.</b>																					
<b>62.</b>	<b>Do you offer post-implementation support? If so, what is the duration?</b>																					
<b>63.</b>	<b>Will the vendor contractually agree to the following?</b>																					
	<table border="1"> <thead> <tr> <th><b>Contractual Inquiry Term Condition</b></th><th><b>Yes</b></th><th><b>No</b></th></tr> </thead> <tbody> <tr> <td>Provide staff for training and implementation</td><td><input type="checkbox"/></td><td><input type="checkbox"/></td></tr> <tr> <td>Non-performance holdbacks?</td><td><input type="checkbox"/></td><td><input type="checkbox"/></td></tr> <tr> <td>Payment holdbacks until fully operational and formally accepted?</td><td><input type="checkbox"/></td><td><input type="checkbox"/></td></tr> <tr> <td>Allow the Board approve Vendor staff assigned to help with implementation?</td><td><input type="checkbox"/></td><td><input type="checkbox"/></td></tr> <tr> <td>Ongoing costs are waived during the first year of implementation</td><td><input type="checkbox"/></td><td><input type="checkbox"/></td></tr> <tr> <td>Ongoing cost for software modules is waived until the implementation phase for the given modules begins</td><td><input type="checkbox"/></td><td><input type="checkbox"/></td></tr> </tbody> </table>	<b>Contractual Inquiry Term Condition</b>	<b>Yes</b>	<b>No</b>	Provide staff for training and implementation	<input type="checkbox"/>	<input type="checkbox"/>	Non-performance holdbacks?	<input type="checkbox"/>	<input type="checkbox"/>	Payment holdbacks until fully operational and formally accepted?	<input type="checkbox"/>	<input type="checkbox"/>	Allow the Board approve Vendor staff assigned to help with implementation?	<input type="checkbox"/>	<input type="checkbox"/>	Ongoing costs are waived during the first year of implementation	<input type="checkbox"/>	<input type="checkbox"/>	Ongoing cost for software modules is waived until the implementation phase for the given modules begins	<input type="checkbox"/>	<input type="checkbox"/>
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**SEWERAGE AND WATER BOARD OF NEW ORLEANS (SWBNO)**  
**Request for Proposals**  
**Enterprise Asset Management System and Implementation Services**  
**2025-SWB-48**

<b>Software Updates and Distribution</b>	
<b>64.</b>	<b>Describe the product release cycle including:</b>
	<ul style="list-style-type: none"> <li>Frequency of upgrades/enhancements or new versions (major and minor version releases)</li> </ul>

	<ul style="list-style-type: none"> <li>Contents of release</li> </ul>
	<ul style="list-style-type: none"> <li>How long release takes to implement</li> </ul>
	<ul style="list-style-type: none"> <li>Use of release notes</li> </ul>
	<ul style="list-style-type: none"> <li>Backward version compatibility and support of back versions</li> </ul>
	<ul style="list-style-type: none"> <li>Timeframe/policy on moving to new versions</li> </ul>
	<ul style="list-style-type: none"> <li>Automatic product upgrades or on demand</li> </ul>
	<ul style="list-style-type: none"> <li>Ease of implementation for the Board staff versus need to contract for services</li> </ul>
	<ul style="list-style-type: none"> <li>Additional information</li> </ul>
<b>Customizations</b>	
<b>65.</b>	<b>How can the Board customize or configure the software directly without Vendor involvement?</b>
<b>66.</b>	<b>How are local customizations or configurations maintained when installing new releases of the Vendor's software?</b>

# Sewerage and Water Board of New Orleans

## Reference Check Request Form

### RFP-EAMS Software Implementation

<b>Company Name:</b>				
<b>Reference Name:</b>				
<b>Reference Position:</b>				
<b>Reference Email Address:</b>				
<b>Phone Number:</b>				
<b>On a scale of 1-4 indicate by circling a number whether you agree or disagree with the following statements:</b>	<b>1 Greatly Disagree</b>	<b>2 Disagree</b>	<b>3 Agree</b>	<b>4 Greatly Agree</b>
Implementation length matched your original timeline.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Vendor followed a structured implementation methodology that was effective.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Vendor managed project scope, timeline and budget well.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Vendor handled all issues and challenges well.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Vendor provided a knowledgeable and experienced team.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Vendor team was consistent with little turnover.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Vendor provided adequate and effective training, including training materials.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Data migration process was smooth with no major issues.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Vendor was accommodating for my specific requirements.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Vendor was available and effective during go-live support.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
I am satisfied overall on the vendor's implementation experience.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
There were no to little unexpected costs or scope changes after go-live.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

<b>Given the above, would you recommend this vendor for a implementation? Please enter a YES in appropriate box.</b>	
<b>Highly Recommend</b>	
<b>Recommend</b>	
<b>Recommend with Reservation</b>	
<b>Do not Recommend</b>	

**Any further comments:**

Please complete this form and return it to **Procurement at [bids@swbno.org](mailto:bids@swbno.org)** no later than **February 3, 2025**.