The Sewerage & Water Board
OF NEW ORLEANS

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July 8, 2025

Addendum No. 1

Your reference is directed to the Request for Proposal for**: 2025-SWB-48 Enterprise Asset Management Software and Services** for the Sewerage and Water Board of New Orleans which proposals are due on **July 18, 2025,** at **11:00 a.m**. CST.

This addendum provides for the following:

1) Questions by Vendors
2) Updated Proposal Due Date
3) Pre-Proposal Recording
4) Pre-Proposal Attendance Sheet

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1) Questions By Vendors

1. May a prime contractor submit multiple implementation services (performed by different subcontractors) in their bid package?

    They can provide a bid using as many subs as they want as long as they account for the DBE, as well.

2. **System Integrations:** Could you please confirm the names and core functionality of the existing systems (e.g., ERP, HR, Financial, etc.) that are expected to be integrated with or replaced by the proposed solution?

    Please see chart titled Current Enterprise Asset Management System Application Environment on Page 10-11 in the RFP.

3. **GovCloud Hosting Requirements (GS-01 & GS-02):**
   Would SWBNO consider removing the requirements related to mandatory hosting in a government cloud environment (GS-01 and GS-02)?

    Yes, SWBNO will waive the Government cloud requirement for GS-01/GC02.

4. The RFP notes 500 users. Could you please clarify the anticipated breakdown of these users.

Administrative Users:
How many users will require full system access (via desktop and/or mobile) for functions such as work orders, inventory management, asset tracking, etc.?

50

Lite Users:
How many users will need limited access—such as creating work orders, adding labor/parts, managing inventory, viewing dashboards and reports, etc.?

200

Field Workers / Mobile Users:
How many users are considered field or maintenance workers who would access the system solely through a mobile device?

300 (overlap between Lite and Field or Mobile Users)

Of the mobile users, how many are expected to share devices?

50-100

5. Could SWBNO clarify whether all integrations listed (e.g., Oracle Fusion ERP, future CIS, GIS, HR systems) are required to operate in real time, or are batch processes acceptable in certain scenarios?

ESRI GIS integrations will need to be real-time. If other systems are capable of API real-time connections, it would be preferred. Regular batch processes would be acceptable in other instances.

6. Will SWBNO provide API documentation or integration specifications for the future HR and CIS systems?

SWBNO has not yet chosen an HCM or CIS solution, therefore are not able to provide at this time. All future systems are anticipated to be cloud based.

7. Will SWBNO make available staging and test environments for interfacing with current systems during the implementation phase?

Yes

8. Regarding GIS integration, is the expectation that all asset management functions support spatial data editing, or is spatial visualization sufficient?

Spatial Data Editing is expected.

9. What are the required security and compliance standards for the proposed solution (e.g., SOC 2 Type II, NIST, CJIS)?

At least SOC 1 Type II. SWBNO is working to become NIST compliant and expects future software to be NIST compliant, as well.

10. Can SWBNO provide an export sample of the legacy RJN Cassworks data to help assess the complexity of data migration?

> The data could be confidential and we are not willing to share data until after a vendor is chosen and a contract is in place.

11. Should legacy asset and work order data be migrated in full, or only for a defined historical period (e.g., past five years)?

> Please see Section 4.7.3 Data Conversion and Migration for detail.

12. Can it be assumed that existing data is reasonably clean, or should vendors anticipate the need for significant data scrubbing and cleansing?

> No, it should not be assumed that the data is reasonably clean.

13. Which business intelligence or reporting platforms does SWBNO currently use (e.g., Power BI, Tableau, Crystal Reports)?

> Power BI and Crystal Reports

14. What internal SWBNO resources (e.g., IT, operations, GIS) will be assigned to the project team during implementation?

> There will be a dedicated SWBNO IT Project Manager.
> There should be no assumption of SWBNO personnel to perform specific tasks, but some SWBNO staff will be considered SMEs during implementation.
> SWBNO Cassworks support is available as needed.

15. Is SWBNO open to a phased module-based rollout (e.g., Work Orders followed by Fleet), or is a single-phase cutover expected?

> Phased module rollout is acceptable but vendor should propose based on experience and best practices.

16. What are SWBNO's expectations for post-go-live onsite support (e.g., duration, staffing, support scope)?

> Please see Section 4.10 Ongoing Support Services on page 31 of the RFP.

17. Is there a targeted go-live date or a high-level timeline that SWBNO is aiming to meet?

> Vendor should provide high level timeline based on experience and knowledge of their solution. Targeted go-live date will be negotiated with chosen vendor.

18. How are work orders currently initiated at SWBNO, and how is this process expected to function in the new EAMS?

> Depending on the department and RJN database, a user with the appropriate permission can create a work order. Generally, work orders are initiated by an Inspector, supervisor, Cassworks support, or Customer Service personnel. Ideally, the new EAMS should interface with the future cloud based CIS and manage all field work orders issued by Customer Service.

19. How many SWBNO staff members will require system access?

Please see answer to Question 4 above.

20. How many staff members will require training?

See response to #21

21. Is SWBNO open to a "train-the-trainer" approach for end-user training, or is the vendor expected to conduct all end-user training? If the latter, could SWBNO provide an approximate number of end-users by department or asset type?

Please see Section 4.7.6 in the RFP. Vendor should propose a train the trainer or end user training based on experience and best practices. All SMEs are expected to be trained directly by the vendor.

22. The RFP references 24x7 phone support. Can you confirm whether this is a mandatory requirement?

Please provide vendor's available support hours offered.

23. Will data migration cover both asset records and historical work orders?

Yes

24. Where is current asset data stored, and in what format(s)?

RJN Cassworks – Oracle 8i (version Oracle 8.1.7.4.1 database)

25. Is sample data available for vendors to review as part of the proposal process?

Please see answer to Question 10 above.

26. Could SWBNO clarify the existing inventory management process? Specifically, how many inventory stores are maintained and which asset categories they cover?

Fixed Asset Inventory will be handled by Oracle Fusion Cloud

27. Is there a defined budget range or funding estimate for this project?

Yes, but will not be shared at this time.

28. **Administrative Users** – how many of the 500 users would require full access to the system to perform all aspects of work orders, inventory management, asset management, etc. using either a desktop to access the system, a mobile device, or have the option to use either?

See answer to Question 4 above.

29. **Lite Users** – how many of those 500 Users would need only limited access, such as creating service and/or work orders, with the ability to perform additional tasks in the system on a limited access basis, i.e. adding parts, and labor to a work order, managing inventory, view reports, dashboards, etc.

See answer to Question 4 above.

30. **Field Workers** – Of the 500 Users – would any be considered field/maintenance workers that would access the system solely through a tablet/phone (mobile device) if they could perform all

of their job functions on that mobile device? Of those accessing the system through a mobile device, how many share a device?

See answer to Question 4 above.

31. Please clarify name and functionality of **existing solutions** (ERP, HR, Financial, etc.) to be integrated and/or replaced by the proposed solution.

See answer to Question 2 above.

32. **GS-01 & 02 -** To be hosted in a government cloud environment and supports the use of SSL (HTTPS) for security - Would the customer consider removing requirement GS-01 & GS-02?

See answer to Question 3 above.

33. Can we be given an extension?

A two-week extension will be granted. Responses should be due by 11:00 a.m. on August 1, 2025

34. Can a 2 week extension please be granted? As you are asking for a GIS based system, please be aware that our sales and technical staff (Timmons Group and Trimble) are attending the Esri GIS User conference July 13-18th. With the RFP being due on the 18th, we would need to complete our response and submit on the 11th. Considering that questions will be answered on the 7th or 8th, that will leave us only 4 business days to adjust our proposals, get through risk review and QA/QC reviews.

See answer to Question 33 above.

35. Please detail what version and deployment model your Esri GIS is comprised of?

(On-Premises) Currently ArcGIS Enterprise 10.9.1 w/ Portal and GeoEvent Server; Migration to 11.5 with Utility Network is on-going and expected completion prior to EAMS implementation.
(SaaS) ArcGIS Online organization

36. Page 11 lists "Future Cloud HCM" as a desired interface. Please confirm that this integration is NOT part of the scope of work, therefore it should not be included in the proposed pricing?

Interfaces between all future SWBNO cloud systems will be managed by a SWBNO-owned middleware solution and should be priced accordingly.

37. Please detail what version of Oracle Fusion Cloud ERP is in use.

Oracle Fusion Cloud 25B (11.13.25.04.0)

38. Page 11 lists "Future Cloud CIS" as a desired interface. Please confirm that this integration is NOT part of the scope of work, therefore it should not be included in the proposed pricing?

Interfaces between all future SWBNO cloud systems will be managed by a SWBNO-owned middleware solution and should be priced accordingly.

39. After doing some research on our certification status in the State of Louisiana, PTG has an MBE with SRMSDC (Southern region including Louisiana). We do not have a certification with City of New Orleans.Will we be eligible to submit or do we need to have the DBE participation certificate?

To be considered an eligible DBE for credit purposes, the business must be certified via SLDBE or LAUCP. It is also important to note that companies that are bidding as prime cannot fulfil the DBE requirement by listing themselves. They must select an eligible, certified DBE subcontractor.

40. Have you researched or seen demos of Enterprise Asset Management systems? If so, which?

Yes, but will not share findings of the demos.

41. Do you have an approved budget for this project? If so, will you please share?

Please see answer to Question 27 above.

42. We understand that you are seeking a SaaS solution. We've seen this have different meanings to different organizations. Can you please tell us which of these options you'd be open to?
   a. Vendor maintains all cloud services, including infrastructure and all licensing, and bills SWBNO a fixed amount per user per year
   b. Vendor maintains a cloud service, including full support for the application, on a commercial cloud service (e.g., GCP, AWS, Azure, IBM), allowing SWBNO control and greater flexibility of the cloud platform
   c. Vendor maintains a cloud service, including full support for the application, in an SWBNO datacenter, allowing SWBNO control and greater flexibility

SWBNO is open to option A or B. Please provide vendor recommended solution in response. Option C is not a "cloud based" system, therefore won't be considered.

43. Do you have a need for an air-gapped installation that is completely isolated from other networks?

No

44. Do you require FedRAMP authorization? If so, what level (Medium, High)?

No

45. Do you already use Splunk or a similar log management tool?

No

46. Do you have specific HA/DR requirements? Do you already have a methodology in place, or would you like for the vendor to specify and be responsible for HA/DR procedures?

Please see section 4.7.11 on page 29 and the Technical Requirements Form on page 42-43.

47. How many users do you anticipate using the EAM system? Please group by:
   a. Full-access users (e.g., SMEs, asset managers, administrators)
   b. Limited users (technicians, warehouse staff who will be focused on a smaller set of functionality, managers who will primarily be running reports, etc.)
   c. Self-service users who will request work or parts, but not otherwise be involved in using EAM

Please see answer to Question 4 above.

48. What version of ESRI ArcGIS are you currently using?

   Please see answer to Question 35 above.

49. How many GIS feature classes do you anticipate integrating with EAM?

   30 to 50 currently in the major systems that contain assets likely to integrate with EAMS.

50. Do you anticipate needing to complete any GIS data cleanup to support integration with EAM?

   Please assume that there will be some level of GIS cleanup needed for data compatibility with the selected system.

51. Will SWBNO accept DBE certifications from vendors not listed on the SWBNO website, such as those certified under other U.S. jurisdictions or participating in joint ventures from outside the U.S.?

   Credit will only be given to DBE subcontractors that are certified via SLDBE or LAUCP. These contractors can be found on SWBNO's website.

52. Can you provide additional details about the legacy RJN Cassworks data — including record counts, data formats, and any data cleansing requirements — to help us estimate the data conversion effort?

   RJN Cassworks has been in place for 30+ years, so there is an extensive amount of data. Most data can be extracted using Crystal Reports that can be exported to Microsoft Excel for conversion purposes.

53. For "Future Systems" (e.g., CIS, HCM, Fleet), can SWBNO share expected implementation timelines, current vendor selection status, or integration approaches?

   Oracle ERP – anticipated Q1 2026
   HCM – implementation kick off Q4 2025
   CIS – implementation kick off Q2 2026
   Fleet TBD if not included in EAMS solution

54. Could you elaborate on Oracle Fusion Cloud ERP integration expectations? Are there specific APIs, file formats, or middleware tools currently available or preferred?

   Oracle API is available, but interfaces between all future SWBNO cloud systems will be managed by a SWBNO-owned middleware solution.

55. Are there any data residency or regulatory compliance requirements for the hosted solution (e.g., U.S.-based data centers, FedRAMP, SOC 2 compliance)?

   Please see Technical and Vendor Hosting Requirement #36 on page 42 of the RFP.

56. Does SWBNO prefer a phased rollout (module-by-module) or a single go-live for the entire EAMS? Will a parallel run be required during transition?

   Please see answer to Question 11 above.

57. How many custom reports, dashboards, and visualizations are expected during implementation? Are there preferred platforms for BI/reporting (e.g., Power BI, Tableau)?

> SWBNO is unable to answer the number of custom reports needed. Vendor should respond based on experience in similar implementations.

58. For the post-go-live support period, does SWBNO expect onsite support, or is remote support acceptable? What roles or coverage is expected during this phase?

> SWBNO expects some level of onsite support during the three-month post-go-live period.

59. Will SWBNO prioritize any specific modules or use cases for Round 2 demonstrations based on this specification sheet? If so, when will that be communicated?

> Yes, it will be communicated to chosen vendors prior to Round 2.

60. The pricing workbook contains placeholders for multiple interface and conversion costs. Should vendors assume unit pricing per integration or provide flat project-level pricing?

> The pricing sheet includes one line per interface, so vendors should provide accordingly. If vendor uses unit pricing, it should be noted in the comments section.

61. Should recurring costs like cloud hosting or annual support be broken down by module/year, or can they be grouped at a total level per year?

> The pricing sheet includes one line per year for licenses versus maintenance, so vendors should provide accordingly. If vendor breaks out by module, it should be noted in the comments section.

62. There are sections for optional modules (e.g., Fleet). Will those options be included in the evaluation scoring or negotiated separately if selected later?

> Optional services will be evaluated separately.

63. The RFP references "Attachment – Implementation Form" and "Attachment – Client References", but these forms are not included in the RFP package. Could you please provide these missing attachments or confirm the required format and details to be included for these sections?

> Client Reference Form can be found on Page 53 of the RFP.
>
> The Attachment – Implementation Form mentioned in Section 4.2 was not provided. Please provide implementation approach in response conforming to Section 4.7.1 on page 24 of the RFP.

64. For the Future Cloud HCM, the matrix states: "…planned replacement 2026/2027."Does SWBNO anticipate the new HR/Payroll system to be implemented before the completion (go-live) of the proposed EAM implementation effort?

> Yes

65. For the Future Cloud CIS, the matrix states that it's "future", but no date was specified.Does SWBNO anticipate the new UB/CIS system to be implemented before the completion (go-live) of the proposed EAM implementation effort?

66. For SWBNO's Esri ArcGIS Enterprise deployment: What version of ArcGIS Enterprise is in use, and what components are deployed?

Please see answer to Question 35 above.

Is SWBNO using Esri's Utility Network?

Please see answer to Question 35 above.

Are condition assessment methodologies and values already defined for each asset class?

No

d. Are all asset types that are anticipated to be used within the proposed EAM solution already captured within the GIS? (e.g., are vertical assets in Cassworks only, or are they represented in GIS either as a spatial feature or table record, have all horizontal assets been collected/captured within the GIS, etc.)

No. GIS only contains some horizontal assets. The vast majority of horizontal assets have been captured, but there is a backlog of updates to the system that we are working through as quickly as possible. In addition, there may be additional assets that a modern EAMS includes, that had not previously been included in Cassworks or GIS.

e. How many distinct asset types (feature classes/object tables) does SWBNO have that are anticipated to be used within the proposed EAM solution (including any assets anticipated to be migrated from Cassworks)?

RJN Cassworks has been in place for 30+ years, so there is an extensive amount of data and a truly unknown number of distinct asset types. In GIS, there are 30 to 50 currently that contain assets likely to integrate with EAMS.

67. SWBNO refers to Oracle Cloud Fusion ERP as being used for "inventory management". Can you clarify whether "inventory" in the general EAM and integration context refers to capital assets (e.g., infrastructure assets) or consumable materials and parts (e.g., stockroom supplies), or both? For which is it considered the system of record?

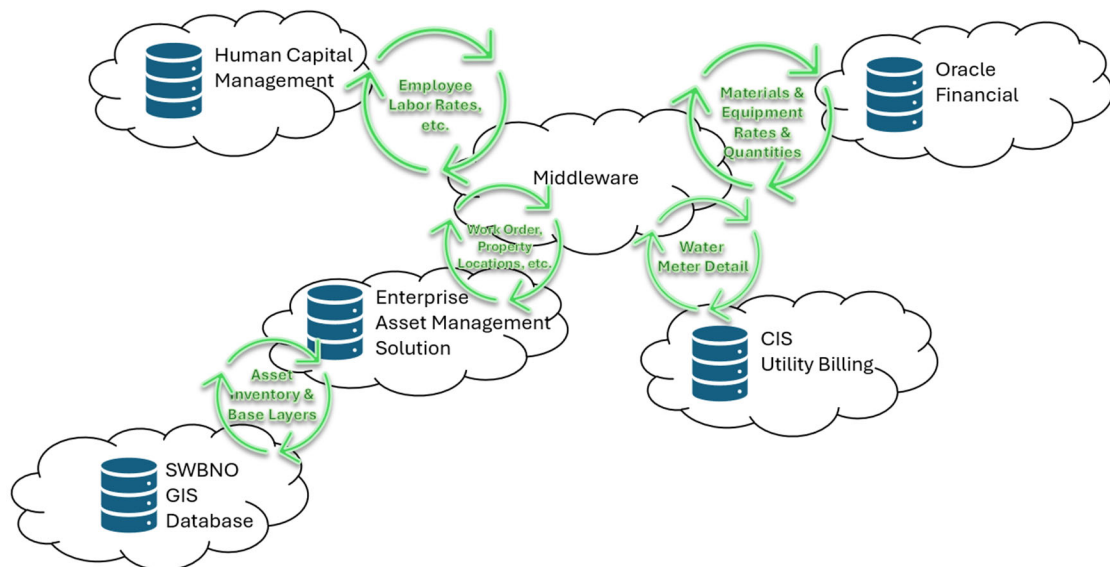Consumable materials and parts will have Oracle Cloud ERP as system of record.

68. Can SWBNO provide an estimate of record volumes and known data quality issues within Cassworks?

Please see answer to Question 12 and 52 above.

69. Can SWBNO provide an estimate of how many custom reports and/or dashboards are required at go-live?

Please see answer to Question 57 above.

70. The RFP references a "System Map" that illustrates what the software systems would ideally look like after the EAMS. We did not see the system map in the RFP; can this System Map be provided?

71. Does SWBNO plan to procure or make available a centralized integration platform for managing data exchanges between the EAM and other enterprise systems, or should the vendor propose its own middleware solution to meet the integration requirements?

> Yes, SWBNO does plan to procure a middleware solution once HCM, EAMS, and CIS solutions are chosen.

72. Should an interface be created between the proposed EAM and the current HR/Payroll system as part of this initial effort, or as a follow-up (post-go-live) phase once the new HR/Payroll system has been implemented?

> HCM go-live is expected to occur prior to EAMS go-live, therefore an integration to current HRP system is not needed.

73. Should an interface be created between the proposed EAM and the current UB/CIS application as part of this initial effort, or as a follow-up (post-go-live) phase once the new UB/CIS system has been implemented?

> CIS go-live is undetermined at this time. A possible interface to current CIS could be needed.

74. The table in 4.7.5 identifies the need for integration with the "Future HR System (Cogsdale GPHR Replacement)", however the current application table in section 2.2 (page 11 of the RFP) identifies this system as Microsoft Dynamics GP. Which system is in use at SWBNO to manage these HR records that will be integrated into the new EAMS?

> As stated in both sections, our current system is GPHR, which is a Microsoft Dynamics GP platform HRP system. Please see answer to Question 72 above for integration needs of HCM.

75. How many users and groups require training (admin, field, supervisors, etc.)?

> See answer to Question 4 above.

76. Will the vendor be expected to perform all training for the initial implementation or is SWBNO open to a train-the-trainer model that will prepare internal resources for training delivery?

77. What is SWBNO's perspective on the tailoring and updates needed for refresher training and new hire onboarding for the duration of the five-year contract after the initial rollout?

    Vendor should present their provided and available training for SWBNO staff's use in training new users after go-live.

78. How often should new-hire onboarding/training be conducted (e.g., as-needed/on-call, monthly, quarterly, etc.)?

    Vendor is not expected to directly train SWBNO staff after post-go-live support is complete, but please provide information regarding any web based or other training materials included in your proposal.

79. Can SWBNO clarify expected internal staffing commitment by role (e.g., PM, IT, SMEs)?

80. Does SWBNO have an existing change management strategy, or is the vendor expected to lead it?

    Vendor should be expected to lead for EAMS implementation.

81. Does SWBNO prefer a phased go-live approach or a single cutover event?

82. Are there any constraints, such as fiscal year-end or seasonal considerations, that may affect go-live timing?

    Vendor should take into consideration Hurricane season and if possible, avoid go-live during this period.

83. What is the estimated number of total users who will use the system?

84. What is the anticipated max number of users who will be in the system AT ONE TIME (a.k.a. concurrent users)?

    150-250

85. Is SWBNO interested in purchasing IoT asset tags, such as RFID tags, GPS tags, or fleet OBDII tags, as part of this RFP?

    SWBNO may consider at a later stage.

86. DBE: Is a commitment to use at least 6% enough, or do we have to have a named DBE locked in by Proposal Due Date? Can we just flag tasks that we're going to retain a DBE for?

    The selected DBE subcontractor must be designated at the time of proposal submission. Signed correspondence between the Prime contractor and selected DBE subcontractor must be submitted with the proposal upon submission.

87. Can SWBNO provide details on the current data format used in Cassworks (e.g., SQL Server database, Access, flat files)? Additionally, are there any export tools or APIs available to extract data from the existing system?

> See answer to Question 24 above.

88. Does the existing Cassworks system store any native spatial geometry (e.g., coordinates, shapefiles), or does it reference spatial data externally through integration with ESRI ArcGIS?

> RJN Cassworks may have some coordinates, but the data is likely inaccurate. There is no existing integration with ESRI ArcGIS as RJC Cassworks is 30+ years old.

89. Will an onsite or designated SWBNO subject matter expert (SME) with experience in RJN Cassworks be available to assist with data extraction, schema clarification, or historical data interpretation during the migration process?

> Yes

90. Can SWBNO confirm whether real-time integrations (e.g., GIS, ERP, 811) require live API connections, or if batch/scheduled file transfers are acceptable for initial go-live?

> Please see answer to Question 5 above.

91. How many distinct departments or user groups will need to be engaged during the implementation (e.g., Stormwater, Sewer, Water Treatment, Fleet, IT, HR)?

> 15 – 25

92. Is there an existing library of "must-keep" reports in Cassworks that must be replicated, or will reporting requirements be developed collaboratively during design?

> There is some data in Cassworks that is required to be included in future reporting functionality, but may be included in vendor's standard reporting capabilities.

93. Will SWBNO provide sample reports, KPIs, or dashboards that should be included in the initial deployment (e.g., PM compliance, work order aging, asset condition)?

> No, vendor should provide their available standard reporting and available custom reporting capabilities.

94. "Requirements are identified in the attached Excel spreadsheet labeled, 2025-SWB-48 EAMS-Functional Specifications" Can you please provide all excel spreadsheets and referenced information.

> Please download a new copy of the "Official Bid Document" from swbno.org website. The required attachments were mistakenly removed after the pre-bid conference. We are granting a two-week extension for responses.

95. Can SWBNO clarify what specific capabilities are expected under "mobile functionality"?
    f. For example, should vendors assume support for any or all of the following:
        Field-based linear inspections

> Yes

        Asset creation or updates from the field

GIS visualization and mapping

Yes

Offline access and sync

Yes

Full work order management from mobile devices

Yes

96. If these or other mobile features are required, would SWBNO be able to confirm which are in scope for go-live?

All are required for go live.

97. Is there a preferred or required mobile platform (e.g., iOS, Android, Windows), or should vendors assume cross-platform support is expected?

Cross platform support is expected.

98. Would SWBNO consider granting a two-week extension to the proposal submission deadline (from July 18, 2025 to August 1, 2025) to allow vendors sufficient time to prepare a thorough and accurate response, given the technical complexity of the RFP?

See answer to Question 33 above.

99. Reference Check Request Form – the form shows that these are due by February 3rd, 2025 at the bottom of the page – what would be the correct due date?

Reference Forms are due July 18, 2025 with proposal submission.

100. Number of Users for Pricing the Software – the Pricing Forms.xlsx (A-Procurement-Renewal Fees) lists 300 users, however the RFP (page 13, Section 2.2) lists 500 – which should we use for pricing purposes?

Please adhere to the Pricing Forms.xlsx, Quantity of 300.

101. During our review, we noticed an inconsistency in the required DBE participation amount. Can you please clarify the proper percentage?

The DBE Percentage needed for this project is 6%.

2) Updated Proposal Due Date

Proposals are due on **August 1, 2025, at 11:00 a.m.** Any Proposals received after the specified time will be rejected.

3) Pre-Proposal Recording

Recording for Mandatory Pre-Proposal meeting held June 30, 2025 at 11:00AM has been posted to the website for download.
SWBNO – https://www2.swbno.org/business_bidspecifications.asp

The changes, additions, and/or deletions included herein are hereby made part of the solicitation documents for 2025-SWB-48 Enterprise Asset Management Software and Services, as fully and completely as if the same were set forth therein. The proposer shall be responsible for having knowledge of all addenda issued for this RFP.

*** END OF ADDENDUM ***

Please write legibly

SEWERAGE & WATER BOARD OF NEW ORLEANS
ATTENDANCE SHEET

PROJECT: Pre-Proposal Meeting: 2025-SWB-48	MEETING DATE: June 30, 2025. 11:00 A.M.
PLACE/ROOM: St Joseph Executive Boardroom	FACILITATOR: Connor Metcalf, Procurement Analyst

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Please write legibly

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Please write legibly

SEWERAGE & WATER BOARD OF NEW ORLEANS
ATTENDANCE SHEET

PROJECT: Pre-Proposal Meeting: 2025-SWB-48	MEETING DATE: June 30, 2025. 11:00 A.M.
PLACE/ROOM: St Joseph Executive Boardroom	FACILITATOR: Connor Metcalf, Procurement Analyst

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