



Request for Proposals

For

Cemetery Management Software



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Section 1: General Information

Request For Proposals (RFP) – Cemetery Management Software

THE ABOVE DESCRIPTION MUST APPEAR ON ALL PROPOSALS AND RELATED CORRESPONDENCE.

THIS IS NOT AN ORDER.

PROPOSALS MUST BE <u>RECEIVED</u> NO LATER THAN: March 25, 2022, at 5:00 pm (MST)	RFP INITIATIVE: Cemetery Management Software
<ul style="list-style-type: none">• All suppliers must respond in detail to each element of this RFP in order to be considered for contract award.• All proposals must be emailed to contact person at the address below.• Pricing must be emailed under separate cover with “Cemetery RFP Confidential Pricing” as the subject line.	
SEND ALL CORRESPONDENCE TO THE CONTACT BELOW:	
Liz Kampa, Purchasing Agent Email: kampal@billingsmt.gov	



Section 2: Objectives

Introduction and Objectives

This RFP is issued by City of Billings (City) for the purpose of obtaining information and pricing regarding Cemetery Management Software. It is the intent of the City to review and assess the RFP responses to determine which proposal best meets the needs of the City.

Suppliers are expected to provide their best and most competitive proposal.

Attachment E, the Intent to Respond form, must be completed and emailed at least two (2) days prior to the advertised RFP due date.

Section 3: Information for Suppliers

Disclaimer

This RFP does not form or constitute a contractual document. The City shall not be liable for any loss, expense, damage or claim arising out of the advice given or not given or statements made or omitted to be made in connection with this RFP. The City also will not be responsible for any expenses which may be incurred in the preparation of this RFP. This RFP is not to be construed as a contract or commitment of any kind.

Instructions to Proposers

EXAMINATION OF DOCUMENTS

Before submitting the proposals, the proposer shall:

- (a) Carefully examine the Standards and Specifications as well as all other attached documents;
- (b) Fully inform yourself of the existing conditions and limitations;
- (c) Include with the proposal sufficient information to cover all items required in the specifications.

PROPOSAL MODIFICATIONS

In addition to any other information and documentation requested in this RFP, any forms provided herein shall be included in the submitted proposal. Modifications, additions or changes to the terms and conditions of this request for proposals may be cause for rejection of the proposal. Proposals submitted without required forms may be rejected.



WITHDRAWAL OF PROPOSALS

Proposers may withdraw their proposal by written request at any time prior to the due date set for receiving proposals.

PRICES HONORED

The proposer must honor their quote for a period of ninety (90) days after the RFP due date.

The prices established from this RFP may be extended to other political subdivisions within the State of Montana solely at the vendor's discretion.

CERTIFICATION

The proposer certifies that the proposal has been arrived at independently and has been submitted without any collusion designed to limit competition. The proposer further certifies that the materials, products, services and/or goods offered herein meet all requirements of the stated specifications and are equal in quality, value and performance with highest quality, nationally advertised brand and/or trade names.

LICENSING

The successful proposer will be required to purchase a City business license and complete the new vendor forms in order to be eligible for payment.

INSURANCE REQUIREMENTS

Specific Insurance Requirements for Cyber/Data Information Security:

The successful Proposer shall purchase and maintain cyber/information security insurance coverage with combined single limits for each wrongful act of \$2,000,000 per occurrence to cover the unauthorized acquisition of personal information such as social security numbers, credit card numbers, financial account information, or other information that uniquely identifies an individual and may be of a sensitive nature in accordance with §2-6-1501, MCA through §2-6-1503, MCA.

If the Proposer maintains higher limits than the minimums shown above, the City requires and shall be entitled to coverage for the higher limits maintained by the Proposer. Any available insurance proceeds in excess of the specified minimum limits of insurance and coverage shall be available to the City.

Such insurance must cover, at a minimum, privacy notification costs, credit monitoring, forensics investigations, legal fees/costs, regulatory fines and penalties, and third party liability settlements or judgements as may be caused by any act, omission, or negligence of the Proposer's officers, agents, representatives, assigns or subcontractors.

Note: If occurrence coverage is unavailable or cost-prohibitive, the City will accept 'claims made' coverage providing the following conditions are met:

1. The retroactive date must be shown, and must be before the date of the contract or the beginning of contract work;
2. Insurance must be maintained and evidence of insurance must be provided for at least three (3) years after completion of the contract of work; and,
3. If coverage is canceled or non-renewed, and not replaced with another claims-made policy form with a retroactive date prior to the contract effective date, the Proposer must



purchase “extended reporting” coverage for a minimum of three (3) years after completion of work.

SYSTEM SECURITY

Proposer shall ensure systems delivered are adequately secure. For purposes of this RFP, adequate security is defined to require compliance with federal and State of Montana security requirements and to ensure freedom from those conditions that may impair the City’s use of its data and information technology or permit unauthorized access to the City’s data or information technology.

The City has established control standards and policies that align with the NIST Cybersecurity Framework. The latest revision of NIST SP 800-53 is used for control adherence evaluation established after developing a security categorization utilizing FIPS PUB 199. Thus, Proposer shall provide reasonable proof, through independent audit reports, **security scans of operating systems, code or the technology environment provided**; that the proposed system meets or exceeds federal and State of Montana security requirements to ensure adequate security and privacy, confidentiality, integrity, and availability of the City’s data and information technology.

Annual assurance statements shall be delivered to the Contract Liaison. Annual assurance statements must contain a detailed accounting of the security controls provided and must be in the form of a NIST Security Assessment Report or FedRAMP Security Assessment Report.

Prohibited Activities and Spoofing

Licensor and its officers, employees, agents, subcontractors, and affiliated users, shall not violate or attempt to violate the security of the City or State of Montana’s network or interfere or attempt to interfere with the systems, networks, authentication measures, servers or equipment, or with the use of or access to the network by any other user. Such prohibited activity includes (i) accessing or logging into a server where access is not authorized; (ii) unauthorized probing, scanning, or testing the security or vulnerability of the City or State’s network or other systems; and (iii) attempting to portray itself as the City or State or an affiliate of the City or State or otherwise attempting to gain access, without authorization, via the network or systems to any account or information technology resource not belonging to Proposer or its officers, employees, agents, subcontractors, and affiliated users. Proposer shall not perform unauthorized spoofing or scanning of any kind, including user account identity. Systems shall not spoof the billings.mt.gov or mt.gov domains or engage in Email Spoofing. Email spoofing is the creation of email messages with a forged sender address. For example, Email spoofing includes creating or sending emails using the City or State’s domain.

DISPOSITION OF PROPOSALS

All materials submitted in response to this RFP become public records under Article II, Section 9 of the Montana Constitution and §§ 2-6-102 and 7-1-4144, MCA and may be distributed by written request pursuant to Montana’s Constitutional Right to Know or Public Records Acts.

Information provided in response to this RFP will be held in confidence and will not be revealed or discussed with competitors prior to award of Contract by Council. However, one copy of each proposal submitted shall be retained for the official files of the Department and will become public record after award of the Contract. Fee or Price schedules submitted, but not reviewed by the City, do not become a public record and shall only be retained for official files.



Records and materials that are constitutionally protected from disclosure are not subject to the provisions of this section.

The Proposer understands that, if selected, the City reserves the right to provide its opinion publicly and privately regarding the Proposer's performance.

QUESTIONS

Questions regarding the Request for Proposals contents must be sent to the contact person listed in Section 1 no later than 5 business days prior to due date for proposals. The City will make every effort to provide a written response within 2 business days. Whenever responses to inquiries would constitute a modification or addition to the original RFP, the reply will be made in the form of an addendum to the Request for Proposals, a copy of which will be posted on the City's website and forwarded to all Suppliers who have submitted an "Intent to Respond" form (Attachment E).

Supplier must submit their questions via email using the "Master Q & A" form found in **Attachment D**, and provide, at a minimum, the following:

- Supplier's name, requester, and appropriate contact information.
- The question, clearly stated.
- Specific reference to the applicable Request for Proposals section(s).

RFP Response Submission

Upon the submission of the RFP response, the supplier acknowledges that all information is accurate and complete.

- All proposals must be emailed to contact person listed in Section 1.
- Pricing must be emailed under separate cover with "Cemetery RFP Confidential Pricing" as the subject line.

Section 4: RFP Evaluation and Selection Processes

Initial Evaluation

Proposals received will undergo an initial review to determine:

- Compliance with instructions stated in the RFP
- Compliance with proposal submittal date

Phase II Evaluation

The evaluation of supplier's proposals may include, but is not limited to, the following criteria:

- Experience of Supplier with goods/services required by the City
- Capacity to assume new business
- Perceived ability to meet the City requirements
- Total Cost Competitiveness
- Availability (timetable) for providing goods and/or services
- Breadth of services available

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- Company's stability
- Ongoing support
- Reporting capability
- Quality Control Process
- Process Improvements
- Training
- Compliance with the City Terms and Conditions
- Price

The City reserves the right to conduct interviews with all or some of the Proposers at any point during the evaluation process. However, the City may determine that interviews are not necessary. In the event interviews are conducted, information provided during the interview process shall be taken into consideration when evaluating firms using the above-stated criteria.

The City also reserves the right to make such additional investigation as it deems necessary to establish the competence and financial stability of any firm submitting a proposal.

Section 5: Scope of Work

Below is information and a general outline of the anticipated scope of work. However, the final scope of work will be negotiated with the successful proposer.

OVERVIEW:

The City is seeking a Cemetery Management Software System that will allow us the following:

- Reduce data and process redundancy
- Safeguard vital records using digital technology
- Provide multiple departmental users on or off-site access to cemetery records
- Provide the public with a mobile and user-friendly interface to locate graves and conduct online burial searches
- Track and manage cemetery inventory in real-time

BACKGROUND:

The City's Cemetery Division (Cemetery) manages the 65 acre Mountview Cemetery. Mountview is the oldest and largest continually operated cemetery in the region. The Cemetery has over 25,000 recorded interments and approximately 3,800 unsold burial spaces/niches. The Cemetery includes a historic mausoleum with crypts and urn niches. Additionally, the Cemetery houses two columbaria. Mountview staff facilitate around 100 burials annually. Furthermore, staff manages all the records related to grave sales, burials, deeds, burial assignments and monument permits.

The Cemetery currently tracks records on paper maps, paper ledgers, carbon copy paper receipts (cash/checks), electronic receipts (credit/debit payments), paper electronic interment slips, and an AS/400 database. Staff enters interment information to an external county grave index. The Cemetery Supervisor uses calendar invites as a modified work order system to schedule burials and maintenance work. Financial transactions are recorded in the aforementioned records and then reentered into the City's financial system (Innoprise). There is a separate financial tool (Converge) to process credit/debit payments. These transactions are



also re-recorded in Innoprise. The Cemetery Supervisor manually creates deeds and monument permits. Depending on the transaction, data is often duplicated up to nine (9) times.

Statistical reports are tracked manually through excel spreadsheets. There is no integration between the cemetery records and the City's geographic information system (GIS) mapping. Ultimately, the goal of the new Cemetery Management Software would be to streamline these processes and eliminate redundancy.

SCOPE OF WORK:

Successful proposers shall provide a Cemetery Management Software solution that includes the following services listed below. These services can be offered in a phased approach.

Please provide us with information about how your proposed solution addresses each of the following:

Financial/Business:

- Tracking of lot/niche sales (with variable price structures based on location and type)
- Generate sales contracts and deeds/certificate of ownership, with date of sale, cost, section/lot/grave, name address and telephone number
- Provide reporting capability on the number of sales and location of sales
- Generate printable PDF copies of documents such as invoices, receipts, and contracts
- Ability to accept partial payments
- Ability to generate billing statements including customer info and grave/niche location
- Ability to generate reports listing vacant and for sale graves
- Ability to generate monument permits

Record Management:

- Advanced search capability for all cemetery records by last name, first name, date of death, date of birth, section number, lot number
- Ability to record notes on all cemetery records
- Ability to attach digital documents and photos to all cemetery records
- Allow searching by partial match
- Interment reporting by name, year, location
- Owner reporting including current and historical
- Ability to track changes to lot ownership in real-time
- Ability to transfer lot ownership
- Ability to track and search ownership by individuals of multiple lots

Operational:



- Scheduling and tracking of activities through internal and external calendars (i.e. interment orders, maintenance, monument inspections)
- Lot card showing layout, burial information, and ownership information on a single page
- Burial calendar with ability to display schedule by day, week and month

GIS:

- Mapping of cemetery (must integrate with ESRI ArcGIS)
- Ability to print detailed maps of cemetery and lots
- Ability to map structures to include, but not limited to monuments, trees, above ground crypts, roads

Customer Service:

- Public facing mobile-friendly web-based tools for searching gravesite records and locations, by date of birth, date of death, first name, last name, section number, lot number
- Mobile navigation to any gravesite

Technical:

- Relational database with graphical user interface
- Data migration
- Simultaneous access, multi-user environment with user/group based permissions
- Cloud-based software
- Strong password support requiring unique passwords
- Audit trail logging and reporting
- Field access for staff via mobile device
- Ability to export information using the ascii/delimited or CSV format
- Proven implementation methodology
- Ability to export data at scheduled times to a county interment database

QUESTIONS:

- What does the data migration process look like?
- Is your system designed to be locally hosted or cloud hosted?
- If cloud hosted, does the proposed solution include backups at a secondary/remote location?
- If locally hosted, please provide details on how many servers will be required (application, SQL Server, DMZ Web server, etc), recommended configurations, required Microsoft and/or other licenses.

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- Does your software require an installed client/app or is it browser-based?
- Tell us how your system integrates with ESRI/GIS?
- What kind of staff training do you provide?
- What standard printable PDF forms are included with your system? Does it have the ability to make custom forms?
- Does your system have the ability track headstones and their placement on graves?
- Does your system have an A/R component? If so, does it integrate with other accounting software?

PRICING:

- **Pricing must be completed on “Attachment B” and must be delivered under separate email cover with “Cemetery Management Software RFP Confidential Pricing” as the subject line.**
- **Do NOT include pricing in any other part of your RFP response.**



ATTACHMENT A

VALIDATION QUESTIONS FOR SUPPLIER

GENERAL INFORMATION

- 1) Company Name
Address:
Contact Name:
Contact Phone:
Contact Email:
Website/URL:
- 2) How many facilities/locations do you have in the U.S? Please list.
- 3) How many years has your company been doing business under this name?
- 4) Total Full-Time Employees.
- 5) What are your standard payment terms?
- 6) References - Please attach a Word® document with all contact information for at least the following three references:
 - a) New Company (started doing business with them in the past 12 months)
 - b) Retained Company (have been doing business with them for 3 + years)
 - c) Former Company (contract terminated in the past 2 years)
- 7) Can you provide meet the City's insurance requirements?

FUNCTIONALITY

- 1) A certificate of insurance must be provided prior to signing the contract, commencing on the day contract begins. Are you willing to comply with these requirements?
- 2) You must instruct your insurance broker/carrier to notify the City should your coverage change. Are you willing to do this?
- 3) The successful proposer will be required to purchase a City business license and complete the new vendor forms in order to be eligible for payment. Are you willing to do this?

QUALITY AND SERVICE

- 1) Do you have a quality assurance program? If yes, please attach a copy.
- 2) Are your employees required to take a mandatory drug test?

LEGAL ISSUES

- 1) Are there any pending lawsuits against your company? If yes, please explain.



ATTACHMENT B

PRICE MATRIX

(to be emailed under separate cover)

<u>Cemetery Management Software</u>	<u>Price</u>
<u>Up-front costs - description</u>	
Total	

<u>Cemetery Management Software</u>	<u>Price</u>
<u>Ongoing costs - description</u>	
Total	

Please provide pricing that addresses all upfront and on-going expenses associated with the proposed solution. Provide pricing details on all proposed & optional hardware, software, licensing, security, backups, and hosting fees.

I/We acknowledge _____ addendum.

#

Company Name

Date

Contact Name (please print)

Title

Signature of Contact Position

By signing the above, I certify that I am authorized by the Company named above to respond to this request.



ATTACHMENT C

CONDITIONS AND NON-COLLUSION FORM

To receive consideration, this form must be signed in full by a responsible, authorized agent, officer, employee or representative of your firm.

CONDITIONS AND NON-COLLUSION AGREEMENT

We have read and agree to the conditions and stipulations contained herein and to the Standard Terms and Conditions contained on the attached.

We further agree to furnish the services specified at the prices stated herein, to be delivered to the location and on that date set forth herein.

In signing this proposal, you also certify that you have not, either directly or indirectly, entered into any agreement or participated in any collusion or otherwise taken any action in restraint of free competition; that no attempt has been made to induce any other person or firm to submit or not to submit a proposal; that this proposal has been independently arrived at without collusion with any other proposer, competitor or potential competitor; that this proposal has not been knowingly disclosed prior to the due date and time to any other proposer or competitor; that the above statement is accurate under penalty of perjury.

Legal Name of Firm/Corporation

Authorized Signature

Address

Printed Name

City/State/Zip

Title

Date

Telephone Number

By signing the above, I certify that I am authorized by the Company named above to respond to this request.



ATTACHMENT D

MASTER Q & A FORM

PROJECT: Cemetery Management Software

Master Q&A	Any questions regarding this Request for Proposals should be submitted according to the process outlined below. The City will make every effort to answer within two (2) days of receiving the questions.
Q&A Process	<ol style="list-style-type: none">1. Prepare questions or concerns on the template provided.2. Complete the table in full, providing a date for each question and a section of the RFP to reference (if applicable).3. Submit the completed form via email to kampal@billingsmt.gov. Attach associated documents as necessary. <p>Please contact Liz Kampa with any questions regarding this process.</p>

Questions from: _____ Company: _____

Email Address: _____

#	Date	Reference Section	Question or Comment	City Response
1				
2				
3				
4				

