

# REQUEST FOR PROPOSAL

## Information Technology Professional Services

Solicitation # 2026-SWB-30



Proposal Due Date: June 11, 2026  
Proposal Due Time: 11:00 A.M. CDT

Sewerage and Water Board of New Orleans  
Request for Proposal  
Information Technology Professional Services  
2026-SWB-30

The Sewerage and Water Board of New Orleans ("SWBNO" or "the Board") is soliciting proposals from qualified firms to provide information technology (IT) professional services in support of the Board's Office of the Chief Information Officer (OCIO). Services may include enterprise application support, infrastructure and operations, cybersecurity, operational technology, information management, and digital transformation. All services will be authorized through individual Task Orders issued under the resulting contract.

RFP will be available May 12, 2026, 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 non-mandatory pre-proposal conference for this RFP will be held on May 21, 2026, at 10:00 a.m. CDT 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 meeting

Join: <https://teams.microsoft.com/meet/238464096046421?p=pkIFA4Akf6Dda3pttN>

Meeting ID: 238 464 096 046 421

Passcode: tr9SE2Vo

[+1 504-224-8698,252072506#](tel:+15042248698252072506) United States, New Orleans

Phone conference ID: 252 072 506#

At this meeting, staff will discuss the scope of work, proposal requirements and respond to questions from the attendees.

Inquiries and/or Requests for Clarification are due to Connor Metcalf, on May 27, 2026, no later than 5:00 pm CDT via in writing or email to [cmetcalf@swbno.org](mailto:cmetcalf@swbno.org). All responses will be posted on or before May 29, 2026.

Proposals will be received by the Sewerage and Water Board of New Orleans Procurement Department by June 11, 2026, at 11:00 a.m. CDT local time. For submission instructions, see proposal documents.

**LATE PROPOSALS WILL NOT BE ACCEPTED.**

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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 firms to provide information technology (IT) professional services in support of the Board's OCIO. The Board seeks to establish a multi-year contract with a qualified services provider to augment its technical workforce through the provision of skilled personnel, management oversight, and professional expertise. Services may include enterprise application support, infrastructure and operations, cybersecurity, operational technology, information management and digital transformation. All services will be authorized through individual Task Orders issued under the resulting contract. Staffing levels and service categories may be adjusted during the contract period as the Board's operational needs and workforce composition evolve.

### 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, 504-756-8198, [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 May 27, 2026, no later than 5:00 pm CST via in writing or email to [cmetcalf@swbno.org](mailto:cmetcalf@swbno.org). All responses will be posted on or before May 29, 2026. Do not contact 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: 2026-SWB-30 – Information Technology Professional 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 “2026-SWB-30 – Information Technology Professional 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	May 12, 2026	
Non-Mandatory Pre-Proposal Meeting	May 21, 2026	10:00am
Deadline for written questions	May 27, 2026	5:00pm
Responses to questions/clarification	May 29, 2026	
Proposal due date and time	June 11, 2026	11:00am

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 Information Technology Professional Services

#### 2.1 Overview of the SWBNO

The Sewerage and Water Board of New Orleans (SWBNO) was established by Act 6 of the Special Session of the Louisiana Legislature of 1899 as a special board independent of the City government to construct, maintain, and operate a public water treatment and distribution system, as well as a sanitary sewerage system for the City of New Orleans. In 1903, the Legislature expanded the Board's responsibility to include the City's major drainage system.

Today, the Board's major operations include providing safe drinking water, reliable sewerage services, and effective drainage for the City of New Orleans. The Board also operates its own power generation facilities, including the West Power Complex, to support drainage and pumping operations. These systems are vital to public health, safety, and economic stability in a city with unique geographic and environmental challenges. The Board of Directors is composed of eleven members, including the Mayor of the City of New Orleans. The organization employs approximately 1,300 staff and provides services to around 140,000 active customer accounts.

#### **2.1.1 Office of the Chief Information Officer**

The Chief Information Officer (CIO) leads technology strategy and operations for the organization. The CIO reports to the Executive Director and is responsible for providing strategic leadership, modernization planning, and operational oversight across all information and technology systems. The CIO is also responsible for IT governance, including adherence to compliance frameworks, and coordination with the Executive Director and the SWBNO Board of Directors on technology risk and investment decisions.

The OCIO currently consists of a well-established Information Technology (IT) Department and three emerging departments: Operational Technology (OT), Cybersecurity (CY), and Information Management (IM). The organizational placement and maturity of these departments may evolve during the contract period. The IT Director serves as the SWBNO Contract Administrator for this contract and reports to the CIO. As the OCIO organizational structure matures, additional department directors (Cybersecurity, Operational Technology, Information Management) may be authorized to request Task Orders through the IT Director in the IT Director's capacity as Contract Administrator. The IT Director retains overall responsibility for contract administration, performance oversight, and coordination of all Task Orders regardless of the requesting department.

#### **2.1.2 Information Technology Operations**

IT provides enterprise infrastructure, applications, databases, Geographic Information Systems (GIS), web systems, PC support, and network operations. IT supports enterprise platforms including Oracle Financials, Customer Service Management (CSM), the Enterprise Asset Management System (EAMS) based on Trimble Unity (CityWorks), Dayforce for human capital management, and GIS. The IT Department is responsible for both short- and long-term planning, daily operations, and modernization of these platforms. OCIO staff provide oversight and direction for all technology contracts, including the contract resulting from this RFP, as well as enterprise licensing and business continuity planning.

### **2.1.3 Operational Technology Systems**

The OT Systems support is an emerging department within the OCIO to provide strategy, governance, risk management, and compliance oversight for Supervisory Control and Data Acquisition (SCADA) systems, industrial control systems, and Industrial Internet of Things (IIoT) environments. These systems support essential water, sewerage, drainage, and power generation operations across Board facilities.

Daily operational control and management of SCADA platforms, plant control systems, and power generation assets shall remain under the authority of the General Superintendent's Office (GSO). The Contractor shall coordinate with the GSO to ensure alignment with Board-approved security standards, architecture requirements, and compliance obligations. As required by the Board, the Contractor may be tasked to provide specialized OT support personnel, including PLC programmers and SCADA/Ignition technicians.

All OT environments shall remain segregated from IT networks, with any data exchange between OT and IT domains occurring exclusively through defined, secure, Board-approved interfaces.

### **2.1.4 Cybersecurity**

CY is an emerging department that will provide governance, Identity and Access Management (IAM), Security Operations Center (SOC) operations, risk management, and compliance oversight. As the department matures, CY may establish separate branches or specialized roles to address IT cybersecurity and OT cyber-physical security, reflecting the distinct risk profiles and compliance requirements of each environment. Civil Service positions will form the long-term foundation of this department, but the Contractor may provide supplemental staffing, SOC-as-a-Service, or surge support as needed during its maturation. CY will also oversee disaster recovery and business continuity standards.

### **2.1.5 Information Management**

IM is an emerging department with two functional branches: Digital Transformation (DT) and Records Management. The DT branch is focused on modernizing administrative workflows, digitization, and process automation. The Records Management branch will be responsible for records retention, compliance, and the appointment of a Records Management Officer. Key leadership positions, including the IM Department Manager and Records Management Officer, will be Civil Service. Contractor support may be requested for optional roles such as digitization technicians and scanning staff.

### **2.1.6 Standards Alignment**

The OCIO aligns its IT operations and modernization efforts to recognized national and international standards. The following table summarizes the primary frameworks and their areas of application.

Standard / Framework	Application Area
ITIL 4, COBIT	IT Service Management and Governance
ISO/IEC 20000, ISO/IEC 27001	IT Service and Information Security Management
NIST CSF, NIST SP 800-53, NIST SP 800-171, SP 800-82, CISA CPGs	Cybersecurity
IEC 62443	OT and Industrial Control Systems
ISO 15489, NARA Standards	Records Management, Digitization, and Information Management
ADA, WCAG 2.1	Accessibility

The following chart illustrates the current OCIO organizational structure, including both Civil Service and contractor positions. This structure is subject to change as the Board establishes additional Civil Service classifications and adjusts organizational alignment.

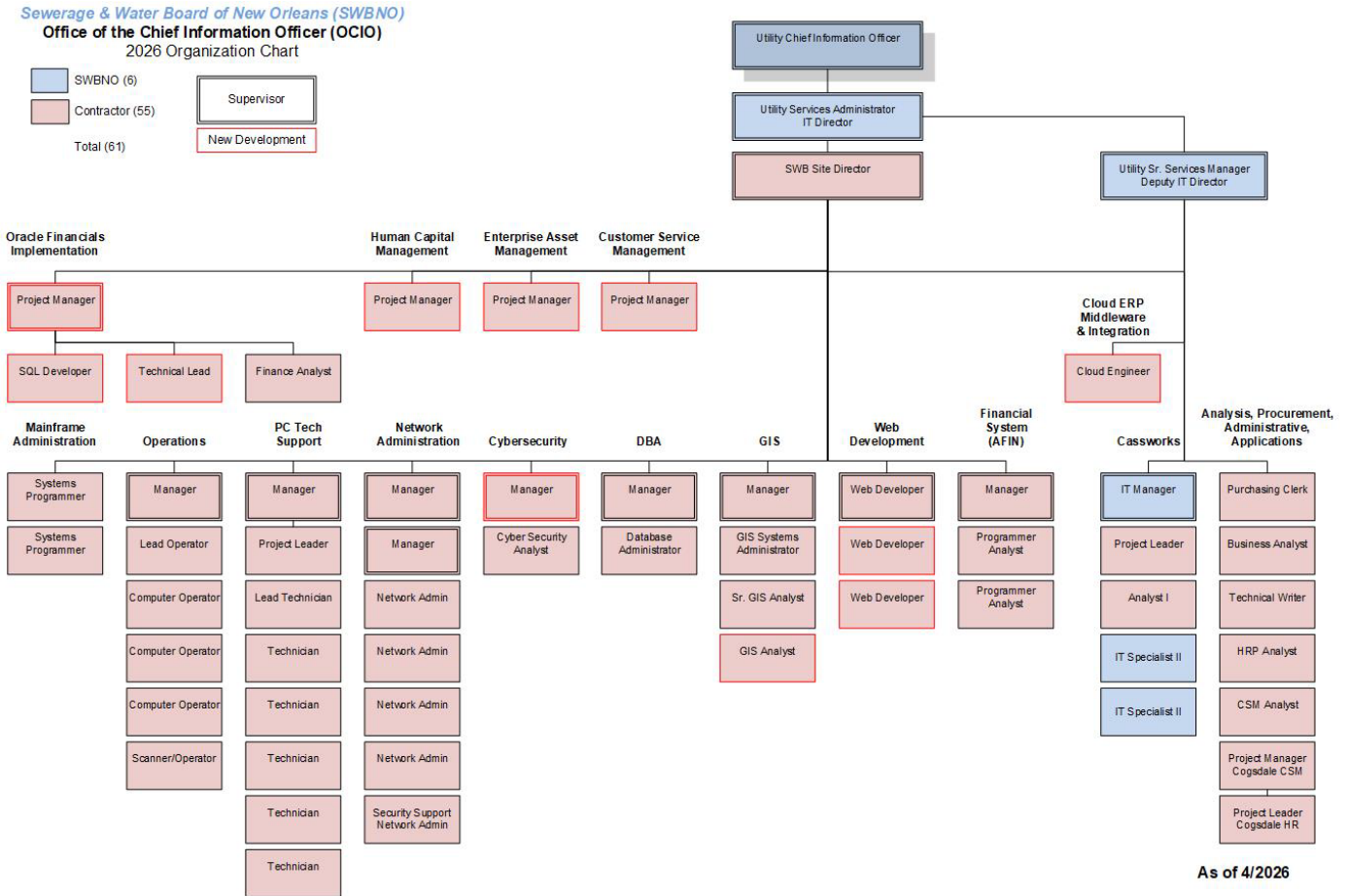


Figure 1. OCIO Current Organizational Structure

The following chart illustrates the target organizational structure under development. This structure reflects anticipated Civil Service classifications for IT, Cybersecurity, Operational Technology, and Information Management as separate functional areas under the CIO. The target structure will be implemented incrementally as Civil Service approvals are obtained, positions are funded, and qualified candidates are hired. Full implementation is expected to occur over multiple contract periods as approvals and funding are secured.

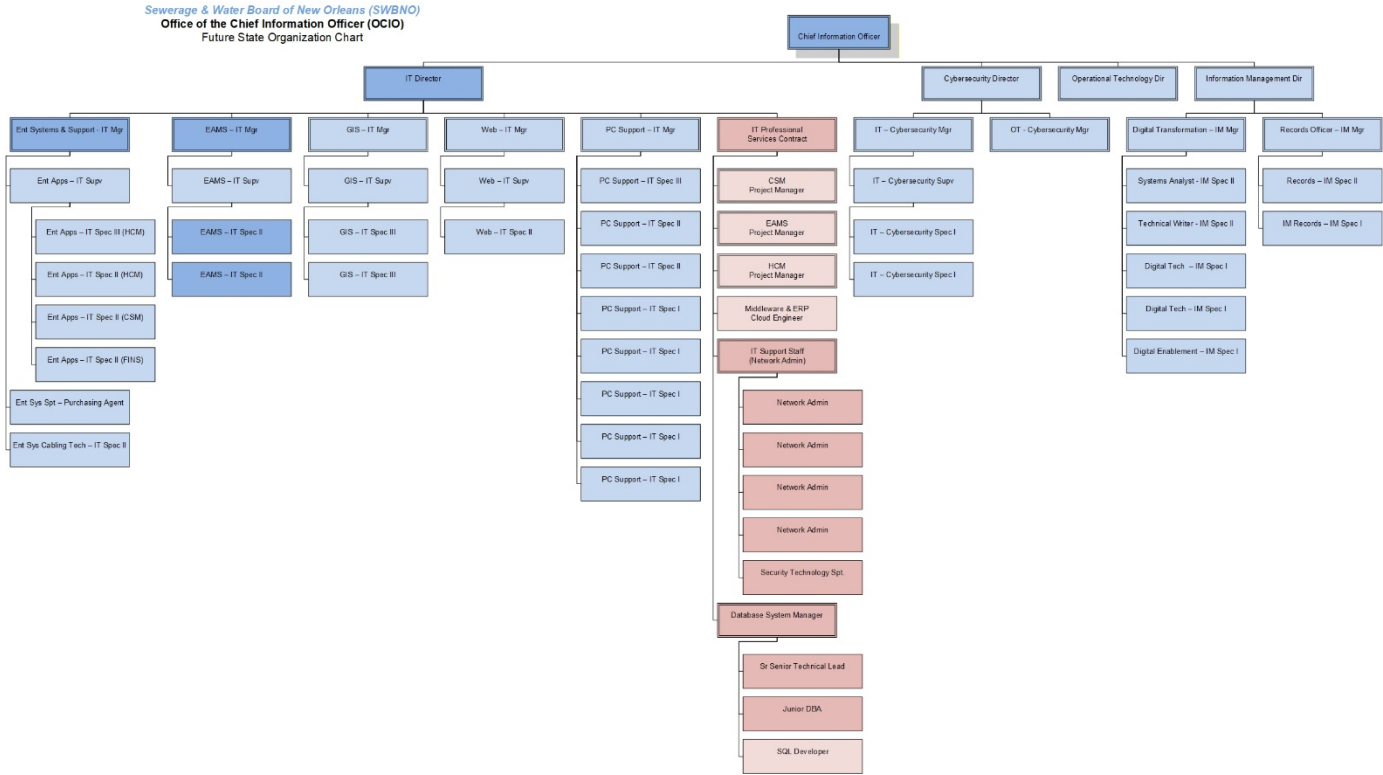


Figure 2. OCIO Target Organizational Structure (Projected Future State)

## 2.2 Scope of Work

The selected Proposer shall provide qualified technical personnel, management oversight, and professional services to support the Board's OCIO. Services shall be authorized through written Task Orders issued under the resulting contract. Task Orders will specify the positions, qualifications, deliverables, and performance standards applicable to each engagement.

The primary scope of this contract is IT Operations including Specialized Technical Services. The Board also seeks flexibility to obtain emerging-capability support through the same contract vehicle as organizational needs evolve. Staffing levels, service categories, and the mix of contracted and Civil Service personnel may change over the contract period at the Board's sole discretion.

Service categories are organized into the following tiers:

### 2.2.1 IT Operations

The Contractor shall provide personnel to deliver stable, continuous IT services across the Board's enterprise environment. This category represents the core, ongoing requirement of this contract. Functional areas include:

a) Help Desk and End-User Support. First-point-of-contact support for Board staff, including service request intake, triage, remote troubleshooting, password resets, account management, and escalation to appropriate technical groups. The Contractor shall maintain service request tracking and reporting as directed by SWBNO. Contractor staff may also support audio-visual systems, video conferencing, and Board meeting technology as directed.

b) PC Deployment and Lifecycle Management. Installation, configuration, imaging, relocation, and decommissioning of desktops, laptops, and peripheral devices across all Board facilities. Responsibilities include hardware inventory management, equipment refresh coordination, and end-of-life disposal in accordance with Board policy.

c) Enterprise Application Support. Ongoing functional and technical support for the Board's enterprise platforms, including Oracle Fusion Cloud ERP (Financials), Customer Information System (CIS) and Billing, Enterprise Asset Management System (EAMS) based on Trimble Unity (CityWorks), Dayforce (Human Capital Management), and related systems. Support includes troubleshooting, patch and upgrade coordination, configuration changes, report development, user support, and coordination with software vendors.

d) Database Administration. Administration and maintenance of the Board's database environments, including Oracle, Microsoft SQL Server, and other platforms as required. Responsibilities include performance monitoring, backup and recovery, security administration, capacity planning, and support for database migrations and upgrades.

e) GIS Operations and Data Management. Operation, maintenance, and enhancement of the Board's Geographic Information System (GIS) environment, including ESRI ArcGIS Enterprise and related platforms. Responsibilities include spatial data management, map production, analytical support, system administration, and coordination with engineering and operations departments. The Board is progressing toward an ESRI Utility Network model; GIS staff should be prepared to support planning and migration activities as directed.

f) Network Administration and Infrastructure Operations. Administration of the Board's enterprise network, including LAN, WAN, wireless, VPN, and operational infrastructure. Responsibilities include network monitoring, configuration management, troubleshooting, firewall administration, connectivity provisioning for field and remote locations, and coordination with communications providers. This scope includes administration of the Board's VoIP telephone system, voicemail services, and support for Board-issued mobile devices. The Contractor's network administration responsibilities include management of all Board-owned network infrastructure devices, including firewalls, routers, switches, and wireless access points deployed in both IT and operational technology (OT) environments. This includes network devices at treatment plants, pump stations, and other operational facilities. Network administration of these devices is an IT Operations and Maintenance responsibility regardless of the environment in which the device is deployed. This scope does not extend to the configuration or programming of SCADA endpoints, programmable logic controllers (PLCs), or industrial control system components, which fall under the Operational Technology service category described in Section 2.2.4.

g) Server and Data Center Operations. Administration of the Board's server infrastructure, including physical and virtual server environments, storage area networks, cloud-hosted instances, and on-premise data center facilities. Responsibilities include system monitoring, patching, backup management, capacity planning, environmental monitoring, and disaster recovery testing.

h) Web Administration, Digital Content, and Communications Technology Support. Maintenance and development of the Board's public-facing web presence, internal web applications, and digital communications platforms. Responsibilities include content management system (CMS) administration, web hosting, accessibility compliance (ADA/WCAG 2.1), and development of web-based tools and interfaces as directed. The Contractor shall also provide technical support for the Board's digital communications channels, including social media platform administration, digital content formatting and publishing, graphic design for web and social media assets, video editing and encoding for public-facing content, and email marketing or notification platform support as directed by the Chief of Communications. Content strategy, messaging, and editorial direction remain the responsibility of SWBNO staff. The Contractor provides technical execution and production support only.

i) Audio-Visual and Meeting Support. Setup, operation, and maintenance of audio-visual equipment in Board meeting rooms and at community meetings. Responsibilities include video recording and encoding of public meetings, camera system support, and technical assistance for Board presentations and events.

k) Baseline Cybersecurity Operations. Administration and monitoring of the Board's existing cybersecurity tools and platforms as part of day-to-day IT operations. Baseline responsibilities include endpoint protection management, firewall administration and monitoring, identity and access management (IAM) within Active Directory and related platforms, security event monitoring using deployed tools, and coordination of vulnerability scanning and patching activities. These activities represent the operational security baseline included within IT Operations. As the Board establishes a dedicated Cybersecurity department, certain functions may transition from IT O&M to the Cybersecurity service category through the Task Order process. Expanded cybersecurity capabilities, including a standalone Security Operations Center (SOC), dedicated governance, risk, and compliance (GRC) staffing, and OT cyber-physical security, are addressed separately under the Cybersecurity service category in Section 2.2.3.

l) Emergency and Continuity Operations. Designated Contractor personnel shall be available for on-site support during Level III emergency activations, hurricane events, and other declared emergencies as required by the Board. The Contractor shall maintain a hurricane staffing plan and ensure that critical IT functions remain operational during emergency conditions. This requirement applies to personnel in network, server, help desk, and operations roles as designated in individual Task Orders.

### 2.2.2 Specialized Technical Services

The Contractor shall provide, through Task Orders, specialized technical personnel in disciplines that require market-rate compensation, advanced certifications, or skills not readily available through Civil Service classification. These include, but are not limited to:

a) Project Managers for enterprise modernization and implementation projects, including EAMS, HCM replacement, CIS/Billing System, and other initiatives as authorized.

b) Cloud Engineers for cloud infrastructure management, migration planning and execution, middleware design and implementation, and platform administration across Microsoft Azure, and other cloud environments in use.

c) Database Architects and Senior Administrators for complex database environments requiring specialized expertise in performance optimization, high-availability configuration, and multi-platform administration.

d) Network Engineers for enterprise network design, security architecture, and operations requiring certifications or experience beyond standard administration.

e) Enterprise Application Specialists for complex configuration, integration, and implementation tasks associated with Oracle Fusion, Trimble Unity, Dayforce, GIS Utility Network and other enterprise platforms.

SWBNO anticipates an ongoing requirement for specialized technical disciplines throughout the contract period. However, the specific roles, quantities, and durations will be determined through individual Task Orders and may change based on project timelines, modernization milestones, and funding availability.

### 2.2.3 Cybersecurity

The Board may, at its discretion, issue Task Orders for cybersecurity services. Cybersecurity is an emerging department within the OCIO; the Contractor must be prepared to provide services whether cybersecurity functions remain within IT or are structured as a separate department.

Services may include governance, risk, and compliance (GRC) support; Identity and Access Management (IAM) administration; Security Operations Center (SOC) operations or SOC-as-a-Service; vulnerability management and assessment; incident response support; and security awareness program support.

Civil Service positions will form the long-term foundation of the cybersecurity department. Contractor support under this category will be supplemental to, and directed by, the Board's cybersecurity leadership. The Board may alternatively establish cybersecurity capabilities through Civil Service staffing, a separate procurement, or a combination of approaches.

#### 2.2.4 Operational Technology Systems

The Board may, at its sole discretion, issue Task Orders for supplemental OT technical services. These services shall be authorized by the OCIO and coordinated with the GSO and are intended to augment, but not replace, the GSO's operational responsibility for plant and power systems.

SCADA application support is currently provided by a subcontractor specializing in SCADA applications, including PI Data Archive, PI Asset Framework, PI Vision, and iFIX HMI/SCADA systems. The Proposer shall include a minimum of 40 hours of monthly SCADA application support in their base bid. This support shall cover routine server maintenance, software updates, connection and interface monitoring, troubleshooting, and related documentation for the Board's SCADA application environment. The Proposer may fulfill this requirement through a qualified subcontractor. The Board will facilitate coordination between the incumbent provider and the awarded Proposer during the transition period to ensure continuity of support.

The OT services may include SCADA technician support, PLC programming and configuration, iFix and/or Ignition platform support, IIoT device management, and compliance activities consistent with applicable industry standards such as IEC 62443 and NIST SP 800-82. All OT environments shall remain segregated from IT networks, and data exchange with IT systems shall only occur via secure, Board-approved interfaces. Network infrastructure devices (firewalls, routers, switches) deployed in OT environments are administered under the IT Operations and Maintenance scope described in Section 2.2.1(f). OT services under this section are limited to SCADA application support, PLC programming, industrial control system configuration, and related OT-specific functions.

The Board reserves the right to obtain OT technical support through GSO-directed procurement or other contracting mechanisms independent of this RFP.

#### 2.2.5 Information Management

The Board may, at its discretion, issue Task Orders for Information Management (IM) support. IM is an emerging department within the OCIO with two functional branches: Digital Transformation (DT) and Records Management (RM).

Services within the DT branch may include support for administrative workflow modernization, digitization of paper-based processes, process automation, and technical execution of digital transformation initiatives as defined by Board leadership.

Services within the RM branch may include support for records retention program implementation, compliance documentation, scanning and digitization operations, and records disposition activities aligned with ISO 15489 and NARA standards.

Key leadership positions for the IM department, including the IM Department Manager and Records Management Officer, will be Civil Service. Contractor support, if requested, will be limited to technical execution and operational support roles such as digitization technicians, scanning staff, and records processing assistants.

## 2.2.6 Ancillary Support

The Contractor shall provide, as part of its management and operational overhead, the following ancillary functions in support of authorized Task Orders:

a) **Contract Administration.** The Contractor shall designate a Contract Manager responsible for day-to-day management of all Contractor personnel, quality assurance, compliance with contract terms, and communication with the IT Director as the SWBNO Contract Administrator. The Contract Manager shall be based within Louisiana and be available to provide regular on-site presence at Board facilities as required by the SWBNO Contract Administrator.

b) **Reporting.** The Contractor shall provide regular status reports as specified in individual Task Orders, including but not limited to staffing reports, service level metrics, project status updates, work plan summaries, and incident reports. Reporting frequency and format will be defined in each Task Order.

c) **Knowledge Transfer.** The Contractor shall maintain current documentation of processes, procedures, configurations, and institutional knowledge for all supported systems and functions. Upon request, the Contractor shall participate in knowledge transfer activities with Civil Service staff or a successor contractor. Knowledge transfer obligations are described further in Section 2.13.

d) **Quality Assurance.** The Contractor shall maintain internal quality assurance practices to verify that personnel meet the qualifications specified in Task Orders, that work product meets professional standards, and that service delivery aligns with SWBNO expectations. The Board reserves the right to conduct independent quality reviews at any time.

e) **Reporting Requirements.** The Contractor shall provide the following reports to the IT Director at the frequencies indicated:

Report	Frequency	Content
Project Status Report	Weekly	Status of all active projects, milestones, risks, issues (written or verbal, as agreed by IT Director)
Help Desk Metrics	Monthly	Ticket volume, resolution times, satisfaction scores
System Availability Report	Monthly	Uptime metrics for Tier 1 and Tier 2 systems
Position Status Report	Monthly	Filled positions, vacancies, recruitment status
Security Incident Summary	Monthly	Security events, incidents, remediation status
Work Plan Update	Quarterly	Progress against annual work plans
DBE Utilization Report	Quarterly	DBE spend, participation percentage (also provided to EDBP Department)

Strategic Recommendations	Annually	Technology roadmap, improvement opportunities
Disaster Recovery Test Results	Annually	DR plan test outcomes, gaps, recommendations
Policy and Procedure Review	Annually	Updated policies, revision summary

All costs associated with Ancillary Support functions, including contract administration, reporting, quality assurance, knowledge transfer, and training, shall be included in the Contractor's management overhead and reflected in the fully burdened hourly rates proposed for each position category. Ancillary Support functions shall not be billed as separate line items or identified as discrete positions in the Pricing Form.

### 2.2.7 Training

- a) Annual Training Plan: The Contractor shall prepare an annual training plan for all Contractor personnel assigned to this contract. The plan shall identify required certifications, continuing education, and professional development activities. The plan shall be submitted to the IT Director within thirty (30) calendar days of contract commencement and annually thereafter.
- b) Knowledge Transfer Training: Upon request, Contractor personnel shall provide training to SWBNO employees on systems, processes, and procedures as part of knowledge transfer activities.
- c) New System Training: When new systems or significant upgrades are implemented and primarily overseen by Contractor, the Contractor shall provide end-user training as specified in the applicable Task Order.

### 2.2.8 Scope Limitations

Issuance of this RFP does not guarantee any minimum volume of work, expenditure of funds, or continuation of any specific staffing level. SWBNO reserves the right to increase, reduce, or eliminate positions, service categories, or Task Orders based on operational requirements, budget availability, Civil Service hiring outcomes, and organizational changes. The Contractor's pricing structure must accommodate staffing adjustments without penalty to the Board.

Nothing in this RFP or the resulting contract shall be construed to grant the Contractor authority over Board policy, governance decisions, IT budget or strategy, or organizational structure. The Contractor provides staff and services at the direction of SWBNO IT Director.

### 2.2.9 Current IT Environment

The Board's IT environment supports approximately 1,300 employees, 400 contractors with network access, and approximately 140,000 active customer accounts across multiple facilities, including the main campus, water treatment plants, pumping stations, and field locations throughout the City of New Orleans.

The following table summarizes the Board's current technology standards. Proposers should review this information to understand the operating environment. Detailed technical specifications, system counts, and infrastructure inventories are provided in ATTACHMENT - IT Environment and Workload Summary.

Technology Area	Current Standard
Desktop Operating System	Windows 10 (End of Life) /Windows 11
Email and Productivity	Microsoft 365 (Exchange Online, Teams, SharePoint)
Internet Browser	Google Chrome (preferred); Microsoft Edge (supported)
Enterprise Resource Planning	Oracle Cloud Fusion ERP
Customer Service Management	Cogsdale CSM (Microsoft Dynamics GP); Customer Information System / Billing replacement under evaluation
Enterprise Asset Management	RJN Cassworks; Trimble Unity (Cityworks); implementation in progress
Human Capital Management	Microsoft Dynamics GP (Great Plains) for HR/Payroll; Dayforce implementation in progress
Geographic Information System	ESRI ArcGIS Enterprise; migration to Utility Network in progress
Relational Databases	Microsoft SQL Server, Oracle Database
Server Infrastructure	VMware virtualization; physical and cloud-hosted instances
Backup and Recovery	Veeam
Remote Access	Palo Alto GlobalProtect VPN
User Authentication	Microsoft Azure/Entra Active Directory; Single Sign-On utilized for most applications
Handheld and Mobile Devices	Windows, Apple iOS, and Android
Internet Connectivity	Redundant with automated failover at multiple facilities
Network Security	Palo Alto firewalls; additional details restricted

The Board is undertaking several enterprise modernization initiatives, including the completion of Oracle Financials implementation and mainframe archive, Customer Information System system evaluation, Enterprise Asset Management System (EAMS) deployment based on Trimble Unity, Human Capital Management (HCM) system replacement by Dayforce, and GIS migration toward ESRI Utility Network. These initiatives are at various stages of planning, procurement, and implementation. The Contractor will be expected to support these platforms as they are deployed, including participation in implementation projects as authorized through Task Orders.

Legacy mainframe systems, including the AFIN financial system and GHRS human resources/payroll system, are in the process of being retired. The Contractor should anticipate that mainframe support requirements will decrease prior to the contract period and plan staffing transitions accordingly.

#### 2.2.10 Task Order Framework

All work under this contract shall be performed pursuant to written Task Orders issued by the SWBNO Contract Administrator or designee. No work shall be performed, and no costs shall be incurred, without an executed Task Order.

##### 2.2.10.1 Task Order Issuance and Structure

Each Task Order will specify the scope of services, required personnel and qualifications, deliverables, performance standards, period of performance, reporting requirements, and compensation structure. The Board may issue multiple concurrent Task Orders across different service categories.

Task Orders may be priced on a time-and-materials basis with a not-to-exceed amount, a firm-fixed-price basis, or another mutually agreed structure appropriate to the nature of the work. The Board anticipates that the primary IT Operations and Specialized Technical Services requirement will be structured as a time-and-materials Task Order based on authorized positions and approved billing rates. Specialized, project-based, and other services may be structured differently depending on scope and duration.

The Contractor shall submit a Task Order response, including proposed personnel, qualifications, and pricing, within five (5) business days of receiving a Task Order request, unless a different response period is specified. The Board reserves the right to negotiate terms, request revised proposals, or decline to issue a Task Order at its sole discretion.

##### 2.2.10.2 Task Order Modification and Termination

The Board may modify, reduce, or terminate individual Task Orders at any time with reasonable written notice, not less than thirty (30) calendar days except in cases of cause, emergency, or mutual agreement. Modification of one Task Order does not affect the terms of other active Task Orders or the base contract.

The Contractor shall not be entitled to additional compensation, claims of lost revenue, or modification of remaining Task Order terms due to reductions in any Task Order's scope or the number of authorized positions. The Contractor may request a written modification to a Task Order if changed conditions materially affect the Contractor's ability to perform; approval of such requests is at the Board's sole discretion.

##### 2.2.10.3 Task Order Prioritization

In the event that concurrent Task Orders create resource conflicts, the SWBNO IT Director will establish priorities. IT Operations services and the Specialized Technical Services should be considered the highest priority requirement unless the Board directs otherwise. The Contractor shall not unilaterally reassign personnel between Task Orders without prior written approval.

## 2.2.11 Personnel and Staffing Requirements

### 2.2.11.1 General Requirements

The Contractor shall provide qualified personnel necessary to perform authorized services. All personnel assigned to Task Orders are subject to SWBNO approval. SWBNO reserves the right to approve or reject any individual proposed for assignment and to request removal and replacement of any assigned personnel at any time and for any reason. Personnel substitutions for key roles shall require prior written approval and shall not result in increased cost to SWBNO.

All Contractor personnel shall comply with SWBNO policies regarding workplace conduct, information security, acceptable use, and facility access. Personnel requiring access to Board systems or facilities shall complete background checks and security screening as required by the Board prior to beginning work. Requirements for specific clearances or screenings will be identified in individual Task Orders.

### 2.2.11.2 Work Schedule and Location

Full-time contract personnel shall work a total of eight (8) hours daily, forty (40) hours per week, excluding lunch, and shall follow the Board's holiday schedule. Overtime, if required and pre-approved in writing, will be compensated in accordance with the approved billing rates and applicable labor law. Services may be performed on-site or remotely, subject to SWBNO approval and security requirements. SWBNO reserves the right to require on-site presence for specific Task Orders, personnel categories, or operational conditions.

The Contractor shall ensure that personnel assigned to emergency support roles are available outside normal business hours, including during hurricane season and Level III emergency activations, as specified in the applicable Task Order.

### 2.2.11.3 Workforce Adjustment

SWBNO may direct the Contractor to increase, reduce, or reallocate personnel at any time through Task Order modifications. The Contractor shall accommodate staffing adjustments within a reasonable timeframe, not to exceed thirty (30) calendar days for reductions and as mutually agreed for additions.

The Contractor shall not impose penalties, liquidated damages, increased rates, or other financial consequences as a result of SWBNO-directed staffing adjustments, including reductions related to Civil Service hiring, organizational restructuring, budget changes, or the conclusion of specific projects. The Contractor's pricing model shall anticipate and accommodate workforce variability over the contract period.

### 2.2.11.4 Candidate Submission and Qualifications

When SWBNO authorizes a new or replacement position, the Contractor shall submit qualified candidates within fourteen (14) business days for standard IT positions and within twenty-one (21) business days for specialized or senior-level positions. Each candidate submission shall include a current resume, relevant certifications, confirmation that the candidate has been screened against the requirements of the applicable Task Order, and a statement of the candidate's availability.

Minimum qualifications for each position will be specified in the applicable Task Order. The Contractor is responsible for verifying that all submitted candidates meet or exceed stated qualifications, including education, certifications, years of experience, and any specific technical competencies.

#### 2.2.11.5 Key Personnel

The Contractor shall designate the following as Key Personnel:

a) Contract Manager. The Contractor shall designate a Contract Manager responsible for overall contract performance, day-to-day coordination of Contractor personnel, quality assurance, compliance with contract terms, and communication with the IT Director as the SWBNO Contract Administrator. The Contract Manager shall be based within Louisiana and be available to provide regular on-site presence at Board facilities as required by the IT Director.

The Contract Manager is a required Key Personnel position but is not a separately billable role. The Contractor's costs for the Contract Manager, including salary, benefits, travel, and administrative support, shall be included in the Contractor's management overhead and reflected in the fully burdened hourly rates proposed for all position categories. The Contract Manager may perform limited billable technical work in addition to management duties only with prior written approval of the IT Director, and only in a position category for which the Contract Manager is qualified and for which a billing rate has been established.

b) Technical Leads. For each major functional area (as defined in the primary Task Order), the Contractor shall designate a technical lead responsible for work quality, coordination with SWBNO management, and supervision of Contractor personnel within that area.

Key Personnel may not be removed or replaced at the Contractor's initiative without prior written approval from the SWBNO IT Director. For planned or Contractor-initiated changes, the Contractor shall provide at least thirty (30) calendar days' advance notice, along with resumes of proposed replacements. In the event of an unplanned departure, including employee resignation or other circumstances outside the Contractor's control, the Contractor shall notify the SWBNO IT Director within two (2) business days of receiving notice and shall submit proposed replacement candidates within thirty (30) calendar days. In all cases, Key Personnel replacements are subject to SWBNO approval and shall meet or exceed the qualifications of the departing individual.

#### 2.2.11.6 Subcontractors

The Contractor may use subcontractors to fulfill specialized requirements, subject to prior written approval by the Board. Use of subcontractors does not relieve the Contractor of responsibility for performance, compliance, or Disadvantaged Business Enterprise (DBE) commitments. The Contractor shall identify proposed subcontractors and their roles in the proposal submission. Changes to subcontractor arrangements after award require written approval from the SWBNO Contract Administrator.

#### 2.2.11.7 Personnel Retention

The Contractor shall maintain an annual retention rate of not less than eighty-five percent (85%) for personnel assigned to this contract, calculated as the number of personnel who remain in their assigned positions for twelve (12) consecutive months divided by the average number of filled positions during the same period. Voluntary departures for Civil Service employment with SWBNO and departures requested by SWBNO shall be excluded from the retention calculation.

If the Contractor's retention rate falls below 85% in any twelve-month period, the Contractor shall submit a written corrective action plan to the IT Director within fifteen (15) business days identifying the causes of turnover and specific measures the Contractor will implement to improve retention. The IT Director may require monthly retention reporting until the rate returns to the required level.

The Contractor's proposal shall describe its approach to retaining personnel, including compensation practices, professional development, career progression, and any other retention strategies the Proposer employs for long-term client engagements.

## 2.2.12 Civil Service Workforce Transition

SWBNO is building its Civil Service technology workforce through the City of New Orleans competitive hiring process. Over the term of this contract, SWBNO anticipates establishing Civil Service positions in some areas currently supported by Contractor personnel. All Civil Service hiring will follow applicable City of New Orleans human resources rules, including competitive selection. Contractor personnel may apply for Civil Service positions through the standard process but are not guaranteed selection, and nothing in this contract creates an expectation of direct conversion from Contractor to Civil Service employment. The Contractor acknowledges that such transitions are a normal and expected feature of this contract and shall cooperate fully with the Board's workforce planning activities.

SWBNO has established the IT Civil Service classification series (IT Director, IT Manager, IT Supervisor, IT Specialist I through III) through the City of New Orleans Civil Service Commission. Additional classification series for Cybersecurity, Operational Technology, and Information Management are in various stages of the approval process. The pace of Civil Service hiring will depend on the completion of classification approvals, City Council action, position funding, and the availability of qualified candidates through the competitive hiring process. The Contractor should anticipate that Civil Service conversions will occur incrementally over the contract period but should not assume a specific number or timeline for conversions.

### 2.2.12.1 Separation and Fee Restrictions

The Contractor shall not impose non-compete clauses, conversion fees, buyout charges, or other contractual barriers that would prevent Contractor personnel from applying for or accepting employment with SWBNO or the City of New Orleans. No conversion fee or other charge shall apply for Contractor personnel who separate from the Contractor's employment after twenty-six (26) consecutive weeks of service under this contract, regardless of whether the individual is subsequently employed by SWBNO through the Civil Service process. The service period shall be calculated from the individual's first day of active service under this contract, regardless of prior service with a different contractor or under a predecessor contract.

### 2.2.12.2 Transition Notice and Knowledge Transfer

When SWBNO determines that a position will transition to Civil Service, the Board will provide the Contractor with reasonable written notice, not less than thirty (30) calendar days, before the position is removed from the applicable Task Order. During the notice period, the incumbent Contractor employee and the incoming Civil Service employee may work concurrently to support knowledge transfer, at no additional cost to the Board beyond the existing authorized billing rate for the position.

The Contractor shall ensure that all personnel maintain current, written documentation of their assigned duties, system configurations, procedures, and institutional knowledge. This documentation shall be the property of the Board and shall be provided to SWBNO upon request, upon personnel departure, or upon contract expiration, whichever occurs first.

#### 2.2.12.3 Workforce Transition Planning

The Contractor's pricing and staffing model must account for the possibility of workforce transitions over the contract period. Reductions resulting from Civil Service hiring shall not constitute grounds for rate increases, claims of lost revenue, or modification of remaining Task Order terms.

Upon request, the Contractor shall participate in workforce planning discussions with the SWBNO Contract Administrator and Human Resources to support orderly transitions. This includes providing information about current staffing, upcoming vacancies, and potential Civil Service classification equivalencies, subject to applicable employment laws and the Contractor's obligations to its own employees.

#### 2.2.13 Emergency Operations and Business Continuity

SWBNO provides critical water supply, wastewater collection, and stormwater drainage services to the City of New Orleans and operates continuously, including during severe weather events and other emergencies. IT systems supporting these operations are considered essential services. The Contractor shall maintain the capability to support IT operations before, during, and after declared emergencies.

##### 2.2.13.1 Emergency Staffing Requirements

The Contractor shall designate personnel for emergency response duty in two tiers:

- Tier 1 (ER1): Personnel required to provide on-site, continuous IT support during activated emergency operations. ER1 personnel must be available for extended shifts (up to 12 hours per day) and must maintain the ability to access SWBNO facilities during mandatory evacuation or curfew conditions.
- Tier 2 (ER2): All remaining IT Contractor personnel who must be available to return to duty on short notice following the emergency period and prior to general re-entry of the population.

Prior to the start of each hurricane season (June 1), the Contractor's Contract Manager shall coordinate with the OCIO to identify ER1 and ER2 personnel assignments and develop two alternating staffing rosters. These rosters shall be updated as personnel changes occur. Only designated ER1 personnel or approved alternates shall remain on-site during activated emergency operations.

##### 2.2.13.2 Emergency Compensation

During declared emergencies in which emergency operations have been activated, on-site Contractor personnel shall be compensated at emergency pay rates. Emergency pay rates by position category shall be included in the Contractor's pricing proposal. On-site personnel shall be compensated for no more than twelve (12) hours per day at the emergency pay rate.

On-site ER1 personnel shall be compensated at the emergency hourly rate for up to twelve (12) hours per day. Hours worked in excess of twelve (12) per day during a declared emergency require prior authorization from the IT Director or designee and shall be compensated in accordance with the approved emergency hourly rate and applicable federal and state labor law, including the Fair Labor Standards Act.

#### 2.2.13.3 Facilities and Support

SWBNO will provide access to emergency facilities with generator power for IT personnel required to remain on-site during emergency operations. The Contractor shall support IT operations at the primary data center location, the Emergency Operations Center (EOC), and any designated backup or alternate operating locations as directed by the Board. SWBNO may relocate emergency operations to alternate facilities, including the mobile command post, and the Contractor shall provide IT support at those locations as required.

#### 2.2.13.4 Business Continuity and Disaster Recovery

The Contractor shall:

- Maintain and annually update a Disaster Recovery/Business Continuity Plan for IT systems and infrastructure, subject to OCIO review and approval
- Maintain documented procedures for the protection of IT assets, data backup verification, and restoration of critical systems during and after emergencies
- Maintain current emergency contact information for all Contractor IT personnel and provide updated lists to the OCIO as changes occur
- Participate in SWBNO emergency preparedness exercises and drills as requested
- Support hurricane preparation procedures for IT systems, including pre-storm system shutdown sequences, data backup to off-site or cloud locations, and post-storm system restoration

SWBNO's emergency operations plan is subject to change and may require adjustment to the number and type of IT personnel assigned to emergency duties. Any material changes to emergency staffing requirements during the contract term will be coordinated through the Task Order process.

#### 2.2.13.5 Routine On-Call Support

In addition to emergency operations support, the Contractor shall maintain on-call coverage for non-emergency after-hours support as follows:

- (a) On-call personnel shall be available during the following periods:
  - Weekdays: 5:00 PM to 7:00 AM (following day)
  - Weekends: 5:00 PM Friday through 7:00 AM Monday
  - SWBNO holidays: 24-hour coverage
- (b) On-call schedules shall be established monthly and provided to the IT Director no later than five (5) business days before the start of each month.
- (c) On-call personnel shall respond to after-hours support requests within thirty (30) minutes of notification.
- (d) On-call personnel shall be capable of reporting on-site to 625 St. Joseph Street within sixty (60) minutes when remote resolution is not possible.

- (e) On-call coverage shall include, at minimum:
  - General User Windows Support (Active Director, etc.)
  - Network and server infrastructure support
  - Enterprise application support (Oracle, CIS/Billing, HCM/Payroll, GIS, EAMS)
  - Help desk escalation for critical user issues
- (f) On-call support provided under this section is included in the base contract price and is not subject to emergency rates unless SWBNO declares a formal emergency.
- (g) When on-call personnel are activated and perform work during non-business hours, those hours shall be billed at the applicable hourly rate as set forth in the Price Proposal. Any premium pay obligations are the sole responsibility of the Contractor and shall be incorporated into the proposed rates. On-call availability, when no work is performed, is not separately compensable and is included in the base contract price. Hurricane season standby availability for ER1 and ER2 personnel, as described in Section 2.9.1, is also included in the base contract price and is not subject to separate standby compensation.

#### 2.2.14 Background Checks and Access

All personnel requiring access to SWBNO systems or facilities shall comply with background screening and access control requirements. Access may be revoked at SWBNO's discretion. Background checks must include:

- Criminal history (federal, state, and local) for the preceding seven (7) years
- Employment verification for the preceding five (5) years
- Education verification
- Professional license verification, where applicable
- Sex offender registry search

#### 2.2.15 Cybersecurity and Incident Notification

The Contractor shall:

- Implement reasonable administrative, technical, and physical safeguards consistent with applicable cybersecurity standards
- Notify SWBNO within two (2) hours of discovery of any cybersecurity incident that may affect SWBNO data or systems
- Cooperate fully with incident response and investigation efforts

#### 2.2.16 Intellectual Property

All reports, documentation, deliverables, and other data prepared or compiled by the Contractor in connection with the performance of its obligations under the contract shall be the sole and exclusive property of the SWBNO. The Contractor retains ownership of pre-existing materials, tools, methodologies, and intellectual property. SWBNO is granted a perpetual, royalty-free, non-exclusive license to use deliverables for internal purposes.

The Contractor shall retain in its files sufficiently detailed working papers relevant to its engagement with the SWBNO. The Contractor 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.

#### 2.2.17 Knowledge Transfer and Documentation

The Contractor shall maintain comprehensive documentation of all systems, processes, and institutional knowledge developed or maintained under this contract. Documentation shall be maintained in formats and locations accessible to SWBNO personnel and shall be delivered to SWBNO upon request or contract termination.

#### 2.2.18 Performance Standards and Remedies

The Contractor shall meet the performance standards described in this section. Failure to meet these standards may result in the remedies specified, which SWBNO may apply at its discretion. Remedies are not exclusive and do not limit SWBNO's other contractual rights.

##### 2.2.18.1 Position Vacancy Standards

- (a) Billing for any vacant position shall cease immediately upon the position becoming vacant. The Contractor shall make every reasonable effort to fill any vacancy within ninety (90) calendar days.
- (b) If a position remains vacant beyond ninety (90) calendar days, the Contractor shall be assessed a penalty equal to twenty-five percent (25%) of the monthly value of the vacant position, calculated as:  $(\text{Fully Burdened Hourly Rate} \times 8 \text{ hours} \times 21 \text{ days} \times 0.25)$
- (c) If a position remains vacant beyond one hundred eighty (180) calendar days, the penalty shall increase to fifty percent (50%) of the monthly value of the vacant position.
- (d) During any vacancy period exceeding ninety (90) calendar days, SWBNO reserves the right to obtain services from an alternative source until the Contractor fills the position. Vacancy penalties shall continue to apply until the Contractor fills the position regardless of whether SWBNO exercises this right.
- (e) The Contractor shall simultaneously pursue internal candidates and external recruitment. If online advertising fails to identify viable candidates within sixty (60) calendar days, the Contractor shall expand recruitment efforts to include additional sourcing channels as agreed with the IT Director, which may include specialized IT job boards, professional associations, staffing partnerships, recruitment events, or other targeted outreach beyond the Contractor's standard sourcing methods.
- (f) For positions designated as Specialized Technical Services in the Pricing Form, the Contractor shall provide the IT Director with a written recruitment status report every thirty (30) calendar days beginning on the date the position becomes vacant. The report shall include sourcing channels used, number of candidates screened, candidates submitted, reasons for rejection, and planned next steps. Failure to provide the required recruitment status report shall result in a penalty of five hundred dollars (\$500) per missed report in addition to applicable vacancy penalties

##### 2.2.18.2 Response Time Standards

For purposes of this section and the reporting requirements in Section 2.2.6(e), system tiers are defined as follows:

Tier 1 (Mission Critical): Systems whose unavailability directly prevents SWBNO from performing core water, sewerage, or drainage operations; processing customer bills and payments; processing SWBNO payroll, or meeting regulatory reporting obligations. Tier 1 systems include Oracle Fusion Cloud ERP (Financials), the CIS and Billing platform, HCM, Work Order Management System/Asset Management System (EAMS), network core infrastructure (WAN, domain controllers, primary firewall cluster), and the primary data center at 625 St. Joseph Street.

Tier 2 (Business Critical): Systems whose unavailability significantly impairs, but does not prevent, SWBNO operations. Tier 2 systems include email and collaboration (Microsoft 365), help desk and IT service management, VoIP telephone system, Geographic Information System (GIS), VPN remote access, enterprise backup and recovery, and secondary data center or DR infrastructure.

System classifications may be updated by the IT Director through the Task Order process as systems are deployed, retired, or reclassified.

- (a) Critical System Outage Response: The Contractor shall respond to any critical system outage within one (1) hour of notification. A critical system outage is defined as any condition rendering a Tier 1 or Tier 2 system (as defined in this section) unavailable to end users.
- (b) Failure to respond within the required timeframe shall result in a penalty of one thousand dollars (\$1,000) per occurrence, unless the Contractor demonstrates to the satisfaction of the IT Director that timely response was impossible due to circumstances beyond the Contractor's control.
- (c) Response is defined as acknowledgment of the issue and commencement of diagnostic or remediation activities, not necessarily resolution.

#### 2.2.18.3 Reporting and Communication Standards

- (a) The Contract Manager shall conduct status meetings with the IT Director or designee no less than twice per month. Failure to conduct two (2) consecutive scheduled meetings without prior approval shall result in a penalty of two hundred fifty dollars (\$250) per occurrence thereafter.
- (b) The Contractor shall submit written or verbal project status reports weekly to the IT Director. Failure to submit a status report shall result in a penalty of one hundred dollars (\$100) per missed report.
- (c) The Contractor's corporate office shall initiate communication with the IT Director no less than quarterly. Failure to initiate quarterly corporate communication shall result in a penalty of two thousand five hundred dollars (\$2,500) per quarter. Quarterly communications between SWBNO and the Contractor's DBE firm is excluded from this requirement.
- (d) A representative of the Contractor's corporate office shall visit New Orleans and meet with the IT Director and OCIO staff no less than annually. Failure to conduct an annual corporate visit shall result in a penalty of five thousand dollars (\$5,000) per contract year. Visits between SWBNO and the Contractor's DBE firm is excluded from this requirement.

#### 2.2.18.4 Documentation Standards

- (a) The Contractor shall review and update OCIO policies and procedures annually, or more frequently as directed. Failure to complete an annual review shall result in a penalty of one thousand five hundred dollars (\$1,500).
- (b) The Contractor shall review and update the OCIO Disaster Recovery Plan annually, or more frequently as directed. Failure to complete an annual review shall result in a penalty of five thousand dollars (\$5,000).

(c) Project Managers shall prepare annual work plans to support SWBNO budget preparation. Failure to prepare a work plan by the deadline established by the IT Director shall result in a penalty of two hundred fifty dollars (\$250) per Project Manager. Quarterly work plan updates that are late or incomplete shall result in a penalty of one hundred dollars (\$100) per Project Manager.

#### 2.2.18.5 Workforce Stability Standards

(a) If six (6) or more Contractor employees assigned to this contract voluntarily terminate employment within any thirty (30) calendar day period due to substantial changes in their employment terms initiated by the Contractor, a penalty of twenty thousand dollars (\$20,000) shall be assessed.

(b) This provision does not apply to terminations initiated by SWBNO, terminations for cause, or voluntary departures unrelated to Contractor-initiated changes.

(c) For purposes of this section, 'substantial changes in employment terms initiated by the Contractor' include, but are not limited to, reduction in base compensation, elimination or material reduction of health insurance or retirement benefits, mandatory relocation to a work location outside the New Orleans metropolitan area, or material reduction in accrued paid leave. Routine annual adjustments to benefits plan terms, such as changes in employee premium contributions consistent with market conditions, do not constitute substantial changes.

#### 2.2.18.6 Leave and Furlough

(a) Billing for any employee on leave without pay shall be reduced by the cost of the missed hours for the period of such leave.

(b) Billing for any furloughed employee shall be reduced by the full operations and maintenance rate for the period of the furlough.

#### 2.2.18.7 Penalty Summary Table

Performance Standard	Condition	Remedy
Position Vacancy	0-90 days	No billing for position
Position Vacancy	91-180 days	No billing + 25% penalty
Position Vacancy	181+ days	No billing + 50% penalty
Critical System Response	> 1 hour	\$1,000 per occurrence
Status Meetings	2+ consecutive missed	\$250 per occurrence
Weekly Status Reports/Meetings	Missed report/meeting	\$100 per occurrence
Quarterly Corporate Contact	No contact	\$2,500 per quarter
Annual Corporate Visit	No visit	\$5,000 per year
Annual Policy Review	Not completed	\$1,500
Annual DR Plan Review	Not completed	\$5,000
Work Plan Preparation	Not completed	\$250 per PM

Work Plan Updates	Late or incomplete	\$100 per PM
Mass Departure	6+ in 30 days	\$20,000
Leave Without Pay	Duration of leave	Billing reduced
Furlough	Duration of furlough	Full rate reduction

#### 2.2.18.8 Application of Remedies

- (a) SWBNO shall provide written notice to the Contractor of any performance deficiency subject to remedy under this section.
- (b) The Contractor shall have ten (10) business days to respond in writing with an explanation or corrective action plan, unless a shorter period is specified for a particular standard.
- (c) Remedies shall be deducted from the next monthly invoice following determination of the deficiency.

The remedies specified in this section are cumulative and do not limit SWBNO's other rights under this contract, including termination for cause.

applicable employment laws and the Contractor's obligations to its own employees.

### 2.3 Contract Terms and Compensation

The contract period is one (1) year with four (4) one (1) year renewals 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. The total potential contract period shall not exceed five (5) years.

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.

Contract prices are to remain firm through the effective dates of the contract. The Proposer may request a price adjustment, in writing, between ninety (90) and one hundred twenty (120) days prior to the contract renewal date with the Proposer's proposal stating his intent to renew the contract. If the Proposer does not request a price adjustment between 90 and 120 days prior to the contract renewal date with the Proposer's proposal to renew the contract, no price adjustment will be made. All price adjustments must be approved by the Board's Procurement Department and the Contract Department prior to the implementation of the adjusted pricing. Approval shall be in the form of a contract amendment issued by the Board.

Price adjustments will be made in accordance with the percentage change in the U.S. Bureau of Labor Statistics Consumer Price Index (CPI) for the commodity associated with the product or other industry recognized, mutually agreed upon index. The percentage difference between the CPI issued for the contract's effective month and year, and the CPI issued for the month prior to the request will determine the maximum allowable adjustment of original contract prices. Only final CPI data will be used to adjust contract pricing. No retroactive contract price adjustment will be allowed. The Board may request decrease of prices under the same terms and conditions.

### 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 \$16.01 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 \$16.01 per hour.

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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

### 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 on the basis of 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:

Technical Evaluation Criteria	Weight
<p>Technical Approach and Staffing Capability. This will be measured on the</p> <ul style="list-style-type: none"> <li>• Proposer's demonstrated ability to recruit, retain, and manage qualified IT professionals across the service categories described in Section 2.2, including depth of candidate pipeline, workforce management processes, and experience supporting technical environments.</li> <li>• Proposals demonstrating capability in Cybersecurity, Operational Technology, or Information Management will receive favorable consideration, but such capability is not required for a proposal to be deemed responsive.</li> </ul>	25%
<p>Relevant Experience and Past Performance. This will be measured on the</p> <ul style="list-style-type: none"> <li>• Proposer's record of providing IT professional services to public-sector or utility clients of comparable size and complexity,</li> <li>• Quality of client references</li> <li>• Demonstrated continuity of service delivery</li> </ul>	25%
<p>Management Approach and Transition Plan. This will be measured on the</p> <ul style="list-style-type: none"> <li>• Proposer's contract management structure</li> <li>• Quality assurance processes</li> <li>• Reporting capabilities</li> <li>• Knowledge transfer methodology</li> <li>• Plan for onboarding and transitioning personnel at contract start.</li> </ul>	15%
<p>Organizational Capacity and Financial Stability. This will be measured on</p> <ul style="list-style-type: none"> <li>• Company background</li> <li>• Financial statements or D&amp;B report</li> <li>• Organizational depth</li> <li>• Insurance capacity</li> <li>• Completeness of proposal response.</li> </ul>	10%
<p>DBE Participation. This will be measured on</p> <ul style="list-style-type: none"> <li>• The Proposer's plan to meet or exceed the DBE participation goal established for this solicitation.</li> </ul>	10%
<p>Cost</p>	15%
<p>Total</p>	100

### 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:

$$CS = (LPC/PC*15)$$

Where:

CS = Computed cost score for Proposer

LPC = Lowest proposed cost of all Proposers

PC = Proposer’s cost

15 = Total percentage of allocated cost

### 3.4 Shortlist

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

### 3.5 Best and Final Offer (BAFO)

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.

To facilitate the analysis of responses to this RFP, the Proposer is required to prepare their proposals in accordance with the instructions outlined in this section. Proposers must respond in full to all RFP sections and follow the RFP format (section numbering, etc.) in their response. Failure to follow these instructions may result in rejection.

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. The proposal should be organized as follows:

### 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

Clearly identify the materials by section, page number, and tabs.

Section #	Title	Page Limit	In addition to specified content, provide
1	Executive Summary	3 pages	
2	Company Background and Qualifications	10 pages	Complete Attachment: Company Background Form; Complete Attachment: Questions
3	Technical Approach and Staffing Capability	20 pages	
4	Management Approach and Transition Plan	15 pages	
5	Staffing Plan and Position Qualifications	No limit	Complete Attachment: Staffing Plan Form
6	Relevant Experience and Past Performance	15 pages	Complete Attachment: Client Reference Form
7	Exceptions and Deviations	No limit	
8	Other Required Forms and Attachments	No limit	See Attachments Checklist
Separate	DBE Participation Plan	2 pages	Complete Attachment: EDBP Summary Sheet and Acknowledgement Form
Separate	Cost Proposal	No limit	Complete Attachment: Pricing Form (Excel)

#### 4.3 EXECUTIVE SUMMARY

This part of the response to the RFP should be limited to a brief narrative that does not exceed three (3) pages describing the Proposer's understanding of the required services and its overall approach to delivering IT professional services to SWBNO. 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 AND QUALIFICATIONS (Proposal 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 Proposers 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, including a brief history, current organizational structure, number of employees, geographic presence, and principal lines of business.
- Audited financial information for the past two (2) completed fiscal years, including income statements, balance sheets, and statements of cash flows.
- Privately held companies wishing to maintain confidential financial information must provide a current Dun and Bradstreet (D&B) report.
- A description of the company's IT staffing and professional services practice, including the number of technical professionals currently employed or under contract, disciplines supported, and geographic markets served.
- If the Proposer intends to use subcontractors, provide a description of each subcontractor, the Proposer's relationship with that firm, the specific services or roles the subcontractor will provide, and a Company Background Form for each subcontractor. The Board has the right to approve all subcontractors at any time.
- Proposers must also complete and submit ATTACHMENT-QUESTIONS as part of this section.

#### 4.5 TECHNICAL APPROACH AND STAFFING CAPABILITY (Proposal Section 3)

The Proposer shall describe its approach to providing IT professional services across the service categories described in Section 2.2, including:

- Recruitment and retention methodology for IT professionals across the position categories identified in this RFP, including sourcing strategies for specialized and hard-to-fill positions.
- Workforce management approach, including supervision of on-site personnel, performance monitoring, quality assurance, and handling of personnel issues.
- Demonstrated capability to support IT Operations and Specialized Technical Services as described in Sections 2.2.1 and 2.2.2, including Microsoft 365, Microsoft SQL Server/Oracle Database environments, data center operations, cloud solutions, help desk and PC support, IT networking, and GIS systems. Proposers are encouraged to also demonstrate capability in other service areas (Cybersecurity, Operational Technology, Information Management) as described in Sections 2.2.3 through 2.2.5. Demonstrated capability in these areas is not required for a responsive proposal but will receive favorable consideration in the Technical Approach evaluation.
- Approach to supporting concurrent service needs across IT Operations, Specialized Technical Services, and other service categories.
- Approach to maintaining service continuity during personnel transitions, including sick leave, vacation, and turnover.

#### 4.6 MANAGEMENT APPROACH AND TRANSITION PLAN (Proposal Section 4)

The Proposer shall describe its approach to contract management, transition, and ongoing operations, including:

- Contract management structure, identifying the proposed Contract Manager and the management hierarchy for overseeing Contractor personnel at SWBNO.
- Quality assurance and performance management processes, including how the Proposer monitors and ensures work quality, addresses performance issues, and maintains compliance with contract terms.
- Transition plan for the first ninety (90) days of the contract, including onboarding of incumbent personnel (if applicable), knowledge transfer from the outgoing contractor, and establishment of reporting and communication processes.
- Reporting capabilities, including the Proposer's ability to provide staffing reports, time tracking, service level metrics, and other reporting as described in Section 2.2 (Ancillary Support).
- Knowledge transfer and documentation methodology, including how the Proposer ensures institutional knowledge is captured, maintained, and transferable to SWBNO Civil Service staff or a successor contractor.
- Emergency and business continuity staffing plan, describing the Proposer's approach to meeting the requirements of Section 2.9

The Proposer's transition plan should address the following:

- Approach to offering employment to qualified incumbent contractor personnel currently performing services under the predecessor contract. The Board encourages the successful Proposer to retain experienced incumbent staff to maintain continuity of service during the transition. Proposers should describe their approach to onboarding incumbent personnel, including timeline, screening process, and compensation practices.
- The predecessor contract expires in November 2026. Proposers should assume that incumbent personnel are not subject to non-compete or non-solicitation restrictions that would prevent them from accepting employment with a successor contractor.
- Plan for maintaining operations during the knowledge transfer period, including the Proposer's approach to dual-staffing critical positions during the first thirty (30) to sixty (60) days if needed.

#### 4.7 STAFFING PLAN AND POSITION QUALIFICATIONS (Proposal Section 5)

The Proposer shall provide a detailed staffing plan that demonstrates its ability to fill the position categories anticipated under this contract. The staffing plan shall include:

- A proposed organizational chart showing the reporting relationships between the Contract Manager, technical leads, and operational staff.
- For each position category identified in the Pricing Form, the minimum qualifications the Proposer will require, including education, certifications, years of experience, and specific technical competencies. Minimum qualifications must meet or exceed those specified by SWBNO in Task Orders.
- The Proposer's average time to fill positions by category, based on the Proposer's historical performance.
- The Proposer's approach to retaining personnel assigned to this contract, including compensation practices, professional development, and career progression.
- Resumes for the proposed Contract Manager and any Technical Leads identified as Key Personnel if those positions will not be retained from predecessor's contract.

The Proposer must also complete the ATTACHMENT-STAFFING PLAN Form provided as an attachment to this RFP.

#### 4.8 RELEVANT EXPERIENCE AND PAST PERFORMANCE (Proposal Section 6)

The Proposer must provide at least five (5) references from clients for whom the Proposer has provided IT professional services of comparable scope and complexity within the past five (5) years. At least three (3) references must be from public-sector or utility clients.

For each reference, the Proposer shall provide the information requested in the ATTACHMENT-CLIENT REFERENCE Form provided as an attachment to this RFP, including client name, contract value, number of personnel provided, duration of engagement, and a description of services performed.

The Board reserves the right to contact references and to consider information obtained from references and other sources in the evaluation.

#### 4.9 EXCEPTIONS AND DEVIATIONS (Proposal Section 7)

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.

#### 4.10 ECONOMICALLY DISADVANTAGED BUSINESS PROGRAM (Separate Attachments)

The Sewerage and Water Board of New Orleans established the Economically Disadvantaged Business Program to offer Disadvantaged Business Enterprises (DBEs) the maximum allowable opportunity to compete for the award of and participation in Board contracts and subcontracts.

All solicitations for bids for contracts where DBE percentage goals have been established and recommended by the Staff Contract Review Committee (SCRC) and approved by the Board, shall inform all Proposers of the DBE requirements that must be submitted to the Board as part of the bid. The award of the contract will depend on the DBE requirements set below.

DBE Contract Percentage Goal 25%

See Attachment Section for DBE Forms

Each Bidder must submit the following forms in completion:

1. EDBP Participation Summary Sheet Form
  - Name, address and phone number of each DBE Firm
  - Scope of Work
  - Dollar Value for each DBE
  - Signature of Prime on Form
  
2. EDBP Acknowledgement of Negotiated Terms Form
  - Name, address and phone number of DBE Firm
  - Scope of Work
  - Dollar Value
  - Signatures of Prime and DBE subcontractor on Form

An Acknowledgement Form must be completed for each DBE Firm.

## ATTACHMENT – QUESTIONS

#	Question
1	Describe the company's IT staffing and professional services practice, including the number of years providing IT staff augmentation or managed services to public-sector or utility clients.
2	How many active IT professional services contracts does the company currently hold? How many are with public-sector or utility clients?
3	Describe the company's geographic recruitment reach and its ability to source qualified IT professionals for positions in the New Orleans metropolitan area.
4	Describe any strategic alliances or partnerships that strengthen the company's ability to provide the services described in this RFP.
5	Describe the company's employee retention rate for IT professionals assigned to client engagements over the past three (3) years.
6	Please disclose any outstanding litigation against the company or any principal, member, or officer.
7	If the Proposer intends to use subcontractors, list each subcontractor, the services they will provide, and the percentage of work to be subcontracted.

Please note: if you are a DBE bidding as a prime contractor, you cannot count yourself toward the DBE participation requirement. You must select another certified DBE from the SWBNO Approved Vendor List to fulfill this requirement.

Failure to complete and submit the DBE forms according to the above instructions will render your bid non-responsive. Additional criteria taken into consideration during the evaluation of DBE forms submitted include:

- The selected DBE firms must be SLDBE or LaUCP certified in the required work areas. To identify certified DBEs, visit <https://www.swbno.org/Business/DisadvantagedBusinesses>.
- The work to be performed by the selected DBE firms must be commercially useful and directly related to the project.
- The Board expects Proposers to use their best efforts to meet the DBE goals. If Proposers are unable to meet the goal, Documentation of Good Faith Effort must be submitted for the bid to be considered responsive. Instructions and documents needed to prepare an acceptable good faith effort are available at <https://www.swbno.org/Business/DisadvantagedBusinesses>.

#### 4.11 COST PROPOSAL (Separate Attachment)

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

- The Proposer shall provide fully burdened hourly rates for each position category identified in the Pricing Form. Fully burdened rates shall include all direct labor costs, overhead, fringe benefits, profit, management overhead, and any other costs associated with providing personnel under this contract.
- Rates shall be proposed for the base year and for each of the four (4) option years.
- Time-and-materials pricing is the primary pricing structure for this contract. The Proposer shall not include charges for travel, office space, or other costs that are provided by SWBNO or that are included in the fully burdened rate.
- In the event a position category is not included in the Proposer's proposal, the item should be noted as "no bid."
- The Proposer shall provide all pricing in U.S. dollars.
- The Proposer shall make clear the rationale and basis of calculation for all rates.
- Emergency pay rates by position category shall be included as a separate line item in the Pricing Form, as described in Section 2.9.

The Contract Manager position is not included in the Pricing Form. The Contractor's costs for the Contract Manager shall be included in management overhead and reflected in the fully burdened hourly rates for all position categories.

Emergency hourly rates apply only during declared emergencies as described in Section 2.9 and replace (not supplement) the standard fully burdened hourly rate for hours worked during the emergency.

On-call availability is an inherent requirement of the services, is included in the base contract price, and is an expected responsibility of each functional group. Billing is limited to actual hours worked when on-call personnel are activated and engaged to perform authorized work. Work performed outside normal business hours must be authorized in advance to be billable, except where immediate action is necessary to prevent imminent operational failure or public safety harm and prior authorization cannot reasonably be obtained; in such cases, notification must be provided as soon as practicable.

When on-call personnel are activated and perform after-hours work, those hours may be billed at the applicable standard or pre-approved overtime rate, or alternatively may be offset through approved compensatory time, in accordance with applicable policies. If overtime is billed, the contractor must ensure that corresponding overtime compensation is issued to the employee in compliance with all applicable labor laws and internal policies. Standby time, passive availability, or monitoring while not actively performing work is not separately billable.

#### 4.11.1 Cost Evaluation

For cost evaluation purposes, the Board will calculate total estimated annual cost using the standardized staffing scenario published in the Pricing Form instructions. The standardized scenario specifies a fixed number of positions by category at 2,080 annual productive hours each, at the Proposer's proposed fully burdened hourly rates. The Contract Manager position is not included in the cost evaluation calculation as it is not a billable position. Optional service category pricing and emergency hourly rates will be evaluated for reasonableness but will not be included in the cost comparison formula. The standardized scenario is for evaluation purposes only and does not constitute a guarantee of minimum staffing levels, hours, or expenditure.

In evaluating cost, SWBNO will evaluate on the basis of the total estimated annual cost for the base year staffing complement at proposed fully burdened hourly rates, inclusive of all management overhead, ancillary support, and other costs. The Board may also evaluate option-year pricing and the reasonableness of the rate structure across position categories.

## REQUIRED ATTACHMENTS

RFP Technical and Cost Proposal Submittal Checklist  
Technical Proposal – In Sections  
Cost Proposal (separate file in Excel format), complete 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 FOR PROPOSAL SUBMISSION:

ATTACHMENT – COVER SHEET  
ATTACHMENT – COMPANY BACKGROUND FORM  
ATTACHMENT – QUESTIONS  
ATTACHMENT – STAFFING PLAN FORM  
ATTACHMENT – CLIENT REFERENCE FORM

### Attachments Checklist as Separate Files-REQUIRED AT PROPOSAL SUBMISSION:

ATTACHMENT – ECONOMICALLY DISADVANTAGED BUSINESS PARTICIPATION SUMMARY SHEET  
ATTACHMENT – ECONOMICALLY DISADVANTAGED BUSINESS ACKNOWLEDGEMENT SHEET  
ATTACHMENT – PRICING FORM (IN EXCEL FORMAT)

### Attachments Checklist-FOR INFORMATION:

ATTACHMENT - ECONOMICALLY DISADVANTAGED BUSINESS PROGRAM POLICY

### Attachments Checklist-REQUIRED FOR CONTRACT:

ATTACHMENT – AFFIDAVITS (REQUIRED FOR AWARDED PROPOSER)

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: \_\_\_\_\_

This form must be completed in its entirety. Deviations and failure to complete and sign this form will deem your proposal non-responsive.

**ATTACHMENT – COMPANY BACKGROUND FORM**

<b>Item</b>	<b>Response</b>
Company Legal Name:	
Headquarters Address:	
Nearest Office to New Orleans:	
Year Established:	
State(s) of Incorporation/Registration:	
Licensed to Do Business in Louisiana (Yes/No):	
Total Number of Employees:	
Number of IT Professionals Currently Employed or Under Contract:	
DUNS Number:	
Federal Tax ID (EIN):	
Is Proposer the prime contractor? (Yes/No):	

## ATTACHMENT – STAFFING PLAN FORM

Complete the table below for each position category identified in the Pricing Form. Add rows as needed.

<b>Position Category</b>	<b>Min. Education</b>	<b>Min. Years Exp.</b>	<b>Required Certifications</b>	<b>Avg. Time to Fill (Days)</b>	<b>Proposed Hourly Rate Range</b>
[Example: Help Desk Technician]					

In addition to the table above, provide the following:

- Proposed organizational chart showing reporting relationships between the Contract Manager, Technical Leads, and operational staff.
- Resumes for the proposed Contract Manager (required) and Technical Leads (optional).
- Description of the Proposer's approach to retaining personnel, including compensation, professional development, and career progression practices.
- Description of the Proposer's hurricane and emergency staffing plan, identifying the approach to designating ER1 and ER2 personnel as described in Section 2.9.

## 1. Attachment - Client Reference Form

Complete one form for each reference. Provide at least five (5) references; at least three (3) must be public-sector or utility clients.

<b>Item</b>	<b>Response</b>
Client Organization Name:	
Client Contact Name and Title:	
Client Contact Phone and Email:	
Contract Period (Start and End Dates):	
Approximate Annual Contract Value:	
Number of IT Personnel Provided:	
Public Sector or Utility? (Yes/No):	
Description of Services Provided:	
Key Accomplishments or Results:	

# 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: \_\_\_\_\_

**CONFLICT OF INTEREST DISCLOSURE AFFIDAVIT**

**STATE OF** \_\_\_\_\_

**PARISH/COUNTY OF** \_\_\_\_\_

Before me, the undersigned authority, came and appeared \_\_\_\_\_ who, being first duly sworn, deposed and said that:

He/She is \_\_\_\_\_ and authorized representative of \_\_\_\_\_,

Hereafter called "Bidder."

The Respondent hereby confirms that a conflict(s) of interest **exists /does not exist/may exist (circle one)** in connection with this solicitation which might impair Respondent's ability to perform if awarded the contract, including any familial or business relationships that the Respondent, the proposed subcontractors, and their principals have with the Board officials or employees.

*(If a conflict(s) of interest exists and/or may exist, describe in a letter the nature of the conflict, the parties involved and why there is a conflict. Attach said letter to this form).*

\_\_\_\_\_  
Respondent Representative (Signature)

\_\_\_\_\_  
(Print or type name)

\_\_\_\_\_  
(Address)

SWORN TO AND SUBSCRIBED BEFORE ME

THIS \_\_\_\_\_ DAY OF \_\_\_\_\_ 20\_\_\_\_.

\_\_\_\_\_  
NOTARY PUBLIC (Signature)

\_\_\_\_\_  
NOTARY PUBLIC (Print Name)

Notary ID#/Bar Roll# \_\_\_\_\_

**BIDDERS'S ORGANIZATION**

**AN INDIVIDUAL**

Individual's Name: \_\_\_\_\_

Doing business as: \_\_\_\_\_

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

Telephone No.: \_\_\_\_\_ Fax No.: \_\_\_\_\_ Email: \_\_\_\_\_

**A PARTNERSHIP**

Firm Name: \_\_\_\_\_

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

Name of person authorized to sign: \_\_\_\_\_

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

Telephone No.: \_\_\_\_\_ Fax No.: \_\_\_\_\_ Email: \_\_\_\_\_

**A LIMITED LIABILITY COMPANY**

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

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

Name of person authorized to sign: \_\_\_\_\_

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

Telephone No.: \_\_\_\_\_ Fax No.: \_\_\_\_\_ Email: \_\_\_\_\_

**A CORPORATION**

**IF PROPOSAL IS BY A CORPORATION, THE CORPORATE RESOLUTION MUST BE SUBMITTED WITH PROPOSAL.**

# CORPORATE RESOLUTION

A meeting of the Board of Directors of \_\_\_\_\_ a corporation organized under the laws of the State of \_\_\_\_\_ and domiciled in \_\_\_\_\_ was held this \_\_\_\_\_ day \_\_\_\_\_, 20\_\_\_\_ and was attended by a quorum of the members of the Board of Directors.

The following resolution was offered, duly seconded and after discussion was unanimously adopted by said quorum:

**BE IT RESOLVED**, that \_\_\_\_\_ is hereby authorized to submit proposals and execute agreements on behalf of this corporation with the Sewerage and Water Board of New Orleans.

**BE IT FURTHER RESOLVED**, that said authorization and appointment shall remain in full force and effect, unless revoked by resolution of this Board of Directors and that said revocation will not take effect until the Procurement Director of the Board, shall have been furnished a copy of said resolution, duly certified.

I, \_\_\_\_\_, hereby certify that I am the Secretary of \_\_\_\_\_, a corporation created under the laws of the State of \_\_\_\_\_; that the foregoing is a true and exact copy of a resolution adopted by a quorum of the Board of Directors of said corporation at a meeting legally called and held on the \_\_\_\_\_ day of \_\_\_\_\_, 20\_\_\_\_, as said resolution appears of record in the Official Minutes of the Board of Directors in my possession.

This \_\_\_\_\_ day of \_\_\_\_\_, 20\_\_\_\_

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**SECRETARY**

**CONVICTED FELON AFFIDAVIT**

STATE OF \_\_\_\_\_

PARISH/COUNTY OF \_\_\_\_\_

Before me, the undersigned authority, came and appeared \_\_\_\_\_,

who, being first duly sworn, deposed and said that:

1. He/She is the \_\_\_\_\_ and authorized representative of \_\_\_\_\_, hereafter called "Contractor."
2. The Contractor complies with **City Code Section 2-8 (c) for the City of New Orleans.**
3. No Contractor principal, member, or officer has, within the preceding five 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.

\_\_\_\_\_  
Proposer Representative (Signature)

\_\_\_\_\_  
(Print or type name) (Address)

Sworn to and subscribed before me, in (CITY/STATE) \_\_\_\_\_

This \_\_\_\_ day of (MONTH) \_\_\_\_\_, 20 \_\_\_\_.

\_\_\_\_\_  
Notary Public

\_\_\_\_\_  
Notary Identification No./Bar Roll No.

**NON-SOLICITATION AFFIDAVIT**

STATE OF \_\_\_\_\_

PARISH/COUNTY OF \_\_\_\_\_

Before me, the undersigned authority, came and appeared \_\_\_\_\_,

who, being first duly sworn, deposed and said that:

1. He/She is the \_\_\_\_\_ and  
authorized representative of \_\_\_\_\_ hereafter called "Contractor."
2. The Contractor has not employed or retained any company or person, other than a bona fide employee working solely for Contractor, to solicit or secure the subject contract. The Contractor has not paid or agreed to pay any person, other than a bona fide employee working for Contractor, any fee, commission, percentage, gift, or any other consideration contingent upon or resulting from the subject contract.

\_\_\_\_\_  
Contractor Representative (Signature)

\_\_\_\_\_  
(Print or type name) (Address)

\_\_\_\_\_

Sworn to and subscribed before me, in \_\_\_\_\_, Louisiana,

this \_\_\_ day of \_\_\_\_\_, 20 \_\_\_\_\_.

\_\_\_\_\_  
Notary Public

\_\_\_\_\_  
Notary Identification No./Bar Roll No.

**NON-COLLUSION AFFIDAVIT**

STATE OF \_\_\_\_\_

PARISH/COUNTY OF \_\_\_\_\_

\_\_\_\_\_, being first duly sworn, deposes and says that:

(1) S/He is (Owner) (Partner) (Office) (Representative) or (Agent), of:

\_\_\_\_\_  
the Proposer that has submitted the attached Proposal:

(2) Such Proposal is genuine and is not a collusive or sham Proposal:

(3) Neither the said Proposer nor any of its officers, partners, owners, agents, representatives, employees or parties of interest, including this affiant, has in any way colluded, conspired, connived or agreed, directly, or indirectly with any other Proposer, firm or person to submit a collusive or sham proposal in connection with the Contract for which the attached Proposal has been submitted or to refrain from proposing in connection with such contract, or has in any manner, directly or indirectly sought by agreement or collusion or communication or conference with any other Proposer, or to fix any overhead, profit or cost element of the proposal price or the proposal price of any other proposer, or to secure through any advantage against the Sewerage and Water Board of New Orleans of any person interested in the proposed contract; and

(4) The price or prices quoted in the attached Proposal are fair and proper and are not tainted by any collusion, conspiracy, connivance or unlawful agreement on the part of the Proposer or any of its agents, representatives, owners, employees, or parties in interest, including this affiant.

\_\_\_\_\_  
Proposer Representative (Signature)

\_\_\_\_\_  
Title

\_\_\_\_\_  
(Print or type name)

SWORN TO AND SUBSCRIBED BEFORE ME

THIS \_\_\_\_\_ DAY OF \_\_\_\_\_ 20\_\_\_\_. Notary ID#/Bar Roll # \_\_\_\_\_

\_\_\_\_\_  
NOTARY PUBLIC (Signature)

\_\_\_\_\_  
NOTARY PUBLIC (Print Name)

## Attachment: IT Environment and Estimated Workload Data

*This attachment is provided for reference only. Counts and configurations are approximate and subject to change during the contract period. This attachment addresses the IT environment. Operational Technology (OT) systems, staffing, and workload data will be addressed separately.*

### Facilities and Locations

SWBNO IT operations are distributed across multiple facilities throughout the City of New Orleans. The primary data center and IT offices are located at 625 St. Joseph Street. Additional IT support is provided at treatment plants and other administrative locations.

Location	Primary IT Functions	Contractor Workspace
625 St. Joseph Street (SJ)	Primary data center, IT administration, applications, GIS, help desk, network operations	Offices and cubicles for approximately 35-40 personnel
Carrollton Water Treatment Plant (CWP)	EOC IT support, domain controller, SCADA historian, distribution point	Designated work spaces
Central Yard (CY)	Field operations IT support, domain controller, SCADA historian, distribution point	Office and work spaces
Algiers Water Plant (AWP)	Distribution point	As needed
K&B Building (KB)	Distribution point	As needed
Pump stations (28 stations)	Network routers, monitoring, field device support	Field access

## Enterprise Application Platforms

The following enterprise platforms constitute the core application environment. Several are in active modernization or replacement.

System / Function	Current Platform	Status	Notes
Enterprise Financial System	Oracle Fusion Cloud ERP	Production	Replaced legacy AFIN / Mainframe. Archive work in progress.
Customer Service / Billing	Cogsdale CSM (Microsoft Dynamics GP)	Production	Replacement System Selection in Progress
Enterprise Asset Management	Trimble Unity (Cityworks)	Implementation in Progress	Replacing RJN Cassworks.
Human Capital Management	Dayforce HCM	Implementation Planned	Replacing Microsoft Dynamics GP for HR/Payroll.
Geographic Information System	ESRI ArcGIS Enterprise	Production	Migration to Utility Network in progress.
IT Service Management	ManageEngine Service Desk / Assets	Production	Help desk ticketing and IT asset management.
Email and Productivity	Microsoft Office 365	Production	
Internal Audit / Risk	Diligent ACL Analytics	Production	
Backup and Recovery	Veeam Backup and Replication	Production	
Network Monitoring	PRTG Network Infrastructure Monitoring	Production	
Physical Security / Access Control	S2 Security and Access Control	Production	Badge access and logging.
Mass Notification	Rave	Production	

SCADA / OT	Proficy HMI/SCADA iFIX; OSIsoft PI System	Production	Supported by IT for infrastructure; operational management by SCADA Team. Potential upgrade to Ignition
IVR System	AT&T/Nice InContact	Production	
FOG Abatement	BMG FOG software	Production	Fats, oil, and grease compliance tracking.

**Note:** Operational management by OT or SCADA Team. IT Operations and Maintenance scope includes network infrastructure devices (firewalls, routers, switches) deployed in OT environments, server hosting for SCADA historians, and network connectivity to plant facilities. SCADA application support, PLC programming, and industrial control system configuration are addressed under the Operational Technology service category of the RFP. If SWBNO elects to procure these services under this contract, staffing requirements will be established through separate Task Orders.

### **Server and Data Center Infrastructure**

#### **Physical Servers**

SWBNO operates physical servers across multiple locations. The primary data center at 625 St. Joseph Street houses the majority of server infrastructure, including virtualization hosts, domain controllers, backup systems, and application servers.

<b>Location</b>	<b>Primary Functions</b>
St. Joseph (SJ)	VMware ESXi hosts (general use and Cogsdale), domain controllers, ArcGIS, Exchange, SQL, backup, Veeam repository, SCCM distribution
Carrollton WTP (CWP)	Domain controller, SCADA historian, power generation monitoring, SCCM distribution, badge/camera
Central Yard (CY)	Domain controller, SCADA historian, SCCM distribution, badge/camera
Other (AWP, KB, Julia)	SCCM distribution, camera servers

#### **Virtual Servers**

SWBNO maintains a virtualized server environment hosted on VMware ESXi. Operating systems include current versions of Windows Server, as well as limited Linux distributions for specific applications.

#### **Storage Arrays**

Network storage is used for VM hosting, document centralization, backup repositories, and database archiving.

### **Data Center Specifications**

The primary data center at 625 St. Joseph Street is equipped with chemical fire suppression, UPS battery backup for each server rack, whole room UPS, and an auxiliary generator for extended power outages. Environmental controls include dedicated air conditioning with redundancy. Physical access is controlled by badge access with mandatory sign-in logs for visitors.

## Network Infrastructure

### Wide Area Network

SWBNO maintains a WAN connecting most of the 27 pump stations and 4 major facilities. The pump station network uses Cisco routers (models vary) with AT&T ASE connectivity, providing email and remote monitoring access.

### Remote Access

Remote access is provided through GlobalProtect VPN. User authentication is managed through Microsoft Active Directory (Azure) with Single Sign-On capabilities.

### Telecommunications and Voice Systems

SWBNO operates a unified communications environment supporting voice, voicemail, and conferencing services across all facilities. The Contractor shall provide Tier I and Tier II support for end-user telecommunications issues, with escalation to vendors or specialized support as needed.

### Voice over IP (VoIP)

SWBNO utilizes a VoIP telephone system for internal and external voice communications. The system supports desk phones, and voicemail services integrated with Active Directory. Softphones in customer service are provided through AT&T/NICE InContact cloud-hosted system.

SWBNO utilizes approximately 20-30 analog lines for faxes or alarm systems.

### VoIP Infrastructure Summary

Component	Approx. Count
VoIP Platform	N/A
Desk Phones	700-800
Conference Phones	15-20
Softphone Users	30-40
Voicemail Boxes	700-800

Service Area	Est. Annual Volume	Description
VoIP Trouble Tickets	30-40	Desk phone, softphone, voicemail issues
Phone Moves / Adds / Changes	50-100	New phone setup, relocations, number changes
Conference Room AV Support Requests	100-200	Setup assistance, troubleshooting, hybrid meeting support

Mobile Device Provisioning	50-100	New device setup, MDM enrollment, replacements
Mobile Device Support Tickets	100-200	Troubleshooting, app issues, connectivity

### Mobile Device Management

SWBNO-issued mobile devices are managed through a mobile device management (MDM) platform that enforces security policies, application deployment, and remote wipe capabilities.

MDM Component	Platform	Notes
MDM Platform	Microsoft Intune	
Enrolled Smartphones	Samsung Android / 2-3 iPhones	See Section 5.2 for device counts
Enrolled Tablets	Lenovo X12 / Apple iPad / Android tablets	See Section 5.1 for device counts
BYOD Policy	BYOD is not allowed at this time	

## Email and Collaboration Environment

SWBNO utilizes Microsoft Office 365 for email, calendaring, document collaboration, and productivity applications. The Contractor shall support end-user issues, mailbox administration, distribution list management, and coordination with Microsoft support for platform issues.

### Email and Collaboration Summary

Component	Configuration	Approx. Count / Value
Email Platform	Microsoft 365 (Exchange Online)	N/A
Active Mailboxes		1700
Shared Mailboxes		200
Distribution Lists		50
Mailbox Size Limit		100GB before archive
Retention Policy	<i>No current retention policy</i>	
Archive Mailboxes	<i>Enabled after 2 years</i>	
Litigation Hold Accounts	<i>No current retention policy; history is fully searchable</i>	

## End-User Computing Devices

The following tables summarize the end-user device population. Counts are approximate and represent a snapshot. Actual quantities will vary during the contract period due to procurement cycles, retirements, and organizational changes.

### Workstations, Laptops, and Tablets

Device Category	Standard Configuration	Approx. Count
Desktop or Laptop Workstations	Lenovo / Windows 10/11	700-800
Compact Desktop (Tiny PC)	Lenovo / Windows 10/11	50-60
Tablets (Standard)	Microsoft Surface Pro / Apple iPad	150-200
Tablets (Rugged / Field)	Various	5-10

### Mobile Devices

Device Category	Standard Models	Approx. Count
Smartphones	Samsung Galaxy / Apple iPhone	400
Basic Cell Phones	Various	30-40

### Printers, Plotters, and Peripherals

Device Category	Standard Models	Approx. Count
Monochrome Printers	HP LaserJet	100-150
Color Multifunction Printers	HP	50-75
Color Printers	HP	50-75
Plotters	HP / Canon	5
Scanners (Desktop)	Canon	150-200
Barcode Scanners	RFSmart Devices	10-20

Cashier Equipment (Card Readers, Receipt Printers, OCR Scanners)	Magtek / Epson / ScanCorp	25-30
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### Audiovisual and Conference Room Equipment

SWBNO maintains audiovisual equipment in conference rooms and meeting spaces to support in-person and hybrid meetings. The Contractor shall provide setup assistance, troubleshooting, and coordination with vendors for AV equipment issues.

### Conference Room and AV Inventory

Location	Room Name / Number	AV Configuration	Notes
625 St. Joseph	Executive Board Room	Cameras, Microphones, Projector, multiple output screens, Encoder	Primary executive meeting space
625 St. Joseph	Personnel Conference Room	Cameras, Microphones, Projector, pull down screen, Encoder	Backup room to Executive Board Room
625 St. Joseph	Purchasing Conference Room	SmartBoard, camera and mics	
625 St. Joseph	Two Training Rooms	Projector and Screen; training PCs	
Carrollton WTP	Auditorium	Cameras, Microphones, Projector, multiple output screens, Encoder	Offsite executive meeting space
Central Yard	Central Yard Conference Room	SmartBoard	

## Database Environment

SWBNO maintains multiple relational database platforms to support enterprise applications, reporting, and data management.

Database Platform	Primary Applications
Microsoft SQL Server	GIS, Cogsdale CSM, reporting, various enterprise applications
Oracle Database	Oracle Fusion Cloud ERP (cloud-hosted); legacy on-premises instances as applicable (one instance of Oracle 8i still in use (undergoing replacement))
PostgreSQL	As applicable
MySQL	As applicable

## Cybersecurity Tools and Platforms

SWBNO maintains cybersecurity tools to protect enterprise systems, detect threats, and support incident response. The Contractor shall operate and monitor these tools as directed by the OCIO, if determined Contractor assistance is necessary

### Security Tools Inventory

Tool Category	Platform / Product	Notes
Endpoint Detection and Response (EDR)	Will be released to winning bidder	
Antivirus / Anti-malware	Will be released to winning bidder	
Security Information and Event Management (SIEM)	Will be released to winning bidder	
Vulnerability Scanner	Will be released to winning bidder	
Multi-Factor Authentication (MFA)	Microsoft Authenticator	All Users
Email Security Gateway	M365 Defender	
Web Filtering / Proxy	Will be released to winning bidder	
Intrusion Detection / Prevention (IDS/IPS)	Will be released to winning bidder	
Security Awareness Training	KnowBe4	

Service Area	Est. Annual Volume / Frequency	Description
Security Alerts Reviewed		Alerts from EDR, SIEM, email gateway, firewall
Vulnerability Scans	Monthly	Network and endpoint vulnerability assessments

Phishing Simulations	Monthly	Security awareness testing
Security Incident Investigations	<i>5-10</i>	Confirmed or suspected security incidents requiring investigation
Access Reviews	Quarterly	All application and AD certification reviews
Penetration Testing	As directed	Third-party or internal penetration testing coordination

## Estimated Workload Data

The following tables provide estimated operational workload volumes to assist Proposers in sizing staff and pricing proposals. These are approximate annualized figures based on current operations and are provided for planning purposes only. Actual volumes will vary and do not constitute performance guarantees or minimum service levels. Performance standards will be established through individual Task Orders.

### Help Desk and End-User Support

Service Area	Est. Annual Volume	Description	Reference Standard
Help Desk Calls / Tickets (Total)	7000	All inbound service requests, incidents, and trouble calls	Track via ITSM tool
A/V Assistance	300	Assistance or A/V Support for meetings	
Tier I Resolution	5000	Password resets, account unlocks, basic troubleshooting, routine requests	<10 min
Tier II Escalation	200-400	Application-specific issues, hardware diagnostics, network connectivity	<12 hours
Tier III Escalation	150-200	Complex infrastructure, database, or cross-system issues	Variable
PC Deployments (New/Replacement)	300	Full setup including imaging, configuration, data migration, and user orientation	Variable
Add/Move/Change Requests	100-150	Physical relocations, configuration changes, equipment swaps	Variable

## Infrastructure and Operations

Service Area	Est. Annual Volume / Frequency	Description	Reference Standard
Patch Management Cycles	Monthly after testing	OS and application patching for servers and endpoints	Critical patches per vendor SLA
Backup Operations	Daily incremental; weekly full	Server and data backup via Veeam	100% successful completion
System Availability (Core Infrastructure)	Continuous	Servers, network, storage, core applications	Target: 99.9% excl. planned maintenance
Scheduled Maintenance Windows	Monthly	Planned outages for patching, upgrades, hardware maintenance	Coordinated with affected departments
Change Requests (Configuration Changes)	As requested and approved	Infrastructure, application, and network configuration changes processed through change control	Documented via change management process and policy
DR Testing / Failover Exercises		Backup restoration verification and disaster recovery testing	Per DR Plan

## Applications and Development

Service Area	Est. Annual Volume	Description	Reference Standard
New Development Projects	2-5	Major new applications or system modules	Per Task Order
Web Site / Portal Modifications	20-40	Public web site, intranet, and customer portal updates	ADA / WCAG 2.1 compliance
Report Development / Modification	20-30	Business intelligence, ad-hoc, and scheduled reporting	

## GIS Operations

Service Area	Est. Annual Volume	Description
GIS Data Edits / Updates	Variable	Asset data updates, new features, corrections to water/sewer/drainage network data
Map Production Requests	Variable	Standard and ad-hoc map products for engineering, operations, and planning
GIS Application Support	Ongoing	ArcGIS Server administration, web application maintenance, Utility Network migration support

## Staffing and Coverage Hours

### Standard Operating Hours

IT operations staffing is organized to provide extended coverage for critical systems. Standard coverage hours are as follows:

Function	Coverage Period	Days
Help Desk	Standard business hours	Monday through Friday
Data Center Operations	Standard business hours	Monday through Friday; as-needed weekends and holidays
Network Operations	Standard business hours	Monday through Friday; as-needed weekends and holidays
After-Hours On-Call	All non-business hours	Nights, weekends, holidays

## User Population

SWBNO employs approximately 1,300 personnel across all divisions and departments. The IT-supported user population is estimated as follows:

Metric	Approximate Value
Total SWBNO Employees	1,300
Active Directory User Accounts	1,700 (includes contractors w SWBNO credentials)
Email Accounts (Office 365)	1,700
Users assigned to workstation/computer	700-800
VPN Users (Remote Access)	800

## Configuration Management

The Contractor shall support SWBNO configuration management practices, at a minimum including:

- **Change control:** Maintaining a documented process for reviewing, approving, and implementing changes to production systems, applications, and infrastructure. No changes to production environments shall be made without appropriate review and approval.
- **Configuration baseline:** Maintaining current documentation of system configurations, including server builds, network topology, application versions, and security settings.
- **End-of-life tracking:** Monitoring hardware and software maintenance agreements, warranty status, and vendor support timelines. Identifying and reporting components approaching end-of-life or end-of-support to the OCIO with sufficient lead time for planning.
- **Outage coordination:** Ensuring all planned system and facility outages receive approval from affected departments and system owners prior to occurrence. Communicating maintenance schedules and outage windows to minimize impact to SWBNO operations.
- **Asset inventory:** Maintaining current hardware and software asset inventories using SWBNO-approved tools). Reconciling physical inventory against records on a schedule determined by the OCIO.

The specific tools, processes, and reporting requirements for configuration management will be established through the applicable Task Order(s).

## **Data Classification and Residency**

For the purposes of this RFP, data handled in connection with IT services is classified as follows:

- **SWBNO Operational Data:** Any data collected, generated, maintained, or controlled on behalf of SWBNO in the performance of contract services. This includes customer records, financial data, employee information, infrastructure configurations, GIS data, engineering records, and all other data created or maintained using SWBNO systems. SWBNO Operational Data is the property of SWBNO, must reside in SWBNO-approved systems or cloud environments, and shall not be transferred, copied, or stored outside of SWBNO-controlled or SWBNO-approved infrastructure without prior written authorization.
  
- **Contractor Corporate Data:** Data pertaining to the Contractor's own business operations, including human resources, payroll, accounting, and internal management systems. The Contractor shall furnish its own systems for corporate functions. If any Contractor corporate systems are connected to or hosted on SWBNO networks, those systems must comply with all applicable SWBNO IT security policies and be documented in the IT security and configuration management process.

The Contractor shall not commingle SWBNO Operational Data with Contractor Corporate Data or data from any other client engagement. Upon contract termination or expiration, the Contractor shall return or securely destroy all SWBNO Operational Data in its possession in accordance with the procedures and timelines established in the contract.

### Estimated Initial Staffing Profile

The following tables present the estimated initial staffing requirement for IT services under this contract. These positions and counts are for pricing and planning only. They do not guarantee any minimum staffing level or commitment. Actual staffing will be established through Task Orders and may be adjusted at any time at SWBNO's sole discretion.

SWBNO is concurrently building its Civil Service technology workforce through the New Orleans Civil Service competitive hiring process. Contract staffing levels may decrease over the contract period as Civil Service positions are filled. The Contractor's pricing model must accommodate such adjustments without penalty to the Board.

### IT Operations and Maintenance

The following positions represent the estimated initial IT Operations and Maintenance staffing requirement. These positions support day-to-day IT service delivery across the OCIO.

Position Category	Functional Area	Est. Count
Help Desk	Data Center / Operations	2
PC Support Technicians	End-User Support	8
GIS Analysts / Specialists	GIS	4
Enterprise Application Analysts / Support	Enterprise Applications	6
Web Development	Web Services	3
Cybersecurity Manager and Analysts	Cybersecurity	2
<b>Estimated IT O&amp;M Subtotal</b>		<b>25</b>

The Contract Manager is a required Key Personnel position. The Contract Manager's costs are included in the Contractor's management overhead and are not reflected in the staffing counts.

## Specialized Technical Services

The following positions represent the estimated initial requirement for specialized technical disciplines. SWBNO anticipates an ongoing need for these positions throughout the contract period. These roles require market-rate compensation, advanced certifications, or skills not readily available through Civil Service classification.

Position Category	Functional Area	Est. Count
Project Managers (Enterprise Modernization)	Modernization Programs	3
Cloud Engineer	Cloud / ERP Infrastructure	1
Database Manager / Administrators	Database Systems	2
Data Conversion Specialist	Enterprise Migration	1
Network Administrators / Engineers	Network / Infrastructure	8
<b>Estimated Specialized Services Subtotal</b>		<b>15</b>

The combined estimated initial staffing level across both categories is approximately 41 positions. This estimate is subject to adjustment prior to contract award. SWBNO will confirm actual initial staffing requirements through the first Task Order(s) issued under the contract.

Cybersecurity, Operational Technology, Information Management staffing are not included in the estimates above. If SWBNO elects to procure these services under this contract, staffing requirements will be established through separate Task Orders.