



# The Sewerage & Water Board OF NEW ORLEANS

625 ST. JOSEPH STREET  
NEW ORLEANS, LA 70165  
504.529.2837 OR 52.WATER  
[www.swbno.org](http://www.swbno.org)

November 12, 2025

## Addendum No. 1

Your reference is directed to the Request for Proposal for: **2025-SWB-84 Customer Information System (CIS) Software and Services** for the Sewerage and Water Board of New Orleans which proposals are due on **December 1, 2025**, at **11:00 a.m.** CST.

This addendum provides for the following:

1. Extension of Proposal Due Date and Time.
2. Answers to Questions.
3. Posting of Pre-Proposal Attendance Sheet and Pre-Proposal Video

- 
1. Would SWBNO consider extending the RFP response deadline 2-weeks to December 15<sup>th</sup>, given the Thanksgiving holiday and end of year activities?

**Answer: A two-week extension is approved by IT and CCSO; deadline extended to 11:00am on December 15, 2025**

2. Is Meter Data Management (MDM) part of this scope, or, will there be an integration required to connect with your existing MDM system?

**Answer: Integration will be required via Temetra and Sensus Analytics**

3. The RFP states that you require "CRM and Business Analysis in the new CIS system." Are you asking for a completely new CRM system to replace what you have in place (IE. Salesforce, etc.)? Please define what you mean by "Business Analysis."

**Answer: SWBNO does not currently have an official CRM and is looking for a system with integrated BA that can help streamline analytics of CIS and customer data and assist with presenting necessary data to management and Board members in an appropriate manner.**

4. Could you please clarify if the 6% DBE requirement applies solely to the services provided, or does it also include any relevant software licensing and subscriptions?

**Answer: The 6% DBE requirement applies to implementation fees only and does not apply to SaaS fees.**

5. Can the services be provided on a hybrid basis (onshore and offshore)? If so, is it required that the system be hosted inside the U.S.?

Answer: As per the RFP and applicable state regulations, all SWBNO data must reside within the contiguous United States and is strictly prohibited from leaving U.S. borders under any circumstances. If offshore personnel are proposed, they may only interact with SWBNO systems by securely remoting into a U.S.-based environment. Direct access to data from outside the United States is not permitted.

6. With the Thanksgiving holiday week coming up, I wanted to ask if the Board would consider extending the CIS RFP submission deadline. A brief extension would help vendors ensure complete and compliant submissions given the limited availability during that week.

Answer: A two-week extension is approved by IT and CCSO; deadline extended to 11:00am on December 15, 2025

7. Reference: Attachment – 2025-SWB-84 CIS Software and Services Functional Specifications (Excel)

In the Functional Specifications document, there are no valid choices available in the drop-down list for the “Complexity Level” column (Column G). Could SWBNO please provide a new copy of the Functional Specifications Excel file with the correct drop-down values enabled or a version that allows manual entry in that column?

Answer: Once you enter the Vendor Response that requires a complexity, the Complexity Level cell should highlight Yellow and the dropdown should work. If it still isn't working, open in the Excel app rather than SharePoint – SP should but doesn't always work the same as the app.

8. Calendar & Protocols

- Rules for contacting staff outside procurement; any blackout period?

Answer: Vendors are only allowed contact with procurement staff through final selection.

9. Evaluation Method

- Provide scoring weights: Functional %, Technical %, Price %, Vendor Experience

Answer: The weights are found in the RFP in Section 3.

10. Methodology %.

- Will there be scripted demos, sandbox testing, references, or interviews? How are these scored?

Answer: The weights for the two rounds of selection are found in the RFP. Any future rounds will be determined by the selection committee.

11. Hosting, Environments & Non-Functional Requirements NFRs  
Environments

- Required environments  UAT/PRE-PROD/PROD  and refresh cadence from PROD.

Answer: Refresh cadence will be determined during SOW negotiations with the chosen vendor.

## Performance & Availability

- Target SLAs: uptime, peak concurrency, page/transaction response, batch windows.
- Maintenance windows and notice period.

Answer: There is no question asked in the above bullet points and no clarification is being requested.

## Resilience & Ops

- RPO/RTO targets, backup frequency, DR site location, failover tests cadence.
- Observability: log access, metrics/alerts, audit trails

Answer: There is no question asked in the above bullet points and no clarification is being requested.

## 12. Security, Data Sovereignty & Compliance

### Data Residency & Encryption

- Must resident data be stored in the U.S.? Any state/city mandates?

Answer: As per the RFP and applicable state regulations, all SWBNO data must reside within the contiguous United States and is strictly prohibited from leaving U.S. borders under any circumstances. If offshore personnel are proposed, they may only interact with SWBNO systems by securely remoting into a U.S.-based environment. Direct access to data from outside the United States is not permitted.

- Encryption at rest  AES-256  and in transit  TLS  1.2  required? Any key-management constraints?

Answer: Yes. SWBNO requires AES-256 encryption at rest and TLS 1.2 or higher in transit. Key management must follow industry best practices, including secure storage, rotation, and access controls. Any cloud-based key management must be FIPS 140-2 validated and hosted within the U.S.

### Certifications & Audits

- Required attestations  PCI-DSS for payments, SOC 2 Type II, ISO 27001/27002  and audit cadence

Answer: There is no question in the above bullet point.

### Identity & Access

- SSO/IdP (e.g., Microsoft Entra/Azure AD , MFA expectations, role-based access patterns.
- Access review schedule, joiner-mover-leaver process, privileged access controls.

Answer: There is no question in the above bullet points. We use Azure/Entra for SSO with MFA.

## Retention & Privacy

- Retention policies for logs, audit trails, bills, notices, and meter data (raw/curated) with required years.
- Breach notification SLA, data ownership, and data export/egress expectations at end of term.

Answer: There is no question in the above bullet points. Retention policies and expectations will be negotiated with chosen vendor.

## 13. Data Migration & Data Management

### Scope & Sources

- Source systems (e.g., NorthStar, Tyler GL/AP, InvoiceCloud, SilverBlaze, T2G2/AMI, mCare/Elements, ArcGIS). Which remains vs. retire?

Answer: Our current Cogsdale CSM system (GP based) and any GP-imbedded third parties are being replaced. Invoice Cloud is a separate payment processor.

- Datasets: customers/accounts/premises/service points/meters (active & inactive), billing history, adjustments, charges/fees, service orders, payments, communications, deposits/guarantees, write-offs, prepay balances.

Answer: There is no question in the above bullet point.

### History & Rules

- Years to convert for billing, payments, meter reads, service orders, and communications.
- Any legal/regulatory minimums for historical conversion or access.

Answer: There really isn't a question above, but as discussed in the mandatory bid hearing, SWBNO need to keep all data currently stored in CSM (October 2016 to present). We are open to discuss options with the chosen vendor.

### Meter Data

- Any interval/AMI data to migrate now or later phases?
- If AMI is planned, expected interval (15/60-min) and retention.

Answer: We expect to migrate a monthly AMI reading for all billed customers. Interval readings are currently stored in MDM system, not CIS.

### Technicals & Quality

- File formats, primary/foreign keys, and extract layouts for each legacy source; provide samples.
- Known data-quality issues (duplicates, address standardization, meter serial mismatches). Who cleanses—utility or vendor? Acceptance criteria.

Answer: We will provide this information to the chosen vendor after contract award. As most systems, there will be some data integrity issues expected.

#### 14. Integrations Real-Time & Batch) Accounting/ERP (e.g., Tyler/MUNIS/Sage)

- We'd like to ensure complete alignment with your expectations. Could you please confirm if there are any preferred third-party ERP solutions that you would like us to consider, or would you prefer that the proposer recommend the most suitable and compliant option based on your requirements?"

Answer: As mentioned during the mandatory bid conference, we are requesting bids for the best-in-breed solution for SWBNO needs. Please provide your recommended solution.

#### Payments

- Keep InvoiceCloud or replace? Required channels (counter, online, mobile, IVR, kiosk, AutoPay), tokenization, and real-time posting.

Answer: SWBNO is open to considering other options.

- Chargebacks/NSF flows, NACHA/PCI expectations, and posting/reversal handling.

Answer: There is no question in the above bullet.

#### GIS Esri ArcGIS

- One-way or bidirectional sync for premises/service boundaries; addressing/cadastral keys; CSR/portal map layers.

Answer: There is no question in the above bullet

#### Work Orders (mCare/Elements)

- Will you keep Elements? Events to integrate (move-in/out, meter change, rereads, field collections). Mobile offline and completion codes.

Answer: The chosen CIS will need to issue service orders that will integrate with our future EAMS for meter related field requests. EAMS work orders will be used for field services.

#### Meter Reads T2G2/AMI

- Import schedules, VEE rules, exception queues, error remediation SLAs.

Answer: There is no question in the above bullet.

#### Integration Patterns

- Preferred patterns APIs/webhooks vs. file/SFTP vs. message bus). Security, retries, and monitoring standards.

Answer: There is no question in the above bullet. APIs are always preferred as SWBNO will be using a middleware for interface design between major systems.

## 15. Payments, Collections & Reconciliation

### Volumes & Channels

- Channel volumes and trends (walk-in, online, mobile, IVR, kiosk, drop box, AutoPay).
- AutoPay methods (ACH, card), partial payments, payment arrangements, promises-to-pay, and installments.

Answer: There are no questions in the above bullets.

### Finance & Controls

- Chargebacks/NSF volumes & process, ACH return code handling, write-off workflows.
- Daily bank reconciliation expectations (timing, tolerance thresholds) and interface files for finance.

Answer: There are no questions in the above bullets.

### Providers & Commercials

- Payment provider(s), contractual arrangement on transaction charges, and who pays fees (utility vs. consumer).
- Settlement timelines, funding flows, and fee disclosure requirements.

Answer: There are no questions in the above bullets. Invoice Cloud is our current payment provider. If SWBNO decides to change providers, terms will be negotiated at that time.

## 16. PCI Scope

- PCI segmentation boundaries if a third-party processor is retained; tokenization approach and scope reduction measures.

Answer: There is no question in the above bullet.

## 17. Implementation & Project Governance

### Method & Timeline

- Target go-live date(s), phased vs. big-bang, and blackout restrictions.
- Milestones, deliverables, and acceptance criteria per phase.

Answer: There are no questions in the above bullets. All of these items will be determined with the chosen vendor.

### Cutover & Hypercare

- Cutover weekend plan, rollback criteria, hypercare duration, and post-go-live SLA.

Answer: There is no question in the above bullet. Hypercare duration is set at 3 months as a requirement in the RFP.

### Volumes & Sizing Matrix

18. Fill in or confirm:

Metric Value

Active accounts / premises / meters **Around 145,000 locations/meters**

Billing cycles per month & avg. bills/cycle **20 cycles with 1 cycle billed per day average 7k bills per cycle**

Avg / peak monthly bill print & e-bill counts- **Around 30% of customers on e-bill, we bill daily, Monday-Friday.**

Monthly meter reads (actual / estimated) & import windows- **Meter reads mainly come in electronically through Sensus Analytics; 2-3% are manual reads with a portion of those being estimated.**

Portal users (registered) & peak concurrent

Payments/month by channel (counter/online/mobile/IVR/kiosk/AutoPay) **We accept all of these payments. Counts will be provided to chosen vendor.**

SMS & email notifications/month (billing, collections, prepay alerts) **We currently use other systems for SMS and email notifications and it is an integration.**

Field work orders/month (by type)- **This varies, but primarily the service orders are for turn ons, turn offs, and leak investigations.**

Historical data to migrate (yrs): billing, payments, reads, service orders, communications- **As discussed during the mandatory bid conference, SWBNO needs to keep all CSM data back to October 2016 in some form. We are open to options.**

Storage targets (for sizing): bills \_yrs, notices \_yrs, reads \_yrs, logs/audits \_yrs  
**No retention schedule set at this time.**

**19. Will the Board please consider a Two-week extension to the current proposal submission deadline. This request is based on the following considerations:**

- The comprehensive nature of the RFP, particularly the level of detail required in completing the Functional Specification spreadsheet,
- The relatively short turnaround time between the pre-bid meeting and the proposal due date,
- The impact of the U.S. Thanksgiving holiday on our ability to coordinate with internal teams and partners.

**Answer: A two-week extension is approved by IT and CCSO; deadline extended to 11:00am on December 15, 2025**

## 20. CIS Core Scope:

- Is the expectation that Special Payment Arrangements (Payment Plans) will be managed in the CIS moving forward or will those be managed in Promise Pay? **Promise Pay, but there is an integration component.**
- Is the Bill template currently managed by Cogsdale or your Bill Print Provider? - **Cogsdale**
- When implementing a new CIS, it's often a good time to revisit the bill template and take advantage of additional flexibility that the new CIS vendor can provide with regard to the information that is displayed on the bill template? Is it safe to assume that updating the Bill Template will be part of this project? **Yes**
- Does the Board currently bill for Stormwater? If so, can you provide some additional details on how stormwater is currently billed? **Not currently**
- How is CASS certification currently handled at the Board? Is it provided by the CIS vendor or by the Bill Printer? - **Satori within Cogsdale**
- How is Bill Print currently handled? - **3<sup>rd</sup> Party vendor**
- Who currently provides the Electronic Billing for the Board (Cogsdale, Invoice Cloud, Bill Printer) and is there a fee being charged to the Board for Electronic Billing? - **E-bill is through our online vendor and integrated with the CIS**
- How many collection agencies does the Board currently work with? - **one**

## 21. AMI & Meter Data Management:

- How far along is the Board with the deployment of Sensus AMI? - **We have over 130k of the 145k meters installed.**
- Who is doing the meter deployment work? If it's a 3rd party is there an integration required to their field service system to get new meter information back into the CIS? - **our MDMS is Sensus RNI and will require an interface to chosen CIS. Field service work will be performed in a new EAMS that has yet to be chosen.**
- How is interval data stored or visualized today (if at all)? **Via Sensus RNI/Analytics and VertexOne Customer Portal**
- Are you interested in the ability to provide CSRs the ability to view interval data directly within the CIS without having to go out to another application to view interval data (EG. Sensus Analytics, VxEngage)? - **Yes, we would be open to exploring what that would look like.**
- How are leak or continuous consumption alerts to customers currently handled? Are they communicated to customers using Sensus or Vx Engage? - **Sensus and VX communication**

## 22. Field Operations:

- Newer and modern CIS systems often include a purpose built and tightly integrated Mobile Field Service module. In our experience, industry best practice is to use the native Mobile Field Service capabilities for all short cycle work generated out of the CIS (customer, Premise, meter related work). This will allow for additional automation and data validation as the CIS will service as the system of record for meters. This is typically a better user experience than trying to integrate to an Enterprise Asset Management system that is not purpose built for short-cycle meter work. There are Mobile Field Service requirements in the RFP, will the Board consider the inclusion of short-cycle Mobile Field Service as part of the core scope or at least for optional consideration?  
**Answer: Our determination is best practice would be for field service work to be consolidated within EAMS, but SWBNO would consider other options.**

- If so, can you please break down the number of Mobile Field Service Users by the following categories:
  - o Full Users - Users which have full Read/Write Access. This typically consists of all Field staff and dispatchers.
  - o Light Users - Users which have Read Only Access. This typically consists of managers who wish to review data or look at reports.
  - o CSR Users - Customer Service Representatives which will be reviewing additional information in the Mobile Field Service Application.
- How is dispatch of orders currently handled? Is it automated and is the field staff segmented by geographic zone or territory?

### 23. **Optional Applications:**

It appears that the Board uses several software applications (AQUA, TecNXS, BMP) to manage backflow and FOG programs. Is the common for utilities to include backflow in scope as part of CIS upgrades. Is the Board interested in optional information on Backflow/FOG software for consideration?

**Answer: At this time, the Board is not interested in adding backflow to the CIS scope**

- If so, how many Testable Backflow Devices does the Board Currently Manage?
- There are numerous benefits to having the CIS very tightly integrated with the Customer Self-Service Portal and Mobile Field Service for automation reasons? Is the Board interested in optional information and pricing for a CSS portal that is purpose built to work with the proposed CIS?

**Answer: Would be open to options for the portal.**

- Some CIS software vendors include integrated Payment Processing capabilities. Is the Board interested in possibly exploring this approach and replacing Invoice Cloud as part of this procurement?

**Answer: Would be open to options and would discuss with selected vendor at time of selection.**

### 24. **Integrations:**

- What is the current Call Center (ACD) System? **Nice inContact**
- How many collection agencies does the Board currently work with? **One**
- Does the Board process liens or have a debt set-off program where uncollectable A/R is sent to the County for collection?- **no**
- What IVR system does the Board currently use? Is the same IVR used for outbound campaigns and for inbound payments? **Currently Vocantas but currently being transitioned to Nice InContact by EOY. We do not use it for outbound campaigns.**
- We did not see Promise Play documented as an integration in the Integrations Tab of the Functional Requirements. Is the Board expecting that there will be an integration required between Promise Pay and the new CIS? If so, can you please describe how you envision that will work?

**Answer: The RFP was originally drafted prior to Promise Pay go-live. A bidirectional integration will be needed for Promise Pay (API, preferably, or SFTP)**

**25. Implementation:**

• Normally during a CIS implementation, it is the utility's responsibility to extract the data from the legacy software (EG. Cogsdale). If the proposed vendor has unique expertise with the legacy Cogsdale system, is the Board interested in having the proposing vendor assume responsibility for the data extraction to help de-risk the implementation? **Yes, the Board would consider this as an optional service.**

**26. Pricing Form:**

In the provided *2025-SWB-84 CIS Software and Services Pricing Form*, there are no integrations listed in the "Integrations" tab, although the RFP (Section 4.7.5) references interface pricing. Could SWBNO please confirm if an updated version of the pricing sheet is available that includes the integration list described in the RFP?

**Answer: It is not listed in the costing sheet because interfaces could be replaced with base functionality and/or one interface may require multiple lines in the costing sheet (ex. Inbound and outbound) and it's the vendor responsibility to identify the interfaces that are needed for each.**

**27. Optional Modules:**

Will SWBNO accept information on inclusion of optional modules, such as Mobile Work Management, Customer Portal, Backflow Management, or similar solutions, if they are proposed with core integrations to the CIS platform?

**Answer: the Board will consider optional modules if presented, but the RFP scoring criteria is for CIS platform.**

**28. Affidavit Requirements:**

The RFP notes several affidavits (Conflict of Interest Disclosure, Corporate Resolution, Convicted Felon, Non-Solicitation, and Non-Collusion) under the "Required for Awarded Proposer" section. Could SWBNO please confirm whether these affidavits should be submitted only if selected as the vendor of choice, or included with the initial proposal submission?

**Answer: These will be required from the winning bidder.**

29. Are there existing legacy reports from Cogsdale CSM that can serve as a baseline for new report development?

**Answer: SWBNO currently uses eOne's SmartList as our reporting tool and will be reviewed and provided to the selected vendor.**

30. Should vendors lead discovery and validation of new/custom reports, or will SWBNO define them upfront?

**Answer: It will be a combined effort with selected vendor, but overall would want to follow best practices**

31. Are there preferred BI/reporting tools, or is the choice fully at the Proposer's discretion? **No preference**

32. Should the reporting solution be integrated directly with Oracle Cloud Financials, Sensus Analytics, and vxSmart Portal, or via middleware?

Answer: As mentioned in the mandatory bid conference, SWBNO will be purchasing and implementing a middleware solution that will integrate with all major software once all remaining vendors are chosen.

33. Is there a dedicated reporting database or data mart, or should reports run directly on the CIS transactional environment?

Answer: SWBNO is open to options, but would require seamless reporting for our users without needing to open another portal.

34. Will SWBNO provide access to current database schema and data dictionaries, or should these be derived from exports?

Answer: SWBNO will provide access as needed for selected vendor.

35. Are there any role-based security requirements for ad-hoc reporting beyond standard system permissions?

Answer: Yes. SWBNO requires role-based security for reporting beyond standard system permissions. Access to reporting functions must align with least-privilege principles, ensuring users can only view or generate reports for data within their authorized roles. Administrative overrides and audit logging of report access are mandatory.

36. For historical or archived data, is there an expectation to generate reports across legacy and current data simultaneously?

Answer: This would be ideal.

37. Is SWBNO expecting customized documentation for each report, or a single consolidated reporting guide/manual?

Answer: SWBNO is open to a single consolidated reporting guide, as long as it is functional and each report data is well defined.

38. The Posting of Pre-Proposal Attendance Sheet and Pre-Proposal Video will be posted to the SWBNO website by Friday, November 14, 2025.

*The changes, additions, and/or deletions included herein are hereby made part of the solicitation documents for 2025-SWB-84 Customer Information System (CIS) Software and Services, as fully and completely as if the same were set forth therein. The proposer shall be responsible for having knowledge of all addenda issued for this RFP.*

**\*\*\* END OF ADDENDUM \*\*\***