



Tabulation Of Bids

Event # : 579

Name: Cemetery Management Software (Request for Information)

Description: The City of Fort Lauderdale is requesting information (RFI) from qualified and experienced firms to gather detailed insight into modern Cemetery Management Software solutions capable of supporting operations across the City's municipal cemetery system. This RFI is being issued to help refine the City's implementation strategy, budget planning, and technology needs aligned with industry best practices in the death care sector.

Open Date: 01/23/2026 07:50:00 PM

Close Date: 02/10/2026 04:00:00 PM

Event Currency: USD

Supplier	Bid Amount
Concourse Tech Inc. 169 Madison Ave, Suite 15520 New York, NY 10016	45,000.00
Ramaker & Associates 1955 Atwood Avenue Suite 202 Madison, WI 53704 ** Supplier has responses with a no charge	0.00
PlotBox 1 Marina Park Drive #1410 Boston, MA 02210 ** Supplier has responses with a no charge	0.00
Site Industries(CemSites) 14 Memorial Dr Perryopolis, PA 15473 ** Supplier has responses with a no charge	0.00



Response For Supplier: Ramaker & Associates

Event # : 579-0

Name: Cemetery Management Software (Request for Information)

Description: The City of Fort Lauderdale is requesting information (RFI) from qualified and experienced firms to gather detailed insight into modern Cemetery Management Software solutions capable of supporting operations across the City's municipal cemetery system. This RFI is being issued to help refine the City's implementation strategy, budget planning, and technology needs aligned with industry best practices in the death care sector.

Date created: January 27,
2026 8:01:23 PM UTC

Preview date:

Open date: January 23, 2026
7:50:00 PM UTC

Close Date: 02/10/2026 04:00:00 PM UTC

Date submitted: February 10,
2026 3:08:00 PM UTC

Q & A open date: January 23,
2026 7:50:00 PM UTC

Q & A close date: February 5,
2026 10:00:00 PM UTC

Dispute close date:

Responded To: 1 Out of 1 Lines

Response Currency: USD

Response Attachments

Attachment

RFI - 47199 City of Fort Lauderdale, FL - 20260210.pdf

Line Responses

Line 1: Request for Information - Cemetery Mgmt Software Solution

Description: This is a Request for Information (RFI); it is not a request for pricing, commitment to purchase, or an obligation to provide products or services described in this notice. Please see the attached forms for response details.

Event # 579-0: Cemetery Management Software (Request for Information)

Item: CEMETERY MGMT SOFTWARE SOLUTION	Request for Information - Cemetery Mgmt Software Solution
Commodity Code: 920-45	Software Maintenance/Support
Quantity: 1.0000	Unit of Measure: LS

Bid Quantity: 1.0000

No Charge: Yes

No Bid: No

Vendor Item: CEMETERY MGMT SOFTWARE SOLUTION Request for Information - Cemetery Mgmt Software Solution

Comments: Submitted RFI documentation 2/10/2026. We look forward to your response!



Request for Information
City of Fort Lauderdale, FL
47199

February 10, 2026



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Let CIMS Simplify Your Cemetery Management

Section 1

About Ramaker and CIMS

Since 1992, Ramaker has provided innovative engineering and technology solutions to clients in the public and private sectors. We have an extensive background in GIS (Geographic Information Systems), which includes mapping and custom software solutions for clients, such as cemeteries, private businesses, school districts, and municipalities. We also have a strong resume of land surveying and engineering projects. This combination of expertise has made our firm a trusted partner to cemeteries across the United States.

We began partnering with cemeteries in 1998. At that time, a cemetery in Wisconsin was looking for GIS maps for their cemetery. Our staff proposed a solution that included GIS mapping and developed a stand-alone software that would help them manage the cemetery for years to come. This project launched the CIMS family of software products.

THE RAMAKER DIFFERENCE

In addition to our CIMS cemetery software, Ramaker is a full-service architecture and engineering firm. We have assisted a variety of cemeteries with land surveys, stormwater management, ground penetrating radar, drone imagery, road design, foundation design, and construction management. We provide all of these services in-house and can serve as a one-stop shop for almost any cemetery needs. As is evidenced by this suite of services, Ramaker has a comprehensive understanding of the design needs of a cemetery, and we apply this holistic expertise to every CIMS project.

Headquarters

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Madison, WI 53704

Phone

(608) 643-4100

Websites

ramaker.com
cims cemeterysoftware.com

Go-to Contact



BRANDON FINLEY

Email: brandon@ramaker.com

Direct: (608) 644-2235

Cell: (608) 370-1309

95

RAMAKER
EMPLOYEES

1000 +

CEMETERIES
USING CIMS IN
THE CLOUD

49

STATES WITH
CIMS CLIENTS

12

CIMS TEAM
MEMBERS

75

COMBINED
YEARS OF
EXPERIENCE

11

LOCATIONS
NATIONWIDE

THE CIMS TEAM

Meet the dedicated team working on your project!



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GIS Manager

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Web Software Developer

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608-644-2260



DEBRA GOTTHART

Accounting Assistant

dgotthart@ramaker.com
201-896-7503



SYMBOLS KEY

- | | | | |
|------------------|---------------------|----------------|------------------------|
| General question | Proposals & pricing | Invoices | Drone & 360 imagery |
| Project status | Platinum mapping | Data migration | Custom deeds & reports |



February 10, 2026

Subject :

City of Fort Lauderdale, FL
100 North Andrews Avenue
Fort Lauderdale, FL 33301

CIMS LETTER OF INTENT FOR THE CITY OF FORT LAUDERDALE

City of Fort Lauderdale,

Thank you for considering CIMS (Cemetery Information Management System) as your cemetery management software solution. The Ramaker team understands that cemetery management software is a significant investment for any municipality. We respect your responsibility to preserve public records, support daily operations, and serve your community with accuracy and care.

CIMS is purpose-built for municipal and city-managed cemeteries. For more than 20 years, CIMS has supported municipal, township, and city cemeteries nationwide, including organizations managing multiple cemetery sites. This experience allows us to deliver software that aligns with public-sector workflows while remaining intuitive and practical for staff.

CIMS distinguishes itself through industry-leading mapping technology and a comprehensive cemetery database. Every section, block, lot, and grave is recorded within CIMS, providing real-time insight into ownership, burials, and availability. This centralized system improves customer service, supports long-term planning, and reduces risk associated with paper records or disconnected systems.

From a technical and strategic standpoint, CIMS delivers long-term value through its secure, cloud-based platform. All data is hosted within Amazon Web Services (AWS), eliminating the need for local servers, manual backups, or software upgrades. Authorized users can securely access cemetery records from the office or the field. For on-site operations, CIMS Gold and CIMS Platinum allow staff to navigate directly to grave locations using GPS-enabled mobile devices, improving efficiency and accuracy.

CIMS is designed to scale with municipal needs, supporting both single-site and multi-site operations. Optional capabilities such as Ground Penetrating Radar (GPR) integration, drone imagery, and financial tools allow municipalities to modernize at their own pace while preserving data continuity.

The following page includes four references highlighting CIMS experience with municipal and large-site cemetery operations.

We appreciate the opportunity to be considered and look forward to the possibility of partnering with the City of Fort Lauderdale.

Sincerely,

Brandon Finley
CIMS Group Service Leader

CIMS References

CITY OF BOISE CEMETERIES

BOISE, IDAHO

Contact: Debbie Garcia

Phone: (208) 384-4060 x8061

Email: dgarcia@cityofboise.org

Software Used: CIMS Platinum, Burial Search

Year Implemented: CIMS Desktop in 2008, and upgraded to CIMS Platinum in 2017

DESCRIPTION OF WORK PERFORMED

The City of Boise's three cemeteries total 73 acres. Before implementing CIMS, the cemetery staff used a combination of hand-written documents, paper maps and Excel files. With CIMS's assistance, the city was able to get their burial and owner information down to one manageable file, which was then migrated into CIMS after the creation of an interactive map. The CIMS team also completed on-site installation and training services for the City.

CITY OF TAMPA, FL

TAMPA, FLORIDA

Contact: Neris Reyero

Phone: (813) 274-8893

Email: neris.reyero@tampagov.net

Software Used: CIMS Platinum, Burial Search

Year Implemented: 2025

DESCRIPTION OF WORK PERFORMED

City of Tampa, FL has over 70 acres, and they were using a proprietary database to maintain their burial, ownership, and financial records. CIMS worked with the City of Tampa team to convert their maps to a GIS data format and migrate their data into CIMS Cloud. CIMS also completed drone imagery for all of their cemetery locations. CIMS completed online installation and training for their staff after onboarding.

CITY OF KISSIMEE, FL

KISSIMMEE, FLORIDA

Contact: Karla Colon

Phone: (407) 518-2350

Email: karla.colon@kissimmee.gov

Software Used: CIMS Platinum, Burial Search

Year Implemented: CIMS Desktop in 2006, upgraded to CIMS Platinum in 2019

DESCRIPTION OF WORK PERFORMED

Prior to working with CIMS, the City of Kissimmee, FL was using Crypt Analyst in order to maintain their cemetery records. CIMS was able to work with the city's existing shapefiles and databases in order to create a completely usable system with all cemetery information beginning on the day it was installed.

CITY OF GAINESVILLE, FL

GAINESVILLE, FLORIDA

Contact: Karen Pruss

Phone: (352) 393-8185

Email: prusske@cityofgainesville.org

Software Used: CIMS Platinum

Year Implemented: 2025

DESCRIPTION OF WORK PERFORMED

City of Gainesville, FL has 53 acres and their records consisted of a proprietary database. CIMS converted all their maps into a GIS data format and matched the data from their existing data to the map. This created a completely usable system with all cemetery information beginning on the day it was installed. After their successful implementation of burial search, local news covered the new functionality for the public.

Attachment 2 – Response Forms

SCOPE OF WORK

1. Please identify the procurement method(s) your company is able to support and describe any existing cooperative contracts or public sector agreements under which the City of Fort Lauderdale may procure your solution. (check all that apply)
 - Request for Proposals (RFP)
 - Invitation to Negotiate (ITN)
 - Cooperative Purchasing/ Piggyback Agreement
 - Sole Source Procurement
 - Other: .

2. Provide an overview of your company, including ownership, years in operation, and number of customers using cemetery management solutions.
 - CIMS, a Ramaker product, has partnered with cemeteries since 1998. It began when a municipal cemetery in Wisconsin sought a GIS-based mapping solution. Ramaker’s team proposed a comprehensive approach that combined GIS mapping with purpose-built software to support long-term cemetery management—launching what is now the CIMS family of products. Ramaker, founded in 1992, is an employee-owned engineering and architectural firm. Today, more than 1,000 cemeteries across the United States rely on CIMS for digital cemetery management.

3. Describe your experience working with municipal governments or cemetery systems of similar size and complexity.
 - CIMS helps municipal cemeteries replace fragmented paper records and legacy databases with a single, GIS-driven system that unifies burial, ownership, and mapping data from day one. See references on page 6 of the RFI. Through expert data conversion and interactive mapping creation, cities like Boise, Tampa, Kissimmee and Gainesville have gone live with fully usable systems immediately after implementation. With hands-on training and modern tools like cloud access and drone imagery, CIMS enables staff to work more efficiently while improving accuracy and public access to cemetery information.

4. Does your organization currently possess an ISO 27001 certification, including scope and surveillance audit schedule? If your organization does not currently hold an ISO 27001 certification, please explain why it does not and describe any plans, roadmap, and expected timeline to obtain it.
 - No, as an alternative, we hire a third-party vendor called defense.com to complete security audits and penetration tests on our infrastructure. We complete assessments on an annual basis.

5. Does your organization currently possess a SOC 2 Type II report? If your organization does not currently hold SOC 2 Type II, please explain why it does not and describe any plans, roadmap, and expected timeline to obtain it.
 - CIMS is hosted on AWS Infrastructure. We provide the AWS SOC 2 to clients that request it. We are considering our own SOC 2 in the future, but the timeframe for that is undetermined.

6. Does your organization currently possess PCI DSS documentation applicable to the services provided?

Attachment 2 – Response Forms

Explain the type of documentation you can make available such as a completed SAQ, Attestation of Compliance (AOC), or Report on Compliance (ROC), as applicable to your PCI scope.

- We do not currently possess PCI documentation because we do not do credit card processing. We intend to add credit card processing later this year and will provide PCI documentation at that time.

7. Describe your internal controls for:

- **Access management**
 - o We use Ramaker’s domain as authentication. Only users who can pass Ramaker’s domain authentication (which includes MFA) are able to access any of the CIMS infrastructure.
- **Data encryption (in-transit & at-rest)**
 - o Encrypted in-transit & at-rest
 - Date in transit is encrypted via 4096 bit RSA SSL. Data at rest is currently not encrypted, but is part of an update which will be in place by end of Q2 2026.
- **Vulnerability scanning and patching**
 - o On annual basis, we hire a 3rd party called Defense.com to perform a penetration test. Upon completion of the test, we immediately fix and implement all issues and suggestions, and then retest.
 - o Patches to the software are implemented as-needed by the CIMS development team.

8. Describe how your system supports financial data integrity and audit tracking.

- CIMS Cemetery software has an audit log that tracks all changes to the database, which user performed the change, and when. Currently, this Audit log is only accessible to CIMS Staff.

9. Explain how the City’s Finance Department can independently verify transactions via system reports or exports.

- CIMS has built-in reports that are designed for this purpose.

10. Describe your standard data migration methodology (phases, tools, quality checks).

- CIMS employs a standardized, low-risk data migration methodology designed to ensure data integrity, auditability, and continuity of operations. We begin with a discovery and assessment phase to inventory existing data sources, identify required records, and document data quality issues. Legacy data is then mapped to the CIMS data model, including validation rules and required fields, with client review and approval.
- Prior to migration, data is cleansed to address duplicates, formatting inconsistencies, and missing values. A test migration is performed to verify accuracy, relationships, and usability within the system.

11. Explain how you will migrate data from:

- SQL databases

Attachment 2 – Response Forms

- Excel spreadsheets
 - o CIMS routinely migrates data from both SQL-based databases and Excel spreadsheets using standardized, controlled processes. For **SQL databases**, data is extracted using read-only queries or approved exports. Tables and relationships are reviewed, mapped to the CIMS data model, and transformed as needed to meet validation and business rules. Test migrations are performed to verify accuracy prior to production loading.
 - o For **Excel spreadsheets**, data is reviewed for structure, completeness, and consistency. Required fields are validated, formats are standardized, and duplicate or invalid records are addressed prior to migration. In both cases, migrations use documented mappings, repeatable tools, and validation checks. Test migrations, record reconciliation, and client review are completed before final migration to ensure data integrity and auditability.

12. Provide a list of required data fields and formats for ingestion.

- Every project is different and has different data. We do not have required fields and can work with almost any data, but we recommend the following at a bare minimum:
 - o **Core Location Data**
 - Section, block, lot, space identifiers, we recommend that there is a record in the table for every space in every cemetery
 - o **Burial Records**
 - Decedent first name, last name, space that they are buried on
 - Ideally, a table relationship or a matching “Space_ID” from the Core Location Data
 - o **Ownership / Rights**
 - Owner name(s)
 - Ideally, a table relationship or a matching “Space_ID” from the Core Location Data

13. Describe how duplicate, inconsistent, or incomplete data is identified and corrected.

- CIMS identifies data quality issues through validation rules, uniqueness checks, and exception reporting. Duplicate, inconsistent, or incomplete records are flagged during staging and test migrations. Where possible, issues are corrected through standardization; items requiring interpretation are documented and resolved with client input prior to final migration.

14. Outline your process for validating migrated interment, ownership, mapping, and financial records.

- CIMS validates migrated interment, ownership, mapping, and financial records through structured reconciliation and audit controls. Validation includes record counts, required-field checks, and verification of relationships between records. Interment and ownership data is reviewed for logical consistency and date accuracy. Mapping data is validated through feature counts, spatial alignment, and linkage to underlying records. Financial and ownership totals are reconciled against source data. Test migrations allow review within the CIMS system prior to final migration. All discrepancies are documented, corrected, and revalidated, with final client review and sign-off to ensure accuracy and auditability.

Attachment 2 – Response Forms

15. Please provide an overview of core modules, including:

- Property inventory
- Mapping/GIS
- Contract management
- Work orders
- Scheduling
- Finance
- Family services
- **Property Inventory** – Centralized management of all cemetery spaces (sections, lots, graves), ownership records, deeds, and burial/interment history with real-time visibility into sold and available inventory.
- **Mapping / GIS** – GIS-based interactive cemetery maps directly linked to the database, with plot-level visualization, status color-coding, GPS navigation, and optional integration of 360° imagery.
- **Contract Management** – Digital creation and management of cemetery ownership instruments (deeds), sale records, and related documentation, with records securely stored and associated to spaces, owners, and burials.
- **Work Orders** – Operational task tracking to support cemetery maintenance by grave space and service activities, with tools designed for field and office workflows.
- **Scheduling** – Support for operational workflows and work orders, including internal scheduling tools and structured processes tied to cemetery services and staff activities.
- **Finance** – Integrated financial capabilities through CIMS Ledger for invoicing, payments, revenue tracking, and pre-need/trust activity, with optional QuickBooks integration for advanced accounting needs.
- **Family Services** – Management of decedent, owner, and next-of-kin records; attachment of burial documents and media; and support for public-facing burial search tools to assist families and staff.

16. Are cemetery maps updated dynamically in real-time after sales, burials, or transfers?

- Yes

17. Please list all available APIs and integrations points.

- CIMS does not have an API. We can allow access to the database for your cemeteries via an ODBC connection.

18. Describe how your system integrates with:

- **ESRI GIS**
 - ESRI GIS – CIMS Maps can be exported to ESRI Shapefile format so they can be incorporated with the city’s GIS data.
- **ERP financial systems**
 - ERP Financial Data – CIMS can be integrated with your ERP via an ODBC connection to the CIMS database, or through custom development and connection to the ERP.
- **Laserfiche or document management systems**

Attachment 2 – Response Forms

- Laserfiche or document management systems – we have not done this in the past, but we could via custom development.

19. Describe any integration limitations and recommended alternatives.

- None that we are aware of.

20. Provide a typical project timeline for a cemetery operation similar to the City’s size.

- Drone Flights: Weeks 1-3
- Mapping for CIMS Platinum, custom report development: Weeks 4-24
- Data Migration – Weeks 25-32
- Implementation/Go Live – Weeks 33-34.

21. Identify roles and responsibilities for both vendor and City staff.

Role	Implementation Responsibilities	Ongoing Responsibilities
City – Cemetery & Administrative Staff	Provide records and maps; review migrated data; participate in setup and training	Maintain ownership/burial records; generate deeds & reports; manage users and data quality
City – Cemetery Field Crews	Validate cemetery layout and map accuracy; provide field input	Complete work orders; update burial/marker status; report field changes
City – Finance Personnel	Define pricing and financial workflows; review financial configuration	Generate invoices & reports; track payments; reconcile with city systems
CIMS – Customer Success	Lead project coordination; manage timeline; oversee onboarding and go-live	Ongoing support; best-practice guidance; feature adoption and optimization
CIMS – Training Team	Deliver role-based training and documentation	Refresher and new-staff training; support new features
CIMS – GIS / Mapping Team	Create and validate digital cemetery maps; incorporate city feedback	Maintain and update maps for expansions or corrections

22. Describe required City resources (FTE hours, subject matter experts, IT support).

- CIMS requires limited City resources to support implementation and data migration. City participation typically includes a designated project contact and subject matter experts for cemetery operations, records, and business rules to support data review, validation, and decision-making. Limited IT support may be needed to provide data exports, database access, or network approvals, depending on existing systems. No dedicated full-time City staff are required. CIMS manages the majority of configuration, migration, and validation activities, coordinating with City staff at defined milestones to minimize impact on daily operations.

Attachment 2 – Response Forms

23. Describe your training approach for:

- Cemetery staff
- Administrative staff
- Field crews
- Finance personnel

Role	Training Approach	Key Focus Areas	Outcome
Cemetery Staff (General Users)	Role-based onboarding with hands-on, scenario-driven instruction	System navigation, searching, reporting, best practices	Confident daily use of CIMS across cemetery operations
Administrative Staff	Instructor-led, workflow-focused training	Ownership & burial records, deeds, permits, reporting, user management	Independent management of records and system configuration
Field Crews	Short, task-focused videos	Maps, work orders, burial/marker status updates	Efficient completion of field tasks with accurate updates
Finance Personnel	Specialized, finance-specific training	Invoicing, payments, revenue categories, financial reporting	Accurate financial tracking and audit-ready reporting

24. Provide examples of user documentation and knowledgebase tools.

- The following link is CIMS' Wiki, our user documentation.
https://wiki.cimscloud.com/index.php/Main_Page

25. Describe post-launch support, SLAs, and escalation procedures.

Area	Description
Post-Launch Support	After go-live, customers transition to ongoing support provided by the CIMS Customer Success and Technical Support teams. Support is delivered by the same staff who design, maintain, and enhance the CIMS platform, ensuring continuity and deep product expertise.
Support Access	Customers submit support requests via a dedicated CIMS Technical Support channel. Customer Success remains engaged for workflow guidance, adoption support, and long-term success.
Service Levels (SLA)	Support requests are triaged and prioritized based on severity and operational impact. Issues affecting system availability or core functionality receive highest priority; routine questions and usability requests are handled as part of standard support operations.
Escalation Process	Issues unresolved at initial intake are escalated internally to senior technical staff, GIS specialists, or software developers as needed. High-impact issues receive leadership oversight to ensure timely resolution and clear communication.

Attachment 2 – Response Forms

Ongoing Improvement	Customer feedback from support interactions and surveys informs product enhancements, usability improvements, and future feature development, ensuring the platform continues to evolve with customer needs.
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26. Identify any optional modules or features.

Optional Module / Feature	Description
CIMS Ledger	Financial module that adds invoicing, payment tracking, revenue categories, and financial reporting integrated directly with cemetery records.
360° Imagery Integration	Integration of 360-degree imagery to visually document cemetery spaces and enhance records.
Ground Penetrating Radar (GPR)	Optional integration of GPR survey data to assist with locating unmarked graves and enhancing historical accuracy.
Timeline Memorials	Optional feature that allows cemeteries to create digital timelines or memorial views associated with burial records.

27. Provide your technology development roadmap for the next 24–36 months.

- We are not comfortable providing our detailed roadmap for the future. However, some projects that are underway and will be completed during that time period include:
 - o Security Updates/MFA
 - o User Suggested Enhancements
 - o Partial Cemetery Mapping for Platinum Clients
 - o Credit Card Processing
 - o Updated Dashboards
 - o Updated User Interface

28. Describe how customer feedback influences product enhancements.

- Customer feedback is a primary driver of CIMS product enhancements. Feedback is gathered through direct client interactions, support requests, surveys, implementation reviews, and our user conference. Feature requests and recurring themes are evaluated and prioritized within the product roadmap. Recent enhancements, including financial tools and workflow improvements, were initiated directly in response to client needs and feedback. Proposed features are reviewed with users, refined through iterative development, and adjusted based on real-world use. This continuous feedback loop ensures enhancements align with municipal workflows and evolving cemetery management requirements.

29. Identify any planned security certifications or compliance improvements.

- We are currently in process with our annual penetration test with Defense.com. In the next few weeks, we are encrypting our database at rest. Later this year, we plan to provide an option for client use Multi Factor Authentication and integration with Microsoft Entra. Longer term, we are considering SOC 2 Compliance.

Attachment 2 – Response Forms

ADDITIONAL COMMENTS

Please use the space below to provide any additional comments or project considerations that you would like to share with the City's project team

Name: Brandon Finley

Company: CIMS, Ramaker

Address: 1955 Atwood Ave Madison, WI 53704

Signature: 

Title: CIMS Group Service Leader

Phone: 608-620-8111

Email: brandon@ramaker.com

Date: 2/10/2026



Thank you for your consideration.



Response For Supplier: Concourse Tech Inc.

Event # : 579-0

Name: Cemetery Management Software (Request for Information)

Description: The City of Fort Lauderdale is requesting information (RFI) from qualified and experienced firms to gather detailed insight into modern Cemetery Management Software solutions capable of supporting operations across the City's municipal cemetery system. This RFI is being issued to help refine the City's implementation strategy, budget planning, and technology needs aligned with industry best practices in the death care sector.

Date created: February 9,
2026 7:42:30 PM UTC

Preview date:

Open date: January 23, 2026
7:50:00 PM UTC

Close Date: 02/10/2026 04:00:00 PM UTC

Date submitted: February 9,
2026 7:44:19 PM UTC

Q & A open date: January 23,
2026 7:50:00 PM UTC

Q & A close date: February 5,
2026 10:00:00 PM UTC

Dispute close date:

Responded To: 1 Out of 1 Lines

Total Bid Amount: 45,000.00 **Response Currency:** USD

Response Attachments

Attachment

2026-01-28_Concourse240975_Cemetery_Management_Software_Technical_Reviewed.pdf

RFI 579-0 Attachment 2 Responses, Concourse Tech Inc..pdf

Project Information and Attachments _1_ .pdf

Project Information and Attachments _1_ signature only.pdf

Line Responses

Line 1: Request for Information - Cemetery Mgmt Software Solution

Description: This is a Request for Information (RFI); it is not a request for pricing,

Event # 579-0: Cemetery Management Software (Request for Information)

commitment to purchase, or an obligation to provide products or services described in this notice. Please see the attached forms for response details.

Item: CEMETERY MGMT SOFTWARE SOLUTION Request for Information - Cemetery Mgmt Software Solution

Commodity Code: 920-45 Software Maintenance/Support

Quantity: 1.0000

Unit of Measure: LS

Bid Quantity: 1.0000

Unit Price: 45,000.0000

Extended Amount: 45,000.00

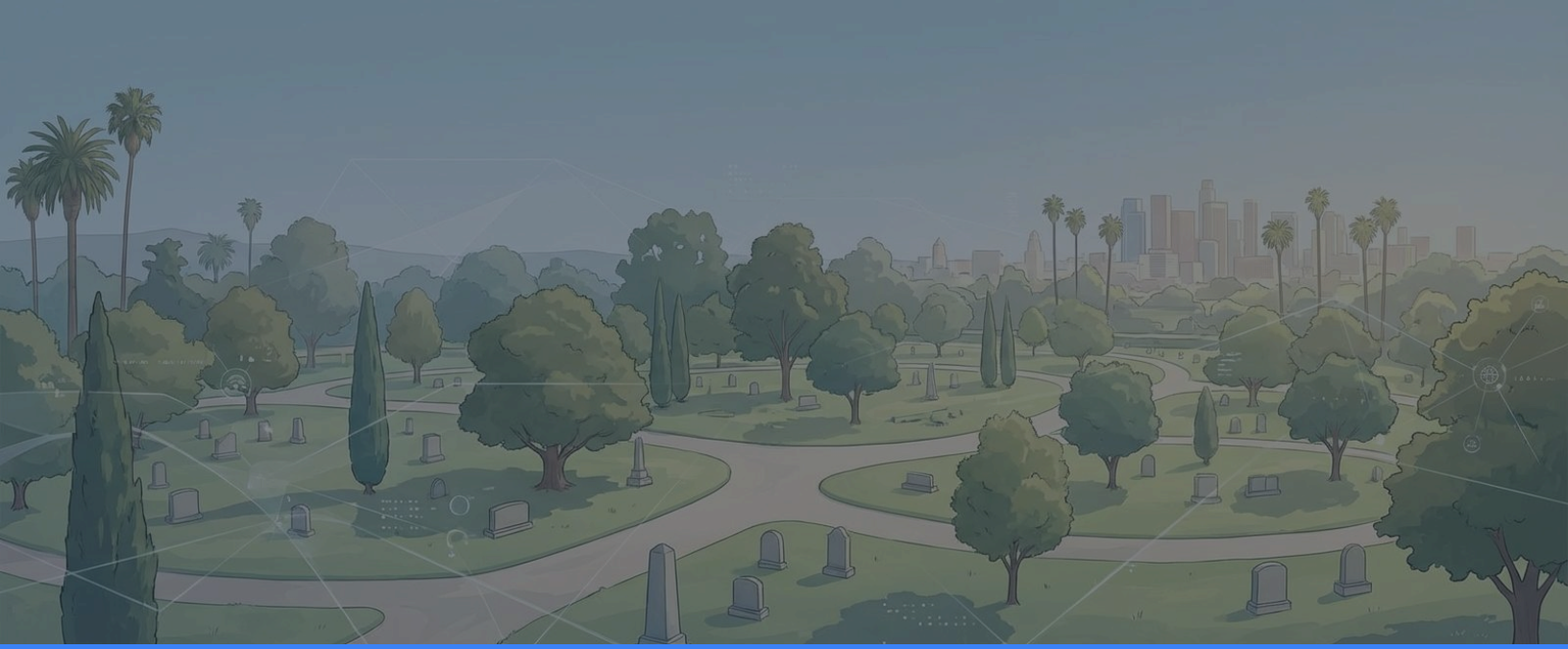
No Charge: No

No Bid: No

Vendor Item: CEMETERY MGMT SOFTWARE SOLUTION Request for Information - Cemetery Mgmt Software Solution

Comments: All-Inclusive Annual Subscription

The following budget estimate is provided for the City's planning purposes. Our all-inclusive model encompasses platform access, implementation services, data migration, integrations, training, and ongoing support



Concourse Tech Inc. • New York, NY • (646) 305-9964

Cemetery Management Software Solution

City of Fort Lauderdale

Request for Information • Concourse Ref: 240975

Cemetery Division

[Modern Platform for Municipal Cemetery Operations](#)

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Our Mission at Concourse

To empower governments to serve their citizens better through modern, secure technology.

We believe public sector agencies deserve the same quality of software that powers the best private sector organizations. Concourse exists to bridge that gap—delivering technology that improves government service delivery for all citizens.

Executive Summary

Concourse is pleased to submit this response to the City of Fort Lauderdale's Request for Information for Cemetery Management Software. We understand the City's critical need to modernize cemetery operations following the transition back to municipal management in FY 2019, and we recognize the operational challenges created by the current reliance on manual processes for burial records, contract management, and administrative functions.

Concourse will develop a purpose-built Cemetery Management Platform specifically designed to address the City's requirements across all four municipal cemeteries. Our solution will deliver comprehensive functionality including property inventory management, dynamic GIS mapping with ESRI integration, contract and ownership tracking, work order management, burial scheduling, financial reporting with audit trails, and family services capabilities. All modules will operate from a unified platform accessible to cemetery staff, administrative personnel, field crews, and finance teams.

Our all-inclusive annual subscription model of \$45,000 encompasses platform access, complete data migration from existing SQL databases and Excel spreadsheets, system configuration, integrations with ESRI GIS, ERP financial systems, and Laserfiche, comprehensive training for all user groups, and ongoing technical support. This approach eliminates separate implementation costs and provides predictable budgeting for the City's planning purposes.

Key Highlights

- **Budget Estimate** \$45,000 annual subscription (all-inclusive)
- **Implementation** 12-week phased deployment
- **Scope** All 4 cemeteries on unified platform
- **Data Migration** SQL and Excel sources included

Section 1: Company Overview

Designated Point of Contact

Field	Information
Name	Kelsey Shaner, Operations Manager
Company	Concourse Tech Inc.
Mailing Address	169 Madison Ave., Suite 15520, New York, NY 10016
Phone	646-305-9964
Email	sales@concoursetech.com

Company Overview

Concourse Tech Inc. ("Concourse") is a privately-held software development company specializing in custom enterprise platforms for government organizations. We provide end-to-end software solutions including requirements analysis, platform development, data migration, system integration, training, and ongoing support.

Procurement Methods Supported

- Request for Proposals (RFP) - Primary method
- Invitation to Negotiate (ITN)
- Cooperative Purchasing/Piggyback Agreement - GSA MAS Contract holder
- Other negotiated procurement methods as permitted by Florida law

Cooperative Purchasing: GSA Contract:

Concourse holds a GSA Multiple Award Schedule (MAS) contract, enabling streamlined procurement through cooperative purchasing. Florida municipalities may leverage this contract under state cooperative purchasing statutes.

Experience with Municipal Cemetery Operations

While Concourse has not previously implemented a cemetery-specific management system, our team brings extensive experience in developing custom platforms for municipal governments with comparable complexity. Our approach involves building purpose-designed software tailored to the City's specific operational workflows rather than adapting generic off-the-shelf products.

Relevant Experience: Key relevant capabilities include:

- Multi-site operational platforms serving distributed locations from a unified system
- Property and asset inventory management with GIS integration
- Contract lifecycle management including ownership transfers
- Work order systems for field operations and scheduling
- Financial modules with audit trails and reporting exports
- Constituent-facing service portals for public interaction
- Data migration from legacy SQL databases and unstructured sources

Section 2: Letter of Interest

To: City of Fort Lauderdale

RE: Cemetery Management Software Initiative - Expression of Interest

Concourse Tech Inc. is pleased to express our preliminary interest in participating in the City of Fort Lauderdale's Cemetery Management Software initiative. We believe our approach to custom government software development positions us well to address the City's operational needs across all four municipal cemeteries.

Strategic Value

Concourse brings a differentiated approach to this initiative. Rather than offering a rigid commercial-off-the-shelf cemetery product, we will develop a purpose-built platform designed specifically for Fort Lauderdale's operational requirements. This approach offers several advantages:

- **Tailored Workflows** System designed around how your staff actually works, not how a generic product assumes they should work
- **Integration Flexibility** Native connections to your existing ESRI GIS, ERP, and Laserfiche systems rather than middleware workarounds
- **Ownership Alignment** Platform built to support municipal cemetery operations with public sector governance requirements
- **Scalability** Architecture designed to accommodate future cemetery acquisitions or service expansions

Relevant Municipal Experience

Our team has successfully delivered custom platforms for state and municipal governments including multi-agency systems handling complex operational workflows. We understand the unique requirements of public sector technology projects including transparency, audit requirements, constituent service expectations, and the need for reliable, long-term vendor partnerships.

Commitment to Partnership

We are committed to a collaborative approach throughout any future procurement and implementation process. Our project methodology emphasizes knowledge transfer, ensuring City staff are empowered to operate the system independently while receiving responsive ongoing support.

We welcome the opportunity to participate in further discussions and any subsequent formal procurement process the City may initiate.

Respectfully submitted,

Kelsey Shaner, Operations Manager

Concourse Tech Inc.

Section 3: Technical Questionnaire Response

Security Certifications

Certification Status

The following summarizes our current security certification posture and roadmap.

ISO 27001:

Concourse does not currently hold ISO 27001 certification. We are actively pursuing this certification with an expected completion timeline of 18-24 months. Our current security practices align with ISO 27001 control frameworks, and we have engaged a qualified registrar to guide our certification journey.

SOC 2:

Concourse currently holds SOC 2 Type I certification. We are actively pursuing SOC 2 Type II certification, with audit completion expected within the next 12 months. The Type II audit will validate the operational effectiveness of our controls over a continuous monitoring period.

PCI DSS:

For payment processing, the proposed platform will integrate with the City's existing payment processor or a PCI-compliant third-party gateway. This approach removes cardholder data from our system scope. We can provide documentation of our integration partners' PCI compliance (SAQ or AOC) as applicable to the selected payment solution.

Internal Controls

Access Management

- Role-based access control (RBAC) with configurable permission levels
- Multi-factor authentication (MFA) for all administrative access
- Single Sign-On (SSO) integration capability with City identity providers
- Automated user provisioning and deprovisioning workflows
- Comprehensive access logging with user activity audit trails
- Segregation of duties enforced for financial transactions

Data Encryption

- **In-Transit** TLS 1.3 encryption for all data transmission; HTTPS enforced for all web traffic
- **At-Rest** AES-256 encryption for database storage and file attachments; encryption keys managed via secure key management service

Vulnerability Management

- Automated vulnerability scanning performed weekly
- Third-party penetration testing conducted annually
- Security patches applied within 72 hours for critical vulnerabilities
- Continuous dependency monitoring for open-source components
- Security incident response procedures with defined escalation paths

Financial Data Integrity & Audit Tracking

The proposed platform will support comprehensive financial data integrity through the following capabilities:

- **Immutable Audit Logs** All financial transactions recorded with timestamp, user ID, and before/after values
- **Transaction Reconciliation** Built-in reconciliation reports matching system records to external payment processor data
- **Approval Workflows** Configurable approval chains for contracts, refunds, and adjustments above defined thresholds
- **Export Capabilities** Standard format exports (CSV, Excel, PDF) for independent verification by Finance Department
- **Real-Time Reporting** Dashboard access for Finance personnel with drill-down to transaction details
- **Segregation of Duties** System-enforced separation between transaction entry and approval functions

Independent Verification: The City's Finance Department will have independent access to run audit reports, export transaction data, and verify financial records without requiring IT intervention.

Data Migration Methodology

Migration Approach

Our data migration methodology follows a structured four-phase approach designed to ensure complete, accurate transfer of cemetery records while minimizing operational disruption.

Phase 1: Data Discovery & Assessment

- Inventory all source systems (SQL databases, Excel spreadsheets, paper records)
- Document current data structures, relationships, and quality issues
- Identify data gaps and inconsistencies requiring remediation
- Develop data mapping specifications from source to target schema

Phase 2: Data Cleansing & Transformation

- Automated duplicate detection using configurable matching rules
- Standardization of names, addresses, and date formats
- Resolution of inconsistent or incomplete records (flagged for staff review)
- Data normalization to target platform schema

Phase 3: Migration Execution

- **SQL Databases** Direct database connection with automated ETL (Extract-Transform-Load) processing
- **Excel Spreadsheets** Template-based import with validation rules and error reporting

Phase 4: Validation & Reconciliation

- Record count reconciliation between source and target systems
- Sample-based validation of interment records, ownership chains, and mapping data
- Financial record verification against existing accounting records
- User acceptance testing with Cemetery Division subject matter experts

Required Data Fields

The following core data elements will be required for migration:

Category	Required Fields	Format
Interment Records	Decedent name, dates, location (section/lot/grave)	Text, Date (ISO 8601), Alphanumeric
Ownership Records	Owner name, contact info, purchase date, lot assignment	Text, Date, Alphanumeric
Property Inventory	Section, lot, grave, status, type, dimensions	Alphanumeric, Enumerated values
Financial Records	Transaction date, amount, type, associated lot/contract	Date, Currency, Alphanumeric
Mapping Data	Coordinates, boundaries, GIS feature attributes	GeoJSON, Shapefile, or coordinate pairs

Core Platform Modules

Property Inventory

Complete inventory management for all sections, lots, and graves across four cemeteries. Track availability status, property types (traditional, cremation, mausoleum), and ownership history.

Contract Management

Full contract lifecycle from pre-need sales through at-need services. Template-based document generation, digital signatures, and ownership transfer processing.

Scheduling

Burial scheduling with calendar views, resource allocation, and conflict detection. Automated notifications to staff and families.

Family Services

Constituent-facing portal for burial searches, pre-planning inquiries, and service requests. Memorial and obituary display options.

Mapping/GIS

Interactive cemetery maps with ESRI GIS integration. Visual property selection, location search, and dynamic updates reflecting sales, burials, and transfers.

Work Orders

Field crew task management for openings, closings, monument installations, and grounds maintenance. Mobile-friendly interface with photo documentation.

Finance

Integrated financial tracking with payment processing, invoicing, and revenue reporting. Audit trails and export capabilities for Finance Department.

Dynamic Map Updates

Cemetery maps will update dynamically following sales, burials, or ownership transfers. Status changes are reflected immediately in the GIS layer, ensuring staff always work with current availability and location data. This eliminates the risk of double-booking and provides accurate inventory counts in real-time.

Integration Capabilities

Available APIs and Integration Points

- RESTful API for programmatic data access and third-party integrations
- Webhook notifications for real-time event triggers
- Bulk data import/export via secure file transfer
- Single Sign-On (SSO) via SAML 2.0 or OAuth 2.0

ESRI GIS Integration

The platform will integrate with ESRI GIS products based on the City's deployed environment. Integration will utilize ESRI's REST API services for bidirectional data exchange. Map layers will be published to ArcGIS Online or ArcGIS Enterprise as feature services, enabling visualization in the City's existing GIS infrastructure.

Note: Integration approach will be confirmed during discovery based on the specific ESRI products and versions deployed by the City.

ERP Financial System Integration

The platform will integrate with the City's ERP financial system for:

- General ledger posting of cemetery revenues
- Accounts receivable synchronization for outstanding balances
- Chart of accounts mapping for proper revenue classification
- Periodic batch exports or real-time API integration (based on ERP capabilities)

Note: Specific integration method will be determined during discovery based on the City's ERP system and available integration interfaces.

Laserfiche Document Management Integration

Contract documents, interment authorizations, and other records will be stored in and retrieved from Laserfiche. Integration will utilize Laserfiche's API for document upload, metadata tagging, and search/retrieval within the cemetery management interface.

Integration Considerations

Integration Notes

All integrations are subject to API availability and capabilities of the City's existing systems. During discovery, we will conduct technical assessments of each integration endpoint to confirm feasibility and identify any alternative approaches if needed. Where direct API integration is not available, we will recommend secure file-based exchange or middleware solutions.

Implementation Timeline

The following timeline represents a typical 12-week implementation for a cemetery operation of the City's size and complexity:

Phase	Weeks	Key Deliverables	City Resources
Discovery & Planning	1-2	Kickoff meeting, requirements validation, data audit, integration assessment, project plan	20 FTE hours
Data Migration & Configuration	3-6	Data cleansing, SQL/Excel migration, duplicate resolution, property inventory setup, GIS mapping	40 FTE hours
Integration & Testing	7-9	ERP integration, Laserfiche connection, UAT, record validation, security configuration	30 FTE hours
Training & Go-Live	10-12	Staff training (all user groups), documentation deployment, production go-live, 30-day hypercare	50 FTE hours

Roles and Responsibilities

Concourse Responsibilities	City Responsibilities
Project management and coordination	Designate project sponsor and lead
Data migration execution and validation	Provide subject matter experts for data validation
System configuration and customization	Grant access to legacy systems and data sources
Integration development and testing	Participate in UAT and provide sign-off
Training delivery and documentation	Coordinate staff availability for training
Technical support and issue resolution	IT support for integration endpoints

Required City Resources

- **Project Sponsor** Cemetery Division leadership for decision-making and sign-off (estimated 2-4 hours/week)
- **Subject Matter Experts** Cemetery staff familiar with operations, records, and mapping (estimated 4-6 hours/week during key phases)
- **IT Liaison** Technical contact for integration endpoints, network access, and system administration (estimated 2-4 hours/week)
- **Finance Representative** Validation of financial data migration and ERP integration requirements (estimated 2 hours/week)

Total Commitment: Total estimated City staff commitment: 140 FTE hours over 12 weeks.

Training Approach

Training will be tailored to each user group's specific workflows and responsibilities:

User Group	Training Focus	Format	Duration
Cemetery Staff (Front Office)	Contract entry, scheduling, family services, record lookup	On-site instructor-led + hands-on	2 days
Administrative Staff	Reporting, contract management, system administration	On-site instructor-led + hands-on	1.5 days
Field Crews	Mobile work orders, photo documentation, task completion	On-site hands-on (mobile devices)	0.5 day
Finance Personnel	Financial reports, audit trails, export functions, ERP reconciliation	On-site instructor-led	0.5 day

Documentation and Knowledgebase

- Comprehensive user guides organized by role and workflow
- Video tutorials for common tasks and procedures
- Searchable online knowledgebase with FAQs and troubleshooting guides
- Quick reference cards for field crews (laminated, mobile-friendly)
- System administrator guide for IT staff

Post-Launch Support

Support Model

- **Hypercare Period** 30-day intensive support following go-live with dedicated project team availability
- **Standard Support** Business hours support (Monday-Friday, 8 AM - 6 PM ET) via phone, email, and ticketing system
- **Emergency Support** 24/7 availability for critical system outages

Service Level Commitments

Priority	Description	Response Time	Resolution Target
Critical	System unavailable or major function inoperable	1 hour	4 hours
High	Significant feature degradation affecting operations	4 hours	1 business day
Medium	Non-critical issue with workaround available	1 business day	3 business days
Low	Minor issue, enhancement request, or question	2 business days	Scheduled release

Escalation Procedures

Escalation path: Support Technician → Support Manager → Account Manager → Director of Operations. Critical issues are automatically escalated to management within response timeframes.

Future Development & Roadmap

Optional Modules and Features

- Public memorial portal with searchable burial records
- Online pre-need sales and payment processing
- Mobile family services app for location wayfinding
- Advanced analytics and business intelligence dashboards
- Automated perpetual care fund tracking

Technology Roadmap (24-36 Months)

- **Enhanced Mobile Capabilities** Expanded field crew features including offline mode and GPS-based task routing
- **Advanced GIS Features** 3D cemetery visualization and drone imagery integration
- **AI-Assisted Search** Natural language search for burial records and genealogy research
- **Integration Marketplace** Pre-built connectors for common ERP, CRM, and document management systems

Customer-Driven Development

Product enhancements are prioritized through a formal customer feedback process. Clients submit feature requests through our support portal, which are reviewed quarterly by our product team. High-priority requests affecting multiple customers are incorporated into the development roadmap with transparent status tracking.

Planned Security Certifications

- SOC 2 Type II certification (in progress, expected within 12 months)
- ISO 27001 certification (pursuing, expected 18-24 months)
- StateRAMP authorization pathway (committed)

Budget Estimate for Planning Purposes

All-Inclusive Annual Subscription

The following budget estimate is provided for the City's planning purposes. Our all-inclusive model encompasses platform access, implementation services, data migration, integrations, training, and ongoing support in a single predictable annual fee.

Component	Description	Cost
Discovery & Requirements Analysis	Kickoff, requirements validation, data audit, project planning	Included
Data Migration	SQL database and Excel spreadsheet migration with cleansing and validation	Included
System Configuration	Platform setup for all 4 cemeteries, property inventory, workflow configuration	Included
GIS/Mapping Configuration	ESRI integration setup and cemetery map digitization	Included
ERP Financial Integration	Connection to City ERP for financial data exchange	Included
Laserfiche Integration	Document management integration for contracts and records	Included
Staff Training	Cemetery, administrative, field crew, and finance personnel training	Included
Documentation & Knowledgebase	User guides, video tutorials, quick reference materials	Included
Go-Live Support	Production deployment and 30-day hypercare period	Included

Ongoing Support & Maintenance	Business hours support, updates, and enhancements	Included
Annual Platform Subscription	All core modules for 4 cemeteries	\$45,000

\$45,000 Annual Subscription	12 Weeks Implementation	4 Cemeteries Included
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Pricing Notes

- Budget estimate for RFI planning purposes; final pricing subject to formal proposal
- Year 1 and subsequent years at same \$45,000 annual rate
- No separate one-time implementation fees
- All integrations included based on technical feasibility confirmed during discovery
- Pricing assumes cloud-hosted deployment; on-premise options available upon request

Additional Comments

Concourse appreciates the opportunity to respond to this Request for Information. We recognize the City's commitment to improving cemetery operations and constituent services following the transition back to municipal management.

Key Recommendations for the City's Project Team

- **Data Preparation** Begin documenting current data sources and conducting preliminary quality assessment to accelerate migration planning
- **Integration Inventory** Compile technical specifications for ESRI GIS, ERP, and Laserfiche environments including versions, APIs, and IT contacts
- **Stakeholder Alignment** Identify key users from each group (cemetery staff, admin, field, finance) to participate in requirements validation and UAT
- **Success Metrics** Define measurable goals for the initiative (e.g., record lookup time reduction, scheduling efficiency, reporting accuracy)

We welcome any follow-up questions and look forward to the possibility of participating in a formal procurement process should the City proceed with this initiative.

Concourse's Approach

Bespoke quality, off-the-shelf speed.

Concourse combines deep public sector expertise with modern software development practices to deliver solutions that meet government requirements without the typical delays and complexity of legacy contractors.

Security-First Development

Security is at the heart of everything we build. From architecture decisions to deployment pipelines, we design with compliance and data protection as foundational requirements, not afterthoughts.

Agile Delivery with CI/CD

We work in agile sprints with continuous integration and continuous delivery, enabling rapid iteration and frequent feedback cycles. This means you see your user-specific version in a fully-operational context early and often, not just at the end.

Cloud-Native Infrastructure

We leverage AWS for scalable, secure infrastructure with modern frameworks (including Next.js and React) and streamlined deployments. We can also deploy on Google Cloud Platform or Microsoft Azure based on your requirements.

User-Centered Design

Our discovery process focuses on understanding the needs of end users—the government staff and citizens who will interact with the system daily. We ensure solutions are intuitive and practical, not just technically compliant.

API-First & Modular Components

We build reusable, independent components that allow for flexible customization, faster integration with your existing systems, and future-proof solutions tailored to your needs.

No Legacy Technical Debt

We're not weighed down by legacy systems, ensuring speed and agility in every project.

How We Work With You

- We undertake a collaborative discovery process to ensure we're configuring our system to meet your exact needs.
- You'll have a dedicated project team working closely with you throughout delivery, and a dedicated account manager post-delivery to ensure ongoing improvements and questions are quickly addressed.
- We integrate directly with your team's communication channels (such as Microsoft Teams) to facilitate faster feedback and more transparent collaboration.
- Change requests and scope adjustments are welcomed—we discuss openly to ensure we're always aligned with your evolving needs.

Your Project Team

Our dedicated team brings decades of combined experience in technology, public work, and program management. Each member is committed to ensuring your success with the Concourse platform.



Thomas Smyth

Yale University, B.A. • 14+ Years in Software • 300+ Municipal & K-12 Clients

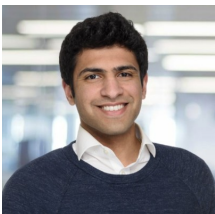
Thomas brings more than 14 years of experience building and scaling technology-driven organizations, with a background that blends strategy, technical development, and public-sector-focused business growth. He has worked with over 300 municipalities and K-12 school districts, gaining deep insight into the unique challenges and requirements of public sector technology. After years working across startups and enterprise software environments, he founded Concourse to bridge the gap between high-quality commercial technologies and the needs of government buyers. Today, he leads the company's mission to help agencies procure smarter, faster, and more affordably through a streamlined, value-driven approach.



Rapolas Binkys

Brown University, B.S. • 11+ Years as Founder & Consultant • AI & Workflow Automation Expert

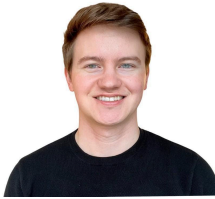
Rapolas brings 11+ years in tech as a founder, consultant, and investor. He leads the full product lifecycle at Concourse: from defining requirements to overseeing engineering and development. His deep expertise in automating workflows, AI, and deployments ensures project success. Rapolas has led teams across a broad range of customers and scopes, bringing a pragmatic, results-oriented approach to building secure, scalable systems that drive efficiency for the public sector.



Ajay Menon

Duke University, B.S. • 6+ Years in Product Strategy • Tech Deployments & Configuration

Ajay brings 6+ years of experience advising tech enterprises on product strategy, with hands-on experience in technology deployments and configurations. He leads successful client implementations at Concourse, working closely with agencies to scope their technology needs and develop innovative, secure solutions. Ajay also heads the education vertical, ensuring that schools and universities receive tailored, high-value technology solutions.



Mike Mumma

Georgetown University, B.A. • 10+ Years in Tech & Consulting • Government Technology & Public Policy

Mike brings 10+ years of experience in tech and consulting, including significant work in the public sector. With a background in government technology and public policy, he helps public sector agencies source the best-fit technology solutions while navigating the complexities of procurement. He brings a consultative approach to each engagement, built on years of experience working with both fast-growing startups and structured vendor ecosystems. At Concourse, he oversees customer success and delivery operations, serving as the primary relationship leader for strategic accounts.



Kelsey Shaner

8+ Years in Operations • Contracting & Compliance • Full Procurement Lifecycle

Kelsey brings 8+ years of operational experience focused on technology, with a strong mix of technical know-how and business development skills. She spent time in the FinTech space before moving into GovTech, where she's found real fulfillment helping public agencies navigate procurement and implement impactful technology solutions. At Concourse, she streamlines contracting and compliance processes for SaaS projects, aligning configuration, documentation, and reporting with agency requirements and SLAs. Kelsey manages the full procurement process from initial opportunity through contract award.

Government Technology Delivery Experience

Concourse has successfully delivered technology solutions to government agencies nationwide. Below are relevant examples of our work:

State of Oklahoma

Oklahoma City, Oklahoma • Statewide Solicitation and Contract Management Platform

Delivered a statewide solicitation and contract management platform for the State of Oklahoma, powering 600+ state agencies and municipalities to manage statewide contracts, solicitations, and usage reporting across 3,000+ suppliers. Contract Management: Centralized oversight of both mandatory statewide contracts and agency-specific agreements. Solicitation Management: Streamlined bid processes serving multiple agencies with varying requirements. Supplier Management: Unified vendor portal with integrated financial and fee tracking capabilities. Implementation completed in less than 60 days.

City of Owosso, Michigan

Owosso, Michigan • Community Engagement Portal

Built a community engagement portal for the City of Owosso, Michigan, enabling City Hall staff and city agencies to communicate more effectively with citizens. Features include surveys and feedback tools for community input on specific topics, a map-based 311-style system for citizens to log concerns (potholes, etc.) with location context, and streamlined workflows for city staff to track, triage, and respond to submissions. Implementation completed in less than 60 days.

City of Tamarac

Tamarac, Florida (Broward County) • Adobe Acrobat Pro & Creative Cloud Enterprise

Provided Adobe Acrobat Pro for enterprise, Creative Cloud for enterprise All Apps, Illustrator, and Photoshop to the City of Tamarac. Acrobat Pro provides comprehensive PDF creation, editing, OCR, redaction, and commenting tools to support secure document workflows and governance.

NY Department of Labor

Albany, New York • Salesforce Licenses

Provided Salesforce Licenses to the New York Department of Labor. Salesforce is a cloud platform that provides centralized customer data management with configurable workflows and collaborative case tracking. The solution includes dashboards, analytics, and reporting, and offers APIs and connectors for integration with external systems.

Southeastern Pennsylvania Transportation Authority

Philadelphia, Pennsylvania • Salesforce Public Sector Foundation

Provided Salesforce Public Sector Foundation Advanced, Government Cloud Plus, and Employee Experience for Public Sector to SEPTA. Salesforce delivers a centralized CRM platform with configurable workflows, dashboards, analytics, and reporting to manage interactions and data across programs.

Customer References

Entity	Contact Name	Email	Phone
Tarrant County	Kehinde Olugbile, Senior Buyer	kolugbile@tarrantcount ytx.gov	(817) 212-7249
San Antonio Water System	Josiah Sia, Purchasing Agent	Josiah.Sia@saws.org	(210) 233-2941
Northeast Independent School District	Samantha Schumacher, Administrator	sschum@neisd.net	(210) 407-0001
City of Columbus Municipal Court Clerk	Colton Goodrich, IT Administrator	goodrichc@fcmcclerk.c om	(614) 645-8183
Notre Dame Preparatory High School	Ty Lloyd, IT Manager	tlloyd@ndpsaints.org	(480) 634-8200

Company Information

Company Name	Concourse Tech Inc.
Contact Person	Kelsey Shaner, Contracting & Compliance Lead
Phone	(646) 305-9964
Email	sales@concoursetech.com
Address	169 Madison Ave, Suite 15520, New York, NY 10016
DUNS Number	119359641
CAGE Code	09E17

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New York, NY 10016
(646) 305-9964
www.concoursetech.com

Jan 29, 2026

Re: RFI 579-0, City of Fort Lauderdale - Cemetery Management Software

Attachment 2 Responses

1. Provide an overview of your company, including ownership, years in operation, and number of customers using cemetery management solutions.

Concourse Tech Inc. ("Concourse") is a privately-held software development company specializing in custom enterprise platforms for government organizations. We provide end-to-end software solutions including requirements analysis, platform development, data migration, system integration, training, and ongoing support.

2. Describe your experience working with municipal governments or cemetery systems of similar size and complexity.

While Concourse has not previously implemented a cemetery-specific management system, our team brings extensive experience in developing custom platforms for municipal governments with comparable complexity. Our approach involves building purpose-designed software tailored to the City's specific operational workflows rather than adapting generic off-the-shelf products.

Relevant Experience: Key relevant capabilities include:

- Multi-site operational platforms serving distributed locations from a unified system
- Property and asset inventory management with GIS integration
- Contract lifecycle management including ownership transfers
- Work order systems for field operations and scheduling
- Financial modules with audit trails and reporting exports

- Constituent-facing service portals for public interaction
- Data migration from legacy SQL databases and unstructured sources

3. Does your organization currently possess an ISO 27001 certification, including scope and surveillance audit schedule? If your organization does not currently hold an ISO 27001 certification, please explain why it does not and describe any plans, roadmap, and expected timeline to obtain it.

Concourse does not currently hold ISO 27001 certification. We are actively pursuing this certification with an expected completion timeline of 18-24 months. Our current security practices align with ISO 27001 control frameworks, and we have engaged a qualified registrar to guide our certification journey.

4. Does your organization currently possess a SOC 2 Type II report? If your organization does not currently hold SOC 2 Type II, please explain why it does not and describe any plans, roadmap, and expected timeline to obtain it.

Concourse currently holds SOC 2 Type I certification. We are actively pursuing SOC 2 Type II certification, with audit completion expected within the next 12 months. The Type II audit will validate the operational effectiveness of our controls over a continuous monitoring period.

5. Does your organization currently possess PCI DSS documentation applicable to the services provided? Explain the type of documentation you can make available such as a completed SAQ, Attestation of Compliance (AOC), or Report on Compliance (ROC), as applicable to your PCI scope.

For payment processing, the proposed platform will integrate with the City's existing payment processor or a PCI-compliant third-party gateway. This approach removes cardholder data from our system scope. We can provide documentation of our integration partners' PCI compliance (SAQ or AOC) as applicable to the selected payment solution.

6. Describe your internal controls for:

- **Access management**
 - Role-based access control (RBAC) with configurable permission levels
 - Multi-factor authentication (MFA) for all administrative access
 - Single Sign-On (SSO) integration capability with City identity providers
 - Automated user provisioning and deprovisioning workflows
 - Comprehensive access logging with user activity audit trails
 - Segregation of duties enforced for financial transactions
- **Data encryption (in-transit & at-rest)**
 - **In-Transit** TLS 1.3 encryption for all data transmission; HTTPS enforced for all web traffic
 - **At-Rest** AES-256 encryption for database storage and file attachments; encryption keys managed via secure key management service
- **Vulnerability scanning and patching**
 - Automated vulnerability scanning performed weekly
 - Third-party penetration testing conducted annually
 - Security patches applied within 72 hours for critical vulnerabilities
 - Continuous dependency monitoring for open-source components
 - Security incident response procedures with defined escalation paths

7. Describe how your system supports financial data integrity and audit tracking.

The proposed platform will support comprehensive financial data integrity through the following capabilities:

- **Immutable Audit Logs** All financial transactions recorded with timestamp, user ID, and before/after values

- **Transaction Reconciliation** Built-in reconciliation reports matching system records to external payment processor data
- **Approval Workflows** Configurable approval chains for contracts, refunds, and adjustments above defined thresholds
- **Export Capabilities** Standard format exports (CSV, Excel, PDF) for independent verification by Finance Department
- **Real-Time Reporting** Dashboard access for Finance personnel with drill-down to transaction details
- **Segregation of Duties** System-enforced separation between transaction entry and approval functions

Independent Verification: The City's Finance Department will have independent access to run audit reports, export transaction data, and verify financial records without requiring IT intervention.

8. Explain how the City's Finance Department can independently verify transactions via system reports or exports.

The City's Finance Department will have independent access to run audit reports, export transaction data, and verify financial records without requiring IT intervention.

9. Describe your standard data migration methodology (phases, tools, quality checks).

Our data migration methodology follows a structured four-phase approach designed to ensure complete, accurate transfer of cemetery records while minimizing operational disruption. Please see Concourse Proposal for full details.

10. Explain how you will migrate data from:

- **SQL databases**

Direct database connection with automated ETL (Extract-Transform-Load) processing

- **Excel spreadsheets**

Template-based import with validation rules and error reporting

11. Provide a list of required data fields and formats for ingestion.

Core Data Elements Required for Migration

- **Interment Records**
Required fields: Decedent name; dates; location (section / lot / grave).
Format: Text; Date (ISO 8601); Alphanumeric.
- **Ownership Records**
Required fields: Owner name; contact information; purchase date; lot assignment.
Format: Text; Date; Alphanumeric.
- **Property Inventory**
Required fields: Section; lot; grave; status; type; dimensions.
Format: Alphanumeric; Enumerated values.
- **Financial Records**
Required fields: Transaction date; amount; type; associated lot or contract.
Format: Date; Currency; Alphanumeric.
- **Mapping Data**
Required fields: Coordinates; boundaries; GIS feature attributes.
Format: GeoJSON; Shapefile; or coordinate pairs.

12. Describe how duplicate, inconsistent, or incomplete data is identified and corrected.

Phase 2: Data Cleansing & Transformation

- Automated duplicate detection using configurable matching rules
- Standardization of names, addresses, and date formats
- Resolution of inconsistent or incomplete records (flagged for staff review)
- Data normalization to target platform schema

13. Outline your process for validating migrated interment, ownership, mapping, and financial records.

Phase 4: Validation & Reconciliation

- Record count reconciliation between source and target systems
- Sample-based validation of interment records, ownership chains, and mapping data
- Financial record verification against existing accounting records
- User acceptance testing with Cemetery Division subject matter experts

14. Please provide an overview of core modules, including:

- **Property inventory**

Complete inventory management for all sections, lots, and graves across four cemeteries. Track availability status, property types (traditional, cremation, mausoleum), and ownership history

- **Mapping/GIS**

Interactive cemetery maps with ESRI GIS integration. Visual property selection, location search, and dynamic updates reflecting sales, burials, and transfers.

- **Contract management**

Full contract lifecycle from pre-need sales through at-need services. Template-based document generation, digital signatures, and ownership transfer processing.

- **Work orders**

Field crew task management for openings, closings, monument installations, and grounds maintenance. Mobile-friendly interface with photo documentation.

- **Scheduling**

Burial scheduling with calendar views, resource allocation, and conflict detection. Automated notifications to staff and families.

- **Finance**

Integrated financial tracking with payment processing, invoicing, and revenue reporting. Audit trails and export capabilities for the Finance Department.

- **Family services**

Constituent-facing portal for burial searches, pre-planning inquiries, and service requests. Memorial and obituary display options.

15. Are cemetery maps updated dynamically in real-time after sales, burials, or transfers?

Cemetery maps will update dynamically following sales, burials, or ownership transfers. Status changes are reflected immediately in the GIS layer, ensuring staff always work with current availability and location data. This eliminates the risk of double-booking and provides accurate inventory counts in real-time.

16. Please list all available APIs and integration points.

- RESTful API for programmatic data access and third-party integrations
- Webhook notifications for real-time event triggers
- Bulk data import/export via secure file transfer
- Single Sign-On (SSO) via SAML 2.0 or OAuth 2.0

17. Describe how your system integrates with:

• **ESRI GIS**

The platform will integrate with ESRI GIS products based on the City's deployed environment. Integration will utilize ESRI's REST API services for bidirectional data exchange. Map layers will be published to ArcGIS Online or ArcGIS Enterprise as feature services, enabling visualization in the City's existing GIS infrastructure.

Note: Integration approach will be confirmed during discovery based on the specific ESRI products and versions deployed by the City.

• **ERP financial systems**

The platform will integrate with the City's ERP financial system for:

- General ledger posting of cemetery revenues
- Accounts receivable synchronization for outstanding balances

- Chart of accounts mapping for proper revenue classification
- Periodic batch exports or real-time API integration (based on ERP capabilities)

Note: Specific integration method will be determined during discovery based on the City's ERP system and available integration interfaces.

- **Laserfiche or document management systems**

Contract documents, interment authorizations, and other records will be stored in and retrieved from Laserfiche. Integration will utilize Laserfiche's API for document upload, metadata tagging, and search/retrieval within the cemetery management interface.

18. Describe any integration limitations and recommended alternatives.

All integrations are subject to API availability and capabilities of the City's existing systems. During discovery, we will conduct technical assessments of each integration endpoint to confirm feasibility and identify any alternative approaches if needed. Where direct API integration is not available, we will recommend secure file-based exchange or middleware solutions.

19. Provide a typical project timeline for a cemetery operation similar to the City's size.

The following timeline represents a typical 12-week implementation for a cemetery operation of the City's size and complexity.

- **Discovery & Planning (Weeks 1–2)**
Key deliverables: Kickoff meeting; requirements validation; data audit; integration assessment; project plan.
City resources: 20 FTE hours.
- **Data Migration & Configuration (Weeks 3–6)**
Key deliverables: Data cleansing; SQL/Excel migration; duplicate resolution; property inventory setup; GIS mapping.
City resources: 40 FTE hours.
- **Integration & Testing (Weeks 7–9)**
Key deliverables: ERP integration; Laserfiche connection; UAT; record validation; security configuration.

City resources: 30 FTE hours.

- Training & Go-Live (Weeks 10–12)
Key deliverables: Staff training (all user groups); documentation deployment; production go-live; 30-day hypercare.
City resources: 50 FTE hours.

20. Identify roles and responsibilities for both vendor and City staff.

Roles and Responsibilities

- Project Management & Coordination
Concourse: Project management and coordination.
City: Designate project sponsor and project lead.
- Data Migration
Concourse: Data migration execution and validation.
City: Provide subject matter experts for data validation.
- System Configuration & Customization
Concourse: System configuration and customization.
City: Grant access to legacy systems and data sources.
- Integration & Testing
Concourse: Integration development and testing.
City: Participate in UAT and provide sign-off.
- Training & Documentation
Concourse: Training delivery and documentation.
City: Coordinate staff availability for training.
- Support & Issue Resolution
Concourse: Technical support and issue resolution.
City: IT support for integration endpoints.

21. Describe required City resources (FTE hours, subject matter experts, IT support).

- **Project Sponsor** - Cemetery Division leadership for decision-making and sign-off (estimated 2-4 hours/week)
- **Subject Matter Experts** - Cemetery staff familiar with operations, records, and mapping (estimated 4-6 hours/week during key phases)
- **IT Liaison** - Technical contact for integration endpoints, network access, and system administration (estimated 2-4 hours/week)
- **Finance Representative** - Validation of financial data migration and ERP integration requirements (estimated 2 hours/week)

Total Commitment: Total estimated City staff commitment: 140 FTE hours over 12 weeks.

22. Describe your training approach for:

- **Cemetery staff (Front Office):** Contract entry, scheduling, family services, record lookup.

Format: On-site instructor-led with hands-on training. *Duration:* 2 days.

- **Administrative staff:** Reporting, contract management, system administration.

Format: On-site instructor-led with hands-on training. *Duration:* 1.5 days.

- **Field crews:** Mobile work orders, photo documentation, task completion.

Format: On-site hands-on training using mobile devices. *Duration:* 0.5 day.

- **Finance personnel:** Financial reports, audit trails, export functions, ERP reconciliation.

Format: On-site instructor-led training. *Duration:* 0.5 day.

23. Provide examples of user documentation and knowledgebase tools.

- Comprehensive user guides organized by role and workflow
- Video tutorials for common tasks and procedures
- Searchable online knowledgebase with FAQs and troubleshooting guides

- Quick reference cards for field crews (laminated, mobile-friendly)
- System administrator guide for IT staff

24. Describe post-launch support, SLAs, and escalation procedures.

Support Model

- **Hypercare Period** - 30-day intensive support following go-live with dedicated project team availability
- **Standard Support** - Business hours support (Monday-Friday, 8 AM - 6 PM ET) via phone, email, and ticketing system
- **Emergency Support** - 24/7 availability for critical system outages

Service Level Commitments

- **Critical:** System unavailable or major function inoperable.
Response Time: 1 hour. Resolution Target: 4 hours.
- **High:** Significant feature degradation affecting operations.
Response Time: 4 hours. Resolution Target: 1 business day.
- **Medium:** Non-critical issue with workaround available.
Response Time: 1 business day. Resolution Target: 3 business days.
- **Low:** Minor issue, enhancement request, or question.
Response Time: 2 business days. Resolution Target: Scheduled release.

Escalation path: Support Technician → Support Manager → Account Manager → Director of Operations. Critical issues are automatically escalated to management within response timeframes.

25. Identify any optional modules or features.

- Public memorial portal with searchable burial records
- Online pre-need sales and payment processing
- Mobile family services app for location wayfinding
- Advanced analytics and business intelligence dashboards

- Automated perpetual care fund tracking

26. Provide your technology development roadmap for the next 24–36 months.

- **Enhanced Mobile Capabilities** - Expanded field crew features including offline mode and GPS-based task routing
- **Advanced GIS Features** - 3D cemetery visualization and drone imagery integration
- **AI-Assisted Search** - Natural language search for burial records and genealogy research
- **Integration Marketplace** - Pre-built connectors for common ERP, CRM, and document management systems

28. Describe how customer feedback influences product enhancements.

Product enhancements are prioritized through a formal customer feedback process. Clients submit feature requests through our support portal, which are reviewed quarterly by our product team. High-priority requests affecting multiple customers are incorporated into the development roadmap with transparent status tracking.

29. Identify any planned security certifications or compliance improvements.

- SOC 2 Type II certification (in progress, expected within 12 months)
- ISO 27001 certification (pursuing, expected 18-24 months)
- StateRAMP authorization pathway (committed)

ADDITIONAL COMMENTS

Please use the space below to provide any additional comments or project considerations that you would like to share with the City's project team.

Event 579 – Project Information

1.0 Purpose

The City of Fort Lauderdale is requesting information (RFI) from qualified and experienced firms to gather detailed insight into modern Cemetery Management Software solutions capable of supporting operations across the City's municipal cemetery system. This RFI is being issued to help refine the City's implementation strategy, budget planning, and technology needs aligned with industry best practices in the death care sector.

In addition, this RFI seeks confirmation, clarification, and supplemental details from firms regarding their system capabilities, technical requirements, security posture, integrations options, and overall suitability to meet the City's operational, administrative, and long-term strategic needs.

This RFI is not a solicitation for bids or proposals, nor does it represent a commitment to issue a subsequent Request for Proposal (RFP). Rather, it is intended to provide a structured process for industry participants to share relevant insights, recommendations, and expressions of interest that will inform the City on whether the development of a formal procurement process is warranted. All submissions become City property and will not be returned.

2.0 Background

The City of Fort Lauderdale owns and operates four municipal cemeteries within the City limits: Evergreen Cemetery, Lauderdale Memorial Park Cemetery, Sunset Memorial Gardens Cemetery, and North Woodlawn Cemetery. Together, these cemeteries span approximately 102 acres. The cemeteries have been City-owned since 1917 and were returned back to City's operation in FY 2019 following twenty-five years of private contract management, with the goal of improving service quality and operational oversight.

When the City resumed direct management in FY 2019, access to the prior firm's software system was not provided, resulting in increased manual processing of critical administrative and back-office functions, including burial record retrieval and file management. Recognizing the operational inefficiencies and service challenges this created, the Cemetery Division has identified the need for a modern Customer Relationship Management (CRM) system to streamline processes, enhance record accuracy, and reduce service disruptions.

Event 579 – Project Information

As a result, the City has been actively assessing CRM solutions capable of supporting the complex operational needs of the municipal cemetery system and their capabilities to support this project.

Attachment 1 – Response Guidance

Interested parties are requested to respond to this RFI by uploading responses to the Infor portal. Responses shall be limited to 15 pages total and divided into three sections.

Section 1 (4 pages max; provided by respondent)

Section 1 of the response shall provide a company overview, administrative information, and the following at a minimum:

- Name, mailing address, phone number, and e-mail of designated point of contact.

Section 2 (2 pages max; provided by respondent)

Respondents are encouraged, not required, to submit a brief Letter of Interest (LOI) along with their RFI response. The LOI should indicate the company's preliminary interest in participating in the City's Cemetery Management Software initiative, highlight relevant experience with municipal or multi-site cemetery operations, and outline any strategic or technical value the organization may bring to the project. The LOI should be addressed to the City of Fort Lauderdale, be limited to two pages, and be signed by the company's designated point of contact.

Section 3 (9 pages max; included in RFI)

Respondents are requested to provide detailed answers to the questionnaire included in this RFI as *Attachment 2 – Response Form*. These questions are designed to gather detailed insights on the recommended technical approach, preferred delivery methods, and a realistic implementation timeline. Please ensure that responses are complete, accurate, and submitted using the fillable PDF response form provided.

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Additional space is provided within the response form for firms to include any observations, recommendations, or insights that may be beneficial to the City's project team.

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SCOPE OF WORK

1. Please identify the procurement method(s) your company is able to support and describe any existing cooperative contracts or public sector agreements under which the City of Fort Lauderdale may procure your solution. (check all that apply)

- Request for Proposals (RFP)
- Invitation to Negotiate (ITN)
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- Sole Source Procurement
- Other: Other negotiated procurement methods as permitted by Florida law

2. Provide an overview of your company, including ownership, years in operation, and number of customers using cemetery management solutions.

Please see attached document: RFI 579-0 Attachment 2 Responses, Concourse Tech Inc..pdf

3. Describe your experience working with municipal governments or cemetery systems of similar size and complexity.

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4. Does your organization currently possess an ISO 27001 certification, including scope and surveillance audit schedule? If your organization does not currently hold an ISO 27001 certification, please explain why it does not and describe any plans, roadmap, and expected timeline to obtain it.

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6. Does your organization currently possess PCI DSS documentation applicable to the services provided? Explain the type of documentation you can make available such as a completed SAQ, Attestation of Compliance (AOC), or Report on Compliance (ROC), as applicable to your PCI scope.

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7. Describe your internal controls for:

- Access management
- Data encryption (in-transit & at-rest)
- Vulnerability scanning and patching

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ADDITIONAL COMMENTS

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Name: Kelsey Shaner


Title: Operations Manager

Company: Concourse Tech Inc.

Phone: 646-305-9964

Address: 169 Madison Ave, Suite 15520
New York, NY 10016

Email: sales@concoursetech.com

Signature: 

Date: 01/29/2026

Attachment 2 - Response Forms

Event 579 – Project Information

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The City of Fort Lauderdale is requesting information (RFI) from qualified and experienced firms to gather detailed insight into modern Cemetery Management Software solutions capable of supporting operations across the City's municipal cemetery system. This RFI is being issued to help refine the City's implementation strategy, budget planning, and technology needs aligned with industry best practices in the death care sector.

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Phone: 646-305-9964

Address: 169 Madison Ave, Suite 15520
New York, NY 10016

Email: sales@concoursetech.com

Signature: 

Date: 01/29/2026

Attachment 2 - Response Forms



Response For Supplier: Jotform

Event # : 579-0

Name: Cemetery Management Software (Request for Information)

Description: The City of Fort Lauderdale is requesting information (RFI) from qualified and experienced firms to gather detailed insight into modern Cemetery Management Software solutions capable of supporting operations across the City's municipal cemetery system. This RFI is being issued to help refine the City's implementation strategy, budget planning, and technology needs aligned with industry best practices in the death care sector.

Date created: February 3,
2026 12:25:04 PM UTC

Preview date:

Open date: January 23, 2026
7:50:00 PM UTC

Close Date: 02/10/2026 04:00:00 PM UTC

Date submitted: February 4,
2026 8:19:24 AM UTC

Q & A open date: January 23,
2026 7:50:00 PM UTC

Q & A close date: February 5,
2026 10:00:00 PM UTC

Dispute close date:

Responded To: 1 Out of 1 Lines

Total Bid Amount: 16,616.00 **Response Currency:** USD

Response Attachments

Attachment

The City Of Fort Lauderdale - Cemetery Management Software.pdf

Jotform - Pricing.pdf

Line Responses

Line 1: Request for Information - Cemetery Mgmt Software Solution

Description: This is a Request for Information (RFI); it is not a request for pricing, commitment to purchase, or an obligation to provide products or services described in this notice. Please see the attached forms for

Event # 579-0: Cemetery Management Software (Request for Information)

response details.

Item: CEMETERY MGMT SOFTWARE SOLUTION Request for Information - Cemetery Mgmt Software Solution
Commodity Code: 920-45 Software Maintenance/Support
Quantity: 1.0000 **Unit of Measure:** LS

Bid Quantity: 1.0000

Unit Price: 16,616.0000

Extended Amount: 16,616.00

No Charge: No

No Bid: No

Vendor Item: CEMETERY MGMT SOFTWARE SOLUTION Request for Information - Cemetery Mgmt Software Solution



Powerful forms for your team

PROPOSAL PREPARED FOR

The City of Fort Lauderdale
Cemetery Management Software

PREPARED BY

Grant Gutwein
grant@jotform.com
Business Development Manager
Jotform Inc.

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Section 1

Empower your team members to build custom online forms, automate workflows, collect e-signatures, and create real-time reports with their own role-based access. Digitally transform your organization with unlimited forms, submissions, payments, and storage. Secure data with a single sign-on integration, local data residency center, service level agreements, and administrative controls.

From powerful, no-code conditional logic to workflows and an additional enterprise-only API over and above our open API, Jotform Enterprise empowers teams across your entire organization to create solutions and automate their busywork. Digitize paper-based processes to eliminate manual data entry and reduce paper-based costs. Automate email notifications and follow-ups to reduce bottlenecks in common decision trees. Design powerful workflows to keep projects on track and managers focused on more strategic work. Leverage Jotform Sign and automation to eliminate expensive single-service providers.

Control your organization's entire instance from a central dashboard. With the Admin Console, you can establish teams and role-based access for users, enable or block available widgets and integrations, customize SMTP settings, add your logo and colors to match your exact brand standards, create detailed reports, and more.

Jotform Enterprise preserves your IT resources for more strategic initiatives while ensuring the security and ownership of your organization's forms and data. Migrate single-user, self-serve accounts to an Enterprise instance with administrative controls, online team workspaces, role-based access for users, and complete customization options. Get the security you need and the autonomy teams want on the no-code platform everyone loves.

Grant Gutwein
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Jotform Inc.
4 Embarcadero Center Suite 780
San Francisco, CA, 94111-4102

Section 2

Dear Evaluation Committee,

Jotform is pleased to submit this Letter of Interest in response to the City of Fort Lauderdale's Cemetery Management Software initiative. This letter accompanies our RFI response and confirms Jotform's preliminary interest in participating in the City's procurement process for a modern, secure, and scalable solution to support cemetery operations.

Jotform is a cloud-based, low-code platform used globally by public-sector organizations to digitize, manage, and automate complex, records-driven processes. Municipal governments use Jotform to support functions such as records management, asset and property tracking, payments, approvals, compliance reporting, and public-facing service workflows. Our experience working with cities and government entities enables us to align with public-sector governance, audit, accessibility, and security requirements.

Jotform has supported municipal customers, including the City of Kingston and the City of Guelph, in streamlining data collection, approvals, internal workflows, and reporting. In environments comparable in scale and complexity to cemetery operations, Jotform has been used to manage structured records, ownership information, workflow approvals, and financial transactions while maintaining auditability and data integrity. These implementations demonstrate Jotform's ability to support multi-site operations, distributed users, and evolving operational needs without requiring custom software development.

From a strategic and technical perspective, Jotform offers the City of Fort Lauderdale a flexible platform that can be configured to support cemetery management functions such as interment and ownership records, work orders, scheduling, financial tracking, reporting, and integrations with external systems. The platform's low-code architecture enables City staff to adapt workflows over time without vendor dependency, while enterprise-grade security, role-based access controls, encryption, and compliance certifications support the City's risk and governance requirements. Jotform's API and integration capabilities further allow the solution to coexist with existing City systems and mapping or GIS platforms as needed.

Jotform is committed to supporting public-sector organizations with reliable, secure, and configurable technology that improves operational efficiency and service delivery. We appreciate the opportunity to express our interest in this initiative and look forward to continuing engagement with the City of Fort Lauderdale as the procurement process progresses.

Sincerely,

Jotform Inc.

Section 3

SCOPE OF WORK

1. Please identify the procurement method(s) your company is able to support and describe any existing cooperative contracts or public sector agreements under which the City of Fort Lauderdale may procure your solution. (check all that apply)

- Request for Proposals (RFP)**
- Invitation to Negotiate (ITN)**
- Cooperative Purchasing/ Piggyback Agreement**
- Sole Source Procurement**
- Other:**

2. Provide an overview of your company, including ownership, years in operation, and number of customers using cemetery management solutions.

Jotform, founded in 2006, has grown to become a leading force in the online form-building industry, serving over 36 million customers across 192 countries. Its platform is a trusted tool in diverse sectors, including corporate, healthcare, government, finance, and education, facilitating efficient online data collection.

Jotform offers an intuitive and user-friendly interface that allows users to create and customize forms for a wide range of purposes such as surveys, registrations, and order forms. The platform's drag-and-drop functionality enables users to design forms without any coding knowledge, making it accessible to all. With a variety of form fields, customization options, and built-in features like [Jotform Apps](#), [Jotform Workflows](#), [Jotform Sign](#), and [Jotform PDF Editor](#) users can automate their business processes seamlessly.

Jotform Enterprise is particularly esteemed in the financial sector, where data security and regulatory compliance are paramount. The platform adheres to strict industry regulations, including options for GDPR, HIPAA, and SOC 2 compliance, ensuring that sensitive information is securely managed and stored. With offices in the US, Canada, UK, Turkey, and Australia, Jotform is well-positioned to provide exceptional service to its global clientele.

The platform's wide range of integrations with popular apps and services such as [Google Drive](#), [PayPal](#), and [Slack](#) streamline workflows and boost productivity. Jotform's comprehensive analytics tools provide valuable insights into form performance, aiding businesses in making informed, data-driven decisions.

In brief, Jotform excels as a versatile and secure online form-building platform. Its user-friendly interface, extensive customization options, robust security measures, and powerful integrations make it an indispensable tool for businesses and organizations looking to streamline their data collection and workflow processes.

3. Describe your experience working with municipal governments or cemetery systems of similar size and complexity.

Jotform has experience supporting municipal governments and public-sector organizations of varying size and complexity, including departments responsible for records management, permitting, finance,

public works, and community services. Municipal customers such as the City of Kingston and the City of Guelph have used Jotform to digitize and streamline processes, including data collection, approvals, internal workflows, and reporting. In environments similar to records-driven operations, Jotform supports structured data capture, ownership, and interment-related records, audit trails, and integrations with external systems where required.

4. Does your organization currently possess an ISO 27001 certification, including scope and surveillance audit schedule? If your organization does not currently hold an ISO 27001 certification, please explain why it does not and describe any plans, roadmap, and expected timeline to obtain it.

Jotform currently possesses a SOC 2 Type II report. The SOC 2 Type II audit evaluates Jotform's controls over an extended period of time and confirms that these controls are suitably designed and operating effectively in alignment with the Trust Services Criteria, including security, availability, and confidentiality. Updated SOC 2 Type II reports are made available to customers upon request.

5. Does your organization currently possess a SOC 2 Type II report? If your organization does not currently hold SOC 2 Type II, please explain why it does not and describe any plans, roadmap, and expected timeline to obtain it.

Jotform currently possesses a SOC 2 Type II report. The SOC 2 Type II audit evaluates Jotform's controls over an extended period of time and confirms that these controls are suitably designed and operating effectively in alignment with the Trust Services Criteria, including security, availability, and confidentiality. Updated SOC 2 Type II reports are made available to customers upon request.

6. Does your organization currently possess PCI DSS documentation applicable to the services provided? Explain the type of documentation you can make available such as a completed SAQ, Attestation of Compliance (AOC), or Report on Compliance (ROC), as applicable to your PCI scope.

The [PCI DSS](#) ROC confirms that Jotform's in-scope systems and processes meet the applicable PCI DSS requirements for securely handling payment card data. The AOC and supporting PCI documentation can be made available to customers upon request.

7. Describe your internal controls for:

- **Access management**

Jotform Enterprise offers two primary user roles: Admin and User. Admins have full access to all data, forms, and system settings, while Users are restricted to accessing only owned or assigned forms and data.

Jotform also supports granular permission allocation through its [Jotform Teams](#) feature, which is particularly useful for enterprises, ensuring structured management of user roles and responsibilities. Administrators can create teams and assign specific roles to members, ensuring that users have the appropriate access level based on their job responsibilities. The available roles include:

Team Admin: Can manage team assets and members.

Data Collaborator: Can view forms and manage submissions.

Data Viewer: Can view submissions only.

Creator: Can manage forms only.

To allocate these permissions, team admins can log into their accounts, navigate to the team management section, and assign roles to team members based on their needs. This structured approach enables efficient task delegation while ensuring the protection of sensitive data and workflows.

- **Data encryption (in-transit & at-rest)**

All data is encrypted in transit, end to end, and at rest. Volume encryption keys and machines that generate volume encryption keys are protected from unauthorized access. Volume encryption key material is protected with access controls such that the key material is only accessible by privileged accounts.

- **Vulnerability scanning and patching**

Jotform utilizes Nessus Scanner to consistently scan, identify, and address vulnerabilities on our systems. We also utilize OSSEC on all systems, including logs, for file integrity checking and intrusion detection.

8. Describe how your system supports financial data integrity and audit tracking.

Jotform supports financial data integrity and audit tracking through a combination of secure controls, validation mechanisms, and detailed logging. Financial and payment-related data is protected using strong encryption, role-based access controls, and field-level validation to prevent unauthorized changes or data corruption. Jotform maintains comprehensive audit logs that record submission activity, data updates, user access, and administrative actions, including timestamps and user identifiers.

9. Explain how the City's Finance Department can independently verify transactions via system reports or exports.

The City's Finance Department can verify transactions using Jotform's built-in reporting, filtering, and data export capabilities. In addition, detailed submissions, timestamps, payment status, and audit logs provide full traceability, enabling the Finance Department to independently review transactions without reliance on vendor intervention.

10. Describe your standard data migration methodology (phases, tools, quality checks).

Customers can independently perform data migration into Jotform. Jotform provides self-service data import tools that allow customers to upload Excel or CSV files, map data fields to forms or Jotform Tables, and validate records during ingestion. For more advanced or recurring migrations, customers may use Jotform's API and automation integrations to manage data transfers internally.

11. Explain how you will migrate data from:

- **SQL databases**

Jotform provides a robust [API](#) that enables seamless integration with forms and submissions, allowing users to interact with their data programmatically. Through the API, users can add new questions, retrieve and send responses, and delete data, facilitating smooth data exchange with third-party applications without needing to access Jotform website. This functionality supports automation, enhances workflow efficiency, and ensures real-time synchronization with external systems.

- **Excel spreadsheets**

Jotform supports secure and efficient migration of data from Excel spreadsheets through multiple methods. Existing Excel files can be uploaded directly into Jotform to pre-populate forms or import historical submission data using Jotform's data import tools. Data mapping is handled through

column-to-field alignment to ensure accuracy and consistency.

12. Provide a list of required data fields and formats for ingestion.

Jotform requires the following data fields and formats for data ingestion. The exact fields may vary depending on the form configuration, but the standard requirements are outlined below.

- Required data fields are field ID or field label, field type, field value, and submission date/time
- Supported data formats by field type are short text / long text, email, number, date, time, phone number, dropdown/radio button, checkbox, and file upload
- Accepted file formats are Excel, CSV, and PDF.

13. Describe how duplicate, inconsistent, or incomplete data is identified and corrected.

Jotform identifies and addresses duplicate, inconsistent, or incomplete data through a combination of validation controls, automated checks, and administrative review tools.

Duplicate data is detected using a configurable [unique field](#) element. Inconsistent data is identified through [field-level validation rules](#), predefined option lists, data type enforcement, and format validation. Incomplete data is identified by required field settings, submission completeness checks, and missing or null value indicators in Jotform Tables. Duplicate records can be reviewed, merged, or removed manually within Jotform Tables.

This approach ensures data accuracy, consistency, and completeness while maintaining compliance with applicable security and data governance requirements.

14. Outline your process for validating migrated interment, ownership, mapping, and financial records.

Jotform enables customers to import data from Excel or CSV files directly into a secure Jotform account using its Import Data tool. Once data is ingested into Jotform Tables, customers can use filters, sorting, and exports to review records for completeness, duplicates, or anomalies. Exported data can be reviewed externally in CSV/Excel formats.

15. Please provide an overview of core modules, including:

- **Property inventory**

Jotform supports property inventory management by enabling organizations to capture, maintain, and track property records through configurable forms, workflows, and centralized data tables. Property details such as location, status, usage, and associated documents can be recorded and updated in real time.

- **Mapping/GIS**

Jotform provides a robust [API](#) that enables seamless integration with forms and submissions, allowing users to interact with their data programmatically. Through the API, users can add new questions, retrieve and send responses, and delete data, facilitating smooth data exchange with third-party applications without needing to access Jotform website.

- **Contract management**

Jotform supports contract management through secure data capture, [workflow](#) automation, and centralized record storage. Contracts and related documents can be created, submitted, reviewed,

approved, and stored using configurable forms, approval workflows, and Jotform Tables. Role-based access controls ensure that only authorized users can view or modify contract records.

- **Work orders**

Jotform supports work order management by enabling organizations to create, assign, track, and close work orders through configurable forms, automated workflows, and centralized data tables. Work requests can be submitted by staff or the public, routed for approval to the appropriate teams.

- **Scheduling**

Jotform supports scheduling by allowing organizations to manage appointments, services, and internal activities through configurable scheduling forms and automated workflows. Availability rules, date and time selection, and [conditional logic](#) help prevent conflicts and ensure accurate bookings.

- **Finance**

Jotform supports finance-related operations by enabling secure collection, tracking, and reporting of financial data through configurable forms, workflows, and centralized data tables. Jotform supports payment collection, transaction tracking, approval workflows, and reconciliation through detailed submission records, timestamps, and audit logs.

- **Family services**

Jotform supports family services by enabling secure intake, case management, and service coordination through configurable forms and workflows. Information such as family details, service requests, eligibility data, and supporting documentation can be collected and managed in a centralized system with role-based access controls to protect sensitive information.

16. Are cemetery maps updated dynamically in real-time after sales, burials, or transfers?

Jotform does not natively provide an embedded GIS-based cemetery map. However, Jotform supports real-time updates of records through its data collection capabilities. These updates can be securely synchronized with external systems using Jotform's [API](#), [webhooks](#), or automation integrations.

17. Please list all available APIs and integrations points.

Jotform offers a diverse range of [integrations](#) that enhance the functionality of forms, streamline workflows, and improve data management. Below is an overview of the key integration categories available to optimize form processes:

Analytics & Reporting: Users can integrate with advanced [analytics tools](#) to gain insights from form responses and generate comprehensive reports for data-driven decision-making, such as [Google Analytics](#), [Funnelytics](#), [MonkeyLearn](#).

Automation: Jotform allows users to connect with leading [automation](#) platforms to simplify workflows, eliminate manual tasks, and enhance overall efficiency such as [Zapier](#), [IFTTT](#), [Microsoft Power Automate](#).

CRM: Jotform allows users to sync with [CRM](#) systems like [Salesforce](#), [Zoho CRM](#) and [HubSpot](#) to manage leads, track customer interactions, and maintain organized records of customer relationships.

Payment: Jotform facilitate secure payments with integrations from top [payment processors](#) like [PayPal](#), [Stripe](#), and [Square](#), allowing for seamless transactions directly within forms.

File Sharing & Storage: Simplify [file management](#) by connecting with cloud storage services like [Google Drive](#), [Dropbox](#), and [OneDrive](#), enabling users to efficiently store and access uploaded files.

Jotform provides a robust [API](#) that enables seamless integration with forms and submissions, allowing users to interact with their data programmatically. Through the API, users can add new questions, retrieve and send responses, and delete data, facilitating smooth data exchange with third-party applications without needing to access Jotform website.

18. Describe how your system integrates with:

- **ESRI GIS**
- **ERP financial systems**
- **Laserfiche or document management systems**

Jotform provides a robust [API](#) that enables seamless integration with forms and submissions, allowing users to interact with their data programmatically. Through the API, users can add new questions, retrieve and send responses, and delete data, facilitating smooth data exchange with third-party applications without needing to access Jotform website. This functionality supports automation, enhances workflow efficiency, and ensures real-time synchronization with external systems.

19. Describe any integration limitations and recommended alternatives.

Jotform provides a broad range of native integrations and API capabilities; however, certain limitations may apply depending on the target system, data volume, or required real-time synchronization. Some legacy or proprietary systems may not offer direct connectors, and complex bi-directional or high-frequency integrations may require additional configuration or custom development.

20. Provide a typical project timeline for a cemetery operation similar to the City’s size.

Jotform’s implementation and onboarding plan follows a structured, phased approach to ensure the platform is operational, secure, and fully adopted by the City’s staff.

Week	Phase	Deliverables
Week 1-2	Planning and Kickoff	The account manager will conduct a kickoff meeting with the City.
Week 2-3	Configuration and Build	The timeline during this phase depends on whether the City is building forms themselves or contracting Jotform’s Professional Services to build them.
Week 4	Training	Training sessions on platform utilization, workflow, reporting, and administrative functions. The scheduling of the training is based on the City’s availability.
Week 5	Go-Live	Deployment for operational use, monitoring system performance,

		and providing immediate support for any issues.
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21. Identify roles and responsibilities for both vendor and City staff.

Jotform Enterprise offers two primary user roles: Admin and User. Admins have full access to all data, forms, and system settings, while Users are restricted to accessing only owned or assigned forms and data.

Jotform also supports granular permission allocation through its [Jotform Teams](#) feature, which is particularly useful for enterprises, ensuring structured management of user roles and responsibilities. Administrators can create teams and assign specific roles to members, ensuring that users have the appropriate access level based on their job responsibilities. The available roles include: Team Admin, Data Collaborator, Data Viewer, and Creator.

To allocate these permissions, team admins can log into their accounts, navigate to the team management section, and assign roles to team members based on their needs.

22. Describe required City resources (FTE hours, subject matter experts, IT support).

Jotform is delivered as a cloud-based, low-code platform and requires minimal City resources for implementation and ongoing use. No dedicated infrastructure, hosting, or ongoing technical maintenance resources are required from the City, as Jotform manages platform availability, updates, and security.

23. Describe your training approach for:

- Cemetery staff
- Administrative staff
- Field crews
- Finance personnel

Jotform uses digital tools that educate and develop its users through many channels: [newsletters](#), [webinars](#), [help content](#), [videos](#), and [FAQs](#). For specific cases, users can reach the support team on the [Support Forum](#). Our support team is available 24/7 and our average response time is between one and two hours. Jotform offers its Enterprise customers access to Jotform Enterprise Professional Services for an additional cost. These services include implementation that would help customers to implement forms, workflows, and other products to offer to suit the needs of customers. [Jotform Enterprise Professional Services](#) equip the customer’s team and every session will be tailored to meet the unique requirements to utilize Jotform Enterprise to its fullest.

24. Provide examples of user documentation and knowledgebase tools.

Jotform provides a comprehensive set of user documentation and knowledgebase resources to support customers. These resources include a searchable [Help Center](#) with detailed step-by-step guides, how-to articles, and best practices covering form creation, workflows, integrations, data management, and advanced features. Jotform also offers [video tutorials](#) that walk users through common tasks and features, enhancing self-paced learning.

25. Describe post-launch support, SLAs, and escalation procedures.

When a customer identifies a platform difficulty or defect, they may engage our global Enterprise Support team through one of two primary channels:

- **Support Ticket:** Customers can open a support ticket at any time, with an average initial response time of approximately one hour.
- **Customer Success:** Customers may also schedule a 1:1 or team Zoom session with a Customer Success Manager (CSM), who is a product expert who can triage problems live during a call.

Please find Jotform’s SLA proposal and the set of Key Performance Indicators and service credits to facilitate clear quantification of all key elements of service performance below:

Uptime:

- a. Jotform shall ensure that Customer has online access to the Platform ninety-nine and nine-tenths percent (99.9%) of the time as measured during any calendar month, 24 hours per day, seven days per week, 365 days per year (“Uptime”). Any outages as directed by the Customer shall not be included in how Uptime is measured. For any month that Jotform has failed to meet the Uptime requirements, Jotform will provide the Customer with a report detailing the extent of the unavailability not later than the tenth of the month following the measured month.
- b. If Jotform fails to meet the Uptime requirement, the Customer will receive a service credit, allowing Customer to continue to use the Platform for a certain period of time after the normal expiration of Customer’s subscription period, as follows:

Monthly Uptime %	Service Credit - Extra Days of Use
99% - 99.9%	3 days
98% - 98.9%	4 days
97% - 97.9%	5 days
96% - 96.9%	10 days
Below 96%	30 days

Throughout the term of this Agreement, Jotform shall provide the following minimum levels of support to customer.

- a. Consultation through the Platform’s built-in ticketing system and, where reasonably necessary, real-time screen-sharing consultation, including problem-solving, bug reporting, documentation clarification, and technical guidance for the Service. Jotform will assist the Customer in identifying, verifying, and attempting to resolve problems in the Service. Real-time calls will be available during the hours of 8 am to 6 pm US Pacific Time, Monday through Friday.
- b. Priority processing of technical assistance requests.

26. Identify any optional modules or features.

Jotform offers several optional modules and features that customers may enable based on their operational needs. These include Jotform Tables for centralized data management, Jotform Workflows for multi-step review, Jotform Sign for electronic signatures, Jotform Apps for no-code mobile app creation, payment processing integrations, advanced reporting, and SSO for identity management.

27. Provide your technology development roadmap for the next 24–36 months.

Admin Console: Beyond advanced asset analytics such as completion rates, engagement metrics, and organization-wide insights for Forms, Signs, App, Workflow, Agent Assets, the Admin Console extends into deep operational and security capabilities.

Insights: Insights is a centralized analytics dashboard that helps you track and understand the performance of your and your teams' digital assets. It provides visual data, trend charts, and audience breakdowns so you can improve engagement and results.

Form Draft Mode: Form Draft Mode allows users to review, edit, and refine forms before publication, ensuring accuracy, quality, and consistency across all submissions.

Branding: The AI-generated Brand Kit enables organizations to create a unified, branded experience across forms, workspaces, and login pages.

AI Capabilities: Jotform Enterprise 2.0 enables the rapid creation of organization-wide form templates with AI, saving time, building consistency, and empowering teams to work efficiently while remaining fully on-brand.

28. Describe how customer feedback influences product enhancements.

Customer feedback plays a central role in guiding Jotform's product enhancements and roadmap. Feedback is collected through multiple channels, including customer support interactions, feature requests, user surveys, and direct engagement with enterprise customers.

29. Identify any planned security certifications or compliance improvements.

Jotform is planning to pursue [GovRAMP authorization](#) to further support U.S. government and state/local government customers. This initiative is intended to strengthen alignment with government-recognized security frameworks and to provide additional assurance regarding Jotform's risk management, security controls, and operational practices.

Name: Tolga Sakman**Title:** VP of Sales**Company:** Jotform Inc.**Phone:** 1-415-658-9905**Address:** 4 Embarcadero Center Suite 780
San Francisco, CA, 94111-4102**tolga@jotform.com**

02/03/2026

Tolga Sakman

TITLE	The City Of Fort Lauderdale - Cemetery Managememe
DOCUMENT ID	260332875415053
DOCUMENT PAGES	13
STATUS	COMPLETED
TIME ZONE	Europe/Istanbul

DOCUMENT HISTORY

	Process Started	Feb 03, 2026 01:36 PM	The document has been sent for signature.
	Invitations Sent	Feb 03, 2026 01:36 PM	Sent for signature to (tolga@jotform.com) IP: 136.144.42.92
	Viewed	Feb 03, 2026 02:23 PM	Viewed by (tolga@jotform.com) IP: 24.246.250.98
	Signed	Feb 03, 2026 02:32 PM	Signed by (tolga@jotform.com) IP: 24.246.250.98
	Process Completed	Feb 03, 2026 02:33 PM	The document has been completed.

Jotform Enterprise Pricing Model

Jotform Enterprise uses a custom, subscription-based pricing model tailored to each organization's specific needs. Pricing varies based on several key factors:

1. Base Package

Jotform Enterprise Base Package includes:

- Unlimited forms and submissions
- 1 TB of data storage
- Access for up to 5 permitted users
- Additional permitted users can be added in bundles of 5

2. Number of Users

Pricing is influenced by the number of user licenses (seats). Each user has their own login credentials, and permissions are managed through role-based access control.

3. Usage Requirements

While forms and submissions are unlimited, higher data volumes (such as large file uploads or heavy submission traffic) may impact pricing if additional storage or infrastructure is needed.

4. Custom Domain & White-Labeling

Enterprise includes the ability to use a custom domain (e.g., forms.utahtech.com) and offers full branding control, both of which are factored into the pricing model.

5. Security & Compliance

Jotform Enterprise supports advanced security features, including:

- Single Sign-On (SSO) via SAML 2.0 (for an additional cost)
- SOC 2 compliance (for an additional cost)
- HIPAA compliance (for an additional cost)
- GDPR compliance
- Data residency options

Organizations with strict compliance requirements may require additional configuration and support.

6. Service and Support

Each Enterprise account includes:

- A dedicated account manager
- Priority support from our dedicated Enterprise Customer Success Team
- Onboarding assistance
- Service level agreements (SLAs)

Hosting

The server will be hosted in one of our Google Cloud Platform data centers.
Available Data Center Locations;

Region	City	Country
APAC	Changhua County	Taiwan
	Hong Kong	Hong Kong
	Tokyo	Japan
	Osaka	Japan
	Mumbai	India
	Jurong West	Singapore
	Sydney	Australia
EUROPE	Hamina	Finland
	St. Ghislain	Belgium
	London	England, UK
	Frankfurt	Germany
	Eemshaven	Netherlands
	Zürich	Switzerland
AMERICAS	Montréal	Québec, Canada
	São Paulo	Brazil
	Council Bluffs	Iowa, USA
	Moncks Corner	South Carolina, USA
	The Dalles	Oregon, USA

Pricing

Customer		The City of Fort Lauderdale - Cemetery Management Software				
Term of the Subscription ("Term")						
Section	Item Description	Quantity / Unit	Unit Price (USD)	Frequency	Total (USD) 12 months from the Effective Date	Notes
A. Annual Software License Fee	Base Package (includes 5 users)	1	\$8,328.00	Annual	\$8,328.00	Base Package (includes 5 users) Jotform Enterprise subscription, including all software and licenses, administrative accounts, and up to 5 permitted users. 1TB storage, account manager, SLA, and priority support.
	HIPAA Compliance	N/A	\$4,788.00	Annual	\$4,788.00	Optional feature for secure data handling
B. Installation & Initialization	Jotform Enterprise Onboarding Fee	1	\$3,500.00	One-time	\$3,500.00	Optional. One-time setup and configuration support
C. Training and Support	Initial Training & Setup Support	Included	-	One-time	Included	Included in the onboarding fee
	Ongoing Support	Included	-	Annual	Included	Included in the onboarding fee Standard with the Jotform Enterprise plan
Total Fees (USD\$)					\$ 16,616.00	

- **3-year agreement: 10% off total cost (total amount due up-front within 30 days from invoice)**
- **5-year agreement: 15% off total cost (total amount due up-front within 30 days from invoice)**



Response For Supplier: PlotBox

Event # : 579-0

Name: Cemetery Management Software (Request for Information)

Description: The City of Fort Lauderdale is requesting information (RFI) from qualified and experienced firms to gather detailed insight into modern Cemetery Management Software solutions capable of supporting operations across the City's municipal cemetery system. This RFI is being issued to help refine the City's implementation strategy, budget planning, and technology needs aligned with industry best practices in the death care sector.

Date created: February 6,
2026 7:05:46 PM UTC

Preview date:

Open date: January 23, 2026
7:50:00 PM UTC

Close Date: 02/10/2026 04:00:00 PM UTC

Date submitted: February 6,
2026 7:10:39 PM UTC

Q & A open date: January 23,
2026 7:50:00 PM UTC

Q & A close date: February 5,
2026 10:00:00 PM UTC

Dispute close date:

Responded To: 1 Out of 1 Lines

Response Currency: USD

Response Attachments

Attachment

Fort Lauderdale RFI Submission Doc.pdf

Line Responses

Line 1: Request for Information - Cemetery Mgmt Software Solution

Description: This is a Request for Information (RFI); it is not a request for pricing, commitment to purchase, or an obligation to provide products or services described in this notice. Please see the attached forms for response details.

Event # 579-0: Cemetery Management Software (Request for Information)

Item: CEMETERY MGMT SOFTWARE SOLUTION	Request for Information - Cemetery Mgmt Software Solution
Commodity Code: 920-45	Software Maintenance/Support
Quantity: 1.0000	Unit of Measure: LS

Bid Quantity: 1.0000

No Charge: Yes

No Bid: No

Vendor Item: CEMETERY MGMT SOFTWARE SOLUTION Request for Information - Cemetery Mgmt Software Solution

Comments: All information for this RFI is within the PDF documents. No prices are shown as that has not been requested.



**Cemetery Management System
Fort Lauderdale, FL - RFI 560/Event 579
RFI SUBMISSION**

DUE DATE: Tuesday, February 10th, 2025, 11AM Local Time

TO: CITY OF Fort Lauderdale, Florida

**FROM: PLOTBOX
1 Marina Park Drive
Suite 1410
Boston, MA 02210**

**Point of Contact
Marc Lamb
Ph: (508) 981-3325
Email: marc.lamb@plotbox.com**



Section 1

Company Overview and Solution Capability

PlotBox is the premier cemetery software provider in North America, with our United States headquarters established in Boston, MA, for over a decade. Cemetery software management is our foundational focus, and we currently serve more than 2,500 deathcare facilities worldwide, with approximately two-thirds of our business concentrated in North America.

Our organization is supported by a large and stable team of over 130 professionals, many of whom are located across North America. All front-line support and customer success teams are locally based in the United States. We possess extensive experience addressing similar challenges for numerous cities and municipalities, evidenced by a substantial, referenceable customer base who can attest to the quality of our solution, implementation services, and ongoing support.

The PlotBox solution is designed to meet and exceed your requirements with robust out-of-the-box functionality, complemented by customization where necessary. Beyond the core operational software, our services include digitization, data migration, specialized mapping, dedicated project management, comprehensive training, and continuous support. Our platform is a complete, integrated solution capable of managing all critical aspects of cemetery operations, including mapping, records, deeds, plots, scheduling, contracts, work orders, memorial management, and financial integration. The service is fully scalable and receives multiple, uninterrupted system updates monthly.

Established in North America in 2014, PlotBox has become a global leader in cemetery software. Our team is structured into four key divisions: Technology, Operations (Data, Mapping, Project Management, Support, Customer Success), Commercial, and Finance/HR. Guided by our mission to alleviate the difficulties associated with death for both families and the professionals who serve them, our strategy is centered on solving the complexities faced by cemeterians, allowing them to focus on what matters most. Over the past decade, we have continuously refined our operational workflows, resulting in an intuitive, best-in-market solution that incorporates global best practices. This commitment, coupled with the focused attention of our Customer Support and Customer Success teams, ensures we maintain the largest, most diverse, and referenceable customer base in the industry, highlighted by our exceptional customer retention rate.



Section 2

Subject: Letter of Interest – Cemetery Management System RFI for the City of Fort Lauderdale, FL

To Whom It May Concern:

PlotBox is pleased to submit this Letter of Interest to become the cemetery software provider for the City of Fort Lauderdale, Florida. We fully understand the City's specific requirements, the inherent challenges of implementing a new cemetery management system, and the critical importance of a successful transition.

With over ten years of experience, PlotBox has a proven track record of successfully implementing and managing cemetery software solutions for small, medium, and large municipalities. We are highly adept at confronting and overcoming typical challenges associated with municipal conversions, which often include integrating disjointed systems, managing diverse data formats, updating older mapping records, and improving historically inefficient operations. Our expertise is further supported by our familiarity with overcoming challenges from failed previous software implementations, ensuring we are well-prepared to navigate complex circumstances.

Our software is characterized by continuous development and client-driven enhancements, a practice that has been refined across over 2,500 global implementations. This commitment to excellence is reflected in our exceptional 99% client retention rate, a figure that underscores the robustness of our system and the enduring value we provide to our partners.

PlotBox's project execution is built upon a strong, dedicated organizational structure designed for successful outcomes. Our project teams comprise specialized units, including dedicated teams for data transformation, mapping, implementation/training, and customer success. The City of Fort Lauderdale will be assigned a dedicated Project Manager and a Customer Success Manager, ensuring clear communication and consistent expectation management from the project's inception.

Our extensive client portfolio includes municipalities managing between one and over 20 cemeteries, as well as numerous private organizations whose operations span multiple states, cemeteries, funeral homes, and crematories.

Sincerely,

Marc Lamb

Marc Lamb

Solutions Consultant, PlotBox

SCOPE OF WORK

1. Please identify the procurement method(s) your company is able to support and describe any existing cooperative contracts or public sector agreements under which the City of Fort Lauderdale may procure your solution. (check all that apply)

- Request for Proposals (RFP) **YES**
- Invitation to Negotiate (ITN) **YES**
- Cooperative Purchasing/ Piggyback Agreement - **Not at this time**
- Sole Source Procurement - **YES - SOLE SOURCE LETTER**
- Other: .

2. Provide an overview of your company, including ownership, years in operation, and number of customers using cemetery management solutions.

PlotBox has been in operation since 2011 and has been established and registered in the United States since 2014. PlotBox, Inc. is a privately held company backed by institutional and strategic investors. The company provides cloud-based cemetery and deathcare management software to public, private, religious, and municipal operators. PlotBox currently supports hundreds of customers across North America, Europe, Australia, and New Zealand, managing millions of interment records and associated assets.

3. Describe your experience working with municipal governments or cemetery systems of similar size and complexity.

PlotBox works with over 2400 deathcare operators worldwide, this includes cemeteries, funeral homes and crematories. In the United States we have nearly 500 cemetery operations using PlotBox. Our customers range from 50 burials per year up to 5,000 burials a year. We work with private, religious and municipal cemetery operations throughout all of North America. We work closely with over 100 municipal governments ranging in size from populations of 20,000 up to 2 million. These municipality needs also range from fairly simple to very complex.

4. Does your organization currently possess an ISO 27001 certification, including scope and

surveillance audit schedule? If your organization does not currently hold an ISO 27001 certification, please explain why it does not and describe any plans, roadmap, and expected timeline to obtain it.

Yes, we are ISO27001:2022 Certified.

5. Does your organization currently possess a SOC 2 Type II report? If your organization does not currently hold SOC 2 Type II, please explain why it does not and describe any plans, roadmap, and expected timeline to obtain it.

No, we do not currently possess this report. We have this in our road map to achieve in the next couple of years. We have not acquired SOC 2 as our ISO2700:2022 certification requires the same level of difficulty and rigor, however is globally accepted.

6. Does your organization currently possess PCI DSS documentation applicable to the services provided? Explain the type of documentation you can make available such as a completed SAQ, Attestation of Compliance (AOC), or Report on Compliance (ROC), as applicable to your PCI scope.

PlotBox is not PCI DSS compliant (nor do we need to be) as we partner with Fiserv, where all financial information is stored, who are compliant. We can supply their Attestation of Compliance for Report on Compliance, their SOC2 type 2 report and their SOC1 Type 2 report.

7. Describe your internal controls for:

- *Access management*

We operate a role of least privilege methodology, ensuring that only employees needing access to perform their assigned duties can access your data. Access is periodically reviewed.

PlotBox provides authentication and access via a unique username and password combination. We optionally support SAML 2.0-based SSO to allow authentication to Azure Active Directory (Microsoft Entra ID) and Google SSO.

- *Data encryption (in-transit & at-rest)*

Customer data is encrypted at rest within the Microsoft Azure data centres. Microsoft Azure provides built-in TLS (2.1+) cryptography, which supports encrypted communications within and between deployments, from Azure to on-premises data centres and from Azure to administrators and users. Azure offers a wide range of encryption capabilities, including AES-256.

- *Vulnerability scanning and patching*

PlotBox engages a third-party independent security company to undertake an annual security

review of our Cloud infrastructure and a yearly penetration test. This organisation is CREST accredited, and registered under the UK National Cyber Security Centre’s CHECK assurance scheme.

8. Describe how your system supports financial data integrity and audit tracking.

PlotBox offers a full suite of Financial Reports that are automatically synced with the data entered into the system. Access to reports is controlled via Role Permissions within the application, so only those that you grant access to will see them. Full audit history is maintained on the data source from which the financial report is pulled. For example, on a contract (that feeds GL report, Commissions report, AR Report, Liability Report, Sales report etc.), full audit history of changes and updates are maintained.

Activity Log

Search

DATE	TIME	ACTION	USER	BEFORE	AFTER
02/06/2026	10:35 am	Edit	Katie PB Administrator	Contract Owners JSON: 1. Name: Ben Adams Id: 19077 Contact_type: Contact Address_line_1: 756 Broadway Address_line_2: Town: Revere County: Massachusetts Country: Postcode: 02151-4412 Email_address: Phone_number: Mobile_number: Date_of_birth: Ethnicity:	Contract Owners JSON: 1. Email_address: katie@plotbox.io Is_contactable: 1

E.g.

9. Explain how the City’s Finance Department can independently verify transactions via system reports or exports.

PlotBox offers a wide range of financial reports including Sales Report, Payments Received Report, Fulfilment Report, Property Sales Report, Inventory Report/Plot Stock Report, Accounts Receivable, General Ledger Report, Agent Sales Report, Liability Report, Late Fees Report, Moneys Due Report, Small Balance Report amongst others. With our PlotBox Pay solution, you will also have full access to a CardPointe system where you can analyse and view all card transactions for payments made via PlotBox Pay.

10. Describe your standard data migration methodology (phases, tools, quality checks).

Please see our Data Migration strategy here:

<https://plotbox.com/hubfs/PlotBox%20Data%20Transformation%20Strategy.pdf>

Explain how you will migrate data from:

- SQL databases

- *Excel spreadsheets*

For both sources of data, PlotBox will follow the above process of Discovery > Analysis > Import > QA > DAT > Sign Off > Go Live Process

During analysis, PlotBox will spend time mapping your SQL Database fields and Excel Fields with Properties in PlotBox before importing. Information within any fields that are not directly applicable to a PlotBox Property, will be placed in the notes of that record.

1. *Provide a list of required data fields and formats for ingestion.*

PlotBox does not typically provide a list of the data fields within our database, nor do we need you as a customer to provide your data in this format.

2. *Describe how duplicate, inconsistent, or incomplete data is identified and corrected.*

When we're analyzing your data, we will identify elements of cleanup where possible, that we'll suggest and get your approval on before we start the migration. This will include standardization of data types (e.g. Capital letters, Section Name tidy ups, date standardization etc.) but also updates for how you'll use PlotBox - making sure that historic data that's migrated into PlotBox will be useable going forward and aligned with your new PlotBox processes. During the PlotBox data analysis phase, we may identify information that may need to be "cleansed" or tidied up prior to import, that we cannot do on your behalf. The PlotBox Data Transformation team will provide advice on how to cleanse this data if the client deems it necessary, supporting you in doing that before we take the final export of your data. PlotBox is not responsible for the consolidation of data when multiple data sources are to be migrated, or if multiple facilities have separate data sources. The client is responsible for providing PlotBox with the data source(s) to be migrated during the various stages of delivery. PlotBox is not responsible for any costs that may be associated with a 3rd party supplier/ vendor in supplying this source data to the client. When more than one data source exists, and is included in scope, PlotBox is not responsible for creating links in data sources and records where none currently exists. This means, for example and not explicitly, that if you have sold property on a contract, and that property is not recorded using a method that allows us to link that contract back to your inventory list, then data will continue to exist in PlotBox without that link. This will be confirmed and added to your Risk Register during initial discovery and could impact your map interactivity.

3. *Outline your process for validating migrated interment, ownership, mapping, and financial records.*

PlotBox uses a series of both automated and manual Quality Assurance tests, run by our Quality Assurance team on all migrated data, before passing it over to you, the customer, for Data Acceptance Testing.

4. *Please provide an overview of core modules, including:*

- *Property inventory*
- *Mapping/GIS*
- *Contract management*
- *Work orders*
- *Scheduling*
- *Finance*
- *Family services*

** Collectively all of these modules support property inventory that is tied to the Records/Contracts/Deeds/Mapping/Reporting Abilities**

Deceased Records Module - Bring all deceased records together into a quickly searchable database of interment records

Deeds Module - The Deeds Module streamlines plot and memorial ownership management. It allows users to easily keep track of grave owners, manage the sale or lease of plots/memorials, handle ownership transfer requests, and produce, enter, edit, and print essential deed documents.

Mapping Module - Our use of high-resolution drone imagery creates a comprehensive digital map accessible on any device, providing real-time visibility into inventory status. The thorough, verified mapping process serves as a forensic audit of your existing inventory, frequently uncovering additional available inventory.

Schedule Module - This module provides a calendar for scheduling cremations, interments, and appointments. Users can maintain customized diaries and schedule appointments and services directly from a Contract record. To eliminate duplication, burial orders, labels, and other necessary 'paperwork' are automatically generated by the system.

Contracts Module: Streamlined Sales and Financial Tracking - This module empowers you to manage sales from any location on any device, providing instant, easy access to your complete inventory, maps, and essential records.

Key features include; Tracking payments against contracts, Managing payment plans, Detailed reporting on contract items, Pre-built reports: Sales Report, Payments Received Report, and Fulfilment Report.

Work Module: Work Order Management - Our system provides comprehensive work order creation and completion management. This includes a master schedule and automated email notifications to



keep staff informed.

Key Features; Easy Generation and Assignment: Staff can quickly generate work orders using customized drop-down lists and easily assign tasks, **Location-Based Tracking:** Tasks can be linked to specific map locations, providing a clear visual of where work is required, **Status Monitoring:** Track the progress of each job with statuses such as "not yet started," "in progress," or "complete."

Memorials Module - Memorials module is used to manage memorial leasing in cemeteries. Users are notified about expiring memorials, reminder letters can be auto-produced in the system and management can quickly pull reports to view memorials sold by type. The Memorials module provides comprehensive management of memorial leasing within cemeteries. It features automated notifications for expiring leases, system generation of reminder letters, and rapid reporting capabilities for analyzing memorial sales by type.

Funeral Director Portal - An annual subscription provides Funeral Directors with 24/7 access to the portal, enabling them to: Request bookings, Upload necessary documentation, View real-time status updates.

CRM Module Subscription - The annual subscription provides access to our CRM module, encompassing essential functions such as tasks, activity tracking, managing quotations, and handling contracts.

Documents Module - An annual subscription for the Documents Module provides storage and indexing capabilities for scanned documents, such as headstone images or burial registers.

Advanced Contracts Reporting Categories: Accounts Receivable, Agent Sales, General Ledger, Inventory Report, Late Fees, Liability, Moneys Due, Property Sales, Small Balance

Commissions - Commissions can be easily managed with flexible and configurable plans. This includes the ability to handle manager commissions, bonuses, and overrides.

PlotBox Pay: Seamless Payment Integration - We offer fully integrated credit card and ACH processing capabilities for contracts. Payments are directly linked to the customer's account and can be facilitated through recurring payment schedules or secure payment links. This service is provided via FiServ.

Optional Family Services Public Portals - Two levels - DISCOVER - CONNECT

PlotBox EverAfter Discover (Free Version)



The free version of PlotBox's EverAfter platform provides families with access to your records under the EverAfter brand, allowing them to; Locate a loved one using a search function, View the memorial photo, Get "walk to grave" directions.

Connect: EverAfter Family Access Portal

Provide families with personalized access to records through the EverAfter platform using a custom web address featuring your organization's name.

Key Features; **Customization:** A unique URL based on your facility's name, complete with your own branding and imagery, **Locate Loved One:** Search functionality to find records, **Memorial View:** Access to memorial photos, **Directions:** "Walk to grave" navigation assistance, **Request Management:** Ability for families to manage and update certain requests, **Spotlight:** Highlighting features for a Person of Interest or Veteran, **Service Schedule:** Viewing upcoming service times, **Family Portal:** Ability for your families to monitor and pay their contracts online via a secure portal. *note, a PlotBox Pay subscription is required for this feature.

5. Are cemetery maps updated dynamically in real-time after sales, burials, or transfers?

Cemetery maps are created with the use of GIS drones that will take images of every acre of every cemetery. Those images are stagnant and will capture each cemetery on the day of the drone flight. You can, at any time, request updated drone images for expanding sections in the cemetery. After we create the images from the drones we overlay onto those images each section and plot for complete interactivity. All maps, and all plots are instantly updated after a transaction occurs, whether that is a sale, burial, transfer, disinterment or edit. All information tied to the plot is updated in real time.

6. Please list all available APIs and integration points.

PlotBox offers API integrations with the below, however we recognize that the City may not utilize these applications.

Quickbooks Online (For a Journal Entry from our GL report), RICOH, Paylocity, C&J Financials, Coupa, Xero, Radius and a Contacts API for PlotBox to ingest Contact information from your CRM.

PlotBox can also offer to build you an export file that's reflective of the format that you may require for download and upload into your accountancy package.

7. Describe how your system integrates with:

- **ESRI GIS** - With access to your existing GIS resources we can format and publish these to ArcGIS online and from this rest location connect to PlotBox to display across the many

modules. If required we can then send these formatted GIS files back to the Clients GIS team to publish to their ArcGIS online account and maintain post go live.

- *ERP financial systems* - As mentioned above, we can build you a manual export file for whatever report you need in the format required for upload to your ERP. We will ask that you provide us with the scope.
- *Laserfiche or document management systems* - We can migrate documents out of any document management system and import into the PlotBox documents module. We do not integrate with external doc management systems.

8. Describe any integration limitations and recommended alternatives.

Any required additional integrations will be scoped at the time of Statement of Word creation. Integration limitations are on a per integration basis and cannot be defined until we know what integration you are hoping to utilize.

9. Provide a typical project timeline for a cemetery operation similar to the City's size.

A typical timeline is based on complexity and the clients ability to dedicate staff. A project typically takes 6-8 months but can be completed sooner or later depending on customer needs. For a City the size of Fort Lauderdale, and given its complexity, we are comfortable providing a range of 6-10 months with the current available information. An **Example** Project Plan is shared via the link below. Please note that this is indicative of how a typical project will run and not the dates that we can commit to for your project. A formal project plan will be developed upon kick off of your project and will reflect availability and commitment across both teams.

<https://app.instagantt.com/shared/s/1211849818838480/latest>

10. Identify roles and responsibilities for both vendor and City staff.

Role	Description/ Responsibilities	Time Estimate
Project Sponsor	Decision-makers with the knowledge and authority to decide on project issues –requirements, design decisions, budgets, resourcing, etc.	3 days over full project

<p>Project Manager</p>	<p>Main point of contact on Client side for project onboarding, who will distribute information throughout the client organisation as required.</p> <p>Understand project goals and objectives.</p> <p>Establish activities and detail budget within the Client organisation.</p> <p>Prepare Client Project schedule.</p> <p>Ensure Client resources are available as required.</p> <p>Direct people individually and as a project team.</p> <p>Keep everyone connected with the project informed.</p> <p>Review project progress and take action to move forward as planned.</p> <p>Ensure Client responsibilities are completed within agreed time frame.</p>	<p>5 hours/ week for length of project</p>
<p>Super User</p>	<p>Ability to troubleshoot.</p> <p>Testing expertise.</p> <p>Ability to communicate effectively with technical teams, users and management.</p> <p>Continuous process improvement skills.</p> <p>Detail oriented.</p> <p>Adaptable to change.</p> <p>First line of support for the client's customers.</p> <p>Act as liaison between Client users and PlotBox.</p> <p>May be involved in training of existing and new users.</p>	<p>2 weeks across project (more during training)</p>
<p>Data & Security Owner</p>	<p>SMEs (Subject Matter expert) on existing systems</p> <p>Data to whom the PlotBox team needs access for advice.</p> <p>Support the Data Testing and Acceptance</p> <p>Ensure security considerations from the Client Side are considered.</p>	<p>2 weeks across project (more during training)</p>
<p>Mapping Testing team</p>	<p>Dedicated time to conduct Mapping acceptance and have discussions around cemetery layouts.</p>	<p>2 weeks across project</p>
<p>Process Owner & Testing</p>	<p>SME (Subject Matter expert) who can approve and make final decisions on the PlotBox implementation of Standard Operating Procedures.</p>	<p>4 weeks across project</p>

		(more at start for SIPOC and then more towards middle for testing)
Data Testing Team	Dedicated time to conduct Data acceptance and Functional acceptance testing to ensure everything is working as expected	2 weeks during DAT
Financial Integration owner (if applicable)	SME on existing financial processes and systems to whom the PlotBox team needs access and advice.	2 weeks for SIPOC and testing
System Champions (per Facility)	SME on processes and systems to whom other staff can reach out for assistance	3 weeks across project

11. Describe required City resources (FTE hours, subject matter experts, IT support).

Clarified in above chart.

12. Describe your training approach for:

- Cemetery staff
- Administrative staff
- Field crews
- Finance personnel

Each municipality has a customized training plan based off of the subscribed modules and users, as well as the needs of each member. We will develop that plan upon agreement. Here is a link to an example of a customized plan. The City of Fort Lauderdale will have the same level of detail and attention.

[Example Training Plan](#)

13. Provide examples of user documentation and knowledgebase tools.

PlotBox has a robust offering of learning resources throughout the customer journey. Public-facing resources can be found [here](#), while customers also have special access to internal resources like the PlotBox Help Center, the PlotBox Academy (our Learning Management System), regular customer

communications including our monthly e-newsletter, and events like our PlotBox User Conference.

14. Describe post-launch support, SLAs, and escalation procedures.

As you move closer to Go Live, and during training you will begin your relationship with our Customer Success Team. You will have a dedicated Customer Success Manager that will work directly with your team. This manager will ensure maximum efficiency, knowledge and training for your team to perform at the highest level.

Customer also receive access to the following; Online and email help desk support, Clear and documented communication for all incidents, Updates from the PlotBox support team throughout incident resolution, Guidance, documentation, and routine advice.

PlotBox manages all communication related to its infrastructure provider, ensuring seamless operational support.

Upon agreement PlotBox will prepare a Statement of Work which will clearly define expected levels of service.

Repair Response & Incident Management

All support requests are logged, tracked, and categorized through PlotBox's Incident Management process. When a support request is determined to be an Incident, PlotBox will:

Prioritize the issue based on severity > Initiate investigation within Service Hours > Provide updates aligned with the Target Response Times > Work toward resolution and provide closure through defined incident categories (e.g., Software Error, User Error, Documentation Error, Change Request)

Target Response Times (within Service Hours): **Critical:** 1 hour, **Severe:** 3 hours, **Serious:** 6 hours, **Minor/Query:** 24 hours

15. Identify any optional modules or features.

Our base package we refer to as a 'CORE' package and includes modules for your Records, Deeds and Plots. Typically, the larger the organization and additional users, the needs increase. We have the following 'bolt on' modules that are typically used for cities as well private organizations.

- Mapping, Contract Management, Work Orders, Schedule, Memorials Management, CRM, Funeral Director Portal, Document Module, Management of Trust and/or Commissions, Cremation facilities, Funeral Home users, Online Payments (via FiServ), Advanced Financial

16. Provide your technology development roadmap for the next 24–36 months.

We have a one year outlook for what is in store at PlotBox that we are developing and implementing over the next year. Beyond that, we operate on the principle that our clients- drive our future. We gather insights from clients, needs of clients and put them into action year over year. What we will have in 24-36 months is directly tied to what customers need as part of their PlotBox experience.

[Here is a link](#) for the most updated roadmap.

28. Describe how customer feedback influences product enhancements.

Our product enhancements are directly tied to the feedback of our clients. This is closely related to the question above. All of our enhancements, developments and roadmaps are based on what our customers require for their systems to operate at the highest level. We provide ProductBoard access for customers to share their insights and feedback. This forum is where we gain much of our intelligence on how our customers need PlotBox to develop and operate for them. Also, through your CSM, you will constantly have the opportunity to provide feedback and input.

29. Identify any planned security certifications or compliance improvements.

PlotBox will continue to maintain our ISO27001:2022 and ISO9001:2015 Certifications. We will also maintain our Cyber Essentials Certification.

SOC2 certification is on our roadmap however not defined as to when we will commence.

Name: Marc Lamb

Company: PlotBox

**Address: 1 Marina Park Drive #1410,
Boston, MA**

Signature: *Marc Lamb*

Title: Solutions Consultant

Phone: (508) 981-3325

Email: marc.lamb@plotbox.com

Date: February 6, 2026



Response For Supplier: Site Industries(CemSites)

Event # : 579-0

Name: Cemetery Management Software (Request for Information)

Description: The City of Fort Lauderdale is requesting information (RFI) from qualified and experienced firms to gather detailed insight into modern Cemetery Management Software solutions capable of supporting operations across the City's municipal cemetery system. This RFI is being issued to help refine the City's implementation strategy, budget planning, and technology needs aligned with industry best practices in the death care sector.

Date created: February 9,
2026 7:16:06 PM UTC

Preview date:

Open date: January 23, 2026
7:50:00 PM UTC

Close Date: 02/10/2026 04:00:00 PM UTC

Date submitted: February 9,
2026 7:24:08 PM UTC

Q & A open date: January 23,
2026 7:50:00 PM UTC

Q & A close date: February 5,
2026 10:00:00 PM UTC

Dispute close date:

Responded To: 1 Out of 1 Lines

Response Currency: USD

Response Attachments

Attachment

Cemetery Management Software RFI - Fort Lauderdale 2026.pdf

Line Responses

Line 1: Request for Information - Cemetery Mgmt Software Solution

Description: This is a Request for Information (RFI); it is not a request for pricing, commitment to purchase, or an obligation to provide products or services described in this notice. Please see the attached forms for response details.

Event # 579-0: Cemetery Management Software (Request for Information)

Item: CEMETERY MGMT SOFTWARE SOLUTION	Request for Information - Cemetery Mgmt Software Solution
Commodity Code: 920-45	Software Maintenance/Support
Quantity: 1.0000	Unit of Measure: LS

Bid Quantity: 1.0000

No Charge: Yes

No Bid: No

Vendor Item: CEMETERY MGMT SOFTWARE SOLUTION Request for Information - Cemetery Mgmt Software Solution

David Berger
Interim President
CemSites
14 Memorial Drive, Perryopolis, PA 15473
(877) 783-9626
David@cemsites.com

February 11, 2026

City of Fort Lauderdale, FL:

Subject: Request for Information Regarding Cemetery Management Software Project for the City of Fort Lauderdale, FL.

We are very pleased to submit this CemSites proposal in response to the Request for Information regarding the Cemetery Management Software Project for the City of Fort Lauderdale, FL. This submission highlights our project approach and addresses all information detailed in your RFI for Cemetery Management Software.

We also welcome the opportunity to **re-engage with the City of Fort Lauderdale**, as we firmly believe CemSites offers the **best overall solution** for your needs and brings the **greatest depth of invested research, learning, and system knowledge** specific to your environment. Because of the work we have already completed to understand your operations and system requirements, we are uniquely positioned to provide the City with the **quickest and most accurate path to going live** on a modern, fully integrated platform.

We pioneered our customer-centric approach to cemetery management in 2012. With our in-house team, we migrate over **35,000,000 records annually**. We are the **fastest-growing cloud cemetery software provider in the world**, and last year alone we helped **over 70 cemetery management organizations** adopt our customer-centric management solutions.

We are confident that this experience, combined with our prior investment in understanding Fort Lauderdale's needs, allows us to deliver exceptional value, reduce implementation risk, and accelerate time to benefit for the City.

I welcome the opportunity to answer any questions you might have regarding our submission. Thank you for the opportunity to submit our proposal for your consideration.

Sincerely,



David Berger
Interim President

Project Understanding - CemSites Submission: Request for Quotation Regarding Cemetery Management Software for the city of Fort Lauderdale, FL.

By this Proposal, we offer to provide the Goods and/or Services in accordance with your RFI on the basis set out in this Proposal Form. We warrant that:

- All information contained in this Proposal Form is accurate and complete.
- We have not provided any inaccurate or misleading information to you in connection with this RFI.
- We have read the RFI and we are fully acquainted with all matters in connection with the Agreement.

GENERAL INFORMATION

Profile of Proposer	
Company	Site Industries LLC. dba CemSites
Office Address	14 Memorial Drive. Perryopolis, PA 15473
Summary	With a background of 30+ years combined in design, programing, and software development; our organization has the in-depth knowledge and experience to undertake this initiative on behalf of the city of Fort Lauderdale – and to complete it effectively, on time and on budget. CemSites is a wholly owned subsidiary of Messenger, one of the oldest companies in the deathcare industry. We are the oldest, most experienced cloud cemetery software solution in the industry. Our staff has a proven track record of providing solutions in the areas of cemetery record management, mapping, and AR financial software. When considering software for the niche cemetery industry, no other company has more experience migrating cemeteries to the cloud than CemSites. Over 500 cemetery organizations have entrusted their data to CemSites. Our passion is to provide our partners and their clientele the best experience possible during times of need.

At CemSites, we believe cemeteries contain the best historical archive on the planet, we are enthused daily to be able to do our part to reconnect families worldwide with the history they seek. Structure and efficiency through technology automation will enhance your employee experience and directly impact the customer experience that follows.

CemSites leadership and engineering talent are the innovators of technology for this generation. Our extensive experience with modern platforms and software engineering methodologies are second to none in the cemetery industry. We were the first to build a world class multi-tenant cloud application exclusively for cemeteries. Many cemetery software companies began on legacy, device dependent platforms and therefore have been slow to modernize old architecture. CemSites has not been limited by outdated technology and was "born" on the cloud. CemSites' customers benefit from the following significant foundations:

- Private ownership with strong financial stability and proven innovators

- Customer focused and consultative approach to sales and the discovery of new software components and advancements.
- Agile software development principles, patterns, and practices
- Scalable technology and processes that consistently outperform the competition
- SaaS/PaaS model that delivers the always up-to-date product this generation demands

CemSites will present your data in a revolutionary visual format. Our mission is to enhance your employee experience with an intuitive and visually appealing user interface. Management will be provided on-demand real-time metrics for analysis and one click reporting to ensure efficient proactive decision making. The delivery of key data and enhanced employee experience will lead to premiere customer experiences, return business resulting in increased revenue.

Section 2: Letter of Interest

Date: February, 10, 2026

City of Fort Lauderdale

Attn: Procurement / Project Team
Fort Lauderdale, FL

Re: Letter of Interest – City of Fort Lauderdale Cemetery Management Software Initiative

Dear Members of the Selection Committee,

CemSites is pleased to submit this Letter of Interest in response to the City of Fort Lauderdale’s Cemetery Management Software initiative. We appreciate the opportunity to participate in this process and welcome the chance to support the City’s goals for modernizing and enhancing its cemetery operations.

CemSites has been providing cemetery management software since 2012 and currently supports more than 500 clients managing over 1,100 cemeteries across North America, including numerous municipal and multi-site operations. Our platform is purpose-built for public-sector cemetery management and integrates mapping, records management, sales and accounts receivable, work orders, reporting, and public-facing services into a single, secure, cloud-based system.

Our experience includes projects involving:

- Multi-cemetery and multi-site municipal environments
- Migration from legacy systems, paper records, and spreadsheets
- Digital mapping and modernization of hand-drawn plans
- Public search and navigation tools
- Work order and maintenance tracking
- Financial tracking, invoicing, and receivables
- Ongoing support and training for municipal staff

CemSites’ strategic value to the City of Fort Lauderdale lies in our **proven implementation methodology**, our **deep focus on cemetery-specific workflows**, and our **ability to scale** as operations, inventory, and public-service expectations grow. Our proprietary mapping system and integrated modules

ensure that operational, financial, and public-facing data remain synchronized in real time, reducing manual processes and improving service to residents.

In addition, CemSites brings a unique cost and schedule advantage to this initiative. **Because we have already completed significant work to create the City's system framework and launch capability, we are able to propose delivery of this project at a substantially reduced cost compared to a ground-up implementation.** This prior work allows us to shorten timelines, reduce configuration and setup effort, and pass those efficiencies directly to the City while still meeting all functional and technical requirements.

From a technical perspective, CemSites offers:

- A secure, cloud-based platform with automated backups and audit trails
- Integrated GIS/GPS-enabled mapping and mobile navigation (Walk-to-Site)
- Role-based security, multi-factor authentication, and optional SSO integration
- Configurable workflows, reporting tools, and document automation
- Public-facing tools with full municipal control over published content

We believe this combination of **municipal experience, cemetery-specific focus, proven delivery, and cost efficiency** positions CemSites as a strong partner for the City of Fort Lauderdale's Cemetery Management Software initiative.

Thank you for the opportunity to express our interest. We would welcome the opportunity to further discuss our approach, experience, and how CemSites can support the City's objectives.

Sincerely,

David Berger
Interim President

Section 3:

SCOPE OF WORK

1. Please identify the procurement method(s) your company is able to support and describe any existing cooperative contracts or public sector agreements under which the City of Fort Lauderdale may procure your solution. (check all that apply)
 - ✓ Request for Proposals (RFP)
 - ✓ Invitation to Negotiate (ITN)
 - Cooperative Purchasing/ Piggyback Agreement
 - ✓ Sole Source Procurement
 - ✓ Other: Renegotiate current arrangement

2. Provide an overview of your company, including ownership, years in operation, and number of customers using cemetery management solutions.

- CemSites is a privately held, U.S.-based cemetery management software company focused exclusively on serving cemetery, crematory, and funeral home operations. The company has been in continuous operation for over a decade and has built its platform in close collaboration with cemetery operators to address real-world operational, financial, and regulatory needs.
- Today, CemSites supports more than **500 organizations** representing **1,200+ cemeteries** across the United States and Canada. Our clients include municipal cemeteries, religious and nonprofit cemetery associations, private operators, and multi-location enterprises. CemSites provides a fully integrated cemetery management solution covering records management, mapping, sales, finance, reporting, and public-facing tools.

3. Describe your experience working with municipal governments or cemetery systems of similar size and complexity.

CemSites has extensive experience working with **municipal governments and public cemetery systems**, including cities, counties, and special districts. These environments often involve:

- Legacy data spanning decades (or centuries)
- Multiple departments and stakeholders
- Public transparency and reporting requirements
- Procurement and compliance constraints
- Integration with municipal finance systems

We regularly support cemeteries of similar size and complexity to municipal operations, including multi-section cemeteries, active and historic burial grounds, mixed interment types, and high public inquiry volume. Our team is experienced in navigating city workflows, approval processes, and change management while maintaining continuity of operations.

4. Does your organization currently possess an ISO 27001 certification, including scope and surveillance audit schedule? If your organization does not currently hold an ISO 27001 certification, please explain why it does not and describe any plans, roadmap, and expected timeline to obtain it. David & Doug

- We do not possess an ISO 27001 certification because we manage and audit our security controls in-house
- If we are selected in the upcoming RFP, we will plan on obtaining an ISO 27001 certification within 3 months

5. Does your organization currently possess a SOC 2 Type II report? If your organization does not currently hold SOC 2 Type II, please explain why it does not and describe any plans, roadmap, and expected timeline to obtain it. David & Doug

- We do not possess an SOC 2 Type II report because we manage and audit our security controls in-house
- If we are selected in the upcoming RFP, we will plan on obtaining an annual SOC 2 Type II report within 3 months

6. Does your organization currently possess PCI DSS documentation applicable to the services provided? Explain the type of documentation you can make available such as a completed SAQ, Attestation of Compliance (AOC), or Report on Compliance (ROC), as applicable to your PCI scope. Doug

- Yes, we can provide an Attestation of Compliance upon request

7. Describe your internal controls for:

- Access management
 - Physical Access Controls:
 - Employee data center access requires approval with valid business justification

- Access granted based on principle of least privilege and time-bound
- Automatic revocation when employee records are terminated in HR system
- Regular access reviews conducted
- Third-party access requires employee sponsorship and follows same principle of least privilege
- All physical access is logged, monitored, and retained

Logical Access Controls:

- Access to customer data only granted to authorized employees who require it for their roles
- All system access is logged
- Customer data logically separated through strict coding standards and database design
- Unique customer identifiers ensure data security
- Single sign-on (SSO) capabilities available through SAML 2.0 and Google authentication
- Integration with Microsoft Azure and ADFS

Monitoring & Governance:

- 24/7 global Security Operations Centers monitor and manage access activities
- Physical access points monitored by CCTV and electronic intrusion detection systems
- Security Operations Centers perform regular threat and vulnerability reviews
- Multi-factor authentication required for data center access

These controls apply to both our AWS infrastructure and internal systems to ensure comprehensive access management across physical and logical environments.

- Data encryption (in-transit & at-rest)
 - Data at Rest: Customer data stored in the cloud is encrypted using the latest encryption technologies
 - Data in Transit: All data transmission is encrypted using advanced encryption protocols
- Vulnerability scanning and patching
 - Monthly Internal Testing: We perform monthly organized internal vulnerability and penetration tests based on best practices
 - Scheduled Testing: Penetration tests are planned, scheduled, and executed in our project management software
 - Continuous Deployment: Our deployment process includes complete server recreation from scripts for each deployment, allowing latest security updates to be automatically implemented
 - Automated Patching: Our Cloudflare firewall receives security patching daily automatically
 - Incident Tracking: Any results or follow-up required from testing is scheduled on a priority and security risk basis
 - Client-Option for Third-Party Testing: Third-party penetration testing is available at the client's cost

8. Describe how your system supports financial data integrity and audit tracking.

- Invoice total validation against line item sums
- Paid amount validation against payment sums
- Remaining balance validation calculations
- Checks for financed amounts matching down payments plus finance amounts
- Date validations (finance dates vs invoice dates, payment dates vs invoice dates)
- Detection of invoices with missing or inconsistent financial data

- Detailed Financial Reports that can be automatically emailed weekly/monthly

9. Explain how the City's Finance Department can independently verify transactions via system reports or exports.

Invoice and Payment Reports:

- View comprehensive payment history associated with contracts, showing payments, finance invoices, and sales orders
- Track how payments have been applied and view unapplied amounts
- See finance invoice history including creation dates, payments, and credits
- Access payment failure reasons through the "Credit Card Errors" report

Customer Account Inquiry:

- Enhanced search functionality to view customer history with multiple filter options (purchaser, decedent, phone, contract numbers, account numbers, location/section/plot, inventory status)
- Ability to see past due amounts and current amounts due
- Payment tracking with real-time visibility to transaction activity

AR Migration Vetting Reports:

- The system includes specialized AR vetting views that detect:
 - Missing invoice numbers
 - Payment/contact mismatches
 - Financial discrepancies between invoices and payments
 - Accounts with missing owner information

Custom Reporting:

- Clients can generate reports showing payment types, dates, and associated contacts
- Ability to export payment data for external validation
- Real-time updating of all transaction information

The system is designed to provide transparent, auditable transaction tracking with built-in validation checks to ensure data integrity and allow clients to independently verify all financial activities.

10. Describe your standard data migration methodology (phases, tools, quality checks).

CemSites follows a structured, multi-phase data migration methodology designed to ensure accuracy, traceability, and minimal disruption to cemetery operations. Our approach emphasizes data integrity, iterative validation, and close collaboration with City staff throughout the process.

1. Discovery & Data Assessment

Objectives

- Understand the City's existing data sources, formats, and data quality
- Identify historical, operational, and financial records to be migrated
- Define migration scope and success criteria

Activities

- Review legacy systems, spreadsheets, scanned documents, and paper-based records
- Identify data gaps, inconsistencies, and normalization requirements
- Establish data mapping rules and assumptions
- Define validation checkpoints and City review cycles

Outputs

- Data inventory and migration plan
- Field mapping documentation
- Identified risks and mitigation strategies

2. Data Mapping & Preparation

Objectives

- Align legacy data structures with CemSites' data model
- Standardize formats to support long-term usability and reporting

Activities

- Map legacy fields to CemSites core entities (decedents, lots, ownership, interments, contacts, financial records)
- Normalize dates, names, locations, and identifiers
- Resolve duplicates and conflicting records where possible
- Apply agreed-upon business rules and transformation logic

Tools

- Secure spreadsheets and structured templates
- Internal migration utilities and scripts
- Version-controlled mapping documentation

3. Test Migration & Iterative Validation

Objectives

- Validate data accuracy prior to production migration
- Allow City staff to review and confirm results

Activities

- Perform one or more test migrations into a non-production environment
- Provide City access to review migrated data
- Validate record counts, relationships, and sample records
- Capture feedback and refine mappings and transformations

Quality Checks

- Record count reconciliation
- Referential integrity checks (e.g., decedent-to-lot, lot-to-section)
- Spot-checking of critical and high-visibility records
- Exception and error reporting

4. Final Migration & Cutover

Objectives

- Migrate approved data into the production environment
- Ensure system readiness for go-live

Activities

- Freeze legacy data for final extract
- Execute final migration using approved mappings
- Perform post-migration verification
- Coordinate cutover timing to minimize operational disruption

Quality Checks

- Final record count comparison
- Validation of key workflows and reports
- Confirmation of user access and permissions

5. Post-Migration Validation & Stabilization

Objectives

- Confirm data accuracy in live operations
- Address any post-launch issues quickly

Activities

- Support City staff during initial system use
- Resolve data-related issues identified post-go-live
- Document adjustments and lessons learned
- Transition to standard support processes

Quality Checks

- Issue tracking and resolution logging
- Follow-up data reviews with City stakeholders
- Confirmation of operational readiness

Data Security & Controls

- Secure data transfer methods
- Role-based access controls
- Migration activity logging and auditability
- Data handled in accordance with applicable municipal and privacy requirements

This methodology allows CemSites to manage complex, historical cemetery data while giving City staff clear visibility and control over validation decisions.

11. Explain how you will migrate data from:

- SQL databases
- Excel spreadsheets
- We will determine the source-of-truth with the client and create automated scripts that will take the original source data and convert its format to match CemSites
- We would then migrate in the non-source-of-truth data, first matching existing records and laying in missing information
- Before we start training, we would ask for the latest data set so we can replace the original data provided
- Then again, just before we go live, we will ask for a final data set to migrate into the system

12. Provide a list of required data fields and formats for ingestion.

- This is determined during our Discovery phase when we review your current data entry practices along with the latest set of your data
- We will verify the source data and field mappings during our Data Review meeting after our initial scripts are created.

13. Describe how duplicate, inconsistent, or incomplete data is identified and corrected.

- We will conduct a Data Review meeting after our initial scripts are created. This meeting will allow us to review data anomalies found during our initial analysis and decide on a plan for resolving each anomaly

14. Outline your process for validating migrated interment, ownership, mapping, and financial records.

- We have a series of validation scripts that we run to find anomalies and list them on the Data Review Sheet to go over with the client
- We also have general reviews of the data
 - Locations: finding anomalies of location names outside the provided maps. Finding locations that are on the map that do not exist in the data provided.
 - Ownership: Duplicates between sources along with anomalies of owners with many properties
 - Financial Records: Calculations like verifying the sum of products and services on a contract add up to the total of the contract.

15. Please provide an overview of core modules, including:

Property Inventory

Manages all cemetery inventory including sections, lots, graves, niches, and mausoleums. Tracks availability, ownership, status (available, sold, used, reserved), and links each property to mapping, customers, documents, and transactions. Provides real-time visibility into inventory across one or multiple cemeteries.

Mapping / GIS

CemSites' proprietary digital mapping system converts paper or legacy maps into modern, interactive, Google-style maps. Supports sections, lots, graves, pathways, roadways, and landmarks, and can incorporate GIS/GPS data for improved accuracy. Maps update in real time as sales, burials, or transfers occur and support both staff use and public-facing tools like Walk-to-Site. Full integration into city GIS software will be available in Quarter 4 of 2026.

Contract Management

Manages deeds, agreements, assignments, and related documents using configurable templates. Automatically populates documents from system data, stores them as digital records in the virtual filing cabinet, and links them to the appropriate customer and property. Supports wet signatures, PDF generation, uploads of signed documents, and full audit trails.

Work Orders

Tracks operational tasks such as burials, disinterment, site preparation, marker installations, and maintenance activities. Includes workflow routing and notifications to ensure the right staff are alerted when work is needed. Each work order records location, task details, status, responsible personnel, and completion history.

Scheduling

Coordinates via in software calendar all burials, services, installations, and maintenance activities. Links schedules directly to work orders, properties, and staff assignments to avoid conflicts and improve operational planning. Provides visibility across departments for better coordination and service delivery.

Finance

Includes CRM and Accounts Receivable functionality to manage plot sales, invoices, payments, balances, and transaction history. Links financial activity directly to customers and properties, supports reporting and auditing, and ensures full financial traceability across all cemetery operations.

Family Services

Supports how staff work with families by managing all family and next-of-kin relationships, contact information, and service history in one place. The system **tracks all interactions with families from first contact forward**, including notes, emails, and correspondence, which are saved directly to the relevant **customer/contact record and the associated property record**. This ensures a complete, auditable history of every interaction is preserved, improves continuity of service, and allows staff to provide informed, consistent support to families over time.

16. Are cemetery maps updated dynamically in real-time after sales, burials, or transfers?

- Yes. **CemSites cemetery maps are updated dynamically in real time** as sales, burials, ownership transfers, and other changes are recorded in the system. Because the mapping system is fully integrated with the core database, any update to a plot, grave, or property record is **immediately reflected on the digital map**.
- This ensures that staff are always working with **current, accurate information** for inventory, operations, and planning, and that public-facing views (where enabled and permitted by the Town) also display the most up-to-date information.

- Real-time updates eliminate duplicate data entry, reduce errors, and ensure consistency between records, mapping, work orders, and reporting across the platform.

17. Please list all available APIs and integration points.

- Merchant Integrations: First American, BluePay, Moneris, Clover, Elavon, CardPointe, Stripe
- API: United Hebrew Cemetery - SY Hebra App, FSI - Trusting Company
- Funeral Home: Passare, CRaKN / Tribute
- Messenger: EFF - Express Funeral Funding, MIP - Make it Personal
- Website: Tukios
- Financial Exporting: Microsoft Dynamics, Dynamics 365, Dynamics Great Plains, Sage Intacct, Sage 50, Intuit QuickBooks, Peachtree, Tyler

Describe how your system integrates with:

- ESRI GIS
 - We utilize ESRI satellite imagery as available layer data in our mapping
- ERP financial systems
 - We can create custom API connections to sync financial records between CemSites and ERP software. This can be 1-way or bi-directional
 - Laserfiche or document management systems
 - We can create a custom REST API to interact with Laserfiche, storing and retrieving documents from inside the CemSites software

19. Describe any integration limitations and recommended alternatives. Doug

- We recommend relying on CemSites as the source of truth for your financial details and exporting summarized debit and credit journal entries to you financial software
- We recommend utilizing our unlimited storage restrictions for document uploads, allowing quick retrieval of documents through our categorized and labeled filing system

20. Provide a typical project timeline for a cemetery operation similar to the City's size.

For a cemetery operation comparable in size and complexity to a municipal system, a **typical implementation timeline ranges from 24–40 weeks**, depending on data condition, scope, integrations, and internal review cycles.

This extended timeline reflects the realities of municipal environments, including stakeholder availability, formal approval processes, historical data validation, and phased adoption.

Typical phases include:

1. Project Initiation & Discovery (4–6 weeks)

- Stakeholder alignment across departments
- Confirmation of project scope and success criteria
- Review of existing processes, records, and systems
- Detailed data assessment and implementation planning

2. Data Preparation & Migration (8–16 weeks)

- Data extraction from legacy systems and manual records
- Data normalization and cleansing
- Iterative test migrations
- City review, validation, and feedback cycles

3. Configuration & Integration (6–10 weeks)

- System configuration and permissions
- Workflow and operational setup

- Financial configuration
- Integration with municipal accounting or reporting systems (as applicable)

4. Training & User Acceptance Testing (4–6 weeks)

- Role-based training sessions
- Scenario-based user acceptance testing
- Refinements based on staff feedback
- Final readiness assessment

5. Go-Live & Stabilization (2–4 weeks)

- Phased or full production launch
- On-site or remote go-live support
- Post-launch issue resolution and optimization

21. Identify roles and responsibilities for both vendor and City staff.

CemSites Responsibilities

- Dedicated Project Manager and Implementation Team
- Project planning, timeline management, and communication
- System configuration and setup
- Data migration and validation support
- Training delivery and documentation
- Go-live support and post-launch assistance

City Responsibilities

- Designated Project Lead / Primary Point of Contact
- Subject matter experts for records, operations, and finance
- Timely review and validation of migrated data
- Participation in training and testing
- Coordination with internal IT and finance teams as needed

22. Describe required City resources (FTE hours, subject matter experts, IT support).Mike

Typical City resource commitment includes:

- **Project Lead:** ~2–4 hours per week
- **Subject Matter Experts:**
 - Cemetery operations / records: 2–4 hours per week (during migration and validation)
 - Finance staff: 1–2 hours per week (during financial setup)
- **IT Support:**
Limited involvement, primarily for access, integrations, and security review if applicable

CemSites does not require extensive internal IT development resources.

23. Describe your training approach for:

CemSites delivers **role-based, practical training** designed around daily workflows.

Cemetery Staff

- Interment management, Decedent and lot records, Mapping and plot management, Search and reporting

Administrative Staff

- Customer and family inquiries, Contract and document management, Sales workflows and reservations, Front-office reporting

Field Crews

- Grave and location lookup, Mobile-friendly access to assignments, Mapping and section navigation, Operational task clarity

Finance Personnel

- Invoicing and receivables, Trust and fund tracking (where applicable), Financial reporting, Accounting system integration workflows

Training is delivered via live sessions, recorded walkthroughs, and hands-on exercises. Follow-up sessions are available post-go-live.

24. Provide examples of user documentation and knowledgebase tools.

CemSites provides multiple layers of user support, including:

- **Role-specific documentation** tailored to operational, administrative, and finance users
- **Recorded training sessions** for ongoing reference
- **In-application guidance** and tooltips

Documentation is continuously updated as features evolve and is accessible to all authorized users.

25. Describe post-launch support, SLAs, and escalation procedures.

- **Issue Resolution and Escalation Procedures**
Post-Go-Live Support: Following the go-live and as part of our SLA, our team will be virtually available to provide immediate support, addressing any issues that arise and optimizing system performance as needed.

- **Response Times:**

- Critical Issues: Response within 1 hour, resolution within 4 hours.
- High Priority Issues: Response within 4 hours, resolution within 24 hours.
- Medium Priority Issues: Response within 6 hours, resolution within 48 hours.
- Low Priority Issues: Response within 8 hours, resolution within 72 hours.

- **Escalation Procedures:**

- Step 1: Initial Issue Reporting – All issues will be reported to our support team via the dedicated support portal or phone line.
- Step 2: Triage and Assignment – Issues will be categorized by priority, and appropriate team members will be assigned for resolution.
- Step 3: Escalation to Senior Management – If an issue is not resolved within the specified time frame, it will be escalated to the Project Manager and, if necessary, to the Vice President of Operations.
- Step 4: Continuous Communication – Throughout the issue resolution process, we will maintain open lines of communication with city officials, providing regular updates on progress.

Commitment to Resolution

CemSites is committed to resolving all issues within the agreed-upon time frames. Our team will work diligently to ensure that any potential disruptions are minimized and that the city's operations continue smoothly throughout the conversion process.

26. Identify any optional modules or features.

Marker Manager

- Track markers from order to installation
- Revenue reporting on unsold markers
- Internal and public image display

Obstruction Manager

- Tracks underground and surface obstructions
- Utilities, trees, benches, buildings, memorials
- Displays obstructions in relation to graves

Inventory Manager

- Live inventory reporting
- Low-stock notifications
- Vendor status tracking

Placement Module – Floral & Mailers

- Mail-merge and placement tracking
- Reporting by placement type
- Enhanced with Revenue Plus

Funeral Home Portal

- Streamlines communication with funeral homes
- Auto-populates customer records
- Document management
- Dashboard with real-time status updates

Revenue Plus

- Generates new revenue opportunities
- Captures leads from memorials, donations, and customers
- Supports email campaigns

26. Provide your technology development roadmap for the next 24–36 months.
- Enhancements to ESRI GIS mapping will include a bi-directional integration with ArcGIS
 - CemSites will be expanding our calendar functionality to include asset management, in-system notifications, and staff scheduling
 - Client Facing automated document builder
 - Enhancements to CemSign (similar to DocuSign), allowing signatures to be sent out for any document via email
28. Describe how customer feedback influences product enhancements.
- Every enhancement listed in the development roadmap originated from client suggestions that were evaluated and road mapped. CemSites values client input and wants to keep CemSites as the best product on the market
29. Identify any planned security certifications or compliance improvements.
- We plan to pursue 27001 certification and SOC 2 annual reports if the RFP requires

ADDITIONAL COMMENTS

Please use the space below to provide any additional comments or project considerations that you would like to share with the City’s project team.

Additional Comments and Project Considerations

CemSites appreciates the opportunity to participate in the City’s cemetery management software initiative and to present a solution purpose-built for **municipal cemetery operations**. Since 2012, CemSites has focused exclusively on this domain, supporting more than **500 clients and over 1,100 cemeteries** across North America. This specialization has allowed us to develop a platform that directly reflects the real-world workflows, compliance needs, and service expectations of public cemetery operations.

CemSites provides a **fully integrated, cloud-based system** that brings together cemetery records, mapping, customer management, sales and accounts receivable, work orders, reporting, document

management, and public-facing services into a single, secure platform. This eliminates data silos, reduces reliance on paper files and spreadsheets, and ensures that staff are always working with **current, accurate information**. Updates to sales, burials, transfers, and records are reflected **in real time** across the system, including on the digital maps.

A key strength of the CemSites platform is its **proprietary mapping system**, which supports both staff and public use. Existing paper maps can be layered into the system or redrawn into **modern, Google-style digital maps** that include sections, lots, graves, pathways, roadways, and landmarks. Where available, GIS and GPS data can be incorporated to improve positional accuracy. The **Walk-to-Site mobile application** further extends this capability by using GPS to guide staff and visitors directly to specific locations within the cemetery.

From an operational standpoint, CemSites supports **end-to-end workflows** including burial scheduling, work orders, maintenance tracking, marker management, and facilities coordination. Automated workflows and notifications ensure that requests—such as burials or site preparation—are routed to the appropriate personnel and tracked to completion. This improves coordination, accountability, and service delivery.

Financially, CemSites' **CRM and Accounts Receivable modules** provide full tracking of plot sales, invoices, payments, balances, and transaction history, all linked directly to the associated properties and customers. Document automation allows the City to generate deeds, invoices, and related documents, store them as PDFs, and retain signed copies. CemSites also functions as a **virtual filing cabinet**, enabling documents and photographs—both historical and newly created—to be stored directly within the relevant customer and property records, with full audit trails of changes over time.

CemSites places a strong emphasis on **data integrity, security, and accountability**. The system includes role-based access controls, multi-factor authentication, optional Single Sign-On integration with Microsoft Entra, detailed audit logs, and **automated backups**. In addition, the City may request and download an on-site copy of its data backup at any time. Public-facing tools such as WebSync and the KeepSafe module allow residents to view approved information and submit content (such as photos or memorials), while ensuring that **all content is vetted and approved by City staff before publication**.

Implementation success is driven by a **proven project methodology**, dedicated project management, and executive oversight. CemSites supports the City through discovery, configuration, data migration, mapping, testing, training, and go-live. Training is provided online, recorded for future reference, and supported throughout the adoption cycle. Comprehensive user documentation is also provided for system use, configuration, reporting, and public website updates.

Finally, CemSites brings both **experience and efficiency** to this project. With over **220 implementations in the past three years alone**, we have demonstrated our ability to deliver projects similar in scope and complexity to the City's needs. In this case, CemSites also offers a unique advantage: **because significant groundwork has already been completed to create the City's system framework and launch capability, we are able to deliver the project at a reduced cost and with a more efficient timeline**, while still meeting all functional and technical requirements.

In summary, CemSites offers the City a **specialized, proven, secure, and scalable solution** designed specifically for municipal cemetery operations—backed by deep industry experience, modern technology, strong project governance, and a commitment to long-term partnership and success.

Tabulation Of Bids For Event # 579: Cemetery Management Software (Request for Information)

Jotform 16,616.00
 4 Embarcadero Center Suite 780
 San Francisco, CA 94111-4102

Items

Item: CEMETERY MGMT SOFTWARE SOLUTION
Description: Request for Information - Cemetery Mgmt Software Solution
Unit of Measure: LS **Quantity:** 1.0000

	Quantity	Unit Price	Extended Amount
Concourse Tech Inc.	1.0000	45,000.000	45,000.00
Ramaker & Associates (No charge)	1.0000	0.000	0.00
PlotBox (No charge)	1.0000	0.000	0.00
Site Industries(CemSites) (No charge)	1.0000	0.000	0.00
Jotform	1.0000	16,616.000	16,616.00