

REQUEST FOR STATEMENTS OF QUALIFICATION

Cemetery Business Plan Consultant

Solicitation # GJ26-16

PURPOSE OF REQUEST FOR STATEMENTS OF QUALIFICATION (RFSQ)

The purpose of this Request for Statements of Qualification is to obtain submittals from qualified firms to provide a business plan for the District and its to-be-developed cemetery. The Snyderville Basin Cemetery District ("SBCD") seeks professionals who are experienced in cemetery development and operations. It is anticipated that this RFSQ may result in a contract award to a single vendor.

This RFSQ is designed to provide interested firms with sufficient basic information to submit statements meeting basic requirements but is not intended to limit a submittal's content or exclude any relevant or essential data. Vendors are at liberty and are encouraged to expand upon the specifications to evidence service capability under any agreement.

SBCD will not be liable for any costs vendors may incur in the preparation or presentation of this solicitation.

ISSUING OFFICE AND RFSQ REFERENCE NUMBER

Snyderville Basin Cemetery District is the issuing office for this document and all subsequent addenda relating to it. The reference number for the transaction is Solicitation #GJ26-16. This number must be referred to on all submittals, correspondence, and documentation relating to the RFSQ.

OVERVIEW

The SBCD is a government special district in Summit County, Utah. Activated in 2023, the District is charged with developing and operating a cemetery to serve the residents of the Snyderville Basin area of the county. SBCD will utilize the resulting contract on an **as needed basis only** and makes no commitment to use the contract. The contract would run for the period of one year.

BUDGET

Under \$20,000.

ANTICIPATED TIMELINE

<u>Event</u>	<u>Date</u>
1. RFSQ Released	08/29/2025
2. Question Submission Deadline via U3P-Bonfire	09/22/2025 no later than 3 pm MT
3. Submissions Due via U3P-Bonfire	09/29/2025 no later than 3 pm MT
4. Interviews with finalist candidates	10/06/2025-10/10/2025
5. Contract Finalized	10-11/2025

DETAILED SCOPE OF WORK

A report which includes:

Market Analysis:

Service area population and death statistics

Disposition data (consumer preferences), current and projected

Competition

Revenue Opportunities:

Products and amenities to be offered

Pricing

Capital Planning:

What should Phase I development include (MVP: minimum viable product); cost

Projected pace of future development

Cash Flow Planning:

Projected Revenues, Expenses and Capital Outlay in first three years

Pro Forma Budget

Organizational Structure and Operations

Optimal operating structure: District employees vs. outsourcing

Level of staffing

Recommendations on Operating software, record keeping, financial management

Marketing and Sales

General recommendations on how to approach branding, property design, communications, sales and community relations.

COMPANY REQUIREMENTS AND QUALIFICATIONS

Demonstrated Experience of Qualifications

Demonstrated experience by proposed staff providing services like the scope of work provided, who have extensive experience advising cemetery operators, especially with experience in the development of a new cemetery or cemetery expansions.

PROPOSAL RESPONSE FORMAT

- A detailed submittal outlining your approach to the scope of work, your demonstrated experience to include examples of similar projects completed, with references if available, and a timeline for completion.
- **Costs.** Cost will not be requested during the initial phase but will be directly negotiated with the highest ranked vendor. If a fair and reasonable contract cannot be negotiated with the highest ranked vendor, negotiations with the next highest scoring vendor will commence, and so on until a fair and reasonable contract can be established.
- Submit one electronic copy by the posted due date and time through U3P at purchasing.utah.gov/currentbids.

LENGTH OF CONTRACT

The initial term of the contract will be for one year.

STANDARD CONTRACT TERMS AND CONDITIONS

Any contract resulting from this RFSQ will include, but not be limited to, SBCD's standard terms and conditions (see Attachment A).

QUESTIONS

All questions must be submitted via the question-and-answer module in the U3P Bonfire portal: purchasing.utah.gov/currentbids

SUBMITTING YOUR PROPOSAL

Proposals must be received by the posted due date and time. Proposals received after the deadline will be late and ineligible for consideration.

PROTECTED INFORMATION

The Government Records Access and Management Act (GRAMA), Utah Code Ann., Subsection 63-2-304, provides in part that:

the following records are protected if properly classified by a government entity:

(1) trade secrets as defined in Section 13-24-2 if the person submitting the trade secret has provided the governmental entity with the information specified in Section 63-2-308 (Business Confidentiality Claims);

(2) commercial information or non-individual financial information obtained from a person if:

(a) disclosure of the information could reasonably be expected to result in unfair competitive injury to the person submitting the information or would impair the ability of the governmental entity to obtain necessary information in the future;

(b) the person submitting the information has a greater interest in prohibiting access than the public in obtaining access; and

(c) the person submitting the information has provided the governmental entity with the information specified in Section 63-2-308;

* * * * *

(6) records the disclosure of which would impair governmental procurement proceedings or give an unfair advantage to any person proposing to enter into a contract or agreement with a governmental entity, except that this Subsection (6) does not restrict the right of a person to see bids submitted to or by a governmental entity after bidding has closed;

GRAMA provides that trade secrets, commercial information or non-individual financial information may be protected by submitting a Claim of Business Confidentiality.

To protect information under a Claim of Business Confidentiality, the offeror must:

1. provide a written Claim of Business Confidentiality *at the time the information (submittal) is provided to the state*, and
2. include a concise statement of reasons supporting the claim of business confidentiality (Subsection 63-2-308(1)).
3. submit an electronic "redacted" (excluding protected information) copy of your submittal response. Copy must clearly be marked "Redacted Version."

A Claim of Business Confidentiality may be appropriate for information such as client lists and non-public financial statements. Pricing and service elements may not be protected. An entire submittal may not be protected under a Claim of Business Confidentiality. The claim of business confidentiality must be submitted with your statement.

To ensure the information is protected, the Department of Purchasing asks the offeror to clearly identify in the Executive Summary and in the body of the submittal any specific information for which an offeror claims business confidentiality protection as "PROTECTED".

All materials submitted become the property of SBCD. Materials may be evaluated by anyone designated by SBCD as part of the submittal evaluation committee. Materials submitted may be returned only at SBCD's option.

PROPOSAL EVALUATION CRITERIA

A committee will evaluate submittals against the following weighted criteria. Each area of the evaluation criteria must be addressed in detail.

<u>WEIGHT</u>	<u>EVALUATION CRITERIA</u>
25%	Demonstrated ability to analyze the local market
25%	Demonstrated experience with operating, or advising operators, of cemeteries, with specific reference to public cemeteries
25%	Demonstrated experience with cemetery finances, both operating and capital
10%	Demonstrated experience exploring creative options for a new cemetery
15%	Demonstrated skills in clear communication

EVALUATION PROCESS

In the initial phase of the evaluation process, the evaluation committee will review all submittals timely received. First, nonresponsive submittals (those not conforming to RFSQ requirements) will be eliminated. Second, the remaining submittals will be evaluated against the provided evaluation criteria and ranked. SBCD will then enter direct negotiations with the highest ranked vendor. If negotiations are successful, the contract will be awarded to that vendor. If they are not, then SBCD will move to the 2nd ranked vendor and repeat the negotiation process and so forth.

If it is determined to be in the best interest of the SBCD, interviews and presentations may be held at the option of the Procurement Unit. Interviews will be limited to the top two or three ranked vendors. Representations made by a vendor during interviews will become an addendum to the vendor's qualifications and will be documented. Representations must be consistent with the vendor's original qualifications and may only be used for purposes of clarifying or filling gaps in the vendor's qualifications. Interviews and presentations will be at vendor's expense.

RFSQ EVALUATION SCORESHEET

Cemetery Business Plan Consultant

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Firm Name: _____

Evaluator: _____

Date: _____

Score will be assigned as follows:		Score (0-5)	Weight	Points
0 = Fail, fails to address the requirements				
1 = Poor, inadequately addresses the requirements				
2 = Unsatisfactory, only partially responsive to the requirements				
3 = Satisfactory, meets minimum requirements				
4 = Good, meets requirements and exceeds in some respects				
5 = Excellent, exceeds all of the requirements				
1. Demonstrated ability to analyze the local market	25 points possible		X 5	
2. Demonstrated experience with operating, or advising operators, of public cemeteries	25 points possible		X 5	
3. Demonstrated with cemetery finances, both operating and capital	25 points possible		X 5	
4. Demonstrated experience exploring creative options for a new cemetery	10 points possible		X 2	
5. Demonstrated skills in clear communication	15 points possible		X 3	
TOTAL EVALUATION POINTS	(100 points possible)		Total	