



MANDATORY PRE-PROPOSAL MEETING FOR RFP-25-015

**Project Management Services for
LIMS Replacement Project**

**Wednesday, August 5, 2026
9:00 AM Pacific Time**



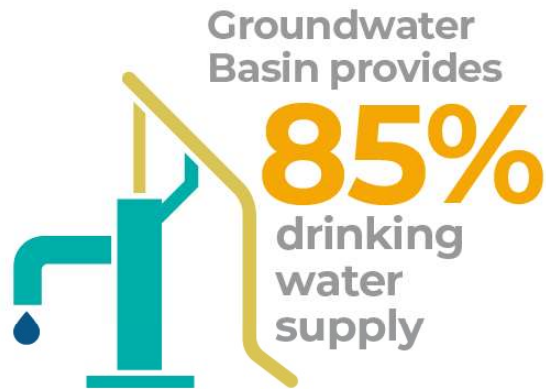
Welcome

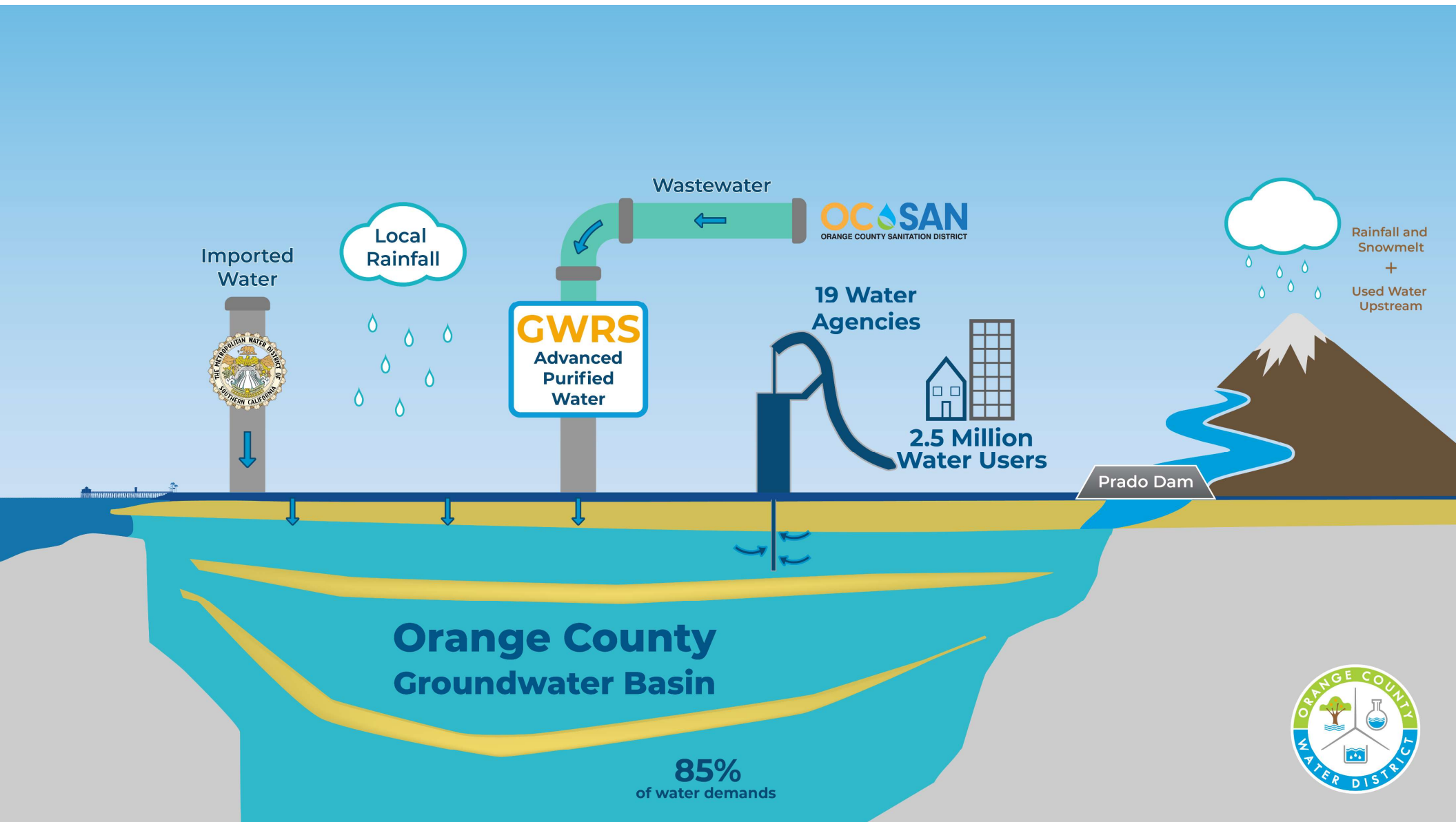
Project Team (OCWD):

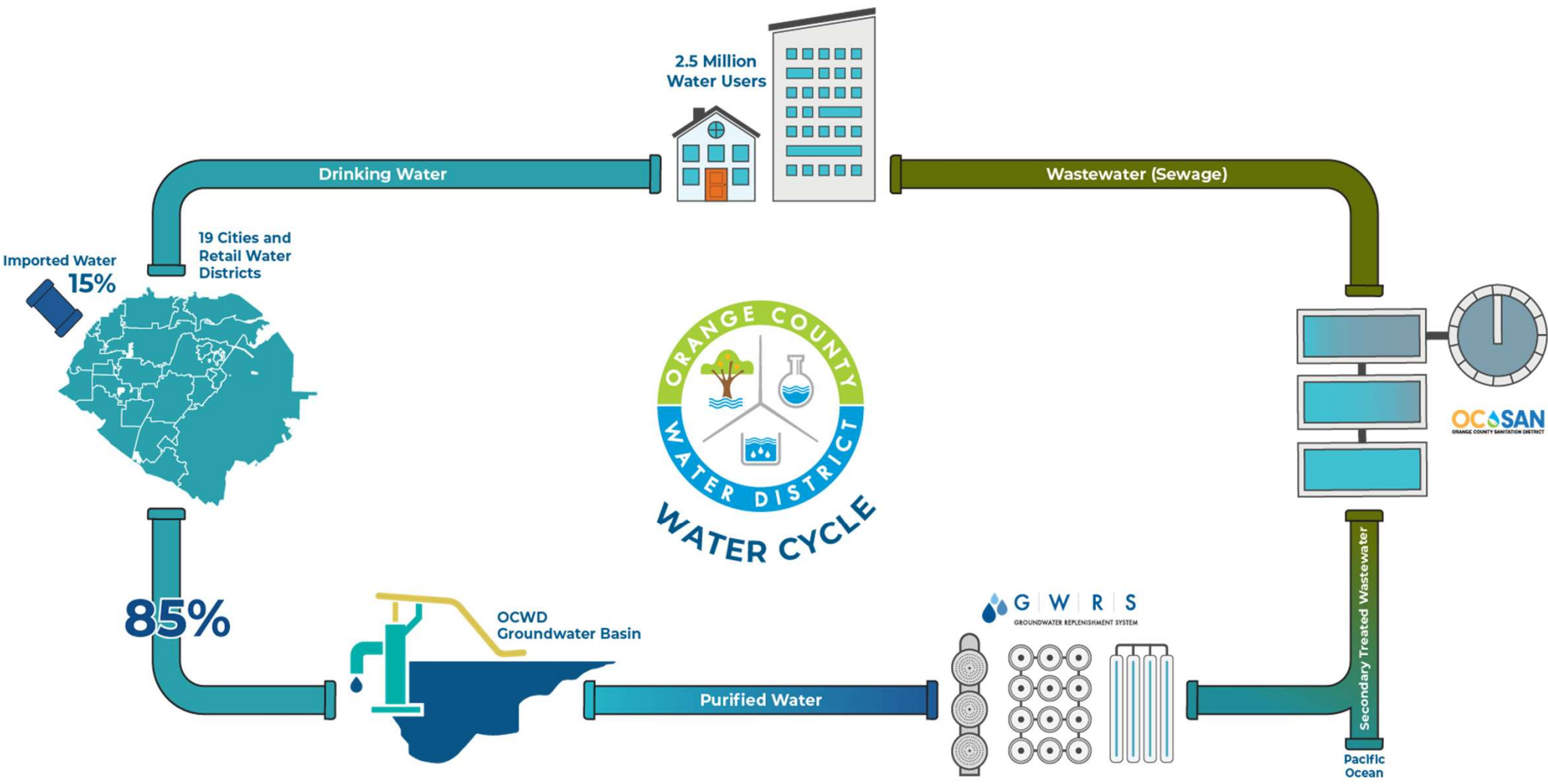
- **Prem Parmar, Lab Director**
- **Daniel Salas, LIMS Administrator**
- **Francisco Hernandez, Director of Information Services**
- **Elsy Catalioto, Principal Enterprise Systems Analyst**
- **Melody Yap, Purchasing Manager**

OCWD Laboratory LIMS – Technical Overview

OCWD AT-A-GLANCE







Groundwater Replenishment System (GWRS)

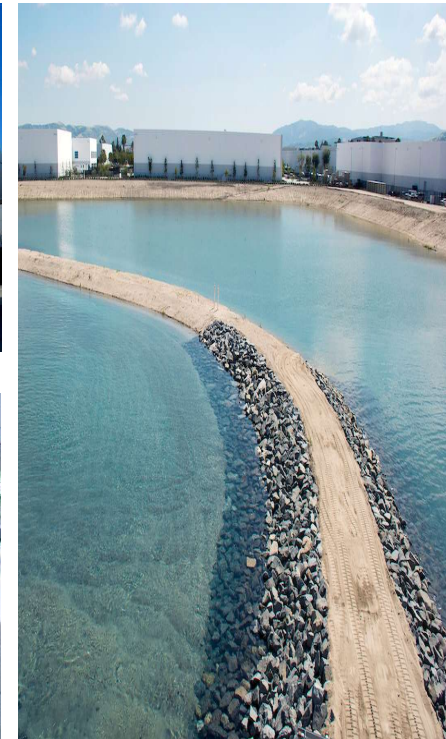
- Purifies treated wastewater that would otherwise be discharged to the ocean
- Advanced purification (microfiltration, reverse osmosis, and UV light with hydrogen peroxide) – purified to drinking water quality
- Operational since 2008 (70 MGD)
 - Initial expansion May 2015 (+ 30 MGD)
 - Final expansion March 2023 (+30 MGD)
- Replenishes groundwater basin with 130 MGD of water – enough for nearly 1 million people
- Recycles 100% of OC San's reclaimable wastewater flows
- More than \$900 million infrastructure investment



World's largest potable reuse facility



Purified product water available to taste



La Palma Recharge Basin in Anaheim

OCWD Operations



GWRS



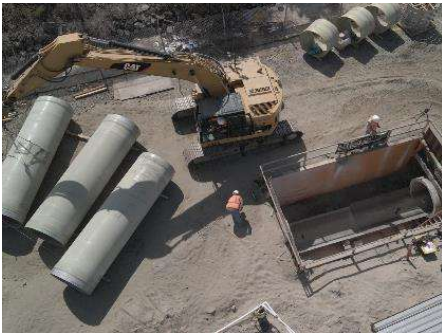
Laboratory



Recharge Basins



Constructed Wetlands



Pipelines



Pump Stations



Rubber Dams

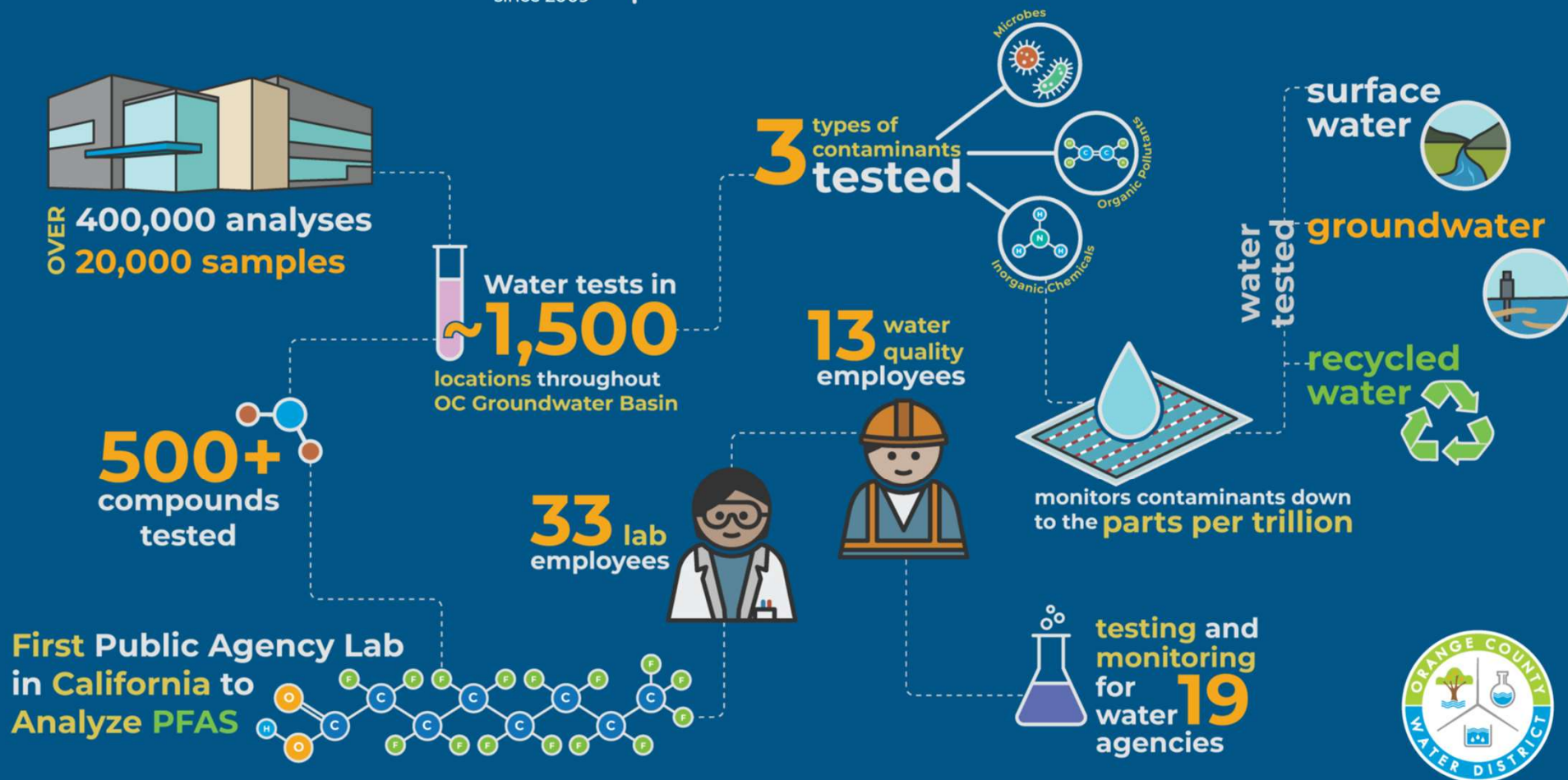


T and L Levees

PHILIP L. ANTHONY WATER QUALITY LAB

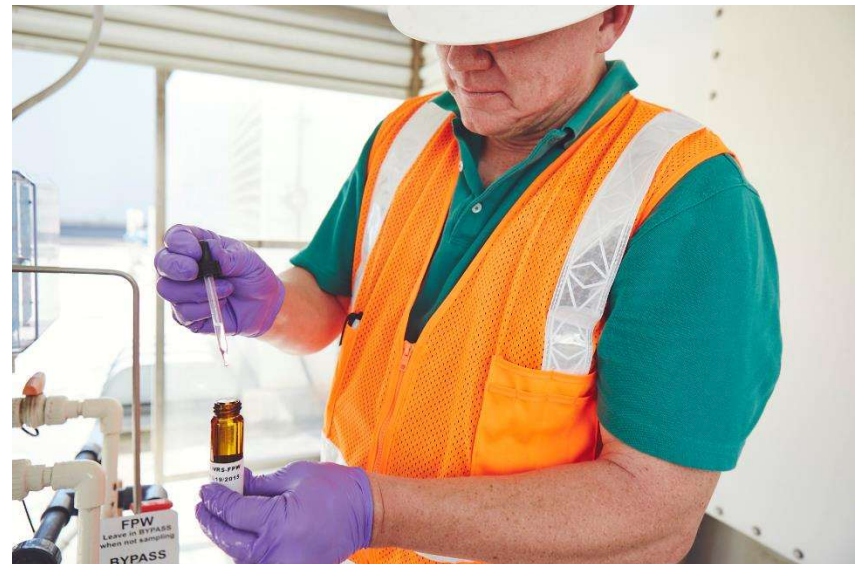
since 2009

OCWD tests for regulatory standards and also monitors constituents of emerging concern in the water. Testing identifies water quality issues and allows OCWD to act quickly to address them. Additionally, the Lab provides water quality information to regulators, water agencies and the public. OCWD is committed to providing exceptional water quality to the 2.5 million people it serves in north and central Orange County.



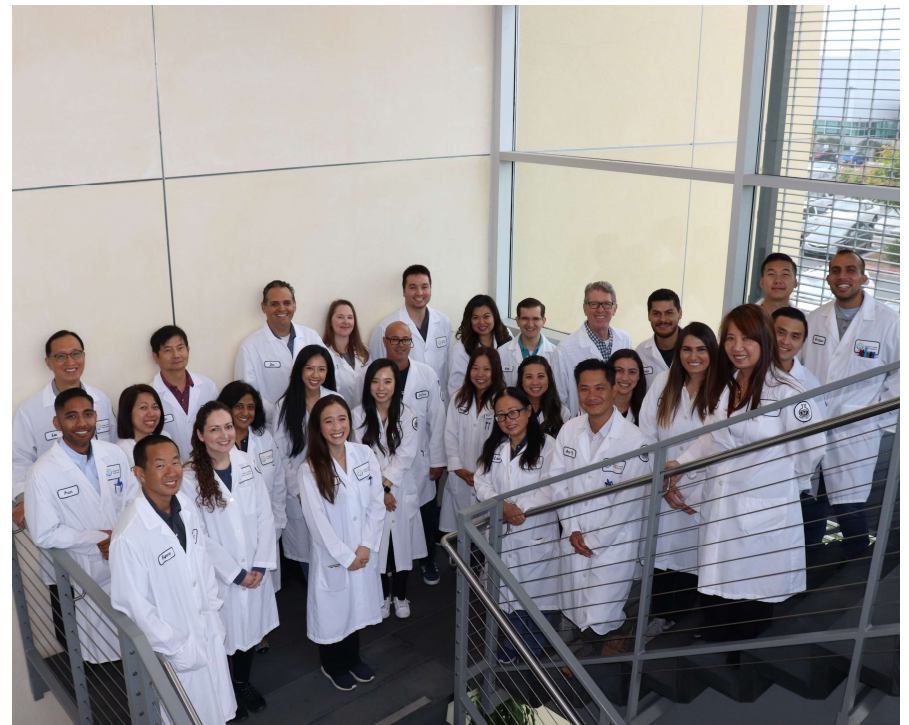
Exceptional Water Quality

- GWRS Permit developed by Regional Water Quality Control Board & Division of Drinking Water
- Tests for **500** compounds with all results well below permit levels or at non-detection (ND) levels
- Performs water quality testing at approximately **1,500** locations throughout the basin
- Laboratory analyzes more than **20,000** samples each year
- Lab reports more than **400,000** results
- Provides regional testing of more than **200** drinking water wells for local drinking water providers



Philip L. Anthony Advanced Water Quality Laboratory

- Opened in October 2009
 - Lab operations began in 1973
- Consists of three sections:
 - Inorganic
 - Organic
 - QA/QC
- Staff consist of **32** full-time employees and **5** student interns



Laboratory Statistics

- Annual sample count: **20,000**
- Annual Number of Analyses: **400,000**
- Testing methods: **50**
- Fields of accreditation: **245**
- Total analyses available: **486**
- Analytical Instruments
 - Inorganic - **12**
 - Organic – **20**
- Normal turnaround time: **2-3 weeks**



Laboratory Methods

Inorganic Analyses:	Organic Analyses:
• Trace metals • Alkali metals • Anions • Inorganic DBPs • Chromium (VI) • Perchlorate • Ammonia • pH/EC/Alkalinity • Microbiology • Solids • TOC	• PFAS • Volatile organics • Semivolatile organics • Nitrosamines • 1,4-dioxane • 1,2,3-trichloropropane • Pharmaceuticals and personal care products • Haloacetic acids • Glyphosate • Carbamates

LIMS Replacement Project – Scope of Work

NOTE: References in this section are to RFP 025-021 for LIMS Replacement which posted on the OCWD website here:

<https://www.ocwd.com/working-with-us/rfp-contracts/rfp-for-laboratory-information-management-system-lims-replacement-rfp-25-21/>

OCWD Laboratory LIMS History

- The lab built its own Citrus LIMS around 2022-2023 to replace Aspen LIMS.
- The lab made extensive plans to build a Citrus Plus LIMS from the ground up but realized it would not be practical.
- That work went into the RFP scope, requirements, and other appendices.



LIMS History

OCWD Laboratory LIMS RFP – What not How

- The RFP is full of requirements, proposed workflows, and report examples, but generally, like TNI, we're specifying *what must be done*, NOT how to do it.



OCWD Laboratory LIMS RFP Scope Variability

- Exhibit A (Scope of Services) Section 1.1 lists 17 LIMS functionalities we expect every modern LIMS to handle.
- It also lists 4 areas where the project scope may vary.

Exhibit A Scope of Services

The project scope includes, but is not limited to, the following major tasks:

Task 1: Project Management and Planning

1.1. The Proposer shall work with OCWD to define the final scope of the project. OCWD's research and the RFI process has shown that commercially available LIMSs vary in capability and scope. The full details of the requirements for OCWD Laboratory's next LIMS are included in Appendix A – LIMS Requirements. These core LIMS functions must be available in the new LIMS:

1. Sample task scheduling/management
2. Sample collection data input
3. Sample receipt
4. Sample management and tracking of both physical sample containers and sample work status (with visible backlog lists)
5. Logs for recordkeeping and batching during sample preparation and analysis
6. Traceability appropriate to meet the 2016 TNI Standard
7. Results import from instruments and manual data entry, as appropriate
8. Ability to perform multiple kinds of calculations for results and QC
9. Ability to configure results display (rounding, significant figures, below reporting limit, below MDL, etc.)
10. Multiple levels of data review and approval
11. Data exchange with other internal and external databases (WRMS, DXR, Ideagen)
12. Automated and on-demand report generation and/or on-screen data displays (dashboards)
13. Automated internal and external rules-based notifications
14. Sample and analyte query capabilities
15. Fully digitized (paperless) workflows
16. Appropriate data security with access levels determined by user roles
17. Full data auditability

OCWD Laboratory LIMS RFP Scope Variability

Improved TNI traceability within LIMS is a must for this project, and includes:

- Increased capacity for CONTEMPORANEOUS digital data input
- Traceability to Equipment/Inventory used
 - Calibration/verification records
 - QC checks of items
 - certificates of analysis, volume, efficacy
 - checks by frequencies – once, by lot, daily, monthly, etc.
 - Maintenance records and maintenance scheduling
 - Lab size/staffing does not make an extensive inventory system practical (no spare staff to input data on incoming products)
- Traceability to staff training and demonstrations of capability
- Traceability to Lab Studies (MDL, method verification, method uncertainty)

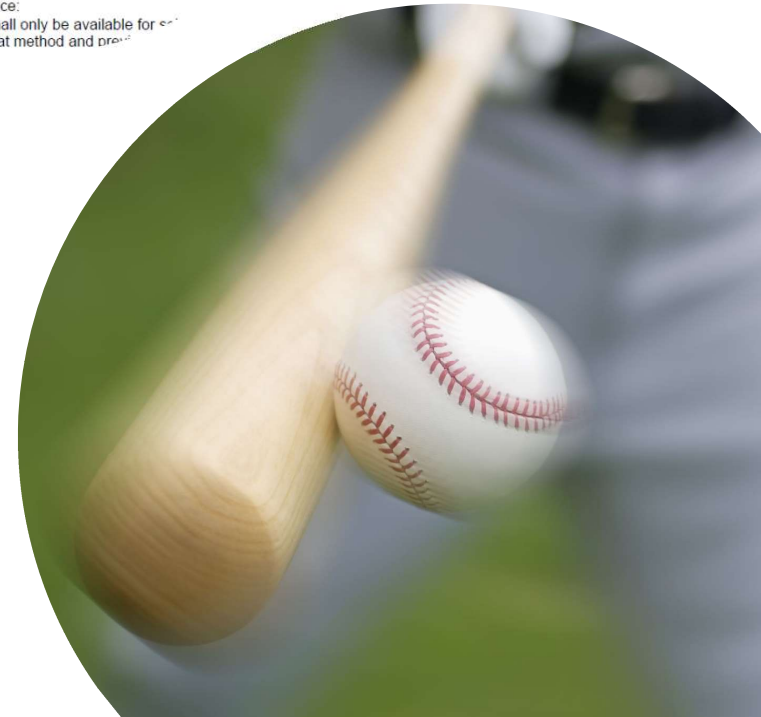
Maximizing user EFFICIENCY is critical due to smaller lab size

- The lab is small but swings BIG.
- Exhibit A “Scope of Services” Section 2.2 provides EXAMPLES (not specific requirements) of LIMS ease-of-use.
- The lab is stressing LIMS’ demonstrated efficiency/ease of use in selecting the LIMS.

LIMS Ease-of-Use for End Users

The LIMS must allow for more electronic recordkeeping and efficiency of entry than our current systems, which are largely paper records or electronic documents not linked to LIMS. As the amount of recordkeeping in LIMS will increase, the new LIMS must improve end-user efficiency over the OCWD Laboratory's current LIMS. The following non-exhaustive list includes examples (not specific requirements) of the types of features that would minimize the LIMS recordkeeping workload:

- 2.2.2. Related functions shall be accessible from relevant screens. For example, when working on a sample preparation log, controls or links shall be readily available to perform the tasks listed below. The preparation log must remain persistent so that returning to the prep log and resuming work shall not require a new search to open it:
- Indicating which bottle, vial, or aliquot is used in the prep;
 - Recording measurements and observations of sample masses or volumes, pH, chlorine presence, etc.;
 - Linking related equipment, reagents, and standards;
 - Adding or removing samples, dilutions, or individual analytes;
 - Adding or removing QC samples such as spiked blanks (LFBs) and method blanks (LRBs);
 - Initiating a resampling or re-prep request/notification;
 - Indicating which samples are assigned for QC duplicates and re-spiking;
- staff must select from a list of available tasks or items, that are filtered. For instance:
- Analytes shall only be available for selection to that method and prep.



OCWD Laboratory LIMS RFP Scope Variability

- The lab analyzes samples from different sources:
 - Sampling tasks managed in DXR/WRMS (OCWD databases outside of LIMS):
 - Compliance samples collected by Water Quality department
 - Includes groundwater, surface waters, and GWRS plant compliance samples
 - Sampling tasks managed within LIMS:
 - GWRS Plant process control samples collected by operators
 - Research samples collected by R&D
 - Miscellaneous non-compliance sampling
- “Managed” means tasks are scheduled, pre-login data is collected, COCs are generated.
- The new LIMS MUST replace the LIMS sampling functionality, but will not* replace DXR/WRMS functionality

*Unless the new LIMS' sampling functionality is so good Water Quality and Upper Management can be convinced to adopt it

OCWD Laboratory Data Management

- Electronic data packets are made as PDF files from a mixture of instrument-generated reports, LIMS-generated reports, recordkeeping performed in Office documents, and scans of hand-written records.
- The lab sends analysis data electronically from LIMS to WRMS for other departments to use.
- The lab does not report data externally, nor does it manage subcontractor lab data from outside OCWD. This is done by other departments in WRMS.
- The lab would like to reduce its reliance on reports and data packets and instead increase use of dashboards, portals, and other electronic displays.
- Digital Data Packets should still be available on-demand.

OCWD Laboratory Uses Ideagen Quality Assurance Software

Ideagen functionality includes:

- Document control with review, approval, version control, and archiving;
- Documentation of Corrective and Preventive Actions (CAPA);
- Tracking of staff training and demonstrations of capability;
- Management of method validations and other lab studies;
- Management of method detection limits by method and instrument.

OCWD Laboratory LIMS RFP Scope Variability

- The new LIMS may supplement, exchange data with, or replace functionality in Ideagen
- Ideagen does NOT exchange data with the existing LIMS.
- Currently, QA/QC staff must ensure recordkeeping is up-to-date.

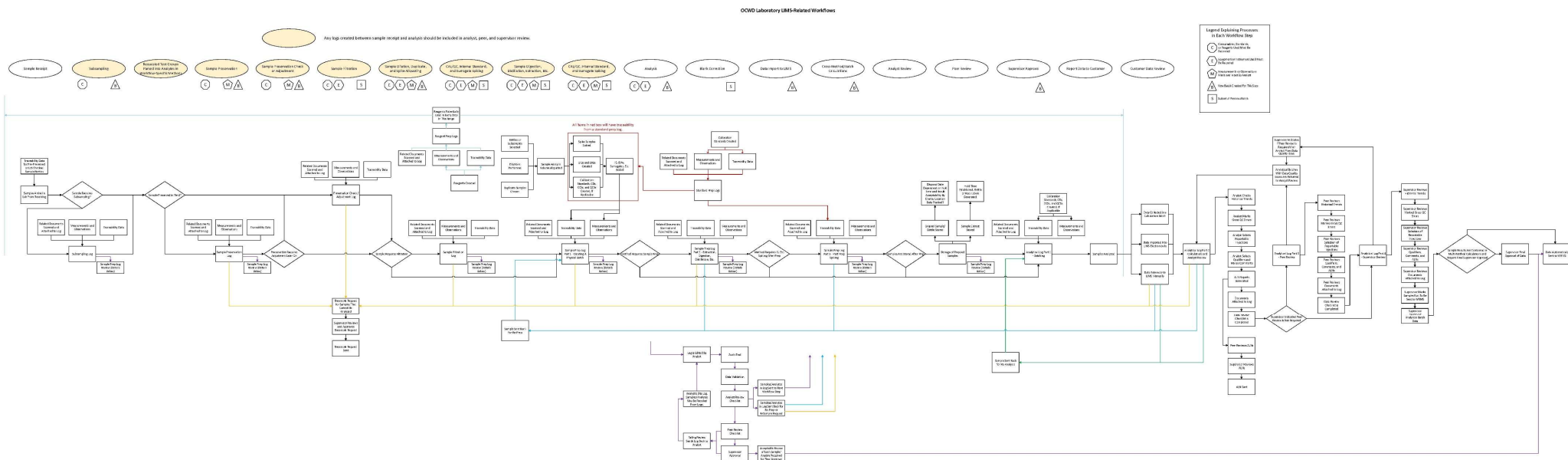


OCWD Laboratory's Citrus LIMS Is Not Flexible Enough

The ideal LIMS would have dynamic workflows:

- Samples are often re-batched, re-prepped, or re-analyzed. This may apply to a whole batch, a single sample, or only some analytes in a sample.
- Sending work forward and backward will be routine.
- Calculations will happen across different analytical methods.
- Some prep or analysis steps may be skipped based on client request or sample properties.
- Results and related QC must be reportable from different injections or dilutions.

OCWD Laboratory's Citrus LIMS Is Not Flexible Enough



**See the Appendices
in Exhibit E for
more details about
LIMS requirements
and lab workflows**

The technical appendices included with this RFP provide detailed information about the District's laboratory operations, existing systems, and functional requirements for the proposed LIMS. Proposers shall review these appendices carefully when preparing their proposals. The following provides a brief description of the technical appendices.

- Appendix A: Requirements and Desired Features for a New OCWD LIMS – Based on our research of our workflows, we have prepared this list of LIMS needs. We have not attempted to list every field on every screen or report as we expect to buy a LIMS with adequate configurability to make listing that level of detail unnecessary.
- Appendix B: OCWD Lab Workflows Overview – A detailed overview of our expected lab workflows from sample receipt to data reporting. This includes functionality not possible in our current LIMS.
- Appendix C: OCWD Lab Simplified Overall Workflow – A simplified overview of our expected lab workflows.
- Appendix D: OCWD Lab Simplified Overall Workflow – Reduced Inventory Scope – Similar to Appendix D, but with a pared down inventory management system that may be more practical for our smaller lab and lean staff.
- Appendix E: Review and Approval of Sample Data Workflow Outline – A narrative outline of how we envision our current process if we could perform it using a more capable LIMS
- Appendix F through J: Workflow diagrams for several OCWD analytical methods representative of the variability seen in our methods.
- Appendix K-1 and K-2: OCWD Method Workflow – A workflow diagram for EPA 200.7 Metals by ICP-OES with a detailed breakdown in Appendix L-2 diagramming the variability required by EPA methods 200.7 and 200.8 depending on which elements are requested for analysis, whether the total or dissolved portion of the sample is analyzed, sample pH, and sample turbidity. The ideal LIMS would allow a dynamic workflow that would route the samples into the appropriate sample preparation steps based on the above factors with minimal manual sample prep log manipulation.

Role of the OCWD Project Manager

- Represents OCWD throughout the implementation
- Leads planning, coordination, communication, and accountability
- Works across Lab, IS, Purchasing, leadership, and the LIMS vendor
- Brings project management discipline, not laboratory subject matter expertise

OCWD provides the business and technical SMEs. The Project Manager provides the structure and discipline to move the project forward.

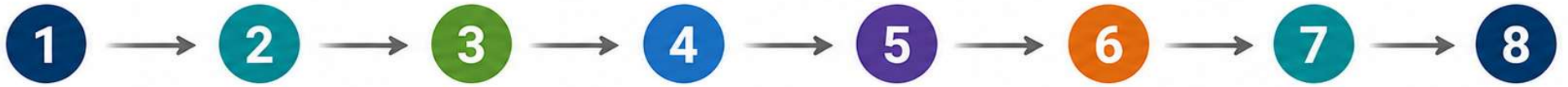
Project Governance and Core PM Functions

- Integrated project schedule
- Risks, issues, actions, decisions, and dependencies
- Scope and change control
- Deliverable and milestone tracking
- Vendor coordination and accountability
- Status reporting and escalation
- Meeting agendas, minutes, decisions, and follow-up

Testing and Defect Management

- System and integration testing
- Data migration validation
- User acceptance testing
- Regression testing
- Test planning, entry criteria, and exit criteria
- Formal defect tracking
- Severity, ownership, due dates, retesting, and closure
- Go-live readiness based on documented results

LIMS Project Phases



Initiation and Planning

- Project kickoff and governance
- Define scope, objectives and success criteria
- High-level schedule and resource plan
- Risk assessment and communication plan



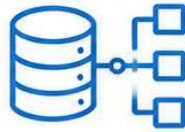
Requirements Validation and Design

- Validate business requirements
- Document workflows and processes
- Define system and technical requirements
- Solution design and acceptance criteria



Configuration and Development

- Configure LIMS solution
- Develop custom components (if applicable)
- Build reports, dashboards and business rules
- Iterative configuration reviews



Data Migration and Integrations

- Data assessment and cleansing
- Data mapping and migration
- Interface and integration development
- Data validation and reconciliation



Testing and Validation

- Test planning and execution
- System and integration testing
- Data migration validation
- User acceptance testing (UAT)
- Regression testing and defect tracking



Training and Readiness

- Develop training materials
- Conduct user training
- Operational readiness and support planning
- Go-live readiness review



Cutover and Go-Live

- Cutover planning and rehearsals
- Data finalization and migration
- Go-live execution
- Hypercare support at go-live



Stabilization and Closeout

- Post go-live stabilization
- Issue resolution and support
- Project closeout and documentation
- Lessons learned and transition to operations

RFP – Evaluation Criteria & Scoring

Item No.	Criteria for Proposal Evaluations	Maximum Points
1	Project Understanding and Approach	25
2	Qualifications and Experience of the Firm	20
3	Qualifications and Experience of the Proposed Lead Project Manager	25
4	Firm's Record of Success on Recent Similar Projects	10
5	Cost Proposal	20
TOTAL POINTS:		100

RFP – Submittal Checklist

ATTACHMENT NO.1

Request for Proposals (RFP) Submittal Checklist

The following submittals shall be completed and submitted with each Proposal package (see table below for the "Required Submittal Checklist."). This table has been provided as a convenience for proposers to use as a reference only. Ultimately, it is the Proposer's sole responsibility to ensure that their proposal complies with all requirements of the RFP and all the required submittals are included in the Proposal package before it is formally submitted to OCWD. Proposals may be deemed nonresponsive if they do not respond to all areas specified in the RFP.

Item No.	Required Submittal Checklist	Check (✓)
1	Signed Proposal package including:	
Part 1		
2	Title Page	
3	Cover Letter	
4	Table of Contents	
5	Experience and Record of Past Experience	
6	Project Team and Qualifications	
7	Project Overview and Approach	
8	Additional Services	
9	OCWD Standard Contract (Exhibit C) • A statement accepting the requirements stated in Section 5.1.9 of the RFP.	
10	Statement of Insurance Compliance (Exhibit C) • A statement accepting the requirements stated in Section 5.1.8 of the RFP.	
11	Billing • A statement accepting the requirements stated in Section 5.1.10 of the RFP.	
12	Conflict of Interest	
13	Equal Employment Opportunity and Affirmative Action Requirements	
14	Addenda Acknowledgement Forms (if applicable)	
Part 2		
15	Price Proposal (Separate Sealed Envelope)	

- Make sure to go through checklist, and provide all required submittal contents with Proposal Package

Solicitation Schedule

1. RFP documents available free of charge from our OCWD website located at <https://www.ocwd.com/working-with-us/rfp-contracts/> .
2. Questions due to us no later than 12:00 PM local time Tuesday, August 11, 2026. Send all questions to Procurement@ocwd.com – (Email Subject Header: **Question – RFP-25-015 for OCWD LIMS**)
 1. OCWD will respond to questions as soon as possible
3. Proposals are due to us no later than 1:00 PM local time on Thursday, August 20, 2026.
 1. HARD-COPY PAPER SUBMISSIONS accepted. FAXED OR E-MAILED SUBMISSIONS WILL NOT BE ACCEPTED. OCWD reserves the right to reject any and/or all responses received.
4. Selection will be made on the basis of OCWD's judgment as to which proposal best serves OCWD's interest. Proposals will be evaluated on the basis of the criteria listed in Section 9.0 of the RFP.
5. Interviews – Will be held the week of August 31, 2026
6. Anticipated Agreement Award – October 2026

Thank You!

Questions:

Procurement@ocwd.com



Stay informed

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@OCWaterDistrict
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