

REQUEST FOR PROPOSALS

CEMETERY MANAGEMENT SOFTWARE



Coachella Valley Public Cemetery District

82925 Avenue 52

Coachella, California 92236

(760) 398-3211

RFP Issue Date: July 16, 2026

Proposal Deadline: August 21, 2026

NOTICE INVITING PROPOSALS

The Coachella Valley Public Cemetery District (“District”) is requesting proposals from qualified firms to provide a comprehensive cemetery management software system. The District is seeking a modern and scalable system capable of supporting its cemetery records, customer relationships, contracts, payments, scheduling, work orders, reporting, and related operational needs.

The District does not intend to prescribe a specific system design or require an exhaustive list of individual functions. Proposers are instead asked to present the capabilities of their software, explain why it is a good fit for the District, identify any limitations or required third-party services, and provide complete implementation and ongoing pricing.

The District may invite selected proposers to participate in an interview and software demonstration before making a final selection.

I. DISTRICT BACKGROUND

The Coachella Valley Public Cemetery District was formed in 1927 under the California Health and Safety Code. The District encompasses approximately 3,450 square miles and operates the Coachella Valley Public Cemetery at 82925 Avenue 52 in Coachella, California.

The District property consists of approximately 60 acres, of which approximately 29 acres are currently developed. The District maintains records for more than 24,000 interments and more than 15,000 grave markers and performs approximately 500 interments annually.

The District is governed by a five-member Board of Trustees appointed by the Riverside County Board of Supervisors.

II. CURRENT OPERATING ENVIRONMENT

The District currently uses a proprietary cemetery management software system for which it pays an annual subscription fee. Over the past five years, the District has invested substantially in customizations and upgrades intended to adapt the system to the District’s size and operational requirements. Despite those investments, the District continues to experience certain limitations and reduced operational flexibility. The District recognizes that some of these limitations may be common among cemetery management systems currently available in the public cemetery market. Nevertheless, the District has chosen to

evaluate available alternatives to determine whether another system may better meet its operational needs.

The selected system will need to support the migration of existing District records and information from our existing CRM and any other applicable sources.

III. DESIRED SOFTWARE

The District is seeking a cemetery management platform that can support its current operations and future growth. The District is interested in understanding the full range of functions offered by each proposer, which may include:

- Cemetery, decedent, ownership, property, and interment records
- Customer and family relationship management
- Contracts, payments, payment plans, and financial reporting
- Scheduling and cemetery-specific work orders
- Cemetery mapping and property inventory
- Document and image storage
- Reports, dashboards, and data exports
- Online or public-facing services
- Mobile access for field employees
- Integrations with payment processors, accounting systems, email, calendars, websites, and other platforms
- Data migration, implementation, training, and ongoing technical support

This list is provided for general guidance only. The District recognizes that software products differ and does not require every proposer to provide every possible function.

Proposers should present the features included in their standard system, available optional modules, available integrations, customization options, and any known limitations. Any required third-party service or exclusive payment-processing arrangement must be clearly disclosed.

IV. PROPOSAL REQUIREMENTS

Proposals should include the following information:

A. Company and Product Information

Provide a brief description of the company, years in business, cemetery-industry specific experience, and the proposed software system.

Describe the system's principal features, available modules, integrations, hosting environment, mobile capabilities, reporting functions, payment-processing options, work-order capabilities, mapping services, and customer-support structure.

Proposers are encouraged to identify any additional capabilities that may benefit the District, even when those functions are not specifically referenced in this RFP.

B. Implementation and Data Migration

Describe the proposed implementation process, anticipated timeline, data-migration approach, staff-training program, and support provided during and following implementation.

Identify the responsibilities of the proposer, the District, and any third-party provider.

C. References

Provide at least three references from cemetery organizations that currently use the proposed system. References from California public cemetery districts are preferred. When three public cemetery district references are not available, proposers may provide references from other municipal, nonprofit, or private cemeteries.

Each reference should include the organization name, contact person, telephone number, email address, implementation date, and a brief description of the services provided.

D. Pricing

Provide complete pricing for the proposed system, including:

- Implementation and setup
- Data migration
- Training
- Software licenses or subscriptions
- Annual recurring costs

- Optional modules or services
- Customization
- Integrations
- Payment-processing costs
- Technical support
- Data storage
- Data extraction or conversion at the end of the contract

Proposers must provide a total implementation cost, annual recurring cost, and estimated five-year total cost.

All assumptions, exclusions, usage limits, transaction fees, and potential additional charges must be clearly identified.

V. SOFTWARE PRESENTATION

The District may invite selected proposers to participate in a one-on-one interview and software demonstration. The presentation should provide an overview of the proposed system and demonstrate how it could support the District's cemetery operations, including customer records, contracts, payments, scheduling, work orders, mapping, reporting, and field activities.

The District may request follow-up information, revised pricing, or additional demonstrations as part of the evaluation process.

Functions presented during a demonstration that are not included in the proposer's pricing must be clearly identified.

VI. EVALUATION

The District may consider the following when evaluating proposals:

- Overall suitability for District operations
- Cemetery-industry experience
- Software capabilities and ease of use

- Scalability and flexibility
- Payment-processing and integration options
- Work-order capabilities
- Data-migration and implementation approach
- Training and technical support
- Initial and ongoing costs

The District is not required to select the lowest-priced proposal. The District will select the proposal that offers the best overall value to the District

VII. PROPOSAL SUBMITTAL

Proposals shall be submitted electronically to:

Joshua Bonner, General Manager
josh.bonner@cvmcd.org

The email subject line should state:

“Cemetery Management Software Proposal”

Proposals must be received no later than 5:00 p.m. on August 21, 2026.

The sender must request confirmation of receipt. If confirmation is not received within 24 hours, or before the submission deadline, the sender should contact the District at (760) 398-3221 and ask for verbal confirmation.

Late proposals will not be accepted. The District is not responsible for transmission failures, delivery delays, misdirected submissions, file-access issues, or other technical problems that prevent a proposal from being received by the submission deadline.

VIII. PROCUREMENT SCHEDULE

Activity:

Date:

RFP issued:

July 16, 2026

Deadline for questions:

August 7, 2026

Responses to questions posted:	August 12, 2026
Proposals due:	August 21, 2026 @ 5:00 p.m.
Proposal review:	August 24 through September 3, 2026
Notice of intent to award:	September 4, 2026
Board consideration:	September 11, 2026

The District may modify this schedule based on operational needs.

IX. DISTRICT RIGHTS

The District reserves the right to reject any or all proposals, waive minor irregularities, request clarification or additional information, conduct interviews and demonstrations, negotiate pricing and contract terms, request revised proposals, or cancel this RFP.

Issuance of this RFP does not obligate the District to award a contract or reimburse any proposer for costs incurred in preparing a proposal.