

Responses to Clarification Questions on 2026 RFP

1. Who are we migrating data from? Single source?

The District's current cemetery management software is CemSites. The majority of the District's cemetery records are maintained within this system.

2. What data will be migrated from said source? Records? Deeds? Plot Locations? Contracts? Memorials? Images?

The District anticipates migrating cemetery records maintained within the current system, including decedent/interment records, ownership and lot information, plot locations, contracts, and available memorial information and images. The specific data fields and information available for migration will be further determined upon selection of a CRM system, in accordance with that system's capabilities and features.

3. For the data migrated, is any of that data outside of the source?

Possibly. The District has historical paper records, including approximately 14 bound record books and approximately 35,000 Owner and Lot index cards. The District also has physical records and documentation that may need to be considered as part of the overall migration/digitization process. In addition, digital work orders and other cemetery-related work reside in a system called "MaintainX." Depending on the functionality of the selected CRM system, there may be other opportunities to migrate additional data.

4. How many users will you have on the system? What are their roles? Will every user need complete access or partial access (e.g., grounds crew)?

The District anticipates approximately 6 to 11 users, including administrative/office, management, and maintenance/grounds staff. Access levels would vary by role. Administrative and management staff would require broader access, while maintenance/grounds staff would primarily need information necessary to perform their duties.

5. For the public-facing side, will you want customers to have the ability to make payments?

Yes. The District would like the public-facing system to provide customers with the ability to make payments online, if this functionality is available.

6. Will you want to sell products online, for example, memorial trees (to be planted elsewhere) or flower delivery?

At this time, the District is primarily interested in cemetery-related services and products. However, the District may select a new CRM based on future capabilities and options, so we encourage proposers to identify all available capabilities and features.

7. What is your current financial accounting system and will you want integration?

The District currently uses QuickBooks Desktop and plans to migrate to QuickBooks Online in 2026. Yes, the District wants integration with its financial accounting system and considers this an important CRM capability.

8. How many niches and crypts in total do you have?

The District currently has approximately 1,852 niches and does not have any crypts.

9. Grave markers. The RFP notes the District maintains records for more than 15,000 grave markers. Could the District confirm how that figure is derived — for example, whether it counts standing monuments only, or also includes flat/flush markers and cremation plaques? An approximate count of physical markers on the ground would help us size any on-site work accurately.

The District maintains photographs of the memorials associated with decedent records, including standing monuments, flat headstones, and bronze headstones. These photographs are uploaded to the corresponding decedent's file. The District also maintains physical cards for grave locations, which have been uploaded to the respective decedent files. The figure of approximately 15,000 represents the District's approximate count of these memorials.

10. Site area. The RFP describes approximately 60 acres of District property, of which approximately 29 acres are currently developed. Should proposals price mapping and survey work against the developed acreage only, or against the full parcel including ground held for future development?

The District would like proposers to provide pricing for the approximately 29 developed acres. While the District does have land reserved for future use, there is no set timetable for when that land will be utilized. Restricting quotes to the currently developed acreage will allow for consistent pricing comparisons among proposals. That said, if a proposer believes that pricing for future development would provide a strategic advantage, they are encouraged to provide future “expansion” pricing.

11. Interment volume. The RFP cites approximately 500 interments annually. Is that the figure the District would like used as the basis for licence pricing, and does the District anticipate that rate changing materially over the next five years?

The figure of approximately 500 interments annually is provided as a general estimate for prospective proposers. For a more accurate accounting of the District’s annual volume, please use the link provided and refer to page 13 of the 2025–2026 Budget Book.

<https://www.coachellavalleycemeterydistrict.gov/files/93eafff38/2025-2026+Budget+Book.pdf>

12. Paper records. The District has previously raised the digitization of older record books and index cards for lots, owners and decedents. To price that accurately we would need an approximate volume — the number of bound books and total pages, and an approximate count of index cards. If samples or photographs are available, those would be helpful.

The District currently has 14 bound record books, with approximately 130–200 pages per book. The index cards consist of a combination of Owner and Lot cards, with an estimated total of approximately 35,000 cards. Please note that pricing for scanning, copying, or other manual labor anticipated as part of this project should be clearly delineated from other pricing in the proposal. Depending on pricing, the District may choose to decline this option or perform a portion of the work internally.

See pictures below:



13. Data extraction from the current system. Can the District confirm it is able to obtain a complete export of its interment and ownership records, and its existing map/GIS layer, in an open format such as CSV or Excel? Are there any contractual restrictions, notice periods or fees associated with extracting that data from the current provider?

There are no known restrictions or costs associated with extracting the data. Should fees arise from the existing vendor, the District would bear those costs.

14. Scope options. The RFP asks for a total implementation cost, an annual recurring cost and a five-year total. May proposers present more than one scope option — for example a core migration and a more complete option — each with its own set of totals, so that the Board can compare?

Yes. So long as the basic requirements of the RFP are met and the District can make consistent comparisons among proposals, proposers may submit additional options and capabilities. Please clearly outline what is included in each option.

15. Submission format. Does the District have any preference or requirement as to proposal format, page limit, or file type beyond electronic submission?

The only requirements are those provided within the RFP.