

# **REQUEST FOR PROPOSAL**

## **Customer Information System (CIS) Software and Services**

**Solicitation # 2026-SWB-39**



**Proposal Due Date: July 14, 2026**  
**Proposal Due Time: 11:00 AM CST**

**Sewerage and Water Board of New Orleans**  
**Request for Proposal**  
**CIS Software and Services**  
**2026-SWB-39**

The Sewerage and Water Board of New Orleans (“SWBNO” or “the Board”) is soliciting proposals from qualified providers for a fully integrated, vendor-hosted/cloud solution for a Customer Information System (CIS) software and services, including software, hardware specifications, implementation and project management, and other technology services.

RFP will be available **June 15, 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 **mandatory** pre-bid conference for this RFP will be held on **June 23, 2026**, at **10:00 am CST** at the SWBNO Administration Building, 625 St. Joseph St. – Executive Boardroom, New Orleans, LA 70165 or if you are unable to attend this in-person meeting, you can also join via teleconference call:

**Microsoft TEAMS**

<https://teams.microsoft.com/meet/232272871992005?p=mlv2UTjYvoUNnOtq9r>

Meeting ID: 232 272 871 992 005

Passcode: Bg2cr3xU

**Dial in by phone**

[+1 504-224-8698](tel:+15042248698), [291794561#](tel:+15042248698) United States, New Orleans

[Find a local number](#)

Phone conference ID: 291 794 561#

At this meeting, staff will discuss the scope of work, proposal requirements and respond to questions from the attendees. Proposer’s failure to attend the mandatory pre-proposal conference will be disqualified from presenting a bid submission.

Inquiries and/or Requests for Clarification are due to **Cashanna K. Moses, on June 24, 2026, no later than 5:00 pm CST** via in writing or email to [cmoses@swbno.org](mailto:cmoses@swbno.org). All responses will be posted on or before **June 29, 2026**.

Proposals will be received by the Sewerage and Water Board of New Orleans Procurement Department by **July 14, 2026, at 11:00 a.m.** CST. 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 Proposers for a vendor-hosted/cloud-based Customer Information System (CIS) to serve the current and projected Services and Software needs of SWBNO, including software, hardware specifications, implementation and project management, and other technology services. In addition to replacing its CSM, which is the current Utility Billing system, the Board also desires to include CRM and Business Analysis in the new CIS system. The purpose of this RFP is to find the best-fit solution and implementation partner to meet the current and future needs of the Board.

### **1.2 Proposal Preparation**

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

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

All correspondence and other communications regarding this RFP shall be directed to **Cashanna K Moses, Procurement Director**, Sewerage and Water Board of New Orleans, 625 St. Joseph Street, Room 133, New Orleans, Louisiana 70165, **504-585-2428**, [cmoses@swbno.org](mailto:cmoses@swbno.org).

Inquiries and/or Requests for Information are due to the Board’s Procurement Department via email to [cmoses@swbno.org](mailto:cmoses@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 **Cashanna K. Moses**, on \_\_\_\_\_, **2026, no later than 5:00 pm CST** via in writing or email to [cmoses@swbno.org](mailto:cmoses@swbno.org). All responses will be posted on or before \_\_\_\_\_, **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-39 – Customer Service Information (CIS) Software and Services**

– [Proposer Name]”. If the file size of the email submission exceeds server requirements, the email submission may be broken into smaller emails with “Part 1 of #” included at the end of each original Subject Line (e.g. RFP# marked “**2026-SWB-39 – Customer Service Information (CIS) Software and Services – [Proposer Name] – Part 1 of 3)**”.

**Email:** If the Proposer intends to submit the response by email, the date and time of the email received by the Procurement Dept. constitutes the time stamp of receipt. The date and time of the email sent by Proposer does NOT constitute a proof of receipt. The Procurement Dept. encourages Proposers 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	6/15/2026	
Mandatory Pre-Proposal Meeting	6/23/2026	10:00am
Deadline for written questions	6/24/2026	5:00pm
Responses to questions	6/29/2026	
Proposal due date and time	7/14/2026	11:00am
Evaluation Committee meeting	TBD	
Award of Contract(s)	TBD	

**1.13 Bid Protest Procedures**

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

**1.14 Public Records Request**

To request a public record for the proposal documents, please submit to the following website:

<https://swbno.nextrequest.com/>

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## PART II. GENERAL INFORMATION

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### Sewerage and Water Board of New Orleans Request for Proposals Customer Information System (CIS) Software and Services

#### 2.1 Overview of the SWBNO

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

#### 2.2 Scope of Work

The Sewerage and Water Board of New Orleans has a need to replace its current CIS system, Cogsdale CSM. CSM relies on the Microsoft Dynamics GP platform which is not being supported after 2029. The Board's new CIS system will be responsible for the following:

- Creation and maintenance of customer profiles
- Linking of accounts to location addresses and meters
- Handling account transfers, closures and updates
- Integration with SmartMeter to receive monthly meter reads
- Validation and estimation of readings, where necessary
- Calculation of charges based on usage, rate structure and service type
- Generation of customer bills and customer notices
- Tracking overdue accounts and managing customer payment plans
- Managing delinquency cycles with appropriate customer notifications/letters including managing multiple notices per customer/account
- Issuing reminders, late fees and disconnection notices
- Integrations with Financial System, Enterprise Asset Management System, Promise Pay, and Customer Portal
- Identification, management or flag of "key" accounts (large commercial, specially identified accounts that require priority attention) and ability to track comments by key account managers
- Data analytics

#### 2.2.1 Current Application Environment

<b>*Legend for Current Applications</b>		
<b>Legend Code</b>	<b>Legend Code</b>	<b>Description</b>
R	Replacement	SWBNO intends to replace this application with the selected solution.
I	Interface	SWBNO intends to keep the application and interface/integrate it with the selected solution.
C/I	Consider/Interface	SWBNO is considering replacing this application with the selected solution based on the strength of the finalist Proposer offering and cost/benefit of the replacement module. In the event SWBNO maintains

**\*Legend for Current Applications**

**Legend Code**

**Description**

this application, it would require an interface to the CIS Software replacement system. Therefore, the Proposer must provide interface experience and pricing for these applications.

<b>Current Application</b>	<b>Application Notes/Description</b>	<b>Departmental Owner</b>	<b>Likely Future of System? *</b>
Oracle Cloud Financials	Financial System (Currently in Implementation)	Finance/Accounting, Budget, Purchasing, PDU, & Inventory	I
Trimble Unity (Cityworks)	Enterprise Asset Management System (scheduled to begin implementation Q3 2026)	Purchasing, Plumbing, New Connections, Meter Inventory, Field Services	I
Sensus Analytics	AMI Meter Reads (Monthly Meter Reads)	Meter Shop	I
Azure	Activity Directory - SSO	IT	I
Backflow Prevention	Aqua Resources	Asset Management Environmental	I
TecNXS –	Used for Scheduling for inspection for Backflow	Asset Management Environmental	I
FOG Software - BMP Municipal Software Program	Tracking and billing of Establishments and vendors who produce or transport fats, oils and grease	Environmental	I
Invoice Cloud	Payment Processing Application	IT	I
vxSmart	Customer Facing Portal	Customer Service	I
Promise Pay	Customer Payment Plan Software	Customer Service	I
Nice InContact	Call Center Softphone/IVR/Analytics	Customer Service	I
Future State Middleware	Manages interactions and interfaces between all future cloud applications.	IT	I

**2.2.2 Current Technical Environment**

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

As part of the proposal process Proposers will be required to submit significant technical detail about the proposed solution detailed in Technical and Vendor Hosted/Cloud Information – [Section 4.4](#) of this RFP.

### **2.2.3 Expected Scope of System Solution**

SWBNO is requiring that responding Proposers propose a fully integrated, vendor-hosted/cloud solution for CIS Software and services, including software hosting applications, conversion tools and technical services to obtain data from legacy application, data cleansing efforts, implementation and project management, and other technology services for the entire scope of the project that may or may not include components owned by the Proposer. SWBNO recognizes that this project will have a significant impact on SWBNO’s staff and is looking to minimize that impact insofar as possible. To the extent Proposer is able, SWBNO is looking for the Proposer to conduct a thorough business analysis at the start of each module and to provide SWBNO with a pre-configured system using its best practices and experience as a model. SWBNO is expecting to review and test this pre-configured system, requesting minimal changes as required.

### **2.2.4 Software Scope**

Core/Required Application Software:

- Customer Information System (CIS)
- Includes General and Technical requirements.
- Any other necessary software components to support the proposed Core Application Software solution.

### **2.2.5 Services Scope – Required Services**

- Task 1: Project Management
- Task 2: Software Installation / Set-up
- Task 3: Security Design and Configuration

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

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

**2.2.6 Summar of Organization Metrics**

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

Metric	Current
Population	384,458
Jurisdictional Area (Square Miles)	364 Square Miles
Total Staff (Full time: 1FTE)	1,300
Total Staff (Part time: 0.5 FTE)	18
Accented Future Number of CIS system users	250
-Heavy users (front office, back office, etc.)	190
-Light users	60
<b>Customer Base</b>	
Current Customer Accounts:	
Residential	122,595
Commercial	12,813
Multi Family	4,543
Industrial	28
Hydrant	299
<b>Service Order Counts for July 2024</b>	
Move In	1,996
Move Out	1,313
Delinquency Disconnect	2,378
Payment Plans	14,172

Metric	Current
<b>Application Users July 2024</b>	
Customer Service	130
Billing	30
Collections	20
Non-Customer Service User (Legal Dept, Budget, Leadership, etc)	30-50
IT/Admins	5

**2.3 Contract Terms and Compensation**

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

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

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

**2.4 Payment**

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

**2.5 Information**

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

**2.6 Non-Collusion Statement**

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

**2.7 Non-Solicitation Statement**

The Contractor has not employed or retained any company or person, other than a bona fide employee working solely for it, to solicit or secure this Agreement. The Contractor has not paid or agreed to pay any person, other than a bona fide employee working for it, any fee, commission, percentage, gift, or any other consideration contingent upon or resulting from this Agreement.

## **2.8 Convicted Felon Statement**

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

## **2.9 Insurance Requirements**

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

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

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

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

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

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

**INSURANCE**, as will protect him from claims under Workers' Compensation Laws. The Workers' Compensation section of the policy shall afford statutory limits and be in accordance with all Louisiana Workers' Compensation Statutes. The Employers' Liability limit shall not be less than \$1,000,000 each accident for bodily injury by accident and \$1,000,000 each employee/policy limit for bodily injury by disease. Whenever any vessel or floating equipment is involved, the insurance shall afford coverage under the Federal Longshoremen's and Harbor Workers' Act, and shall also include protection for injuries and/or

death to Masters and Members of the crews of vessels with statutory limits in accordance with the Jones Act.

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

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

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

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

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

### **2.10 Right to Audit**

The Board shall have the right to audit by its personnel or its authorized representative at all reasonable times any and all records pertaining to the administration of this contract by the contractor, including its records of any subcontractor(s) employed on the contract. Such records shall be made and kept by the contractor in accordance with generally accepted accounting principles and practices. Records shall include, but are not limited to, accounting records, daily reports, correspondence and subcontract files (hard copies as well as computer readable data, if it can be made available). Records subject to audit shall also include but not be limited to those records necessary to evaluate and verify direct and indirect costs (including overhead allocations) as they may apply to cost and/or change order requests associated with this contract. The Board also reserves the right to interview employees, make photocopies, and inspect any and all records at a reasonable time for a minimum of three (3) years after completion of the project or formal acceptance of the contract by the Board. Contractors shall be

required to retain such files of the project as described herein for a minimum of three (3) years after completion of the project or formal acceptance of the contract by the Board.

### **2.11 Confidential Information**

Information contained in the Proposer'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 Proposer's proposal for the Board's purposes. Proposer proposals shall remain confidential until the Board's Proposal Selection Committee makes its recommendation to SWBNO Board of Directors. The Proposer 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 Proposer requirements to be met by respective subcontractor(s). The information requested of the proposer under the terms of this RFP shall also be supplied for each subcontractor and shall be included in the proposal. The proposer will retain full control over this contract and will not assign or subcontract said contract without the prior written consent of SWBNO. Failure to request consent shall be grounds for default under this contract. The Proposer further agrees that assigning or subcontracting any portion or feature of the work shall not relieve the Proposer from its full obligations under this contract.

### **2.14 Living Wage**

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

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

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

[Living Wage Ordinance Rules and Regulations](#)

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

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

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### **3.1 Selection Committee**

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

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

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

### **3.2 Technical Evaluation**

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

Consensus Scoring:

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

The Selection Committee shall first evaluate the proposals 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:

**3.2.1 Round 1 Evaluation:**

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

Round 1 Evaluation Criteria	
Ability to meet functional requirements – This will be measured on: <ul style="list-style-type: none"> <li>• Responses to RFP 2026-SWB-39 CIS Software and Services - Specifications.xlsx</li> <li>• Section 4.3-Application Software</li> </ul>	<b>25</b>
Ability to meet technical requirements – This will be measured on: <ul style="list-style-type: none"> <li>• Responses to RFP 2026-SWB-39 CIS Software and Services - Specifications.xlsx</li> <li>• Responses to Vendor Forms</li> <li>• Section 4.4 – Technical and Vendor Hosted/Cloud Information</li> <li>• Section 4.5.5 – Integrations and Interfaces</li> </ul>	<b>25</b>
Implementation approach and ongoing support – This will be measured on: <ul style="list-style-type: none"> <li>• Responses Vendor Forms</li> <li>• Section 4.5, 4.7, 4.8, 4.10</li> </ul>	<b>25</b>
Proposer viability, including number and quality of comparable references, Proposer financial stability, completeness of response, proposed project team and quality of proposal response – This will be measured on: <ul style="list-style-type: none"> <li>• Whole proposal</li> <li>• Section 4.1, 4.2, 4.7, 4.9</li> </ul>	<b>15</b>
DBE requirements -This will be measured on: <ul style="list-style-type: none"> <li>• Submission of DBE Forms</li> <li>• Meeting Requirements Section 4.</li> </ul>	<b>10</b>
<b>Total</b>	<b>100</b>

**3.2.2 Round 2 Evaluation:**

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

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

- Conduct reference checks relevant to the solicitation to verify any and all information, and rely on or consider any relevant information from such cited references or from any other sources in the evaluation of proposals;

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

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

Round 2 Evaluation Criteria	
Ability to meet functional & technical requirements -This will be measured on: Proposer demonstrations Follow-up questions and answers Reference checking	<b>40</b>
Implementation approach and ongoing support -This will be measured on: Proposer demonstrations Reference checking	<b>30</b>
Proposer Viability, including number and quality of comparable references, financial stability, and proposed staff -This will be measured on: Proposer demonstrations Proposer proposal Reference checking	<b>20</b>
Cost	<b>10</b>
<b>Total Technical Score</b>	<b>100</b>

### **3.3 Price Evaluation**

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

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

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

Where:

CS = Computed cost score for Proposer

LPC = Lowest proposed cost of all Proposers

PC = Proposer’s cost

X = 10 of the total number of points assigned

### **3.4 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.

### **3.5 Notification**

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

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

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## PART IV. PROPOSAL SUBMISSION REQUIREMENTS

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

Proposals must be prepared with tabbed indexes separating the following sections in the following order:

### **4.1 TITLE PAGE**

Title Page should contain the following information:

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

### **4.2 TABLE OF CONTENTS**

Section #	Title	In addition to specified content, provide
1	Executive Summary	
2	Company Background	<b>ATTACHMENT – Company Background Form</b>
3	Application Software	
4	Technical and Vendor Hosted / Cloud Information	<b>ATTACHMENT – TECHNICAL/VENDOR HOSTED FORM</b>
5	Implementation Plan	<b>ATTACHMENT – IMPLEMENTATION FORM</b>
6	Functional System Requirements	<b>ATTACHMENT 2026-SWB-39 – Specifications (In Excel)</b>
7	Staffing Plan	<b>ATTACHMENT – STAFFING PLAN FORM (In Excel)</b>
8	Ongoing Support Services	<b>ATTACHMENT – ONGOING SUPPORT SERVICES FORM</b>
9	Client References	<b>ATTACHMENT – CLIENT REFERENCES</b>
10	Subscription and Maintenance Agreements	
11	Exceptions and Deviations	
<b>Separate Document</b>	Cost Proposal	Separate Excel Spreadsheet <b>2026-SWB-39 – Pricing Forms (In Excel)</b>

Instructions relative to each part of the response to this RFP are defined in the remainder of this section.

Costs for the Proposer's proposed solution should be submitted on the proposal pricing forms provided in the included Microsoft Excel pricing spreadsheet. Costs should include the complete costs for the solution including travel and operating costs.

### **4.3 EXECUTIVE SUMMARY**

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

### **4.4 COMPANY BACKGROUND**

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 Proposer must complete the **Company Background Form**. Information that Proposers should provide in this section is as follows:

- The company's background includes a brief description (e.g., past history, present status, future plans, company size, etc.) and organization charts.
- Audited financial information for the past two (2) completed fiscal years that includes income statements, balance sheets, and statement of cash flows.
- Privately held companies wishing to maintain confidential financial information must provide information detailing the company's long-term stability. Please provide a current Dunn & Bradstreet report (D&B) as part of the Proposer proposal response.

### **4.5 APPLICATION SOFTWARE**

The Proposer is required to provide a general description of the application program product and how it will meet the requirements of this RFP.

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

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

### **4.6 Technical and Vendor-Hosted/Cloud Information**

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

The Proposer must complete the **Technical and Vendor Hosting / Cloud Form**. The information will be used in the evaluation process. Proposers should identify where conflicts may exist between their solution and current technologies being used in the Board as described in this RFP in **Section 2.2.1 and Section 2.2.2**. As the Board is exploring vendor-hosted / cloud solutions, Proposers should clearly define if their software product is a private or public vendor-hosted / cloud solution in the sections below.

## **4.7 Implementation Plan**

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

- Subsection: General Implementation Approach
- Subsection: Project Management Approach
- Subsection: Data Conversion and Migration Plan
- Subsection: Data Analytics, Report and Form Development
- Subsection: Integrations and Interfaces
- Subsection: Training
- Subsection: Organizational Change Management Approach
- Subsection: Testing
- Subsection: Operational Redesign Approach
- Subsection: System Documentation and Manuals
- Subsection: Disaster Recovery Plan
- Subsection: Knowledge Transfer

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

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

### **4.7.1 General Implementation Approach**

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

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

### **4.7.2 Project Management Approach**

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

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

- Project management plan
- Resource management plan
- Quality management plan

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

The Project Manager will work as a team member with the Board’s project management office (“PMO”). This project manager can be an employee of the Proposer or a partner of the Proposer. In either case, the costs for the Project Manager should be clearly denoted in the pricing section of this RFP. The Board prefers a fully dedicated Project Manager and will require significant onsite presence from the Project Manager, as well as some of the project team members.

In addition to providing responses to the following items, the Proposer must complete the **Project Management Approach Form** and include it in this section of the response.

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

#### **4.7.3 Data Conversion and Migration**

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

- Describe your general approach towards data conversion and how you would work with the Board to conclude on the data structure for the new system including what should be converted, based on industry standards and best practices.
- Please describe your organization’s recommended approach toward retention of legacy data.

**Per Louisiana State Law, SWBNO data is required to remain STORED in the United States at all times. Any offshore development resources or near-shore development resources will only be allowed to access our data via onshore servers.**

#### **4.7.4 Data Analytics, Report and Form Development**

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

Provide information on your reporting approach including:

- A representative list of out-of-the-box reports
- Description of various methods of reporting including Business Intelligence

- Methods for the Board to identify, specify, and develop required custom SWBNO reports during the implementation.

#### 4.7.5 Integrations and Interfaces

Information generally needs to be entered only once into the system. Modules within the system should be integrated in real-time with each other such that batch processes are not required to transfer information from one area of the system to another unless that is the preference of the Board. Existing SWBNO interfaces between core modules that may currently exist (e.g., AP posting to GL) or shadow systems that will likely be replaced are not included as they are assumed to be included in an integrated CIS Software Replacement System.

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

In addition:

- Describe the extent to which the various modules are integrated together versus being purchased separately and interfaced.
- Describe your approach towards interfacing and integration with other solutions including use of specific tools, methods and standards.
- Describe data exchange standards (e.g., XML, Web Services, or EDI) supported or provided by your product.
- As it pertains to the Board’s current technical environment described previously, identify potential issues for integrating with specific technologies that are used within the Board.
- If local customizations are made, do you provide any tools or assistance to easily incorporate customizations into new version/releases of your software?

The Microsoft Excel pricing spreadsheet contains a listing of desired SWBNO application interfaces and their likely need in a future integrated environment. Provide pricing for interfaces in the associated Microsoft Excel pricing spreadsheet and explain how the integration maps the data from the old system to the new system.

- Describe your approach to interfacing SWBNO applications that are listed in the Current Application Environment (section 2.3).

#### 4.7.6 Training

In addition to providing responses to the following items, the Proposer must complete the **Training Form** and include it in this section of the response.

- **End User Training Approach:** All end-user and technical training (see below) will be performed onsite through implementation and be performed by the Proposer. End user implementation training will be provided by the Proposer and include joint participation by the relevant SWBNO process owner team lead supporting the process area in the new software system.
- **Train the Trainer Approach:** The Proposer will consider a “train the trainer” or hybrid approach where key SWBNO team leads will be trained through implementation on their modules.
- **Technical Implementation Training:** This will include training for SWBNO IT staff on the technologies required to support the new CIS System as well as provide detailed interface functional description and relevant training or information necessary to maintain the interfaces/integrations.

The Proposer should provide an overall description of the proposed training approach, including the following:

- The Proposer must list the nature, level, and amount of training to be provided for both options (End User and Train the Trainer) in each of the following areas:
  - Technical training (e.g., programming, operations, etc.)
  - User training
  - Other staff (e.g., executive level administrative staff)

Suggested timeframes in which training will be conducted.

Types of training documentation to be developed.

Opportunities for on-going training.

#### **4.7.7 Organizational Change Management Approach**

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

#### **4.7.8 Testing**

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

- System testing
- Integration testing
- Stress/performance testing.
- User acceptance testing (UAT)

#### **4.7.9 Operational Redesign Approach**

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

In addition, describe your organization's capabilities to assist in a SWBNO-wide redesign of the chart of accounts to best leverage the capabilities of the system in order to meet the Board's overall financial tracking and reporting objectives.

#### **4.7.10 System Documentation and Manuals**

The Proposer shall provide user manuals, runbook, and online help for use by the Board as part of the initial training and on-going operational support. Additionally, the Proposer shall provide functional and technical documentation.

- Describe what documentation (user guide, technical guide, training materials, etc.) is available on the system proposed and any related costs.
- Describe what types of documentation you anticipate developing during the project.
- Describe the process of providing customized documentation for the Board's specific processes.

#### **4.7.11 Disaster Recovery Plan**

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

#### 4.7.12 Knowledge Transfer

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

Include:

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

#### 4.8 Functional System Specifications

Requirements are identified in the attached Excel spreadsheet labeled, **2026-SWB-39 RFP-CIS Software and Services - Specifications**. These must be addressed in the Proposer’s proposal and will be required to be part of the chosen Proposer’s Agreement and Statement of Work.

Proposers must replace cell C2 in the “Vendor Instructions” tab with the Proposer’s **Company Name**.

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

Response Values	Description
<b>Base</b>	This requirement currently exists in the proposed version of the solution that is in production use in an environment that is comparable to SWBNO and can be demonstrated.
<b>Configuration</b>	This requirement is met by configuration in the proposed version of the solution that is in production use in an environment that is comparable to SWBNO and can be demonstrated.
<b>UDF</b>	This requirement can be met using a user defined field(s).
<b>Product Calendar</b>	This requirement will be available for production use prior to unit testing at SWBNO and will be incorporated at no additional charge as part of the baseline solution.
<b>New Report</b>	This requirement will be met either with a new report or the modification of an existing report.
<b>New Interface</b>	This requirement will be met either with a new interface or the modification of an existing interface.
<b>Extension</b>	This requirement is not currently available but can be provided as an enhancement to the baseline solution or as an extension of the base product.
<b>Enhancement</b>	This requirement is not currently available but can be provided as an enhancement to the baseline solution or as a modification to the base product.
<b>New Form</b>	This requirement will be met either with a new form or the modification of an existing form.

<b>New Workflow</b>	This requirement will be met either with a new workflow or the modification of an existing workflow.
<b>3rd-Party App</b>	This requirement requires a 3rd-Party application. Include the name of the application in the “Product (Module) & Version” column and the costs in either the “Licensing” or “Hosting” tab of the costing spreadsheet.
<b>Cannot Meet</b>	This requirement is not included in the proposal.
<b>N/A</b>	This requirement is not applicable to the proposed solution. Explain why in the “Reference/Comments” column.
<b>Yes</b>	For Yes/No questions, “Yes”.
<b>No</b>	For Yes/No questions, “No”.

The Proposer is to provide an explanation for each functional requirement that the Proposer feels has restrictions, limitations or needs clarification. Further, the Proposer is to provide a brief explanation of each enhancement or modification and reference the item number. Please feel free to use separate sheets for explanations and simply indicate in the “Reference” column a Reference Item Number corresponding to the item on your additional sheet(s) so that it can be easily found during scoring.

For each requirement that requires additional work effort, please provide the complexity level for the effort (**Simple, Moderate, Complex, or Very Complex**). See the “Complexity Guidelines” tab for examples or publish your own guidelines with the response.

The “**Product (Module) & Version**” column is to be used to specify what product (e.g., product name or software module) is proposed to satisfy the requirement.

For any response that has a RICEFW requirement, use the “**Reference / Comment**” column to cross reference to the **Costing Spreadsheet**, as well as to provide additional comments pertaining to your response for that item.

**Note:** The response to these requirements should be provided in the exact format as provided (e.g., no additional macros, formulas, additional columns, modifications, passwords, etc.).

**4.9 Staffing Plan**

In addition to providing responses to the following items, the Proposer must complete the spreadsheet **2026-SWB-39 RFP-CIS Software and Services - Staffing Plan (In Excel)** included with this RFP and include it in this section of the response.

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

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

**4.10 Ongoing Support Services**

In addition to providing responses to the following items, the Proposer must complete the **Ongoing Support Services Form** and include it in this section of the response. The Board will require some onsite presence

throughout the post-go-live period. The first month of post-go-live will require onsite presence from a majority of the project team.

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

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

#### **4.11 Client References**

The Proposer must provide at least **five** references from clients that are similar in size and complexity to the Board. The format for Proposer references is provided in **Client Reference Form**. In addition, The Board requests a listing of all utility clients, and at least **three** references must be a Proposer hosted / cloud deployment similar to the product and services being proposed by the Proposer.

#### **4.12 Subscription and Maintenance Agreement**

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

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

#### **4.13 Exceptions and Deviations**

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 will contain a definition statement of every objection or deviation with adherence to specific RFP sections. Objections or deviations expressed only in other parts of the proposal, either directly or by implication, will not be accepted as deviations, and the Proposer in submitting a proposal will accept this stipulation without recourse.

#### **4.14 Economically Disadvantaged Business Program**

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 6%

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.

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>.

#### **4.15 Cost Proposal**

The pricing form **2026-SWB-39 RFP-CIS Software and Services – Pricing Form** should be completed and submitted in Excel format. Please refer to the submission instructions on guidance for completion of the form.

## **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 AT PROPOSAL SUBMISSION):**

ATTACHMENT – COVER SHEET

ATTACHMENT – ECONOMICALLY DISADVANTAGED BUSINESS PARTICIPATION SUMMARY SHEET

ATTACHMENT – ECONOMICALLY DISADVANTAGED BUSINESS ACKNOWLEDGEMENT SHEET

ATTACHMENT – COMPANY BACKGROUND FORM

ATTACHMENT – TECHNICAL AND VENDOR HOSTING REQUIREMENTS FORM

ATTACHMENT – PROJECT MANAGEMENT APPROACH FORM

ATTACHMENT – REPORT DEVELOPMENT FORM

ATTACHMENT – TRAINING FORM

ATTACHMENT – FUNCTIONAL SYSTEM SPECIFICATIONS (IN EXCEL FORMAT)

ATTACHMENT – STAFFING PLAN FORM (IN EXCEL FORMAT)

ATTACHMENT – ONGOING SUPPORT SERVICES FORM

ATTACHMENT – CLIENT REFERENCE FORM

SEPARATE FILE – PRICING FORM (IN EXCEL FORMAT)

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

ATTACHMENT – AFFIDAVITS

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

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

**ATTACHMENT  
COVER SHEET**

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

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

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

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

**Primary Contact Person:**

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

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

**Secondary Contact Person:**

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

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

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

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

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

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

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

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

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