Date: Wednesday, October 23, 2024

From: Carly Craig, Manager of Legislative Services/Clerk

Subject: Cemetery Software Quotations

Report COR2024-040

> This document and its attachments are public and available in an accessible format upon request.

Recommendation

That staff be delegated the authority to enter negotiations through an informal request for quotation process for the purchase of cemetery software under the budgeted amount of $25,000.

Background

In the 2024 budget, Council approved a one-time $25,000 capital enhancement request to purchase cemetery software for the Township's three active cemeteries: Mount Pleasant Cemetery, Oxenden Cemetery, and Boyd Cemetery.

In advance of preparing a 2024 budget request, staff had been in contact with two providers to inform the budget request. Since then, staff have engaged an additional provider and received preliminary costing.

By-Law 2029-047 – Purchasing By-Law provides that purchases between $20,000 and $50,000 be tendered or quoted and presented to Council for award. The Purchasing By-Law also provides that department heads may enter purchase and enter into negotiations with one or more bidders where two or more identical bids have been received, in such case, the requirements for inviting tenders, RFPs, or quotations may be waived.

While engaging with software providers, it has become apparent that many of the software products on the market perform similar functions and are similarly priced. While these products may be different, for the Township's purposes, two software products meet the requirements for a similar cost. To ensure the best return on investment and customization, staff are seeking permission to waive the requirement for 3 quotations and enter an informal quotation process with 2 providers.

Analysis

Staff have engaged with three software companies for demonstrations and would consider two out of three proposals to meet the Township's requirements. Staff have engaged the following software providers: PlotBox, CemSites, and the Managed Municipality.

Staff have evaluated the appropriateness of software based on: the location of data servers (per legislated requirements), product function and features, cost, and implementation processes (ie. resources required, delivery timelines). In general, the Township requires that the software perform the following functions:

1. Compliance with information legislation;
2. Provide an interactive map of plots for each cemetery;
3. Stores scanned documents and photographs associated with individuals and plot records;
4. Must list the plot location, type, status, and burials that have occurred in the plot
5. Must be able to generate reports to aid in annual reporting requirements to the Bereavement Authority of Ontario (BAO);
6. Monument management (photographs, installation requests, and status of monuments ie. not installed, type of monument(s) installed);
7. Public facing cemetery interface that can be displayed through the Township's website for easy public access to interment records (Public register requirement under the *Funeral, Burial, and Cremation Services Act, 2002*); and
8. Staff training and ongoing support for technical issues.

Both proposals are similar in cost, with a few variations for software add-ons. If Council authorized staff to enter into an informal quotation and negotiation process, staff would have more flexibility to customize the software to the needs of the Township and remain under budget.

Both software solutions are cloud-based solutions that provide interactive maps and meet the requirements listed above, with some opportunity for add-ons and discounts. Both solutions have an implementation fee of between $23,000 and $24,000 and are subject to annual fees.

Due to ongoing records management efforts by Clerk's department staff and summer student positions approved in the subsequent two budget cycles, staff have realized significant cost savings due to the work conducted to validate cemetery data and accomplish this project under budget. These cost savings could be further explored in an informal quotation process as the implementation cost may decrease through negotiations.

This work commenced in 2021 with a goal to reduce legal risk to the Township and decrease use of resources when verifying requests. During the summers of 2023 and 2024, it is estimated that over 10,000 individual documents were digitized and 3,171 plot files (including ownership, burials, and monument installations) were confirmed and verified. With the majority of this work being completed during the last two summers, the work to validate the data is ongoing as staff review burial requests, authorizations, and monument installations.

This project is expected to take 4-6 months to migrate and implement, with the launch of the public portal to satisfy the legislated requirement of the public register to go live in the summer of 2025. The implementation process includes gathering all Township forms and reports, conducting site visits and gathering cemetery maps, surveying and generating maps, uploading the Township's cemetery data to the software, configuring maps, forms and reports to the Township's needs and preferences, and user testing in advance of going "live".

Financial Impact

There is no anticipated financial impact beyond the budgeted $25,000.00, to be funded from the Mount Pleasant, Boyd and Oxenden Cemetery Reserve.

Strategic Priorities

Purchasing cemetery software satisfies objectives within Pillar #5: Deliver Effective and Cost-Efficient Services, including enhancing online services for more efficient customer service (public register), and increasing efficiencies around cemetery administrative processes.

Conclusion

Staff are requesting Council delegate authority to staff to engage in an informal quotation process for the procurement of cemetery software. By engaging in an informal quotation process, pricing and feature flexibility are afforded to ensure the administrative needs are met for Mount Pleasant, Oxenden, and Boyd Cemeteries to increase administrative efficiencies.

Respectfully Submitted: Carly Craig, Manager of Legislative Services/Clerk

Report Approval Details

Document Title:	COR2024-040 - Cemetery Software Quotations.docx
Attachments:	
Final Approval Date:	Oct 10, 2024

This report and all of its attachments were approved and signed as outlined below:

Samantha Buchanan, Treasurer

Brittany Drury, Deputy CAO/Director of Corporate Services