



## REQUEST FOR PROPOSAL

### Laboratory Information Management System

August 25, 2010

**Proposal Due Date:** September 29, 2010  
**and Time:** 3:00 p.m. (Eastern Time)

**RFP Number:** 2010-005-240  
**Mailing Address:** P.O. Box 4000  
Ashburn, VA 20146

**Delivery Address:** Administrative Services Facility  
44865 Loudoun Water Way  
Ashburn, VA 20147

**Procurement Contact:** Bessie Nelson, Purchasing Technician  
Phone: 571.291.7700  
Fax: 571-223.2513  
E-mail: [bnelson@loudounwater.org](mailto:bnelson@loudounwater.org)

**Pre-proposal Conference:** September 15, 2010  
**and Time:** 10:00 a.m.-11:00 a.m. (Eastern Time)

IF YOU NEED ANY REASONABLE ACCOMMODATION FOR ANY TYPE OF DISABILITY IN ORDER TO PARTICIPATE IN THIS PROCUREMENT, PLEASE CONTACT PURCHASING AS SOON AS POSSIBLE.

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## 1. PURPOSE

This Request for Proposal (RFP) is a solicitation for a vendor to provide a commercial off the shelf (COTS) Laboratory Information Management System (LIMS) to Loudoun County Sanitation Authority (Loudoun Water).

### Schedule of Events (Tentative)

August 25, 2010	RFP Issued
September 15, 2010	Pre-Proposal Conference
September 17, 2010	Questions due (in writing)
September 22, 2010	Answers to questions distributed to all vendors that received the RFP
September 29, 2010	Responses to RFP due
October 6, 2010	Short list notification
October 13, 2010	Short list vendor interviews/demos

Following the receipt of the RFP, questions may be submitted in writing prior to the deadline listed above to the contact listed in Section 6. Responses to all questions will be distributed to all parties that have received the RFP.

Proposals may be submitted at any time prior to the due date and in accordance with the requirements set forth in this document. All submitted copies of proposals shall become the property of Loudoun Water.

Loudoun Water will evaluate the written responses to this Request for Proposal to select the vendor whose approach represents the best overall value to Loudoun Water in terms of best fit by experience, approach to the project, and software functionality.

Loudoun Water will request a presentation and product demonstration from a short-list of vendors. The demonstrations will be evaluated based on a scorecard approach. Loudoun Water reserves the right to withdraw this Request for Proposal, or not award a contract, at any time due to unforeseen circumstances.

The non-mandatory pre-proposal conference will be held in the Boardroom at Loudoun Water's Administrative Services Facility at 44865 Loudoun Water Way, Ashburn, VA 20147.

## 2. COMPETITION INTENDED

It is Loudoun Water's intent that this RFP encourage competition. It shall be the Vendor's responsibility to advise the Purchasing Technician in writing if any language,

requirement, specification, etc., or any combination thereof, inadvertently restricts or limits the requirements stated in this RFP to a single source. Such notification must be received by the Purchasing Technician not later than ten (10) days prior to the date set for acceptance of proposals.

### 3. BACKGROUND INFORMATION

- A. The Loudoun County Sanitation Authority (doing business and hereafter referred to as "**Loudoun Water**") is a public body politic and corporate and an instrumentality of the Commonwealth of Virginia, organized under the Virginia Water and Waste Authorities Act, being Chapter 28, Title 15.1, Code of Virginia of 1950, as amended (the "Act"). Loudoun Water was created by action of the Board of Supervisors of Loudoun County, Virginia and was chartered by the State Corporation Commission on May 27, 1959. As an Authority, Loudoun Water receives revenue from user fees, makes no profit, and our operations and finances are independent of the County's tax-supported services.
- B. Loudoun Water has approximately 60,000 connections serving more than 186,000 people. Its service area is predominantly in eastern Loudoun County, and is composed of more than 1700 miles of water and wastewater pipelines. Water supply is provided through agreements with the City of Fairfax and Fairfax Water. Water sources include the Potomac River and Goose Creek. Wastewater treatment is currently provided through an agreement with the District of Columbia Water and Sewer Authority supplemented by Loudoun Water's new Broad Run Water Reclamation Facility (BRWRF), which came online in 2008. The BRWRF discharges effluent into Broad Run, which feeds the Potomac River and, ultimately, the Chesapeake Bay. Loudoun Water also operates several small community water and wastewater treatment plants throughout Loudoun County.
- C. The BRWRF includes a laboratory that serves as a regional laboratory that supports all of Loudoun Water by providing analysis of various environmental media. The analysis conducted includes wastewater, drinking water, solid and mixed media matrices. Laboratory staffing consists of one supervisor and two analysts. Lab staff performs process control and regulatory work. Samples are delivered to the laboratory by plant operators and inspectors. The majority of samples that are received for analysis are from routine sampling events. The Laboratory personnel perform over 1300 analyses per month. Loudoun Water utilizes contract laboratories for selected analyses.
- D. All of Loudoun Water's laboratory data is currently tracked and documented in Excel spreadsheets. The proposed LIMS will be implemented as a 'date-forward' solution. Legacy data migration, including migration of this spreadsheet data, is not required.
- E. The proposed LIMS will be installed on a server that will be purchased by Loudoun Water. Any required workstations will also be purchased and installed

by Loudoun Water, including all user desktop workstations and laptops. Loudoun Water currently uses Dell PowerEdge Servers

1. Loudoun Water's preferred server configuration is as follows:
    - Windows Server 2008 32 bit acceptable 64-bit edition preferred
    - Microsoft SQL Server 2005 standard edition 32 bit acceptable 64-bit preferred
    - Microsoft IIS 6 or 7 (for web servers)
  2. Water's preferred server configuration is as follows:
    - Windows Server 2008 32 bit acceptable 64-bit edition preferred
    - Microsoft SQL Server 2005 standard edition 32 bit acceptable 64-bit preferred
    - Microsoft IIS 6 or 7 (for web servers)
- F. Loudoun Water's standard desktop configuration is as follows:
1. Processor: Intel Core 2 Duo 2.33GHz processor
  2. Operating System: Windows XP Professional SP3
  3. Memory: 1.0GB 800MHz
  4. Hard Drive: 80GB SATA
  5. CD/DVD Drive: 24X CDRW/DVD Combo
  6. Monitor: 19" Flat Panel monitor
  7. Video Card: Integrated video - Intel GMA3100
- G. Loudoun Water intends to purchase licenses for five (5) concurrent users, or 10 named users, as part of this implementation. Additional read-only (for the purpose of viewing data and reports) licenses will be needed for five (5) concurrent users or 30 named users.
- H. Loudoun Water prefers a LIMS that is web-based. If the LIMS has a desktop-based client, then the LIMS should also include a web-based client that can be used, at a minimum, to view real-time data and reports.
- I. Loudoun Water intends to purchase a LIMS that can be integrated with other enterprise software packages that are currently in use at Loudoun Water. These integration components are not required as part of the current scope of services, but the LIMS software chosen must have the capability to eventually integrate and exchange data with these software packages:
1. MUNIS – Tyler Technologies' MUNIS 7.4 software is Loudoun Water's ERP software solution. This system is used to manage purchasing, financials, human resources, invoicing for services rendered utility billing, and customer information.
  2. Hanson 8 – Loudoun Water uses Infor's Hansen 8 software to maintain and manage water and wastewater assets, including inventory and the management of service requests and work orders. This system is also used to manage the permitting process for new construction.

3. ArcGIS - Loudoun Water uses ESRI's ArcGIS technology to manage geospatial data. A SQL Server 2005-based ArcSDE 9.3 database supports our ArcGIS Desktop 9.3 and ArcGIS Server 9.3 users.

#### **4. SCOPE OF SERVICES**

The scope of services shall include all tasks necessary to successfully implement the LIMS software at Loudoun Water. It is envisioned that these tasks will include, at a minimum, business analysis and implementation plan, software configuration, testing, training, implementation, and support. The system should be configured in three environments (Development, Training and Product) to support ongoing deployment of LIMS and operating system software updates and enhancements. The Offeror should include any additional subtasks or services within these main tasks that will be necessary to ensure a successful implementation. The Offeror is also encouraged to suggest any improvements to the approach that will aid in accomplishing the goals of the LIMS implementation.

Please note that all deliverables will become the property of Loudoun Water (exclusive of typical software licensing terms). If the Offeror wish to publish any part of their work related to the project, this may only be done upon written approval from the authorized Loudoun Water personnel.

Specific scope of services requirements are described below.

##### **A. Business Analysis & Implementation Plan**

Loudoun Water's detailed requirements are described in Appendix A. The Offeror will conduct a business analysis to determine the specific configuration needs of the Offeror's LIMS software in order to meet these requirements. Included in this analysis will be an evaluation of the major laboratory workflows, nomenclature, and reporting requirements, including user-defined information.

As part of the business analysis, Loudoun Water anticipates that the Offeror will need to interview the Laboratory staff (one (1) Lab Supervisor, two (2) Lab Analysts), plus approximately 10 other stakeholders and IT departmental staff within Loudoun Water. No external agencies shall be interviewed as part of the scope.

This analysis will be used by the Offeror to develop an implementation plan. This implementation plan will include a description of the required configuration. The plan will also include a more detailed project schedule showing key milestones and required resources.

This implementation plan shall also include a LIMS Validation as a subcomponent. This validation plan shall include the validation tasks to be performed, validation procedures, and validation results reports. The purpose of this validation is to ensure that the LIMS performs all the functions specified and

represented by the vendor without compromising data quality and integrity. The LIMS must meet or exceed the requirements of the validation plan during the testing phase.

This implementation plan will be used to guide the LIMS implementation to a successful conclusion.

## **B. Software Configuration & Testing**

The Offeror shall configure the LIMS to meet the requirements as described in the implementation plan. This configuration shall include setting up users, establishing workflows, adding user-defined fields, configuring sampling and reporting, and other subtasks as necessary to prepare the system for use.

Approximately 15 reports will be needed for implementation.

Listed below are the current instruments that require interface with the LIMS. The LIMS should also provide for other instrumentation to be added in the future through industry standard interfaces:

- Mettler XP205 Analytical Balance
- Lachat QuickChem 8500 Series 2
- Hach DR5000 Spectrometer

The Offeror shall perform validation testing in accordance with the validation plan using test data to confirm that the LIMS meets the specified requirements.

## **C. Training**

The Offeror shall train the laboratory and systems personnel in the use of LIMS. Loudoun Water has a dedicated computer training facility that may be used for this purpose. The Offeror shall provide training manuals and training documentation to support the training exercises. Training will be performed on-site at Loudoun Water's computer training facility. These users should be classed for training as follows:

- Three (3) Laboratory personnel will require full training on the standard use and operation of the software.
- Four (4) additional users (two (2) from Laboratory and two (2) from IT Support) will also require separate advanced application administration training (training in how to configure the LIMS, manage users, etc.).
- Three (3) users will require system administration training (e.g. any special LIMS requirements for SQL Server beyond normal DBA duties, special IIS requirements, installing and uninstalling the software, etc.)
- Up to 30 users will require training on how to access basic data, including sample results, and view reports. These users will only use the system to view information, not edit.

## **D. Implementation**

The Offerer shall guide Loudoun Water through the implementation 'go-live' period, in which Loudoun Water adopts the use of the LIMS software in full production mode. As part of this implementation, the Offerer shall provide Loudoun Water with three days of on-site support immediately following the go live, and three additional days of on-site support two months after the go-live date.

## **E. Support**

The Offerer shall provide post installation maintenance and support for the LIMS software. This maintenance and support shall include regular releases of software upgrades, and helpdesk support that conforms to a standard Service Level Agreement (SLA). Specific terms of the SLA will be negotiated during the contracting process.

## **5. CONTRACT TERMS**

### **Key Terms**

This contract shall be awarded on a Not to Exceed cost basis that will be negotiated with the Offerer upon completion of the RFP process.

### **Procedures**

The extent and character of the services to be performed by the Offeror (Consultant) shall be subject to the general control and approval of Loudoun Water's General Manager or his authorized representative. Any change to the approved Agreement must be approved in writing by Loudoun Water and the Consultant. The successful Offeror is prohibited from assigning, transferring, conveying, subletting, or otherwise disposing of this Agreement or its rights, title or interest therein or its power to execute such agreement to any other person, company or corporation without the prior consent and approval in writing by Loudoun Water.

### **Insurance**

The successful Offeror shall provide and maintain the following minimum limits of insurance coverage during the period of performance required under an Agreement resulting from this RFP.

- A. Comprehensive General Liability
  - 1. \$1,000,000 Bodily Injury and Property Damage per occurrence and aggregate
  - 2. Comprehensive General Form
  - 3. Extended Business Liability Endorsement
  - 4. Independent Contractors Coverage
  - 5. Products/Completed Operations (to be provided for minimum of 36 months after completion of work)
  - 6. Broad Form Contractual Liability

7. Personal Injury Liability
- B. Comprehensive Automobile Liability
  1. \$1,000,000 Combined Single Limits
  2. Statutory Uninsured Motorist Coverage
  3. Hired and Non-Owned Coverage
  4. Motor Carrier Act Endorsement
- C. Worker's Compensation and Employer's Liability
  1. Statutory Coverage for Virginia
  2. \$1,000,000 Employer's Liability
  3. Broad Form All States Endorsement
  4. Compliance with all Federal Statutes, including U.S. Longshoreman and Harbor Worker's Act, the Jones Act, and Federal Employees Act
- D. Umbrella Liability
  1. Additional \$1,000,000 liability coverage over the primary limits for Comprehensive General Liability, Comprehensive Automobile Liability, and the Employer's Liability

Prior to commencing work under a resultant contract, the successful Offeror shall furnish Loudoun Water with a Certificate of Insurance naming Loudoun Water as an additional insured. A 60 day notice of cancellation, non-renewal, or change in the insurance coverage must be provided.

#### **Hold Harmless Clause**

The Offeror shall, during the term of the Agreement including any warranty period, indemnify, defend, and hold harmless Loudoun Water, its officials, employees, agents, and representatives thereof from all suits, actions, or claims of any kind, including attorney's fees, brought on account of any personal injuries, damages, or violations of rights, sustained by any person or property in consequence of any neglect in safeguarding contract work or on account of any act or omission by the Offeror or his employees, or from any claims or amounts arising from violation of any law, bylaw, ordinance, regulation or decree. The Offeror agrees that this clause shall include claims involving infringement of patent or copyright.

#### **Not To Benefit**

As a prerequisite for payment pursuant to the terms of this contract, there shall be furnished to Loudoun Water a statement, that no employee of Loudoun Water, or members of his immediate family, including spouse, parents or children has received or has been promised, directly or indirectly, any financial benefit, by way of fee, commission, finder's fee or in any other manner, remuneration arising from or directly or indirectly related to a contract resulting from this RFP.

#### **Employment Discrimination by Offeror Prohibited**

Every contract over \$10,000 shall include the following provisions:

- A. During the performance of this contract, the Offeror agrees as follows:
1. The Offeror will not discriminate against any employee or applicant for employment because of race, religion, color, sex, national origin, age or disability, or any other basis prohibited by state law relating to discrimination in employment, except where there is a bona fide occupational qualification reasonably necessary to the normal operation of the Offeror. The Offeror agrees to post in conspicuous places, available to employees and applicants for employment, notices setting forth the provisions of this nondiscrimination clause.
  2. The Offeror, in all solicitations or advertisements for employees placed by or on behalf of the Offeror, shall state that such Offeror is an equal opportunity employer.
  3. Notices, advertisements and solicitations placed in accordance with federal law, rule or regulation shall be deemed sufficient to meet this requirement.
- B. The Offeror will include the provisions of the foregoing paragraphs, 1, 2, and 3 in every subcontract or purchase order over \$10,000 so that the provisions will be binding upon each subcontractor or vendor.

### **Drug-free Workplace**

Every contract of over \$10,000 shall include the following provisions:

During the performance of this contract, the Offeror agrees to (i) provide a drug-free workplace for the Offeror's employees; (ii) post in conspicuous places, available to employees and applicants for employment, a statement notifying employees that the unlawful manufacture, sale, distribution, dispensation, possession, or use of a controlled substance including marijuana is prohibited in the Offeror's workplace and specifying the actions that will be taken against employees for violations of such prohibition; (iii) state in all solicitations or advertisements for employees placed by or behalf of the Offeror that the Offeror maintains a drug-free workplace; and (iv) include the provisions of the foregoing clauses in every subcontract or purchase order over \$10,000 so that the provisions will be binding upon each subcontractor or Consultant.

For the purpose of this section, "drug-free workplace" means a site for the performance of work done in connection with a specific contract awarded to an Offeror in accordance with this chapter, the employees of whom are prohibited from engaging in the unlawful manufacture, sale, distribution, dispensation, possession, or use of a controlled substance including marijuana during the performance of the contract.

### **Exemption from Taxes**

Loudoun Water is exempt from State and Federal Taxes. Tax Exemption Certificate indicating Loudoun Water's tax exempt status will be furnished by Loudoun Water on request.

**Substitutions**

No substitutions, including key personnel, or cancellations permitted after award without written approval by the Purchasing Technician and Loudoun Water's General Manager.

**Assignment of Agreement**

This contract may not be assigned in whole or in part without the written consent of Loudoun Water.

**Termination**

Subject to the provisions below, the contract may be terminated by Loudoun Water upon 60 days advance written notice to the other party; but if any work or service hereunder is in progress, but not completed as of the date of termination, then this contract may be extended upon written approval of Loudoun Water until said work or services are completed and accepted.

*Termination for Convenience*

In the event that this contract is terminated or canceled upon request and for the convenience of Loudoun Water, without the required 60 days advance written notice, then Loudoun Water shall negotiate reasonable termination costs, if applicable.

*Termination for Cause*

Termination by Loudoun Water for cause, default or negligence on the part of the Firm shall be excluded from the foregoing provision; termination costs, if any, shall not apply. The 60 days advance notice requirement is waived in the event of Termination for Cause.

**6. INSTRUCTIONS FOR PREPARING AND SUBMITTING PROPOSALS****Questions and Inquiries**

Questions about this RFP should be directed to Bessie Nelson, Loudoun Water Purchasing Technician, at 571-291-7948 or [bnelson@loudounwater.org](mailto:bnelson@loudounwater.org).

**Contents of Proposals**

The following information is to be submitted as part of the proposal. No other material may be attached. Tabs shall be used to separate sections of the proposal response. The proposal response is limited to no more than **36 single sided pages (or 18 double sided pages)**, not including a cover letter, tab separators, the Offeror's response to Appendix A, or any forms required by Loudoun Water. A cover letter, if included, shall be no more than one page. The proposal is to be organized into the following Sections:

- A. Vendor Profile – Provide a description of the company and each subcontractor, including the following information:

1. Company Name
  2. Location(s) from which services will be provided and location of headquarters
  3. Number of full-time employees
  4. History of major releases including version number, release date and summary of enhancements
  5. Number of companies with active maintenance contracts for the proposed core LIMS product and the corresponding number of licenses
- B. Experience of the Firm – Provide descriptions and references for at least five (5) municipal water/wastewater utility LIMS implementations. At least one (1) implementation should be for a utility located in the Commonwealth of Virginia. Include a discussion of the services provided and how those services align with the services sought in this RFP. Also provide the start and completion dates, contract value, as well as the client contact name, title, address, email, and phone number for each project.
- C. Financial Information – Include an audited financial statement or balance sheet for the most recent fiscal year and a summary of the gross revenue of the firm for the past five years.
- D. Qualifications of Individuals – Include a project organizational chart and resumes of key team members to be assigned to this project.
- E. Sub-consultants – Identify when any outside services will be used. Provide the names and lists of services to be provided by each sub-consultant. Loudoun Water reserves the right to procure services of a sub-consultant directly.
- F. RFP Attachments – All attachments to the RFP requiring execution by the firm are to be returned with the proposal. Include in this section the References form for the five formal references required by Loudoun Water.
- G. Signatures – All proposal originals must be signed in ink by the individual or authorized principals of the firm.
- H. Approach to Project – Describe your approach to meeting the requirements of the scope of services. Include a discussion of your approach to managing the project and how communication will be handled between your team and Loudoun Water. You are encouraged to include any suggestions or alternative approaches that may facilitate the execution of the project.
- I. Software Functionality – Include an overall description of functionality of the LIMS software. Also include a discussion of the application and database technical architecture, including key table fields and relationships.
- J. Software Requirements Matrix - Include your responses to Appendix A showing how the functional requirements are met by the LIMS software. Clearly note

where the LIMS software requires customization, purchase of additional modules, or purchase of 3<sup>rd</sup> party applications in order to meet a given requirement. Include concise comments where necessary to clarify your response. Do not include any other materials or information other than the Appendix A table containing your responses in this section.

- K. Assumptions and exceptions - List any critical assumptions made as part of your proposal. Also list any exceptions to the contract terms.

### **Packaging of Proposals**

Proposals are to be returned in a sealed container. Ensure that the proposal container is completely and properly identified. The face of the container shall indicate the RFP number, 2010-005-240, September 29, 2010, 3:00 p.m., and the title of the RFP, "Laboratory Information Management System".

Each Vendor shall submit one (1) original and six (6) hard copies, as well as an electronic copy in PDF format on a CD of their proposal to Loudoun Water's Purchasing Division as indicated on the cover sheet of this RFP. The original proposal shall be clearly marked.

### **Delivery of Proposals**

- A. Proposals may either be mailed to the Administrative Services Facility at P.O. Box 4000, Ashburn, VA 20146 or hand delivered or shipped to 44865 Loudoun Water Way, Ashburn, VA 20147. They may not be emailed.
- B. Proposals must be received by Loudoun Water's Purchasing Department before **September 29, 2010, 3:00 p.m. (Eastern Time)** deadline. Requests for extensions of this time and date will not be granted. Consultants mailing their proposals shall allow for normal mail time to ensure receipt of their proposals by Loudoun Water's Purchasing Department prior to the time and date fixed for acceptance of the proposals. Proposals or unsolicited amendments to proposals received by Loudoun Water after the acceptance date will not be considered. Proposals will be publicly accepted and logged in at the time and date specified above.

### **Withdrawal of Proposals**

Proposals may be withdrawn on written request from the Offeror at the address shown in the solicitation prior to the time of acceptance.

### **Late Proposals**

Late proposals will be returned to the Offeror unopened, if RFP number, acceptance date and Offeror's return address is shown on the container.

### **Addendum and Supplement to Request**

If it becomes necessary to revise any part of this request or if additional information is necessary to enable an exact interpretation of provisions of this request, an

addendum will be issued to the same distribution list as the original RFP. It is the responsibility of the Offeror to ensure that he has received all addendums prior to submitting a proposal.

### **Proprietary Information**

It is the responsibility of each Offeror to clearly mark any part of his proposal considered to be of proprietary or confidential nature. Offeror shall not mark sections of their proposal as proprietary or confidential if they are to be part of the award of the contract and are of a "Material" nature.

### **Authority to Bind Offeror in Contract**

Proposals must give full legal name and address of the Offeror's Firm. Failure to manually sign proposal may disqualify it. Person signing the proposal should show title or authority to bind said firm in a contract.

### **Rights of Loudoun Water**

Loudoun Water reserves the right to accept or reject all or any proposals, waive informalities and award the contract to best serve the interest of Loudoun Water.

### **Miscellaneous Requirements**

- A. All proposals submitted shall be valid for a minimum period of 120 calendar days following the date established for acceptance.
- B. Loudoun Water will not be responsible for any expenses incurred by an Offeror in preparing and submitting a proposal. All proposals shall provide a straight-forward, concise delineation of the Offeror's capabilities to satisfy the requirements of this request. Emphasis should be on completeness and clarity of content.
- C. The contents of the proposal submitted by the successful Offeror and this RFP will become part of any contract awarded as a result of the Scope of Services contained herein. The successful Offeror will be expected to execute an Agreement with Loudoun Water.
- D. Loudoun Water reserves the right to reject any and all proposals by reason of this request, or to negotiate separately in any manner necessary to serve the best interests of Loudoun Water. Offeror whose proposals are not accepted will be notified in writing.

### **Protest**

Offeror may refer to Sections 2.2-4357 through 2.2-4364 of the Code of Virginia to determine their remedies concerning this competitive process.

## **7. EVALUATIONS OF PROPOSALS**

Proposals will be evaluated by the LIMS Committee of Loudoun Water employees. The proposal process will proceed in three phases:

1. Written Proposal Evaluation
2. Interview/Software Demonstrations
3. Price Evaluation/Negotiation.

### **Written Proposal Evaluation**

Loudoun Water employees will independently evaluate each of the written proposals in accordance with the scoring criteria below.

- A. Approach to Project (25 points)
- B. Experience of the Firm and Sub-consultants (25 points)
- C. Software Functionality (50 points)

After each member of the LIMS Committee has completed an evaluation rating form for each proposal solution, composite ratings will be developed which indicate the committee's collective ranking of the highest rated Written Proposals.

### **Interview/Software Demonstrations**

Upon completion of the Written Proposal Evaluation phase, Loudoun Water will invite two or more of the highest rated firms to present to Loudoun Water. This presentation will include a discussion of the firm's approach to the project, the firm's experience, and a demonstration of their software solution. Loudoun Water will provide specific instructions, including a software demonstration script for key business processes, prior to the demonstrations. Loudoun Water will score these interviews using the same criteria and methodology noted above (composite scoring of approach, experience, and functionality). Two or more of the highest scoring firms will proceed to Price Evaluation/Negotiation phase.

### **Price Evaluation/Negotiation**

Upon completion of the Interview/Software Demonstrations, Loudoun Water will negotiate price with two or more of the highest rated firms. Price negotiation will include all software and implementation costs. Loudoun Water will provide specific instructions for price proposals at this stage.

Upon completion of the Price Evaluation/Negotiation, the LIMS Committee will make a recommendation for the contract award.

**References  
(Must be completed by Offeror)**

Offeror shall provide references on this form.

1. Firm Name \_\_\_\_\_

Contact \_\_\_\_\_

Title \_\_\_\_\_

Mailing Address \_\_\_\_\_

Phone \_\_\_\_\_

Email Address \_\_\_\_\_

2. Firm Name \_\_\_\_\_

Contact \_\_\_\_\_

Title \_\_\_\_\_

Mailing Address \_\_\_\_\_

Phone \_\_\_\_\_

Email Address \_\_\_\_\_

3. Firm Name \_\_\_\_\_

Contact \_\_\_\_\_

Title \_\_\_\_\_

Mailing Address \_\_\_\_\_

Phone \_\_\_\_\_

Email Address \_\_\_\_\_

**References (continued)**

4. Utility Name \_\_\_\_\_

Contact \_\_\_\_\_

Title \_\_\_\_\_

Mailing Address \_\_\_\_\_

Phone \_\_\_\_\_

Email Address \_\_\_\_\_

5. Utility Name \_\_\_\_\_

Contact \_\_\_\_\_

Title \_\_\_\_\_

Mailing Address \_\_\_\_\_

Phone \_\_\_\_\_

Email Address \_\_\_\_\_

**Laboratory Information Management System  
(RFP No. 2010-005-240)**

**SECTION I – OFFEROR IDENTIFICATION AND OWNERSHIP DISCLOSURE**

Company \_\_\_\_\_

Address \_\_\_\_\_

Contact Person \_\_\_\_\_ Title \_\_\_\_\_

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

Organized under the laws of State of \_\_\_\_\_

Principal place of business at \_\_\_\_\_

Following list includes persons having ownership of 3% or more in the company (attach more sheets if necessary):

Name	Address
_____	_____
_____	_____
_____	_____

Loudoun Water requests, as a matter of policy, that any consultant or firm receiving a contract of award resulting from an RFP issued by Loudoun Water shall make certification as specified below. Receipt of such certification, shall be a prerequisite to the award of contract and payment thereof.

**SECTION II - EMPLOYEES NOT TO BENEFIT**

I (we) hereby certify that if the contract is awarded to our firm, partnership, or corporation, that no employee of Loudoun Water, or members of his/her immediate family, including spouse, parents or children has received or been promised, directly or indirectly, any financial benefit, by way of fee, commission, finder’s fee, political contribution or any similar form of remuneration on account of the act of awarding and/or executing this contract.

**SECTION III – CONFLICTS OF INTEREST**

This solicitation is subject to the provisions of VA Code Ann. Section 2.1-639.2 et. seq., the State and Local Government Conflict of Interests Act. The Offeror [ ] is [ ] is not aware of any information bearing on the existence of any potential organizational conflict of interest.

**SECTION IV – COLLUSION**

I certify that this offer is made without prior understanding, agreement, or connection with any corporation, firm, or person submitting an offer for the same services, materials, supplies, or equipment and is in all respects fair and without collusion or fraud. I understand collusive bidding is a violation of the State and Federal law and can result in fines, prison sentences, and civil damage awards.

I hereby certify that the responses to the above representations, certifications, and other statements are accurate and complete. I agree to abide by all conditions of this RFP and certify that I am authorized to sign for my firm.

Signature \_\_\_\_\_ Date \_\_\_\_\_

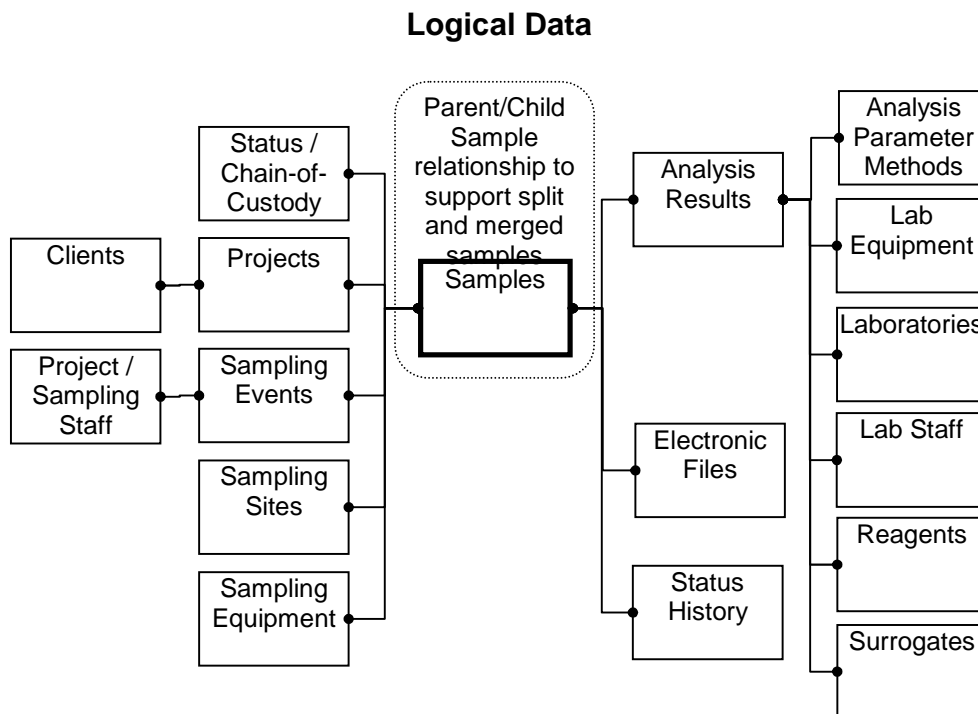
Name (Printed) \_\_\_\_\_ Title \_\_\_\_\_

## Appendix A – LIMS Software Requirements Matrix

This matrix prioritizes technical characteristics for a LIMS product and vendor that Loudoun Water requires for a robust and long-term solution. Additionally, software user functionality required for an effective implementation is prioritized.

### Technical Characteristics

The technical software characteristics are presented based the following logical data relationships centered on individual samples. From any single sample the LIMS must be able to unambiguously reference information shown in this diagram and detailed in the requirements matrix. The Offerer’s actual LIMS product may have a different physical design, but it must support these logical relationships.



The Offerer will include supporting documentation including a data diagram and data dictionary showing the LIMS product’s actual tables and relationship supporting this functionality.

The Offerer will include supporting documentation describing how security is managed by the system with specific details regarding security groups and granularity for applying rights to different data.

### Product Requirement Form

Weight Value: Loudoun Water assigned priority for each requirement where 3 is most important and 1 is least important.

Response Codes: Enter only one of the following codes in column 4 for every weighted requirement.

- M = Product fully meets requirement out-of-the-box or through documented standard system configuration
- C = Product meets requirement with additional system customization through programming interfaces and/or database procedures
- 3 = Product must be supplemented with a 3rd party module to meet requirement
- P = Product partially meets requirement either out-of-the-box, through customization and/or with a 3<sup>rd</sup> party module
- X = Product cannot effectively meet this requirement

Explanation: An explanation must be provided for each requirement with a C, 3 or P response code. In these cases, describe how the out-of-the-box product must be customized or enhanced, including discussion of 3<sup>rd</sup> party module(s), and what specific deficiencies, if any, would still remain.

ID	Requirements	Weight	Response	Explanation
1	<b>Data Relationships</b>			
1.01	A Sample record can be linked to another Sample record through a parent/child reference (or similar mechanism) to create composite samples or separate sub-samples.	3		
1.02	One Sample record can be linked to many Result records. A Result record must be linked directly to one Sample record (and indirectly related to parent/child samples).	3		
1.03	One Sample record can be linked to many Parameters Analysis Methods that have been or will be tested. One Parameters Analysis Method can be linked to multiple Sample records.	3		

ID	Requirements	Weight	Response	Explanation
1.04	One Sample record must be linked to only one Site record. One Site record can be linked to multiple Sample records.	3		
1.05	One Sample record must be linked to only one Project record. One Project record can be linked to multiple Sample records.	2		
1.06	One Sample record must be linked to only one Client record. One Client record can be linked to multiple Sample records.	2		
1.07	One Sample record can be linked to many Chain-of-Custody records. One Chain-of-Custody record can be linked to many Sample records.	3		
1.08	One Sample record can be linked to many sampling Staff records specifying their role. One Staff record can be linked to many Sample records.	2		
1.09	One Sample record can be linked to only one scheduled Sampling Event. One Sampling Event can be linked to multiple Sample records.	1		
1.10	One Sample record can be linked to multiple Electronic Documents (of any format) via URL/UNC path or by embedding the file in the database.	2		
1.11	One Sample record can be linked to only one Sampling Equipment record. One Sampling Equipment record can be linked to multiple Sample records.	2		
1.12	One Result record must be linked to only one Parameter Analysis Method record. One Parameter Analysis Method record can be linked to multiple Result records.	3		
1.13	One Result record must be linked to only one Laboratory record. One Laboratory record can be linked to multiple Result records.	3		

ID	Requirements	Weight	Response	Explanation
1.14	One Result record must be linked to only one Laboratory Equipment record. One Laboratory Equipment record can be linked to multiple Result records.	3		
1.15	One Result record must be linked at least one Lab Staff record including the activity performed. One Lab Staff record can be linked to multiple Result records.	3		
1.16	One Result record can be related to multiple Reagent records. One Reagent record can be related to multiple Result records.	3		
1.17	One Result record can be related to multiple Surrogate Standard records. One Surrogate Standard record can be related to multiple Result records.	3		
1.18	One Project record must be linked to only one Client record. One Client record can be linked to multiple Project records.	2		
1.19	One Project record can be linked to multiple Sampling Event records. One Sampling Event record must be linked to only one Project record.	2		
<b>2</b>	<b>General Data Management</b>			
2.01	Automatically assign unique and persistent IDs to primary data records such as samples, projects, sites, customers, equipment, batches, results, projects, chain-of-custody and instruments.	3		
2.02	Ability to define alphanumeric format for automatically generated IDs for primary data records such as samples, projects, sites, customers, equipment, batches, results, projects, chain-of-custody and instruments.	1		
2.03	Store and display Date-Time fields in military format without daylight saving time ambiguity.	3		
2.04	Support an audit trail of date-time, user ID, table, record ID, field and old value of all data modifications.	2		

ID	Requirements	Weight	Response	Explanation
2.04	Support all English and Metric units of measurement and conversion between related units. Support user-defined counts or units of measurement and conversion factors.	2		
2.06	Ability to set fields as mandatory or optional, with data validation and default values based on the type of record.	2		
2.07	Referential integrity is maintained within the database through enforcement of primary and foreign keys applied to tables.	2		
<b>3</b>	<b>Sample Data</b>			
3.01	Information regarding a discrete quantity of material that can be split or merge to form sample(s) while maintaining reference to the original sample(s).	3		
3.02	Primary attributes: Start and End date-time; Type (grab/composite/integrated); Method (manual, automatic, or more specific options); Matrix; Preservative (type manufacture, lot number, pH); Quantity	3		
3.03	Requirements: Holding time, Parameter/Analysis Method(s); Priority flag; Due Date	2		
3.04	Container: Type; Manufacture; Lot #	2		
3.05	Secondary attributes: Description; Comments; Sampling Frequency for Composite Type; Batch Position	2		
3.06	Status of a sample at any point in time: To Be Received; Received; Rejected; Preparation; Analysis; Peer Review; Group Validation; Project Mgr Validation; QA Validation; Approved; Resample; Storage; Disposal; Cancelled, others	3		
3.07	Storage - Container #; type, sample IDs, location	1		
<b>4</b>	<b>Results</b>			
4.01	Individual records for a parameter analysis value from a sample. The same parameter analysis can be performed multiple times for a single sample.	3		

ID	Requirements	Weight	Response	Explanation
4.02	Primary attributes: Analysis Start and End date-times; multiple analyst names and activities they performed, batch ID, parameter analysis method, detection limit, method limit, reporting level	3		
4.03	Secondary attributes: Comments; multiple Qualitative Yes/No fields	1		
4.04	Microbiology Analysis: Incubation Start and End date-times	3		
4.05	Organic Extraction Solvents: Type (Hexane, Acetone, Methylene Chloride, others); Volume; reference to (Manufacture; Lot #; Expiration Date; Date Used; Purity Check Preparation and Analysis Date); Start and End date-times for base, neutral and acid fraction (BNA) extractions	3		
4.06	Flag as a Reference Results taken in the field - Applicable parameters: dissolved oxygen, pH, conductivity, temperature, chlorine residual			
4.07	Billing Information: Cost; Priority; Due Date	2		
4.08	Result qualifiers: =; estimated; positive detection; negative detection; present; absent; calculated	3		
4.09	Result status attributes: Not Detected; Not Run; Do Not Report; other status settings	3		
<b>5</b>	<b>Site Data</b>			
5.01	Information regarding the specific locations where samples are taken, including address, X, Y coordinates in NAD 83 State Plane and depth of measurement	3		
5.02	Hierarchical categorization to define the site location across the LW operational region.	2		
<b>6</b>	<b>Project Data</b>			
6.01	Information about a group of samples with a common client, billing information, reporting needs and regulatory requirements	3		
6.02	Billing information: PO Number; Client	2		

ID	Requirements	Weight	Response	Explanation
6.03	Primary Attributes: Name; Description; Manager; Comments; Internal and external contact information (name, address, phones, fax, email, website)	3		
6.04	Requirements: QC Procedures; Permits; Reporting; Alerts	3		
<b>7</b>	<b>Lab Materials</b>			
7.01	HAZMAT tracking - Container ID, accumulation start date, disposal date, laboratory, responsible person; type (organic solvent, corrosive, aqueous, other components), comments	1		
<b>8</b>	<b>Reports, Forms and Labels</b>			
8.01	Ability to create virtually unlimited printed reports, forms or labels containing any logical arrangement LIMS data, with ability to sort, group, and/or summarize and filter.	1		
8.02	Reporting tool based on commercial product such as Crystal Reports, SQL Reporting Services, etc.	1		
8.03	Ability to print barcode representation of any primary record ID	3		
8.04	Vial label: Sample ID; Type; Initial Amount; Vial Amount; Batch Position	2		
8.05	Ability to create charts of any data including summarized statistics and standard formats(individual-X/moving range, X-bar and range, pie)	2		
8.06	Sample Disposal Report	3		
8.07	Sample Inventory Report	3		
8.08	Instrument Calibration Report	3		
8.09	Analyst Proficiency Report	1		
8.10	CLP (Level 4) Reports	3		
8.11	Support the EPA CROMERR (Cross-Media Electronic Reporting Rule) compliance requirements	2		
8.12	EDF report format for State Integrated Water Quality System	3		

ID	Requirements	Weight	Response	Explanation
8.13	Print reports to a file (Adobe PDF, HTML, MS Word 2003, MS Excel 2003, XML, CSV)	2		
<b>9</b>	<b>Scheduling</b>			
9.01	Ability to schedule sampling or analysis activities as individual or reoccurring events.	3		
9.02	Schedule reoccurring events based on number of days between events and on daily/weekly/monthly/yearly patterns. Ability to set total number of reoccurrences or a start and stop date. Ease of modifying, extending or removing scheduled Events and their associated Parameter Analysis Methods.	2		
9.03	Automatic scheduling based on project-defined limit exceedance.	2		
9.04	Calendars displays for public, group or individual events based on permissions assigned to the user	1		
9.05	Display/highlight missed events, sample status, re-sample events or priority, events or those governed by specific regulations.	2		
9.06	Display events by Client, Project, Laboratory, assigned Staff or Parameter Analysis Method	2		
9.07	Reference any related information linked to a Sample from its scheduled Event.	2		
9.08	Specify a priority and turnaround time.	1		
9.09	Schedule reports and notifications to be sent via email or SMS	1		
<b>10</b>	<b>User Interface</b>			
10.01	MS Internet Explorer 6.0 or higher compatible browser (thin client) interface including search, print, schedule, keyboard data entry, file import and file export capabilities	2		
10.02	Configurable data entry screens for each analysis type with option for spreadsheet "like" interface or data capture from instruments	2		

ID	Requirements	Weight	Response	Explanation
10.03	Data import/export of any user specified fields to/from MS Access 2003, MS Excel 2003, CSV, XML, HTML and Staged Electronic Data Deliverable (SEDD) formats or through ODBC	3		
10.04	Ability to define calculated fields and display basic or complex calculation utilizing look-up tables	2		
10.05	Print or scan barcode of any ID to support data entry	2		
10.06	Ability to search for records based on any logical combination of field(s) in the LIMS database for explicit values or with wildcards.	3		
10.07	Online context sensitive user help	3		
<b>11</b>	<b>Quality Control</b>			
11.01	Standard reports and alert regarding data gaps or inconsistencies	3		
11.02	Flag QA/QC prepared media and reagents associated with lot # and linked to sample ID	2		
11.03	Inventory tracking of archived samples, microbial isolates, stock cell culture lines, consumable and non-consumable supplies	2		
11.04	Print labels QA/QC forms for packaged media	2		
11.05	Scheduling of cell culture volume needs and generate a media discard list based on category and prep dates	2		
11.06	The system must count the number of samples subjected to verification and calculate a percentage to assure quality control criteria are met	2		
11.07	Workflow management configuration based on analysis method allowing review of test results, scheduled future tests, flagging for additional or reanalysis and documentation of findings	2		
11.08	QA Samples: Double-Blind hide values, limits and QA sample status from analyst; Out-of-Control Flag; Track Split Samples	2		

ID	Requirements	Weight	Response	Explanation
11.09	QA Sample Inventory: Type of standard; Catalog #; Supplier; Lot #; Receipt date; Expiration date; Quantity; Certified parameter values; Manufactures' dilution ratios acceptance limits or range; storage requirements	2		
11.10	Chemistry QA sample data: ID; Analysis date, Analyzed by; Laboratory; Distribution date; Type; Parameters; Analysis required; Manufacturer, Lot #; Dilution ratio; expected or certified values; Acceptance Limits; Results, Acceptance flag; Comment	2		
11.11	Microbiology QA Sample: ID; Analysis date-time, Analyzed by; Laboratory; Distribution date; Analysis required; Plate ID (A - D); Filter R and 2 volumes/colonies; Result; Qualifier; Comment	2		
11.12	QC parameter evaluation of field/travel blanks; lab control samples; matrix spikes – criteria, statistics (mean, mean % recovery, median, std deviation, rel % deviation, rel std deviation, coef of variance, diff of logarithms, rel % diff) and limits (method, method detection and reporting limits)			
11.13	Flagging of out-of-compliance samples for notice and further review.	1		
<b>12</b>	<b>Instrument Maintenance and Calibration</b>			
12.01	Instrument Maintenance and Calibration: Scheduled maintenance tasks with alerts, Capture (Date, Performed By, History of occurrence or missed), Warranty Info; Service Contract Info; Troubleshooting Log (Problem and Resolution); Validation Certificate	3		
12.02	Thermometer Calibration: Cal. Date; Cal. By; Method; Cal. Temperature, Correction Factor(s); NIST Cal. Thermometer ID and Expiration Date; Comments	2		
12.03	Pipette Calibration: ID, Cal. date-time, Cal. By; Target Weight, Actual Weight, Pass/Fail Flag	2		

ID	Requirements	Weight	Response	Explanation
12.04	Balance Calibration: ID; Cal. date-time, Cal. By; Standard Check Nominal Weight; Target Weight, Actual Weight, Acceptance Limits; Pass/Fail Flag	1		
<b>13</b>	<b>Chain-of-Custody</b>			
13.01	Tracking events for each Sample: Event date-time; Relinquished By; Received By, Laboratory / Location; Condition; Quantity; Comment	3		
<b>14</b>	<b>Staff Information</b>			
14.01	Staff contact information – Name, job title, email, telephone, address	2		
14.02	Analyst proficiency testing (track internal and manufacturer (hidden) lot numbers), certifications, allowed instrument methodology	1		
<b>15</b>	<b>System</b>			
15.01	Support Microsoft Active Directory Authentication, associated profile management and login activity tracking in support of EPA Good Automated Laboratory Practices	3		
15.02	Application management of security through permission applied to individual user accounts and to groups of accounts	3		
15.03	Ability to edit approved results must be limited by permissions and audited to Industry and GFOA standards and support Email or SMS notification	3		
15.04	Data storage utilizing SQL Server 2005 or 2008 standard edition (64-bit preferred) on Windows Server 2008 (64-bit preferred)	3		
15.05	Application developed with .Net technology and support extensibility via a published Application Programming Interface (API) and Service Oriented Architecture (SOA)	1		
15.06	OPC-compliant to facilitate exchange of data with Loudoun Water's ICONICS SCADA system	2		

ID	Requirements	Weight	Response	Explanation
15.07	Existing integration examples with Hansen 8; Microsoft Share Point; ArcGIS 9.3; MUNIS 7. and HP's TRIM Context 6.0 records management software	1		
15.08	Supported on MS Windows desktop operating systems XP, Vista, 7 and later	3		