



# Request for Proposals

## Scope of Work

### Management, Operations and Maintenance of Austin Cemeteries

December 20, 2012



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# Request for Proposals

## Management, Operations and Maintenance of Austin Cemeteries

### INTRODUCTION

The purpose of this solicitation is for the City of Austin (“City”), through its Parks and Recreation Department, to identify a range of qualified cemetery management and operations firms to consider contracting with to perform one or all aspects of the City of Austin’s cemetery services (“Cemeteries”). Interested firms who demonstrate relevant experience, sufficient business resources, and the infrastructure capacity necessary for maintaining all City-owned cemetery properties as valuable public assets will be considered. This is a performance-based contract for which the contractor will be reimbursed for services rendered on behalf of the City. The City is seeking proposals for a contract with an initial term of five (5) years, with two (2) five (5) year options.

The City began operating cemeteries in 1856 upon receiving Oakwood Cemetery from the State of Texas. Although owned by the City, the cemeteries were primarily maintained by individual plot owners and the Austin Cemetery Association with the support of the Public Works Department. After consolidation of the Urban Transportation Department and the Public Works Department in 1987, cemetery oversight was transferred to the Parks and Recreation Department. The Parks and Recreation Department provided cemetery maintenance and operations from 1987 until 1990, when the services were outsourced to a contractor. The current cemetery contract will end in 2013.

The City owns five distinct cemetery properties highlighted below:

Property Name	Location	Date Established	Total Acres	Average Burials Per Year
Oakwood Cemetery*	1601 Navasota Street	1839	40	40
Oakwood Annex Cemetery*	1600 Comal	1914	22	20
Evergreen Cemetery	3304 East 12 <sup>th</sup> Street	1928	30	100
Austin Memorial Park	2800 Hancock Drive	1927**	96.75***	320
Plummers Cemetery*	1204 Springdale	1957	8	Occasional

\* Burial sales are essentially inactive.

\*\* Date established per deed dated August 17, 1927. Vol. 407, Page 16, Records of Travis County

\*\*\* 112.75 original acreage. Exact acreage today is to be confirmed.

### OBJECTIVES FOR CEMETERY MANAGEMENT

- A. Ensure all five of the City cemeteries are treated with equal care and each is a well-maintained, dedicated burial place. Each cemetery should be a place where the Austin community feels welcome to visit and gather, to respectfully celebrate life, to make connections with family, friends and predecessors, and to celebrate culture and history.
- B. Ensure management regards the City’s five cemeteries as important historic sites and cultural landscapes in keeping with national best practices that recognize the value of a city’s burying grounds for citizens, scholars, decedents, and tourists who visit Austin.

- C. Ensure accessible and well-maintained cemetery buildings and infrastructure for the visiting public and interment of the deceased in compliance with all applicable statutes, ordinances, rules and regulations.
- D. Ensure cemetery grounds, landscaped areas, and natural elements are well maintained, utilizing applicable industry standards and best practices in landscaping that promotes optimally healthy turf, trees, and plant life, and ensure such activities are conducted in a safe, clean and environmentally friendly manner.
- E. Ensure and coordinate daily operations in an efficient and professional manner that results in quality service delivery, protects public safety, minimizes adverse impact or destruction to public and private property, and minimizes distraction from the cemetery serving as a respectful place of remembrance.
- F. Ensure proper administrative and operational policies and procedures are established to achieve and maintain:
  - professional and operational efficiency;
  - trained and/or certified personnel and active volunteer coordination;
  - high-quality customer service and timely complaints resolution;
  - thorough, accurate and accessible records management and retention, including recordation and maintenance of interment records;
  - effective business and accounts management; and
  - optimum employee and public safety, and adherence to applicable risk management standards.
- G. Ensure best practices in maintaining the public's trust, including a high standard of ethical, equitable and non-discriminatory practices, as well as implementation of management and operational practices that ensure public access to facilities and transparency in public information and business communications. Provide excellent service to customers in a respectful and consistent manner.

### **CITY RESPONSIBILITIES**

The City of Austin Parks and Recreation Department will begin a cemetery master planning process as funding is made available. As a result, Contractor may be asked to accommodate infrastructure and building improvements. Further, existing buildings may be re-purposed to accommodate new uses as identified in the master planning process.

The City will designate a City Cemetery Contract Manager (CCM) to be responsible for exercising oversight and direction of Contractor's efforts as defined in the Scope of Work (SOW). The CCM will represent the interests of the City in resolving any and all issues that may arise incidental to and during the execution of the agreement. Specifically, the CCM shall maintain regular communication with the Contractor through site visits, conference calls, meetings, and operational reports. The CCM will promptly review any written reports submitted by the Contractor, and is responsible for approval of all invoices for payment. The CCM will give the Contractor regular and timely



feedback on the acceptability and progress of work including customer relations, resulting contract deliverables and reports.

To ensure a high level of customer satisfaction, the CCM will conduct and publish an annual customer satisfaction survey that will be used to determine quality of service and progress towards improvement, determine management, operations and community priorities, provide information regarding effectiveness of communications with the public and emerging trends. The CCM will produce and publish a City of Austin Cemeteries annual report.

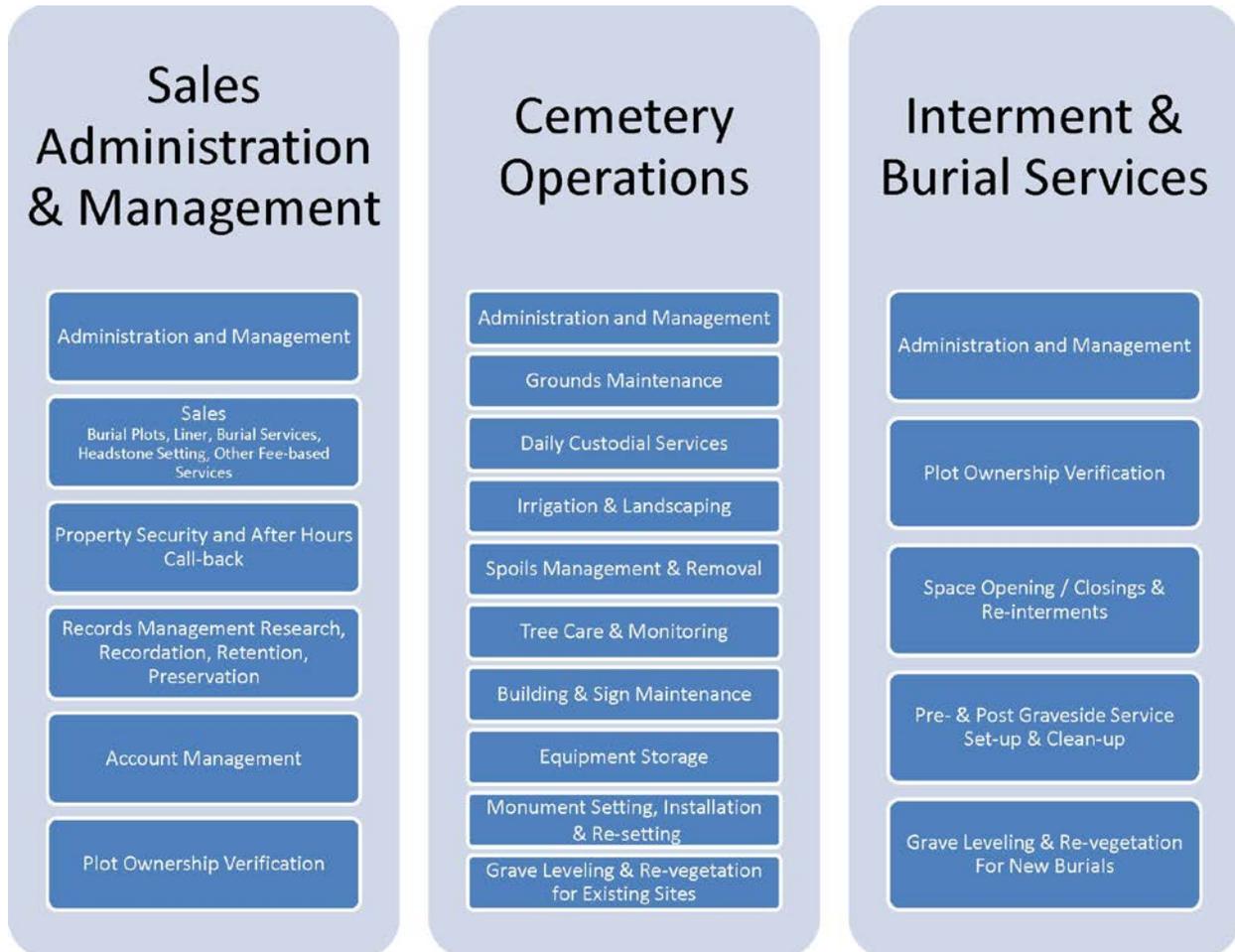
The City's Contract Compliance Unit will ensure the City receives conforming goods and services in accordance with the contract. Compliance staff will monitor all aspects of the contract from funding, term, options, reporting, deliverables, performance, scheduled and unscheduled compliance visits, claims, disputes, amendments, renewals, and closeout activities.

Other City responsibilities include annual facilities and grounds condition assessments, submitting capital planning and improvement funding recommendations, City Code, safety and environmental site review and compliance visits. The City is responsible for major infrastructure development (including roadways).

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## GENERAL DESCRIPTION OF CEMETERY SERVICES

This section includes a general description of each operational area. Austin municipal cemetery operations consist of three major components: Sales, Operations, and Burial Services. While all areas are distinct, they are also interrelated. Each operational area may operate independently. Therefore, the Contractor may choose to submit a response for one or more of the operational areas highlighted below and discussed in further detail in the SOW section of this document.



### SALES ADMINISTRATION & MANAGEMENT

The Contractor for this operational area shall be required to provide a variety of sales administration, marketing and related management services.

**Administration and Management:** Contractor shall perform a variety of general administrative, management and supervisory duties, including operational planning, budgeting, developing and enforcing operational policies and procedures.

Contractor shall provide all personnel, equipment, tools, supplies, supervision and services necessary to ensure sales, administration and management of the cemeteries are provided in a manner that supports and reflects best practices and industry standards.

**Sales and Marketing:** Contractor shall offer for sale a variety of cemetery services in accordance with annual sales objectives approved by the City. The sales function includes the sale of burial spaces,

concrete grave liners, headstone setting and re-setting. Sales are both at the time of need and preneed. Funding mechanisms for prearrangements include cash sales, installment sales, trusts and insurance contracts.

## **CEMETERY OPERATIONS**

A Contractor for this operational area shall provide high-quality maintenance to all five Austin cemetery properties.

Grounds Maintenance activities include complete grounds maintenance, landscaping, tree trimming/planting/removal; mowing and landscaping; pest control; re-vegetation; grave leveling; spoils management; raising, setting and aligning headstones; cleaning headstones; maintenance of hardscapes including pathways, drives, curbs and parking areas; trash removal; maintenance of existing fencing, railing, benches, flag poles, signage, monuments or statues; maintenance of irrigation systems, drainage and special features; property security, access and after hours call-back; monument delivery acceptance, setting, installation, re-setting; and routine reporting in a manner that reflects best practices and industry standards.

Facilities Maintenance activities include the maintenance and repair of all built facilities, including: preventive maintenance activities; pest control services; painting; graffiti removal; building, storage, signage, lighting, plumbing and electrical maintenance and equipment repairs; repair and replacement of deteriorated building systems and components; janitorial and custodial services that include collection and disposal of refuse and recyclable materials.

Other services include: trimming; edging; fertilization and aeration; removal of leaves, debris and trash from turf and grounds; sweeping or blowing clean roads and sidewalks; plant and tree care; snow and ice removal when applicable; grave leveling; and monument setting and leveling.

Contractor shall provide all personnel, equipment, tools, supplies, supervision and services necessary to ensure clean and manicured premises, which are maintained in a manner that uses best practices and innovative approaches to reduce the carbon footprint and any adverse environmental impacts, prevents damage to existing property, and supports healthy grass, trees, shrubs, and plant life. Contractor shall employ practices to reduce impacts on the natural environment through use of alternative energy, low-emissions equipment, bio-degradable chemicals, or items with recycled content. City Council resolutions #20071129-045 and 20070215-023 relate to the adoption of sustainable business practices that reduce chemical and greenhouse gas emissions, comply with LEED standards, and promote the use of recycled materials in goods and services purchased by the City.

## **INTERMENTS & BURIAL SERVICES**

A Contractor for this operational area shall conduct interments and burial services. This consists of space openings and closings, graveside preparation/funeral site set-up and removal, grave-liner installation, spoils removal, and other associated services which include, space ownership and heirship verification, grave leveling and ground vegetation, reporting, documentation of interments, re-interments, and disinterments per regulating requirements.

Contractor shall provide all personnel, equipment, tools, supplies, supervision and services necessary to ensure services are provided in a manner that supports and reflects best practices and industry standards, and are compliant with all applicable statues, ordinances, rules and regulations.

# Scope of Work

## I. SALES ADMINISTRATION & MANAGEMENT

### A. Administration and Management

**Staffing:** Contractor shall employ skilled and competent workers in the performance of a resulting contract. Contractor may adjust and/or rotate personnel among locations to accommodate customer service demands. Contractor shall ensure ability to communicate and serve Spanish-speaking customers, and shall provide reasonable accommodations for persons with disabilities.

**Personnel Management – Credentialing, Training, Conduct Standards, and Policies & Procedures:** Contractor, personnel, and subcontractors shall adhere at a minimum to the following standards of dress and conduct while on duty at any of the City of Austin cemeteries, as follows:

- Personnel attire shall include a visible name tag and a standard uniform that includes official company logo or patch.
- Be fully clothed at all times, to include long slacks or pants and shirt, buttoned up from neck to waist, or company t-shirt. Clothing shall be clean. Any soiled uniforms should be a result of cemetery work performed that day. Tank tops as outer garments are prohibited. Shoes/boots will have no holes or loose soles. Steel-toed shoes will be required in accordance with Occupational Safety and Health Administration (OSHA) requirements. Contractor, its employees and subcontractors shall maintain personal hygiene.
- Shall not engage in loud or boisterous behavior or use profane or abusive language on any cemetery premises. Shall show proper reverence if working during burial services.
- Shall designate eating areas (other than in the business office) for breaks and meals for its employees. Contractor, employees and contractors shall comply with no smoking regulations. All cemetery properties are designated NO SMOKING.
- The possession or consumption of alcohol, tobacco products and/or illicit drugs is strictly prohibited.
- Contractor, employees and/or subcontractors shall not lean, sit or stand on or against headstones or monuments. No tools, equipment or other items shall be placed on headstones or monuments.



Contractor shall be responsible for maintaining satisfactory standards of personnel conduct and work performance and shall administer disciplinary action up to and including employee termination, as required. Contractor shall also be responsible for training and will adhere to standard safety precautions for its employees and subcontractors performing work under the awarded contract. OSHA standards shall be observed in all work performed. Appropriate safety equipment shall be furnished by the Contractor and equipment used shall follow manufacturer recommendations and OSHA standards, including use of hard hats, safety shoes, safety glasses, and hearing protection devices.

Contractor shall provide on-site employee supervision. The supervisor shall be knowledgeable and able to effectively communicate minimum contract requirements to employees and the public.

**Cemetery Security:** Contractor is responsible for cemetery security.

**Emergency Management Procedures:** Contractor is responsible for and shall develop and implement an Emergency Management Plan that, at a minimum, includes:

- Executive Summary: Purpose of plan, authorities and responsibilities of key personnel, types of emergencies that could occur (capabilities and vulnerabilities), managing response operations, schedule and budget.
- Emergency Management Elements: Direction and control, communications, life safety, property protection, community outreach, recovery and restoration, administration and logistics.
- Emergency Response Elements: Procedures for warning employees and customers, communication with personnel and community responders, conducting evacuation and accounting for all persons, managing response activities, utilizing fire extinguishers as appropriate, shutting down operations, protecting vital records, restoring operations, and activating emergency services.
- Support Documents: Emergency call lists, building and site maps, and resource lists.

**Routine and Special Reports:** Contractor shall prepare and submit to the City periodic progress reports with respect to receipts, disbursements, space sales, space inventory, interments, repairs, improvements, safety and environmental incidents. The reports shall be submitted as frequently and in such detail as required on a monthly, quarterly and annually as stipulated in the resulting contract.

**Annual Audit and Reviews:** Contractor shall secure and supply the City with a certified independent financial and program/contract audit annually within 120 days from the close of Contractor's annual accounting period. Contractor shall make all records pertaining to the resulting contract available for review or audit.

**Financial and Contract Monitoring:** During business hours, Contractor shall provide the City access to all records for the purpose of ensuring Contractor's compliance.

## **B. Business Operations**

The Contractor shall maintain standard business hours of operation at Austin Memorial Park and Oakwood. The Austin Memorial Park office is open Monday through Saturday, 8:00 a.m. to 4:30 p.m. The Oakwood office is open Monday through Friday, 8:00 a.m. to 11:00 a.m. and from

1:30 p.m. to 4:30 p.m. The cemetery offices are closed on Thanksgiving, Christmas Day, New Year's Day, and Independence Day (July 4). No funerals are conducted on those days.

Cemetery gates shall be opened at 7 a.m. and locked at 8 p.m. each day during Daylight Savings Time. During Central Standard Time, gates will be opened at 7 a.m. and locked at 6 p.m. The gates are opened year round for visitation. Any changes in standard hours of operation are subject to City approval and advance notice shall be posted to the public.

Contractor shall manage and operate the business office at Austin Memorial Park for the sale of burial spaces, cemetery goods, and services to the general public and funeral homes representing the public. Contractor shall not discriminate in any form or fashion in the sale of burial spaces. Contractor shall be responsible for showing cemetery properties and spaces available for sale to interested parties and complete all administrative tasks and financial transactions associated with space sales and burial services. Contractor shall collect, record, remit and report all sales, receipts, funds, time sales and refunds into account(s) and in reports as prescribed by the City.

Contractor shall maintain at least one full time administrator on-site at Austin Memorial Park and support staff at Oakwood Cemeteries during business days and hours of operation. Hours of operation are subject to review, approval and change by the City. Contractor shall have staff tour the grounds to ensure that all citizens are off the premises before access gates are locked.

The City is committed to a pricing policy that maintains a competitive pricing structure approved by the Austin City Council while providing affordable access to cemetery spaces and services to the public. Approved fees are valid for the period of October 1 through September 30 of the City's fiscal year. All services, sales and other fees associated with municipal cemeteries are set forth in the established City cemetery fee schedule subject to approval by the Austin City Council. Contractor shall not modify, waive, forgive, or defer collection of fees owed to the City.

**Customer Sales and Information Packet:** Standard customer sales and information packets shall include, at a minimum: a copy of the cemetery map, Cemetery Rules & Regulations signed by the customer, signed purchase documents, Installment Sales Contract (if required), Customer and Family Contact Information Sheet, Customer Request Form, Customer Complaint Form and current Austin City Council approved Cemetery Fee Schedule. The City will provide Contractor with revised rules and regulations from time to time indicating an effective date the amended rules are to be enforced.

**Cash Handling:** Contractor shall maintain appropriate levels of internal control at all levels of collection and remittance. Contractor shall account for each step of cash handling from the issuance of "banks" to staff, through final accounting reconciliation and deposit, security methods and emergency procedures to protect Contractor's staff and cash, method of determining cash shortages and full City compensation for all shortages. All transport of cash shall be made in locked transport bags or tamper-evident bags. Contractor shall be responsible for the cost of armored transport services. If any funds collected are lost or stolen from the custody and control of Contractor, Contractor shall be responsible for the loss and compensate the full amount of the loss to the City. Any suspected criminal activity, including embezzlement or theft of City funds or property, shall be reported immediately to the CCM and Austin Police Department upon discovery.

**Submittal of Revenue to the City:** All revenue shall be deposited into the City's account via direct deposit daily. Contractor shall remit copies of daily cash receipts to the CCM weekly by Friday at 2 p.m.

**C. Use of Cemetery Facilities**

**Authorized and Exclusive Use:** Use of property and resources shall be dedicated exclusively to municipal cemetery purposes as permitted by the City of Austin. Any unauthorized use is subject to all rights and remedies afforded under contract and law.

Contractor and Contractor's employees shall park privately owned vehicles in designated parking places as determined by the City. The City is not responsible for any damage or loss to Contractor's equipment, tools and supplies stored on City premises. Contractor shall inspect and maintain equipment in safe operating condition. Contractor shall be responsible for delivering and removing all equipment and supplies not approved for on-site storage on a daily basis. Placement and limited storage of proposed equipment, portable storage facilities, supplies and materials necessary for cemetery operations is subject to prior authorization by the CCM, and will only be allowed at Austin Memorial Park in the areas and buildings designated by the CCM. Any supplies or materials stored within the cemetery must be screened from public view.

Contractor shall be responsible for the safe storage and use of all chemicals, pesticides, herbicides, cleaning solutions needed in the performance of the scoped services in accordance with manufacturer recommendations and City standards. Material Safety Data Sheets (MSDS) are required for all chemicals, pesticides, herbicides and cleaning solutions, with copies stored in the maintenance area. Contractor shall comply with all federal, state, city, and county laws and regulations regarding the use of personal protective equipment for personnel and subcontractors. Contractor shall be responsible for maintaining fire extinguishers and safety equipment.

**D. Records Management**

**General Records Requirements:** Contractor shall prepare, maintain and preserve, complete and accurate books, records, files, and accounts of each operational area related to the cemetery information under a resulting contract. Contractor shall maintain separate contract records independent of records not related to this contract. Such records shall include business, financial, burial and all related activities and transactions in the performance of the awarded contract. Records shall be accessible to the City upon request. Contractor's records shall be organized and indexed in a manner that supports efficient retrieval. Records no longer needed for daily business use will be boxed and moved to the City's approved records storage facility. Records requiring permanent retention shall be provided to CCM.

Contractor shall enter all cemetery business information into an industry standard electronic database management system. Data entered into this system shall include all cemetery management areas of this SOW. In order to ensure integrity of all data, Contractor shall implement procedures that prevent unauthorized access to, alteration improper deletion or use of data related to City business. Contractor shall back-up data daily. In order to prevent catastrophic data loss, Contractor shall implement a data recovery plan that includes procedures to restore data from back-ups in the event of hardware failure or other emergencies. A copy of the data recovery plan shall be provided to the City and shall be reviewed and periodically tested by the Contractor.

Contingent upon sufficient funding, the Parks and Recreation Department will establish a centralized Data Warehouse for cemetery data to provide security, centralized reporting and the ability to produce a comprehensive Annual Report on cemetery operations. Contractor shall provide to the Cemetery Contract Manager a data file in a format using media per specifications to be provided by the City that will support import of the Contractor's data into this Data Warehouse and other City systems upon request.

**Space and Burial Records:** The Contractor shall maintain all burial and space ownership records on a daily basis.

Contractor shall maintain current record book(s) and a map(s) of each cemetery. Contractor will maintain all burial and space ownership records that include: records of the purchaser's name, date of birth, address and contact information, and at least two next-of-kin; the date remains are received; the dates the remains are interred; the name and age of the person interred if these facts can be conveniently located; the name of the owner of the cemetery space; name of the portion of land, block numbers, all or part of a lot, or space for a single interment and all other records pertaining to burials as required; and shall comply with all applicable, state laws, City policies and procedure, and any other federal, state or local government regulations including the City of Austin Local Government Records Control Schedule for Cemetery Unit, approved and adopted 5/18/09 by the Texas State Library and Archives Commission.

Contractor shall record a deed of sale for each burial space sold with the Travis County Clerk's Office, and maintain corresponding property ownership contact information. Recording fees shall be included in the purchase price of the burial space.

Contractor shall utilize existing records as needed as a reference to all prior transactions and contractual obligations, while concurrently implementing an automated cemetery records management system for all burial and financial transactions moving forward.

Contractor shall support the City's efforts in the mapping for the cemeteries to be reconstructed from various records, maps and field review. Cemetery sales and interment records will be converted from both paper and electronic formats and moved into a new map-based Cemetery Records Management system. Contractor will implement and follow preservation plans related to historic cemetery records, which include transfer of archival records to the Austin History Center as outlined in the City's records control schedule.

Contractor shall work with the City in the future to develop and implement an integrated computer-based cemetery management information system to automate and make available to the public cemetery space ownership, location of burials, and available space inventory information. Contractor shall make records available to the public as required by law.

Contractor shall support the conversion of all cemetery sales and interment records to a map based cemetery records management system. Once implemented, the City intends on bringing the data to the City website for web-based public access.

**E. Rules and Regulations Monitoring and Enforcement**

Contractor shall post and distribute copies of the adopted City of Austin Cemetery Rules and Regulations at the designated cemetery business offices for public viewing. Contractor shall enforce cemetery rules and regulations.

**F. Sales and Account Management**

The sales function includes the sale of spaces, concrete grave liners, headstone setting and re-setting. Sales are both at the time of need and preneed. Funding mechanisms for prearrangements include cash sales, installment sales, trusts and insurance contracts.

A customer (general public or a funeral home) purchasing a burial space may enter into a financing contract with the City whereby the City agrees to sell to the customer and customer agrees to purchase from the City, real property situated in the County of Travis and State of Texas for purposes of interment. The customer shall pay the City the purchase price for the property, payable as agreed upon by both parties until the full amount of the purchase price has been paid for a period no longer than one (1) year. There shall be no penalty for prepayment of the balance.

Contractor shall not execute a deed to the customer until Contractor receives full payment for the cemetery space. No grave can be dug or body buried without a deed of ownership or the approval and consent of the City.

**Sales Contract Default:** Contractor shall notify the buyer(s) of contract default status due to non-payment, in accordance with the City's installment contract default procedures and City's intent to repossess the plot(s).

**G. Customer Service and Complaints Resolution**

Contractor shall receive, log, and address all requests from the public. Contractor is responsible for providing the public a process to communicate needs, concerns and complaints. Contractor shall maintain a website with company email address, onsite comment cards, a citizen request box accessible after hours, and business phone number(s) to facilitate customer service and timely communication. Contractor shall post a City-approved public notification sign in a conspicuous place in each business office on how to file a complaint or request assistance.

Contractor shall establish a customer complaint resolutions protocol. Contractor shall respond to non-emergency public complaints within 24- to 48-hours of receipt. Response shall include steps to be taken and timeline for resolution, or an explanation why a resolution cannot be achieved.

Contractor shall manage, monitor and resolve all complaints received from the City's 311 customer service request system, and submit a monthly report on the status and resolution of all 311 requests to the CCM. For complaints received outside the City's 311 line, Contractor shall assign an individual tracking number and include a summary of the status, resolution or disposition of each complaint in the same monthly report identified above. The City reserves the right to amend, replace or substitute the 311 customer service request system.

**H. Marketing Plan & Implementation**

Contractor shall develop, implement and manage a marketing plan for the sale of cemetery spaces and other related products and services. Contractor's marketing plan shall include at a minimum: 1) market research; 2) positioning statement; 3) offerings to customers; 4) established fee schedule; 5) budget; 6) sales strategy; 7) service strategy; 8) promotions strategy; 9) web-based marketing strategy; and 10) implementation and scheduled analysis.

**I. Monument, Marker & Headstone Coordination**

Contractor shall accept monuments upon receipt of full payment, and coordination will be made with Operations for the storage and installation of monuments, markers and headstones.

**J. Procedures Manual**

Contractor shall submit within sixty (60) days of the effective date of the agreement a procedures manual for its cemetery operations and will make it available to the CCM for review prior to adoption. Contractor shall operate, manage and maintain the cemeteries in accordance with the procedures manual.

**K. Cemetery Master Planning**

Contingent upon sufficient funding, the Parks and Recreation Department will begin a master planning process in 2013. Issues expected to be addressed may include overall conditions assessment of building and cultural landscape features, an analysis of historic design and cultural trends that inspired the landscapes of the City of Austin cemeteries, e.g. the design of Austin Memorial Park as a "memorial park." Further, the master plan will entail an overall conditions assessment of trees and other vegetation; general management guidelines; a scheduled maintenance plan including materials management; and detailed historic treatment and prioritized implementation plans for each cemetery. Further, the master plan may address policy recommendations with respect to regulations, historic designations and heritage tourism, emergency preparedness, recordkeeping, potential partnerships, service expansion and funding options.

Contractor shall work cooperatively with the City in the implementation of its future master planning process.

**L. Sales Administration and Management Performance Standards**

The following describes the minimum standards for all cemetery properties. Standards are expected to be achieved 100 percent of the time.

- Personnel are trained and skilled in assigned duties.
- Public funds are properly handled, recorded, transported and deposited.
- Cemetery facilities are properly and respectfully used.
- Financial records are properly recorded.
- Cemetery burial records are properly recorded.
- Cemetery Rules and Regulations are enforced.
- Complaints and suggestion are received, reviewed, recorded, responded to and resolved in an expeditious timeframe.
- Cemetery services are actively marketed to the public in accordance with the marketing plan.

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## II. CEMETERY OPERATIONS

### A. Administration and Management

A Contractor for this operational area shall adhere to the 1) administration and management, and 2) records management requirements as detailed in sections of the Sales Administration and Management operational areas referenced below:

- Administration and Management
- General Records Requirements

### B. Operations Management Plan

Contractor shall submit an Operations Management Plan within sixty (60) days of the effective date of the agreement for cemetery operations and will make it available to the CCM for review prior to finalizing. Contractor shall operate, manage and maintain the cemeteries in accordance with the Operations Management Plan.

### C. Monument, Marker and Headstone

**Annual Assessment:** Contractor shall at a minimum, in January and June of each year, conduct an assessment of monuments to identify those that pose a public safety concern. Following this assessment, the City and Contractor will develop a plan to address any issue identified with the monuments, including responsibility for repairs, funding and schedule. Contractor shall level and straighten markers or memorials that endanger the health, safety, comfort or welfare of the public.

**Installations:** Monuments, headstones and markers shall be installed within seven (7) days of notification by the sales office staff.

Contractor shall schedule monument deliveries in preparation for installation, ensure site layout and preparation, and install monuments. Headstones shall be handled in a manner that prevents damage.

Contractor shall ensure that upright headstones in active burial sections are horizontally and vertically aligned so that inscriptions are visible and installed to ensure a pleasing top line while compensating for ground contours.

Flat markers that are installed shall be uniform in height (parallel with the ground and no more than 1 inch above grade) and horizontally and vertically aligned.

**Maintenance:** Contractor shall ensure that headstones and markers are clean, free of debris and objectionable accumulations.



**Fee-Based Headstone Resetting:** Contractor shall schedule and reset headstones within seven (7) business days of confirmation of payment in full. For headstones that pose an endangerment to the health and safety of the public, Contractor shall mitigate the danger immediately by placing the headstone on the ground. Within ten (10) business days, Contractor shall coordinate with the sales office to contact the plot owner and offer headstone resetting services per established fee schedule. All notifications shall be transmitted in writing.

**D. Grounds Maintenance**

Contractor shall provide grounds maintenance in a manner that ensures the grounds are aesthetically pleasing and consistent throughout all of the cemeteries. Grounds maintenance includes the actions for the initial establishment of turf on a gravesite and the perpetual maintenance of existing gravesites, common areas, administration buildings, and other areas.

Overall, Contractor shall maintain turf that is healthy, trees and shrubs that are kept clean and safe, and roadways, curbs, and walkways that are edged and have appropriate drainage.

Grounds care requires regular and consistent maintenance procedures. Contractor shall be responsible for grounds maintenance of cemetery properties up to the edge of the street (including the area from the exterior of the fence line to the street curbside). To the extent necessary to protect public health, safety, comfort, and welfare, as well as mitigate loss and liability to the City, the Contractor shall train personnel to respect not only the solemn dignity of the cemetery, but also train all employees concerning the provisions of this agreement and the need to prevent damage to tombs, stones, and monuments.

**E. Utilities**

Contractor shall pay all utility expenses including internet, phone, water, electrical, gas, sewer, drainage and waste disposal to operate all cemeteries.

**F. Levels of Maintenance**

To establish maintenance priorities, areas of the cemetery are described in the order of those areas with the greatest visual impact to customers and visitors of the cemeteries. This order of priority is not to be interpreted by the Contractor to mean the medium and low visual impact areas are to be neglected in maintenance. The levels described here are consistent with the National Cemetery Administration Standards.<sup>1</sup>

***Visually Prominent Areas***

- Interment areas
- Public information and administration buildings
- Visitor entrance to the administration building
- Entrance gate
- Restroom facilities
- Areas adjacent to the main entrance road
- Primary roads and routes to the committal service shelters
- Turf, trees and planting areas adjacent to flagpole/assembly area
- Memorial walkways/monuments
- Other buildings in prominent locations

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<sup>1</sup> National Cemetery Standards: Operations Standards and Maintenance. National Shrine Committee. Version 3.1, October 2007

***Medium Visual Impact Areas***

- Non-burial areas adjacent to secondary roads
- Areas adjacent to the maintenance building and yard
- Areas adjoining the memorial path

***Low Visual Impact Areas***

- Non-use areas
- Areas viewed within 175 feet from primary roads

**G. Irrigation**

Contractor shall schedule irrigation for cemeteries with irrigation infrastructure weekly and supplement with additional watering to prevent loss of plant material when necessary. Austin Memorial Park, Evergreen, Oakwood and Oakwood Annex cemeteries have either automatic systems or semi-automatic and manual systems. Oakwood Cemetery irrigation system is non-functioning, and Contractor shall implement irrigation per the needs of the vegetation to ensure healthy vegetation and growth.

When necessary and notified by the CCM, Contractor shall provide supplemental tree watering as per the requirements established by the City's Forestry Unit. Contractor shall comply with water conservation requirements as published by the City through the Austin Water Department.

**Watering by the Public:** Contractor shall allow the public to hand water individual plots during standard cemetery hours to supplement watering done by the Contractor. All watering shall comply with City of Austin water conservation regulations. Watering by the public does not replace or reduce the Contractor's responsibility to irrigate.

**H. Irrigation System Maintenance**

The Contractor will maintain the functional capability of the cemetery irrigation systems. Repair of sprinkler heads, valves and other irrigation system equipment and components is the responsibility of the Contractor.

Contractor shall maintain the irrigation system in working condition. Annually, the Contractor shall provide a status report of the condition of the irrigation systems and a list of repairs and improvements necessary to restore the system to operating condition.

**I. Clearing Live Vegetation Near Headstones, Curbs and Fence Lines**

Contractor shall remove all small trees (2-inch caliper or less), overgrown shrubs, and other plants growing near headstones, curbs, or other objects that could be damaged by trees or shrubs. Undesirable vegetation in or near headstones, curbs, fence lines, and other objects shall be cleared as needed but no less than quarterly. Safety hazards shall be immediately corrected.

Removal of trees that are 3 inches or greater requires prior approval in accordance with the City's tree preservation statutes and the City's Rules and Regulations.

**J. Insect Control**

Contractor shall inspect for insect problems every 1-2 weeks, and apply corrective posture in the application of pesticides. Contractor shall always treat for damaging and heavy insect infestations in accordance with the Parks and Recreation Department Integrated Pest Management Plan.

#### **K. Daily Custodial Services**

Contractor shall provide daily janitorial and custodial services for all cemetery facilities. Contractor shall employ or subcontract routine and emergency cleaning and repair services.

Contractor shall clean and sanitize all restrooms daily unless demand dictates a higher frequency. Contractor shall provide contact information in the restrooms to allow citizens to alert the Contractor when the restrooms are in need of attention. Care shall be furnished for all cemetery buildings. "Care" includes the maintenance of buildings and grounds required to preserve the pleasing appearance of the cemeteries.

#### **L. Building, Fencing & Signage**

**Initial Conditions Assessment:** The Contractor will conduct a facilities conditions assessment for compliance with all federal, state and local codes of all properties (public and non-public, as identified below) and prioritize repairs to be made within ninety (90) days of contract execution, with written and photographic evidence of condition. Such report shall be submitted to the City for review and concurrence. Initial needs identified with a value of \$5,000 or less will be completed within 24 months of the contract execution at Contractor's expense. Items greater than \$5,000 will be submitted to CCM.

**Maintenance:** Contractor shall maintain all buildings. Contractor shall be responsible for keeping the buildings clean and free of debris. Routine inspections of plumbing, HVAC, and structural components of the building shall be conducted by the Contractor on an annual basis, and submitted to the CCM no later than September 30<sup>th</sup> of each year. The City shall review inspection reports for compliance. Repairs under \$5,000 are to be completed by Contractor using the City's corrective repair requirements (to be provided upon award of contract). Contractor shall notify the City in writing of any broken or deteriorated conditions requiring repairs that exceed \$5,000 within three (3) business days.

Non-public access buildings and designated storage facilities shall be maintained to ensure aesthetic and structural integrity. Storage in these buildings shall comply with all applicable federal, state and local codes and ordinances.

Contractor at a minimum shall ensure fences, walls, and gates are repaired, replaced and maintained in good functional order. Contractor shall be responsible for sidewalk repair of 100 square feet or less. Repairs shall be made upon coordination and approval of the CCM. Contractor shall enforce placement of City-owned benches in common areas as approved by the City and consistent with City's Cemetery Rules and Regulations.

**Property Signage:** City will provide property, street and section signs as the City determines necessary to assist the public in locating gravesites. Contractor shall install, maintain and repair all signs.

**Historic Buildings:** Contractor shall be advised that all buildings located within City of Austin cemeteries are historic and some buildings may hold official historic designations. While Contractor is not responsible for major capital improvements, Contractor is advised that any improvements that result in an exterior change to any building on cemetery land must be approved by the City of Austin to ensure that all exterior changes are appropriate and properly permitted, and subject to review by the Historic Preservation Office.

**M. Hardscape Maintenance – Roads, Sidewalks**

Contractor shall maintain all hardscape areas and provide routine pothole and minor road and walkway repairs for all cemeteries. Minor road and walkway repair is defined as repairs less than \$5,000 per individual repair.

**N. Trash and Debris Management**

Contractor shall inspect and collect ground litter and maintain/empty trash cans in all cemeteries, and dispose of trash daily. Contractor shall maintain the public trash containers to ensure they are adequate in number, well-marked, clean, neat, and in good repair.

**Recycling:** Contractor shall adhere to all recycling policies administered by the City of Austin.

**O. Floral and Gravesites Tributes Removal**

Contractor shall remove unsightly flowers and deteriorated items on graves and monuments in accordance with the Cemetery Rules at least twice per year during the semi-annual cleanup campaigns. Contractor shall post signs two (2) weeks in advance at each cemetery advising the public of the scheduled clean-up events.

**P. Turf Care**

Contractor shall provide turf care as described below. Turf care includes all labor, materials, superintendence, machinery, insurance, equipment, supplies, tools, incidentals and services to maintain in superior condition all areas in the developed sections of the cemeteries. The activities are to include mowing, edging, fertilizing, weed and pest control, irrigating, and planting grass and vegetation as required. At a minimum, maintenance standards which call for mowing and trimming will be to keep the grounds in an aesthetically pleasant and safe condition. Such mowing and trimming shall be accomplished on an average 7-14 day cycle adjusted for seasonal demands. Line trim every cycle. Turf aeration shall be conducted once per year in all areas.

Contractor shall reseed or sod over non-shaded bare spots in late spring and fall. Approved grasses include hulled Bermuda 3 lbs. per 1,000 sq. ft. and 6 lbs. winter rye per 1,000 sq. ft. in fall. Contractor shall ensure visually prominent areas have a well-established, healthy stand of turf that is weed-free, free of bare areas, and maintained for the region according to the Operations Management Plan.

The turf planted by the Contractor and/or the Contractor's subcontractor shall be compatible with the geographic region, drought resistant and free of debris, (i.e., leaves, fallen branches and trash/litter). Visually prominent areas shall be kept cleared of debris as needed or at a minimum weekly. Turf damage due to grounds maintenance tasks shall be identified and corrective action initiated by close of business the same day.

**Q. Turf Maintenance**

Contractor shall ensure that turf maintenance activities do not detract from the overall function of the cemetery. Contractor shall be responsible for mowing, edging and trimming all grass within the cemetery. All areas where grounds maintenance activities have been conducted are neat, clean, and free of debris and equipment at the end of the workday. Necessary personal protective equipment and safety measures shall be adhered to at all times during grounds maintenance operations. Turf in visually prominent areas is maintained within 1 inch above the range of that which is professionally recommended for that type of turf and region. Turf surrounding a headstone or marker is trimmed to its recommended height of 2½ inches to 3 inches. There shall be no signs of "grass burns" caused by mowers. There shall be no signs of turf

being “scalped” by string trimmers. Contractor’s employees shall prevent trimmer lines from coming into contact with the trees, bushes, stones, tombs, and monuments. Any damage resulting from Contractor’s work shall be the responsibility of the Contractor.

Contractor shall ensure all un-mowed grass around headstones, monuments, markers, and other vertical surfaces and structures are trimmed. When trimming near stones, tombs, and monuments, Contractor shall ensure the cuttings are ejected away from the monument or headstone. This will help prevent any objects (such as rocks or sticks, etc.) from being thrown toward fragile monuments, thereby minimizing the potential for accidental damage.

All streets, curbs, walkways, tree wells and shrub beds shall be edged inside and outside cemetery grounds. Damage to asphalt/concrete shall be avoided. Debris from edging shall be removed from the site on the same day. Walkways and roads shall be cleared of grass clippings and leaves after mowing, weed-eating, edging, and trimming.

Turf shall be cut to maintain heights between 2½ inches and 3 inches. Mowing will be inspected by the CCM or designee. No mower will be operated within 12 inches of trees, any marker, monument, headstone, footstone or other memorial. Do not mow over buttress roots of existing large trees. All turf between these markers and mown areas must be trimmed using a filament line trimmer equipped with line no heavier than 0.08-inch.

#### **R. Equipment**

Contractor shall acquire and own all equipment and portable structures necessary for the performance of this SOW. Contractor shall be responsible for the maintenance and replacement of any equipment. City may grant Contractor the right to store certain equipment in a designated area approved by the City exclusively used for sole purpose of performing responsibilities of City of Austin cemeteries. Storage shall not exceed the storage space authorized by the City.

Riding mowers may not be used within 12 inches of headstones, markers, monuments, tree or other vertical surfaces. Commercial power trimmers and power edgers shall be used to trim grass from around trees, headstones, monuments, markers, etc. Cutting blades on mowing and trimming equipment must be sharpened so that grass tips are properly cut, not torn or damaged. Cutting heights of all mowing equipment shall be set according to heights specified in in this SOW. The height of grass is what is measured to get correct cutting height.

**Fuel Management:** Contractor shall adhere to all state and federal laws that apply to storage of fuel, to include proper storage containers and inspection from the Austin Fire Department. Contractor shall store no more than 50 gallons of fuel on a temporary basis.

#### **S. Aerification**

Contractor shall aerate non-burial areas once per year. To prevent the germination of weeds, aerification shall not be performed during the spring months. Aerification shall be a minimum of a 3-inch core plug extracted at not less than 6-inch square spacing. Aerification shall not cause damage to surrounding trees, tree roots, vegetation or structures to include sprinkler heads, vases, valve boxes, and control markers.

#### **T. Fertilization and Weed Control**

Contractor shall be responsible for maintaining the turf area of the cemetery and the immediate area surrounding the cemetery in a healthy, visually pleasing condition with proper application of fertilizers and herbicides to control weeds and insect pests, in accordance with the Parks and

Recreation Department Integrated Pest Management Plan. Herbicides will be used as a last resort, per Integrated Pest Management Plan principles. Cultural and mechanical pest control practices will be used preferentially.

Contractor shall adhere to all state and federal laws that apply to spraying herbicide and pesticides. All applicators shall be licensed and all records will be transmitted to the CCM on a semi-annual schedule.

**Fertilizer Application:** Contractor shall have soil tested before applying fertilizer. A copy of the soil test results shall be provided to the CCM for approval prior to the fertilizer purchase. Contractor shall provide and apply fertilizer in the spring and/or fall according to the annual soil test. Documentation of compliance with the soil test application rate shall be provided to the CCM within five (5) working days of fertilizer application. Examples of suitable documentation include the fertilizer purchase order, invoice, or delivery document.

**Weed Control:** Contractor shall control weeds year round in all burial sections, landscape beds, tree wells, and around all buildings, walkways and roadways.

Contractor shall ensure that all turf weed growth be controlled by means of mowing, trimming, pesticide application or any other method approved by the CCM. Herbicide applications for the control of broadleaf and grassy weeds shall be applied as requested by the CCM. The CCM may determine the exact number of applications to achieve the desired control. Additional spot applications may be required at no extra cost to the City. Contractor shall provide the CCM information on the type of herbicide and rate of application for review and prior approval. Weed control shall be performed according to the Parks and Recreation Department Integrated Pest Management Plan. Herbicides will be used as a last resort, per Integrated Pest Management Plan principles. Cultural and mechanical pest control practices will be used preferentially.

Record(s) of pesticides/herbicides applied (type, amount, application area, weather conditions) shall be furnished to CCM within five (5) days of application. Appropriate signs (with application date and time) shall be posted in accordance with Texas Department of Agriculture notification requirements informing the public five (5) days prior to chemical application.

Contractor shall remove weeds and other undesirable vegetative growth in gravel roads, gravel pads, walkways, sidewalks, retaining walls and fence lines during each mow cycle, but no less than once every fourteen (14) calendar days.

#### **U. Leveling of Existing Graves**

The City is committed to maintaining existing gravesites to be level with surrounding terrain. Existing graves shall not show evidence of standing water.

The Contractor will conduct an assessment that will provide a review of all existing gravesites and a priority schedule for leveling. This report will be due within 180 days of contract initiation.

#### **V. Comprehensive Tree Survey and Annual Tree Maintenance Work Plan**

Contractor shall conduct an initial tree survey consistent with the City of Austin Environmental Criteria Manual within six (6) months and shall include all trees with a diameter at breast height (DBH) of three (3) inches or larger.

Contractor shall conduct a Level Two Basic tree risk assessment per ANSI A300 Part 9 standards at least once every five (5) years and a Level 1 visual basic inspection at least once every year on

all trees included in the initial survey. The assessment shall be conducted by an International Society of Arboriculture (ISA) certified arborist. The results shall be reported to the CCM. From those assessments, Contractor shall submit an annual tree maintenance work plan subject to prior approval from the CCM and the City's Urban Forester, prior to any tree maintenance performed. The Contractor shall perform all tree maintenance included in the annual plan within ten (10) months.

#### **W. Tree Maintenance**

Contractor shall be responsible for tree maintenance. Tree maintenance includes tree removal, tree pruning, tree planting, and the assessment of tree health. All tree work shall be directly supervised or performed by an ISA certified arborist. The Contractor shall obtain all required permits for tree maintenance. Contractor's Operations Management Plan shall include a specific section for tree maintenance as follows:

##### **Tree, Shrub, Planting Bed Maintenance**

- Trees and shrubs shall be maintained in a healthy, vigorous condition free of pests and disease. Trees and shrubs shall be trimmed and maintained at a proper size and shape for its particular size and type according ANSI A300 and Z133 standards. Trees shall be maintained in a condition free of broken limbs or branches.
- Contractor shall trim and prune trees to raise canopies and ground level branches a minimum of 8 feet for ADA compliance or as needed for necessary grounds maintenance activities. Canopies will not be raised in "undeveloped" areas unless there is an ADA or grounds maintenance need. Young trees are excepted from this requirement.
- Ornamental trees and shrubs shall be maintained so that they enhance and do not detract from the appearance of public areas or pose a hazard to staff and visitors.
- Cemetery planting beds shall be well maintained and attractive.
- High maintenance areas, in which turf is not a part of the cemetery design, shall be maintained in a manner that is appropriate for the medium in place.
- If damaged trees and shrubs pose an imminent safety risk to staff and visitors, the Contractor shall secure the fall zone area immediately, and take corrective action within three (3) days.
- Work consists of maintaining shrubs and trees in a healthy and attractive condition by proper pruning, removal of dead branches, cultivation and mulching techniques. Within two (2) working days, Contractor shall notify the CCM of any serious pest infestation in trees and planting beds. Pruning should focus on maintaining tree structure, form, health and appearance.
- Personnel shall be properly trained in the operations they are to perform. If pesticide sprays are used, the person in direct charge shall be licensed by the state. All tree and shrub pruning and hedge trimming shall comply with ANSI A300 (Part 1) – 200 Pruning and companion publication "Best Management Practices" (2002 ISA) and shall be directly supervised by an ISA certified arborist.

##### **Pruning/Trimming**

- Tree care and maintenance operations shall comply with ANSI A300 and Z133.1, the Standard of Care for trees and plants in Austin. All pruning cuts shall be made according to ANSI A300 (Part 1) Standards.
- Trees shall be kept free of suckers, dead tree parts over 2 inches in diameter, and broken branches.

- Conforming to the current pattern of growth, at the direction of the CCM, Contractor shall trim shrubs/hedges monthly during summer months/growing season. Shrub trimmings shall be removed. Shrub area shall be kept free of shrub trimmings and any other debris.
- Contractor shall recommend to the CCM corrective action to address trees/branches that are identified as a safety risk to staff and visitors. Recommendation shall be provided to the CCM within ten (10) business days of notice. The CCM will respond to the Contractor's corrective action recommendation within five (5) business days with a determination regarding permission to proceed with corrective action. The Contractor will then be responsible for obtaining any required permits necessary to implement the recommended corrective action(s). Corrective action shall be completed within thirty (30) days.
- Contractor shall ensure that no more than 25 percent of live foliage should be removed without securing the proper City permit.
- The Contractor shall implement standard work procedures that minimize the possibility of limbs or debris damaging or injuring vehicles, private property, or pedestrians.
- In locations where ordinary tree felling operations might cause damage to property, the Contractor must dismember and fell trees using recognized forestry rigging practices as stated in the most current revision of ANSI Z133 (encompassing OSHA work-site safety regulation), ensuring that any severed portion of the tree is under control at all times.
- The Contractor must grind stumps of removed trees to ground level and reestablish grass on the site.

#### **Planting**

- Contractor shall ensure any donated plant material offered for installation shall be subject to approval by the CCM prior to acceptance of the donation. All plant material shall comply with ANSI Z60.1 and shall consist of native or adapted non-invasive species. Plant material shall be installed and maintained by the Contractor or as determined by the CCM.
- Trees shall be planted in accordance with ANSI A300 (Part 6) Standards. All new trees shall be staked using flexible ties for up to three (3) years following planting. Any tree showing adverse effect from high winds shall also be staked. Staking shall be removed after three (3) years.
- Trees, which have been damaged in any way, shall be reported to the CCM without delay. All plant material damaged by the Contractor shall be replaced at Contractor's expense.
- The Contractor shall provide the equivalent of 1 inch of precipitation per week of irrigation to newly planted trees for a period of three (3) years following planting.

#### **Mulch Rings**

- At the direction of the CCM, Contractor shall construct mulch rings around any newly planted trees, and/or young trees exposed to damage by mowers, trimmers or any other type of mechanical damage. The ring shall have a radius of no less than 3 feet from the tree trunk base and mulch materials shall be at least 3 inches from the base of the tree, monuments and headstones. The ring shall be filled and maintained with no less than 2 inches and no more than 4 inches of double-shredded hardwood mulch as per ANSI standard, A300 Part 2 – Soil Management. Mulch material is supplied by the Contractor. Mulch material must be aesthetically pleasing, free of any weeds or pests,

and be approved by the CCM before installation. The mulch rings shall be kept free of weeds.

- Mulch shall be applied to mature tree critical root zones when it does not interfere or impede monuments or cover burial sites.

**X. Ball Moss Removal and Enforcement**

Contractor shall submit a supplemental proposal for the removal of ball moss from trees every two years for each cemetery. Removal costs should be calculated by the size of the trunk of the tree, based on 0"-10", 11"-20", 21"-30", 31"+ diameter at breast height (DBH).

**Y. Brush Removal**

All brush and debris will be collected and deposited into a roll-off dumpster in a concealed area approved by the CCM until job is complete or dumpster is full. Safety hazards shall be immediately corrected.

All wood chips, brush, limbs, and logs, unless otherwise specified and approved by the CCM, shall be disposed of at the City of Austin Hornsby Bend Processing Center to ensure that 100 percent recycling is met for woody material.

**Z. Spoils Management**

Contractor shall be responsible for the general management of cemetery spoils generated. Only in the event of prolonged inclement weather and with approval of the CCM, Contractor, burial service providers, or subcontractors may be allowed to temporarily store spoils for no more than three (3) working days once conditions have improved. Temporary storage will only be allowed with a visual barrier to be approved by the CCM.

**AA. City of Austin Responsibilities**

**Major Infrastructure Development and Improvements:** The City of Austin is responsible for new major infrastructure development to include: roadway development; installation of complete new irrigation systems; platting; surveying and laying-out of new sections of cemetery land; building restorations; new buildings; and major landscaping installations of new section development.

**BB. Cemetery Operations Performance Standards**

The following describes the minimum quality maintenance standards for all cemetery properties. Standards are expected to be achieved 100 percent of the time.

- All operational activities are included in an Operations Management Plan and reviewed and updated annually.
- Daily grounds maintenance activities do not detract from the dignity and solemnity of the cemetery.
- Turf is free of debris, fallen branches and trash.
- All areas where cemetery operations have been conducted are neat, clean and free of debris and equipment at the end of the workday.
- Debris, equipment, tools and supplies are removed at the conclusion of each task or at the end of the workday.
- Spoils are collected, transported and disposed of daily.

- Central trash and brush collection points established in locations are screened from public view.
- Planting beds are well-maintained, attractive, healthy and vigorous, free of pests and disease, and are generally weed free.
- Trees and shrubs are healthy, vigorous, free of pests and disease, and are maintained in accordance with the Operations Management Plan and ANSI standards.
- Visually prominent areas have a well-established, healthy stand of turf and are generally free of bare areas.
- Visually prominent areas in the cemetery are properly trimmed and edged.
- Areas surrounding headstones and other features show turf trimmed to recommended mowing height.
- Headstones and markers are handled and stored to prevent damage prior to and during setting.
- Roads, parking lots, curbs, walks, paths, entry features, and perimeter walls/fences are clean and well-maintained.
- Grounds are maintained in a manner that avoids safety hazards for visitors and staff.
- Safety hazards (holes, pests, hazardous trees and branches, sprinkler heads, etc.) are identified and corrective action initiated within the same workday.
- Trash is collected, disposed of, and does not detract from cemetery appearance.
- Publicly used trash containers are adequate in number, well-marked, clean, neat, and in good repair.

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### III. INTERMENTS & BURIAL SERVICES

#### A. Administration and Management

A Contractor for this operational area shall adhere to the 1) administration and management, and 2) records management requirements as detailed in sections of the Sales Administration and Management operational areas referenced below:

- Administration and Management
- General Records Requirements

#### B. Space Opening/Closing, Interments and Burial Services

Contractor shall bury remains presented for interment in the designated burial space. In a timely manner, Contractor shall prepare the ground to receive a body without covering or damaging other graves. Contractor will ensure that the depth of each grave complies with state regulations and City Code. Contractor will superintend (manage) the burial of the body, refill and properly finish a grave after burial.

Contractor shall collect, transport and dispose of all remaining spoils after each grave closing. Only in the event of prolonged inclement weather and with approval of the CCM, Contractor, burial service providers, or subcontractors may be allowed to temporarily store spoils for no more than three (3) working days once conditions have improved. Temporary storage will only be allowed with a visual barrier to be approved by the CCM. Spoils shall be taken to a City of Austin approved non-cemetery disposal site.

#### C. Plot Ownership Confirmation Prior to Burial

Contractor shall be responsible for obtaining and confirming space ownership documentation. Confirmation shall occur prior to opening of gravesite and burial. Gravesite preparation shall be accomplished in a timely fashion, so as not impede scheduled services.

#### D. Grave Preparation/Funeral Set-up

Contractor shall retain ultimate responsibility for grave preparation/funeral set-up services. Process shall include locating grave space, marking the spaces for excavation, and avoiding tree-root zones during excavation as appropriate.

#### E. Closing of Gravesites

New gravesites are to be cleared, tamped sunk, and leveled with the surrounding terrain within seven (7) calendar days of burial services. Within twenty (20) calendar days following initial leveling, perform a follow-up leveling for re-vegetation. Re-vegetation consists of seeding using existing turf or planting new sod. Re-vegetate areas as needed and as feasible to maintain

## Interment & Burial Services

Administration and Management

Plot Ownership Verification

Space Opening / Closing & Re-interments

Pre- & Post-Graveside Service Set-up & Clean-up

Grave Leveling & Re-vegetation For New Burials

consistent turf coverage within thirty (30) calendar days of the burial service. New graves shall not show evidence of standing water.

**F. Grave Liner Installation**

Contractor shall have equipment and personnel to safely prepare and install grave liners as requested for burial services.

**G. Re-interments**

Contractor shall provide staff and equipment to provide disinterment and re-interment services when requested and authorized by the City.

**H. Pre- & Post-Graveside Service/Set-up & Clean-up**

Contractor shall perform all aspects of pre- and post-graveside service, including planning, preparation, coordination, installation, repairing, de-installation, removing, cleaning, clearing and maintenance of all supplies, equipment acquisition and management, and services associated with memorial and graveside services.

**I. Tent Set-up, Removal, and Storage**

Contractor shall be responsible for gravesite tent set-up. Tents shall be secured with ropes and stakes. All tent stake heads shall be covered with a bar guard or marked with a distinct bright color. The lowering device shall be elevated and level to knee height. All boards and blocks used to level the set-up shall be stable. The lowering device shall be opened to a length and width accommodating the casket, and the straps are drawn tight and locked. Safety straps and rollers shall be used on all set-ups. All lowering devices should be professionally serviced at least once a year.

**Chairs and Set-up**

- A full set of green carpet shall be used. The T's and sides shall extend into the grave to cover the dirt. The entire area under the tent shall be covered with green carpet.
- Each chair shall be checked to ensure it is stable and on good footing. Any unstable chairs must be moved or corrected.
- Any set-up on a hill shall have chairs on the upper side facing the downgrade.

**Tear Down**

- Unless local customs or family preferences dictate otherwise, at least one member from the Contractor's burial crew remains onsite until the family has left the cemetery.
- Lowering the casket, tearing down the set-up and placing the lid shall be conducted in a professional, careful, and considerate manner.

**J. Equipment**

Contractor shall acquire and own all equipment and portable structures necessary for the performance of this SOW. Contractor shall be responsible for the maintenance and replacement of any equipment. City may grant Contractor the right to store certain equipment in a designated area approved by the City exclusively used for sole purpose of performing responsibilities of City of Austin cemeteries. Storage shall not exceed the storage space authorized by the City.

**K. Procedures Manual**

Within sixty (60) days of the effective date of the agreement, Contractor shall submit a procedures manual for interment and burial operations and shall make it available to the CCM

for review prior to adoption. Contractor shall provide services in accordance with the procedures manual.

**L. Interment and Burial Services Performance Standards**

The following describes the minimum quality maintenance standards for all cemetery properties. Standards are expected to be achieved 100 percent of the time.

- Each day's burial site(s) present a neat appearance prior to burial.
- Integrity of existing graves around the worksite is preserved.
- Corrective action to repair damage as a result of graveside preparation is initiated by close of business the same day.
- Open graves are identified and protected by appropriate devices while unattended.
- Each day's burial site(s) are covered, initially groomed, marked, and presentable for visitors before close of business each day.
- All spoils are removed from site to a City of Austin approved disposal site.

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## General Responsibilities

Contractor shall obtain all necessary licenses and/or permits required to perform services outlined in the SOW. Contractor shall take all precautions necessary to protect persons and property from injury or damage. Contractor shall be responsible for any injury to itself, its employees, or others, as well as for any damage to personal or public property that occurs during the performance of a resultant contract that is caused by Contractor or Contractor's employees' fault or negligence. Contractor shall maintain personal liability and property damage insurance prescribed by the City and the laws of the State of Texas.

Contractor shall preserve the health, appearance, and aesthetic value of all trees/shrubs while preventing damage to human life, property and the ecosystem. Contractor shall demonstrate a clear understanding of and sensitivity to environmental issues. Performance shall be consistent and fully compliant with all applicable federal, state, county and city laws. Adequate warning devices, barricades, guards, flagmen or other necessary precautions shall be used. Contractor shall perform required services with the least possible interference with cemetery operations or annoyance to the public. Contractor and its subcontractors shall be qualified and trained to do the work and services outlined. All tools shall be clean, sharp, in proper working order, and shall be checked for safety prior to use.

Contractor shall be responsible and accountable for the grounds, buildings and amenities provided for Contractor's use and shall take all necessary precautions to prevent herbicide spills, fire hazards, odors and vermin.

## Laws, Statutes and Governmental Requirements

Chapter 10-1 of the Austin City Code sets forth certain regulatory standards for the administration and management of Austin cemeteries. A cemetery, as defined by Austin City Code, is the use of land that is dedicated for cemetery purposes for the burial of the dead, including columbarium, crematoriums, mausoleums, and mortuaries.

Contractor shall comply with all applicable laws, statutes, and governmental provisions prevailing during the term of this SOW, including the following:

- Compliance with Austin City Code, Chapter 10-1, Cemeteries ([http://www.amlegal.com/nxt/gateway.dll/Texas/austin/title10publichealthservicesandsanitation/chapter10-1cemeteries?f=templates\\$fn=default.htm\\$3.0\\$vid=amlegal:austin\\_tx](http://www.amlegal.com/nxt/gateway.dll/Texas/austin/title10publichealthservicesandsanitation/chapter10-1cemeteries?f=templates$fn=default.htm$3.0$vid=amlegal:austin_tx))
- City of Austin Cemetery Rules and Regulations (<http://www.austintexas.gov/department/cemeteries>)
- Health and Safety Code, all provisions relating to municipal cemeteries. <http://codes.lp.findlaw.com/txstatutes/HS>
- Tree Preservation – Environmental Criteria Manual, Chapter 3, Tree and Natural Area Preservation ([http://austintech.amlegal.com/nxt/gateway.dll/Texas/environ/section3-treeandnaturalareapreservation?f=templates\\$fn=default.htm\\$3.0\\$vid=amlegal:austin\\_environment](http://austintech.amlegal.com/nxt/gateway.dll/Texas/environ/section3-treeandnaturalareapreservation?f=templates$fn=default.htm$3.0$vid=amlegal:austin_environment))
- Compliance with Austin City Code, Chapter 6-3, Trees and Vegetation ([http://www.amlegal.com/nxt/gateway.dll/Texas/austin/title6environmentalcontrolandconservation/chapter6-3treesandvegetation?f=templates\\$fn=default.htm\\$3.0\\$vid=amlegal:austin\\_tx](http://www.amlegal.com/nxt/gateway.dll/Texas/austin/title6environmentalcontrolandconservation/chapter6-3treesandvegetation?f=templates$fn=default.htm$3.0$vid=amlegal:austin_tx))
- Texas Department of State Health Services (<http://www.dshs.state.tx.us/default.shtm>)

- Chapter 711. General Provisions Relating to Cemeteries. Texas Health and Safety Code <http://www.statutes.legis.state.tx.us/Docs/HS/htm/HS.711.htm>
- Chapter 713. Local Regulation of Cemeteries. Texas Health and Safety Code <http://www.statutes.legis.state.tx.us/Docs/HS/htm/HS.713.htm>
- American National Standards Institute (ANSI): A300 and Z133.1 <http://webstore.ansi.org/>
- OSHA (<http://www.osha.gov/index.html>)
- City of Austin Local Government Records Control Schedule for Cemetery Unit approved and adopted 5/18/09 by the Texas State Library Commission (Exhibit B)

## Definitions

Cemetery terms contained in this section shall take the definitions as defined in the Texas Health and Safety Code.

## Timeline

- December 14, 2012 Post SOW on Parks and Recreation Board (PARB) Agenda
- December 18, 2012 PARB Action: Recommendation Approval for SOW  
*Meeting cancelled due to lack of quorum.*
- December 20, 2012 Submit Draft SOW to Purchasing to Prepare RFP
- January 14, 2013 Publish RFP and Begin Solicitation Process\*

\*A pre-proposal meeting and site tours will be announced with the posting of the RFP.

## **Exhibit A**

### **Pricing Proposal Form Instructions**

Contractor shall use the attached forms to provide pricing for cemetery operations and supplemental services. There are three separate service segments and Supplemental Services:

- I. Sales Administration and Management
- II. Cemetery Operations
- III. Interment and Burial Services
- IV. Supplemental Services

As this RFP allows for Contractors to respond to all or part of the requested services, the Contractor shall submit a Pricing Proposal form for all five cemeteries for each operational area proposed. For example, if Contractor is interested in only providing interment and burial services, Contractor shall submit a Pricing Proposal for each of the five cemeteries providing pricing for interment and burial services. A total of five Pricing Proposals, one for each cemetery with only Section III of the pricing proposal completed. A Contractor may not submit a form for just one cemetery and one operational area.

If a Contractor is interested in submitting a response for both Section I: Sales Administration and Management and Section II: Cemetery Operations, then the Contractor shall submit five separate forms, one for each cemetery, and submit pricing in both Sections I and II of the Pricing Proposal form.

Finally, if a Contractor wants to respond to all three operational areas and supplemental services, the Contractor shall submit five Pricing Proposal forms with pricing in areas I, II and III, and IV for Supplemental Services.

The Contractor shall check the cemetery at the top of the Pricing Proposal form that corresponds with the cemetery for which pricing is being submitted.

Contractors submitting pricing for only Service Segment II, Cemetery Operations shall also include pricing for IV, Supplemental Services. Ball Moss Removal, Facility Assessment and Monuments Assessment are services related to Section II, Cemetery Operations.

Exhibit A  
Pricing Proposal Form

Select Cemetery for this price proposal form: <input type="checkbox"/> Oakwood <input type="checkbox"/> Oakwood Annex <input type="checkbox"/> Plummers <input type="checkbox"/> Evergreen <input type="checkbox"/> Austin Memorial Park
--

**I Sales, Administration and Management**

<b>Administration and Management of Sales</b>		
Cost Per Month	\$	-
Cost Per Year	\$	-

**II Cemetery Operations**

<b>Administration and Management of Cemetery Operations</b>					
		Cost Per Month	\$	-	
		Cost Per Year	\$	-	
<b>Turf Maintenance</b>	Est. Qty	Unit	Unit Price		Total Price
Mowing	16	Cycles/Year	\$ -		\$ -
	20	Cycles/Year	\$ -		\$ -
	24	Cycles/Year	\$ -		\$ -
Trimming Around Headstones/Monuments	16	Cycles/Year	\$ -		\$ -
	20	Cycles/Year	\$ -		\$ -
	24	Cycles/Year	\$ -		\$ -
Edging around curbs/sidewalks	16	Cycles/Year	\$ -		\$ -
	20	Cycles/Year	\$ -		\$ -
	24	Cycles/Year	\$ -		\$ -
Weed Control	2	Cycles/Year	\$ -		\$ -
Fertilizing	1	Cycles/Year	\$ -		\$ -
	2	Cycles/Year	\$ -		\$ -
Aerification	1	Cycle/Year	\$ -		\$ -
<b>Shrub Planting and Bed Maintenance</b>					
Pruning/Trimming	4	Cycles/Year	\$ -		\$ -
	6	Cycles/Year	\$ -		\$ -
	12	Cycles/Year	\$ -		\$ -
Planting Bed Maintenance	4	Cycles/Year	\$ -		\$ -
	6	Cycles/Year	\$ -		\$ -
	12	Cycles/Year	\$ -		\$ -
Supplemental Tree Watering	4	Cycles/Year	\$ -		\$ -
	6	Cycles/Year	\$ -		\$ -
	12	Cycles/Year	\$ -		\$ -

Exhibit A  
Pricing Proposal Form

<b>Select Cemetery for this price proposal form:</b> ___ <b>Oakwood</b> ___ <b>Oakwood Annex</b> ___ <b>Plummers</b> ___ <b>Evergreen</b> ___ <b>Austin Memorial Park</b>
--

<b>Brush Management</b>						
Brush Removal to Hornsby Bend	4	Cycles/Year	\$	-	\$	-
	6	Cycles/Year	\$	-	\$	-
	12	Cycles/Year	\$	-	\$	-
<b>Facility Maintenance</b>						
Cost Per Month	12	Cycles/Year	\$	-	\$	-

**III Interment and Burial Services**

<b>Administration and Management of Interment and Burial Services</b>						
		Cost Per Month	\$	-		
		Cost Per Year	\$	-		
<b>Disinterment</b>		All Cemeteries				
Cremated Remains			\$	-		Per Occurrence
Infant Remains			\$	-		Per Occurrence
Adult Remains			\$	-		Per Occurrence
Raising of Vault			\$	-		Per Occurrence
<b>Disinterment and Re-interments</b>		All Cemeteries				
Infant Remains			\$	-		Per Occurrence
Adult Remains			\$	-		Per Occurrence
<b>Interments (Includes spoils removal)</b>						
<b>Adult Remains</b>		All Cemeteries				
Weekdays			\$	-		Per Occurrence
Saturday			\$	-		Per Occurrence
Sunday			\$	-		Per Occurrence
<b>Infants and Cremated Remains</b>		All Cemeteries				
Weekdays			\$	-		Per Occurrence
Saturday			\$	-		Per Occurrence
Sunday			\$	-		Per Occurrence
<b>Other Services and Fees</b>						
Administrative Fee for burial services		All Cemeteries	\$	-		Cost per Month
Administrative Fee for deed recording		All Cemeteries	\$	-		Cost per Month

Exhibit A  
Pricing Proposal Form

<b>Select Cemetery for this price proposal form:</b> <input type="checkbox"/> <b>Oakwood</b> <input type="checkbox"/> <b>Oakwood Annex</b> <input type="checkbox"/> <b>Plummers</b> <input type="checkbox"/> <b>Evergreen</b> <input type="checkbox"/> <b>Austin Memorial Park</b>
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<b>Monument Setting</b>	All Cemeteries		
All 2 piece monuments		\$	- Per Sq. Inch
1 piece monument >300 sq. inch		\$	- Per Sq. Inch
1 piece monument <300 sq. inch		\$	- Per Sq. Inch
Military Markers Tabloid		\$	- Per Sq. Inch
Military Marker >300 sq. inch		\$	- Per Sq. Inch
Military marker <300 sq. inch		\$	- Per Sq. Inch
 <b>Tent Setups</b>			
Includes Tent, chairs, carpets and services	All Cemeteries	\$	- Per Occurrence
 <b>Spoils Removal</b>			
	All Cemeteries	\$	- Per Interment
<b>IV Supplemental Services</b>			
 <b>Ball Moss Removal: Cost Per Tree, DIA at TBH</b>			
0 to 10 inch caliper		\$	- Per Tree
11-20 inch caliper		\$	- Per Tree
21-30 inch caliper		\$	- Per Tree
30+ inch caliper		\$	- Per Tree
 <b>Monuments and Headstones Condition Assessment (Section C, pg. 16)</b>			
Proposer will submit an estimate to determine monuments that require releveling		\$	- Per Assessment
 <b>Initial Conditions Assessment (Section L, pg. 19)</b>			
Proposer will submit an estimate to conduct the facility assessment for each Cemetery within 90 days			
Not Required for Plummers Cemetery		\$	- Per Assessment
 <b>Tree Survey and Risk Assessments (Section V, Pg. 22)</b>			
Initial Tree Survey within 6 months, COA Environmental Criteria Manual		\$	- Survey/Year 1
Level Two Basic Tree Risk Assessment, ANSI A300 Part 9 Standards		\$	- Assessment/Per Yr.
Level One Basic Tree Risk Assessment, ANSI A300 Part 9 Standards		\$	- Assessment/Year 1



# City of Austin Records Control Schedule CERTIFICATION AND ACCEPTANCE

**Section 1 TYPE OF FORM**

- Original filing
- Amended Schedule
- Amendment to Schedule

Number of pages in the form  
7

Date of form  
5/18/09

Date of previous approved schedule, if applicable

**Section 2 DEPARTMENT INFORMATION**

Department	Parks and Recreation
Division, Unit or Office	Cemetery
Records Administrator	Ric Ramirez
Address	PO Box 1088
City and Zip Code	Austin, TX 78767
Telephone	974-9045

**Section 3 LOCAL GOVERNMENT CERTIFICATION**

The attached document of the type indicated above was submitted to the City's Records Management Committee for approval pursuant to the agreement with the Texas State Library and Archives Commission (TSLAC). The attachment contains only those records series that have previously been approved by TSLAC and/or do not increase retention 5 years beyond the recommendations made by TSLAC in the Records Retention Schedules for Local Governments. As the City's Records Management Officer, I certify that the items listed on the records control schedule meet the minimum state requirements and have been approved the City's Records Management Committee in accordance with the City's Records Management Ordinance and the Committee's Standard Operating Procedures.

Name and Title  
Shirley A. Gentry, City Clerk & Records Management Officer

Signature  
*Shirley A. Gentry*

Date  
5/27/09

<b>LOCAL GOVERNMENT RECORDS CONTROL SCHEDULE</b> Pursuant to Local Government Code § 203.041 Texas State Library and Archives Commission SLR 500 (2/93)	Government: CITY OF AUSTIN Department: Parks and Recreation Address: P.O. Box 1088 Date: 5/18/2009
<input checked="" type="checkbox"/> Original Filing <input type="checkbox"/> Amended Filing	Division/Office: Cemetery Unit City: Austin, Texas Zip: 78767 Telephone: 974-9045 Records Management Officer Shirley A. Gentry, City Clerk
Page: 1 of 7	

TSL RECORD SERIES NUMBER	COA RECORD SERIES NUMBER	RECORD TITLE AND DESCRIPTION	RETENTION PERIOD			CUSTODIAL AND DISPOSITION INSTRUCTIONS
			Office	Records Center	Total	
GR1075-15	PFM01-15A	<b>Accident and Damage Reports Property and Equipment</b> Reports and accidents or damage to facilities, vehicles, or equipment if no personal injury is involved.	3 years		3 years	
GR1000-20(a)	PFM01-05A	<b>Accident Report Adults</b> Reports of accidents to persons on local government property or in any other situation in which a local government could be party to a law suit.	5 years		5 years	
GR1000-20(b)	PFM01-10A	<b>Accident Report Minors</b> Reports of accidents to persons on local government property or in any other situation in which a local government could be party to a law suit.	AC		AC	AC= 5 years; or 2 years after the minor reaches the age of 18, whichever later.
GR1025-26(a)	FIN01-05C	<b>Accounts Payable Capital Equipment and Fixed Assets</b> Records documenting capital equipment and fixed asset purchases. May include cash receipts and other supporting documents for capital projects.	2 years		2 years	FE = End of fiscal year of date of disposal of the asset. Custodian is the Financial and Administrative Services; Controller's Office.

AC= After closed, terminated, expired or settled; CE= End of Calendar Year; FE= End of fiscal year; LA= Life of asset; PM= Permanent; AV= Until administrative value ends; US= Until superseded; AR= Archival review before disposal; ER= Essential Vital Record; CFR= Code of Federal Regulations; TAC= Texas Administrative Code.

<b>CITY OF AUSTIN RECORDS CONTROL SCHEDULE</b>		Department: Parks and Recreation Date: 5/18/2009	Division/Office: Cemetery Unit Page: 2 of 7
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GR1025-26	FIN01-30C	<b>Accounts Payable Vouchers and Invoices</b> Payment vouchers, vendor invoices, manual warrants and supporting documentation, and similar records that document the disbursement of City money including reimbursement to employees for travel and other employment-related expenses.	2 years	2 years	Custodian is the Financial and Administrative Services: Controller's Office.
GR1025-27	FIN05-20A	<b>Accounts Receivable General</b> Records documenting money owed to or received by a City department. Includes statements, billing registers, receipt books, daily cash reports, cash drawer reconciliations, and other similar records.	FE + 5 years	FE + 5 years	FE = End of fiscal year of date of receipt. Custodian is the department that created the record.
GR1000-01(a)	GAR25-30A	<b>Agenda Open Meetings - Non City Council</b> Agenda of other open meetings including Boards and Commissions.	2 years	2 years	Custodian is the creating department's liaison to the board.
GR1025-01(b)	AUD01-20A	<b>Audit Records Periodic Reports Included in Cumulative Audit</b> Annual, biennial, or other periodic reports of an internal or external audit if they are included in a cumulative audit.	2 years	2 years	Custodian is the department conducting the audit (in the case of internal audits) or the department contracting the audit (external audits).
GR1075-01(a)	FIN65-10D	<b>Bid Records Successful</b> Successful bids, including invitations to bid, requests for proposal, bid bonds and affidavits, bid sheets, and similar supporting documentation. If a formal written contract is the result of a successful bid or request for proposal, its supporting documentation must be retained for the same period as the contract.	2 years	2 years	Custodian is the Purchasing Office.
GR1025-04(c)	FIN20-30A	<b>Budget Records Work Papers</b> Work papers created exclusively for the preparation of budgets.	2 years	2 years	Custodian is the department that created the record.
PW5675-04	LEG10-10A	<b>Cemetery Maps and Plats</b> Maps, plats, or similar records showing the location of all graves and gravesites in the cemetery.	PM	PM	Custodian of the permanent record is the department.

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CITY OF AUSTIN RECORDS CONTROL SCHEDULE	Department: Parks and Recreation Date: 5/18/2009	Division/Office: Cemetery Unit Page: 3 of 7
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Item Number	Record Description	Retention Period	Disposition	Custodian of the permanent record is the department.
PW5675-05	<b>Cemetery Registers</b> Ledgers, registers, or similar records showing all cemetery lots by plat number with the name of the purchaser, purchase price, and date of purchase.	PM	PM	
GR1000-24	<b>Complaints</b> Complaints received from the public by the department relating to government policy.	AC + 2 years	AC + 2 years	AC = Resolution or dismissal of complaint.
GR1075-16	<b>Construction Project Files</b> Records concerning the planning, design, construction, conversion, or modernization for the main library, and outlying branches.	AC	AC	The custodian is the Public Works Department. AC = Date project completed.
GR1000-25	<b>Contracts and Agreements</b> <b>Other</b> Records related to obligations under agreements, leases and contracts not negotiated by the City's Purchasing Departments. Example: Inter-local agreements.	AC + 2 years	AC + 2 years	AC = Expiration/termination of the contract, lease or agreement. Custodian is the PARD Accounting Office.
GR1000-26(b)	<b>Correspondence and Internal Memoranda</b> <b>Administrative</b> Correspondence and internal memoranda pertaining to or arising from the routine administration or operation of the policies, programs, services, and projects of a local government.	2 years	2 years	
GR1000-26(a)	<b>Correspondence and Internal Memoranda</b> <b>Policy and Program Development</b> Correspondence and internal memoranda pertaining to the formulation, planning, implementation, modification, or redefinition of the policies, programs, services, or projects of a local government.	5 years	5 years	AR: These files should be reviewed by the Austin History Center for historical value prior to their destruction.
GR1000-26(c)	<b>Correspondence and Internal Memoranda</b> <b>Routine</b> Correspondence and internal memoranda such as letters of transmittal, requests for publications, internal meeting notices, and similar routine matters.	AV	AV	AV = Until administrative value expires. If upon review any material requires a retention period over 1 year please contact Records Management Services.

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CITY OF AUSTIN RECORDS CONTROL SCHEDULE		Department: Parks and Recreation	Division/Office: Cemetery Unit
		Date: 5/18/2009	Page: 4 of 7
PW5675-06	LEG10-05A	<b>Deeds Cemetery</b> Deed books or copies of deeds or comparable instruments of ownership of lots and gravesites, including similar records relating to deed transfers.	PM Custodian of the permanent record is the department.
PW5675-03	WRK15-20A	<b>Disinterment Records</b> Court or health department exhumation orders, copies of disinterment permits, reports concerning the disinterment and subsequent disposition of the exhumed remains, and similar records relating to the disinterment or exhumation of human remains.	PM Custodian of the permanent record is the department.
GR1050-09; GR1050-07; GR1050-03; GR1050-04; GR1050-20	PER30-20B	<b>Employee Personnel Files Non-Civil Service</b> Records providing a history of each employee's employment with the City beginning with initial hire. Includes awards and commendations, certificates and licenses, disciplinary records, grievance records, copy of employment application, transcripts, etc.	AC AC = Date of employee separation. Custodian is the human resource unit of the department that created the record. When employees transfer from one department to another, their files should be transferred to the new department's human resource unit.
GR1025-07(a)	FIN40-05D	<b>Financial Reports Interim</b> Monthly, bimonthly, quarterly, or semi-annual reports.	2 years Custodian is the PARD Accounting Office.
PW5675-02	WRK15-25A	<b>Interment Records</b> Records showing name and age of deceased (if known), date of interment, and type and location of interment	PM Custodian of the permanent record is the department.
GR1075-02	PFM05-35A	<b>Inventory Records Parts and Supplies</b> Inventory records for parts and supplies.	1 year
GR1050-25	PER60-20B	<b>Personnel Studies and Surveys</b> Studies, statistical reports, surveys, costs analyses and projections, and similar records, including employee questionnaires.	3 years Official record is maintained by the Human Resource Department.
GR1050-24; GR1050-55	PER30-35F	<b>Personnel/Payroll Action Forms (PAF)</b> Documents the hiring, termination, transfer, pay grade, position or job title, name changes, etc., including all changes that occur during the employment period.	1 year Official record is maintained by the Human Resource Department.

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CITY OF AUSTIN RECORDS CONTROL SCHEDULE		Department: Parks and Recreation	Division/Office: Cemetery Unit
		Date: 5/18/2009	Page: 5 of 7
GR1000-37	GAR35-05A	<b>Photographs, Recordings, and other Non-Textual Media</b> Photographs, photographic scrapbooks, slides, sound recordings, videotapes, posters, and other non-textual media that document the history and activities of a local government or any of its departments, programs, or projects <i>except</i> such records noted elsewhere in this or other commission schedules.	PM AR: These records should be transferred to the Austin History Center following the expiration of their administrative value to the department.
GR1000-38	GAR40-15A	<b>Policy and Procedure Documentation</b> <b>General</b> Records documenting the guiding principles (policy) and courses of action (procedures) intended to ensure compliance with City requirements. Includes policy documentation and the written procedures related to the adoption of these policies.	PM AR: These files should be reviewed by the Austin History Center for historical value prior to their destruction.
TX2975-13	SAF30-05A	<b>Property Transfer Documentation</b> Deed abstracts, death and probate abstracts, division orders, and similar data documenting transfer of ownership of property, used by appraisal districts to update appraisal records.	AV Custodian is the City Purchasing Office.
GR1075-03(a)	FIN65-30A	<b>Purchase Orders</b> Records related to actual purchases or commitments to purchase and authorizations for expenses.	2 years AV = Until administrative value expires but no longer than 3 years.
GR1075-03(c)	FIN65-25A	<b>Purchase Orders</b> <b>Packing Slips</b> Records that document the receipt of goods and services purchased by City departments.	2 years AV
GR1000-40(d)	GAR40-25A	<b>Records Management Records</b> <b>Policies and Procedures</b> Records Management Plans and Policy Documents.	US + 5 years US + 5 years
GR1000-41(a)(3)	GAR60-25A	<b>Reports and Studies – Non Fiscal</b> <b>Special: Director Requested</b> Special reports or studies prepared by order or request of the chief administrative officer.	5 years AR: These records should be reviewed by the Austin History Center prior to their destruction for historical value.

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CITY OF AUSTIN RECORDS CONTROL SCHEDULE		Department: Parks and Recreation		Division/Office: Cemetery Unit	
		Date: 5/18/2009		Page: 6 of 7	
GR1000-41(a)(4)	GAR60-15A	<b>Reports and Studies -Non-Fiscal Non-Annual</b> Includes monthly, bimonthly, quarterly, or semi-annual reports created by the department.	3 years	3 years	
HR2400-07	LEG65-25A	<b>Reports of Death</b> Reports of death filed by funeral directors or persons acting as such.	AC	AC	AC = Receipt of death certificate
PW5275-07(a)	WRK75-05A	<b>Road and Street Maintenance Records</b> Reports, logs, or similar records compiled on a daily, weekly, and/or monthly basis documenting repair and maintenance work on roads, streets, street lights, sidewalks, rights of way, etc.	3 years	3 years	
PW5200-02	PFM10-30A	<b>Service Request/Work Orders</b> Service requests and work orders to be performed by public works and services personnel; specifically, interment at the cemetery.	2 years	2 years	
GR1075-41(b)	GAR10-65A	<b>Telephone Logs or Activity Reports</b> Registers or logs of telephone calls made and similar telephone activity reports.	2 years	2 years	
GR1050-54(d)	FIN75-10A	<b>Time and Attendance Records Employee Reports</b> Copies of periodic time summary or leave status reports furnished to each employee containing information on vacation, sick, compensatory, or other leave earned and used, including the final report of separated employees.	2 years	2 years	Custodian is the PARD Human Resource Department.
GR1050-54(b); GR1050-56; GR1050-57; GR1050-31	FIN75-15A	<b>Time and Attendance Records General</b> Includes timesheets; requests and authorizations for vacation, compensatory, sick and other types of authorized leave; time change records which document requests and authorizations for overtime, time trading, and other actions that affect normal work time including leave requests; and work schedules.	4 years	4 years	

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<b>CITY OF AUSTIN RECORDS CONTROL SCHEDULE</b>		Department: Parks and Recreation Date: 5/18/2009		Division/Office: Cemetery Unit Page: 7 of 7	
GR1075-20(a)	PFM30-05A	<b>Usage Reports Activity Logs/Usage Report</b> Any type of usage report (e.g., mileage, fuel consumption, copies run) if such reports are the basis for allocating costs, for determining payment under rental or lease agreements, etc.	FE + 3 years	FE + 3 years	
GR1075-19	PFM10-35A	<b>Work Orders Facilities, Vehicles and Equipment</b> For repairs and maintenance to facilities, vehicles, or equipment.	2 years	2 years	

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