

City of Sedro-Woolley
325 Metcalf Street
Sedro-Woolley, WA 98284
(360) 855-1661
(360) 855-0707 Fax

REQUEST FOR PROPOSAL CEMETERY SOFTWARE

The City of Sedro-Woolley is seeking a vendor for Cemetery Software, Consulting, and project administration. This partnership will work with City staff to plan, configure and deploy Cemetery Software and migrate existing content from our existing site, set up new functionality and create efficiencies.

Proposals may be submitted by E-mail in Microsoft Word or PDF format. E-mail submittals shall be e-mailed to: it.specialist@ci.sedro-woolley.wa.us If submitting hard copy proposals, they shall be received at the City of Sedro-Woolley, ATTN: Cemetery Software RFP 325 Metcalf Street, Sedro-Woolley, WA 98284.

**Proposals will be received before 3:00 p.m. (PST), April 2, 2021
and referenced as Cemetery Software RFP.**

The City of Sedro-Woolley encourages all disadvantaged business enterprises to submit proposals in response to all requests for proposals. The City assures that no Person shall on the grounds of race, color, national origin, sex, age, disability, income, or Limited English Proficiency (LEP) as provided by Title VI of the Civil Right Act of 1964, Title II of the American with Disabilities Act of 1990, and related Nondiscrimination authorities, be excluded from participation in, be denied the benefits of, or be otherwise subjected to discrimination under a City of Sedro-Woolley sponsored program or activity. The City of Sedro-Woolley assures every effort will be made to ensure non-discrimination in all of its programs and activities, whether those programs and activities are federally funded or not.

Questions concerning the scope of the project, bid submittal or process should be directed to: Glen Gardner at (360) 855-1661 or it.specialist@ci.sedro-woolley.wa.us

A copy of the Proposal may be obtained at:

https://www.ci.sedro-woolley.wa.us/resources/bids_and_awards/index.php

The City of Sedro-Woolley is subject to public information laws, which permit access to most records and documents. Proprietary information in your response must be clearly identified and will be protected to the extent legally permissible. Proposals may not be marked 'Proprietary' in their entirety. Information considered proprietary is limited to material treated as confidential in the normal conduct of business, trade secrets,

discount information, and individual product or service pricing. Summary price information may not be designated as proprietary as such information may be carried forward into other public documents. All provisions of any contract resulting from this request for proposal will be public information.

Sales Prohibited/Conflict of Interest: No officer, employee, or member of City Council, shall have a financial interest in the sale to the City of any real or personal property, equipment, material, supplies or services where such officer or employee exercises directly or indirectly any decision-making authority concerning such sale or any supervisory authority over the services to be rendered. This rule also applies to subcontracts with the City. Soliciting or accepting any gift, gratuity favor, entertainment, kickback or any items of monetary value from any person who has or is seeking to do business with the City of Sedro-Woolley is prohibited.

Collusive or sham proposals: Any proposal deemed to be collusive or a sham proposal will be rejected and reported to authorities as such. Your authorized signature of this proposal assures that such proposal is genuine and is not a collusive or sham proposal. The City of Sedro-Woolley reserves the right to reject any and all proposals and to waive any irregularities or informalities.

Cooperative Purchase: The City of Sedro-Woolley has entered into intergovernmental (Interlocal) purchasing agreements pursuant to RCW 39.34 with other Washington agencies under which either party may make purchases at the other party's accepted bid price. By submitting this offer to City of Sedro-Woolley, the Contractor agrees to make the same bid terms and price, exclusive of freight, available to other Washington governmental agencies. The City of Sedro-Woolley will in no way whatsoever incur any liability in relation to specifications, delivery, payment, or any other aspect of these purchases.

REQUEST FOR PROPOSAL

Cemetery Software

I. GENERAL DESCRIPTION

The City of Sedro-Woolley (City) is seeking a vendor for Cemetery Software, Consulting, and project administration. This partnership will work with City staff to plan, configure and deploy Cemetery Software and migrate existing content from our existing site, set up new functionality and create efficiencies. Once implemented, the consultant will troubleshoot issues with the implementation. Companies selected by the City may also serve in an advisory/consultative role for future related projects.

II. BACKGROUND

The Public Works - Cemetery Division includes two municipal cemeteries with over 20,000 spaces, performing 75-100 burials annually. The City's Cemetery Division keeps records of all the people buried in the cemetery, ownership, and other information specific to managing the cemetery. Our goal is to obtain a software program that will allow employees to easily input information into a database and provide a simple interface for retrieving the information through canned reporting.

The City's Public Works Department, in partnership with the Information Technology (IT) Department is looking for creative proposals for flexible pricing models that can provide the necessary application consulting support. In addition, ***the City of Sedro-Woolley allows other Public Agencies the opportunity to purchase off the Award for this Bid, at the option of the Awarded Vendor(s).*** Other public agencies may contact the awarded vendor(s) with a desire to piggyback on the resulting contracts as a cooperative user. The originating public agency does not accept responsibility or liability for the performance of the Awarded Vendor(s).

Current Environment

The current cemetery management application was originally developed on paper, then manually added to ASP system. The application is used to track spaces/plots, customers, contracts, interment information and payments, with no direct integration with the city's financial /accounting system or electronic payment processing, and GIS/mapping. The original database developer is no longer available and no documentation is available.

III. SCOPE OF WORK

The City of Sedro-Woolley (City) is in need of a Cemetery Software architect/developer who can assess the current business processes and recommend a solution and design that will meet the cemetery department's needs. This work is to be completed as soon as possible and, depending on need, can be conducted on-site or remotely. The following list is intended to define the scope of services that are most likely to be requested during the length of the contract. There could be other, Cemetery Software/Applications services required.

Required Services/Deliverables:

- 1) We currently are seeking software/application which is capable of integrating with existing internal systems i.e. Spring Brook (finance and accounting), GIS mapping, and provide integrated electronic payment processing that meets all current standards. Integration with internal systems will ensure that no double entry of data occurs.
- 2) Relational database with graphical user interface.
- 3) Simultaneous access, multi-user environment with user/group based permissions.
- 4) Strong-password support with forced password rotation, requiring unique passwords.

- 5) Audit trail logging and reporting. Must log financial functions as well as changes to transactions.
- 6) Provide geographic mapping features that will provide a higher level of service to the citizens. An option for a kiosk at each location is desirable but not required. Indicate in your proposal whether or not you can provide this optional feature; if Yes, at what additional cost. Third-party integration is acceptable.
- 7) Ability to export information using the ascii/delimited or csv format.
- 8) Payment receipts must be printable or able to be e-mailed using the Outlook client or SMTP. Receipts shall be in the PDF format. Each credit card transaction should provide an authorization receipt and a customer copy. Credit card numbers must be masked, displaying only the last four digits of the credit card number.
- 9) Must be able to accept partial payments. Unpaid balances shall be applied to the customer account where the system can report using the aging method.
- 10) The ability to produce billing statements. Statements should be formatted for window style envelopes with an option to e-mail using the Windows Operating system default client.
- 11) Ability to handle different types of taxes and must produce a tax report.
- 12) Credit card settlement report capabilities.
- 13) Envelopes, labels and letter capability, which is capable of providing form letters and mailing labels functionality utilizing Avery label definitions.
- 14) Mapping requirements include not only physical layout of the cemeteries but also grave spaces and any utilities located within the cemeteries, including irrigation lines, valves and controls.
- 15) The ability to attach digital photos to a customer record.
- 16) The following specific reports and functions must be included in the base product:
 - a. Interment report - - alpha (Name), by year, by section.
 - b. Owner report - current; and history of ownership beyond just last owner.
 - c. Graves for sale report - both cemetery locations, and by sections in each.
 - d. Receipts - No Rights of Interment or Interment Services needed for contract payments, foundation orders, misc.
 - e. Transactions - full pay and 2-year contracts.
 - f. Contract payment coupons.
 - g. Interment listings by select last name.
 - h. Owners listings by last name.
 - i. Ability to Include obituary in customer record.
 - j. Ability to include monument/marker pictures in customer record.
 - k. Lot cards - ability to change; print copies of layout, burial information, and ownership notes on a single sheet of paper.
 - l. Section Maps - ability to change or modify.
 - m. Reservations – generate map for crew, and all forms needing signatures of family.
 - n. Request for attention form - and response information.
 - o. Weekly deposit recap report
 - p. Transfer forms - regular and affidavit.
 - q. Listing agreement.
 - r. 60-day hold form - program must generate letter before time expires.
 - s. Historical Contacts - each space, reports based on recent contacts for future space reclamation.
 - t. Ability to add/create spaces – i.e. additional cremains; new columbarium/cremains gardens; new developed/laid out sections at cemetery.
- 17) Online Help with context sensitive capabilities.

- 18) Database conversion options must be included in your proposal.
- 19) Maintenance plans must be included in your proposal. Should be on an annual basis.
- 20) The software shall run on a Microsoft Windows 10 operating system.
- 21) The software shall support all Windows based printers, local or networked.
- 22) User and management reference guides shall be provided at the time the software is delivered.
- 23) Upon delivery a copy of license agreement must be provided for submittal to the City's software licensing team.
- 24) Integrated credit card processing is desirable.

Users

- Total – (4) four users, with internet (web) access for customer inquiries
- Concurrent – 4

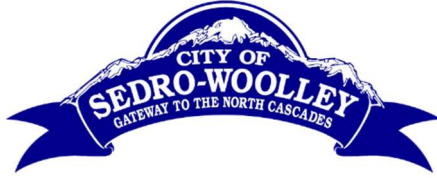
IV. PROPOSAL SUBMITTAL REQUIREMENTS:

The City of Sedro-Woolley shall not reimburse any firm for costs incurred in the preparation and presentation of their proposal. In order to simplify the review process and maximize the degree of comparative analysis, the RFP Response should be organized in the following manner:

1. **Methods and Approach:** Describe your expected or recommended approach, including a clear and detailed description of your proposed “system cutover strategy” (i.e., implementation strategy). Describe the anticipated interaction with the City. Provide an outline of your anticipated schedule for completing consultant implementation tasks including an implementation timeline.
2. **Deliverables:** Given the list above under **Required Services/Deliverables**, provide us with your plan to achieve them.
3. **Qualifications and Experience:** Provide relevant information regarding previous experience related to this or similar Projects, to include the following (***Please limit this to a maximum of two pages***):
 - Brief Company History including time in business
 - Experience in Cemetery Software development, installation, set-up and configuration
 - Minimum of three years’ experience working with Cemetery Software implementation and design.
 - Minimum of three similar projects that demonstrate experience in an organization
 - that successfully implemented or started a Cemetery Software Deployment in a
 - contract of a year or more in the last 2 years. Name, address, and phone number
 - of agency contact overseeing the planning effort.
4. **List of Project Personnel:** This list should include the identification of the contact person with primary responsibility for this contract, the personnel proposed for this contract, and any supervisory personnel, including partners and/or sub consultants, and their individual areas of responsibility. A resume for each professional and technical person assigned to the contract, including partners and/or sub consultants, shall be submitted. The résumés shall include at least three references from previous assignments.
5. **Organization Chart/Proposed Project Team:** An organization chart containing the names of all key personnel and sub consultants with titles and their specific task assignment for this

contract shall be provided in this section. **NOTE: Any Personnel Changes within the awarded Contract will need to be approved by the City of Sedro-Woolley.**

6. Availability: Describe the availability of project personnel to participate in this project in the context of the consultant firm's other commitments.
7. Estimated Hours by Task: Provide estimated hours for each proposed or optional task, including the time required for meetings, conference calls, etc.
8. Schedule of Rates and Cost by Task: Provide a schedule of billing rates by category of employee to be used during the term of the contract, and an anticipated cost of each task identified in the section **Required Services/Deliverables** or for tasks that are recommended as part of this planning effort. All direct costs (i.e., travel, printing, postage, etc.) specifically attributed to the project and not included in the billing rates must be identified.
9. Demonstration Process: Selected contractors should be prepared to provide an online demonstration of their product (if requested by the city staff), the demonstration process will be scheduled in 2 hour blocks. All required reporting requirements will be reviewed along with day to day functionality. In the event your firm is selected to proceed to an oral interview/online demo phase; please indicate your availability to participate the week of April 5, 2021 as part of your proposal. Selected vendors can choose to do this remotely; travel onsite to Sedro-Woolley would be at vendor's option.



Vendor Statement:

I have read and understand the specifications and requirements for this bid and I agree to comply with such specifications and requirements. I further agree that the method of award is acceptable to my company.

NOTE: VENDOR STATEMENT IS TO BE SIGNED & RETURNED WITH YOUR PROPOSAL.

FIRM NAME: _____

ADDRESS: _____

EMAIL ADDRESS: _____

UBI #: _____

PHONE: _____

BIDDER'S NAME: _____

SIGNATURE: _____

PRIMARY SERVICE ISSUES CONTACT: _____

TELEPHONE: _____ **FAX:** _____

EMAIL: _____

CELL: _____ **EMERGENCY:** _____

Award and Contract Process

1. The City reserves the right to award directly as a result of the written proposals. The City may or may not opt to conduct oral interviews/online demos.
2. The selected Contractor shall be expected to sign the City's standard Services Agreement prior to commencing Services
3. The City reserves the right to negotiate with any vendor as meets the needs of the City. The City reserves the right to reject any or all proposals, and to waive any irregularities.