

**TEMECULA PUBLIC CEMETERY DISTRICT  
BOARD OF TRUSTEES  
REGULAR BOARD MEETING  
41911 C St, Temecula, Ca 92592**

**November 17, 2022 @ 8:00 a.m.**

**AGENDA- Estimated Time: 2 1/2 Hrs.**

1. **CALL TO ORDER:** @8:00 a.m. by Trustee Qualm
  
2. **INVOCATION:** Trustee Qualm
  
3. **ROLL CALL**

Chair- Qualm, Vice Chair- Vanderhaak, Trustee Dugan,  
Trustee Davis, Trustee Kelleher, General Manager, Beaudet,  
Foreman, Sands

**MOTIONS TO EXCUSE:**

**VISITORS:** Paul Kaymark-Nigro & Nigro  
Paul will report out to the Board the F.Y. ending 2022 AUDIT and  
discuss repaying the General Fund from the ACO.

#### **4. PUBLIC COMMENTS:**

At this time, members of the public are invited to address the Board concerning any items on the agenda, or on any other matters that are not on the agenda but are within the subject matter jurisdiction of the District. Request must be submitted in person prior to the start of the meeting. Every person will be allowed 5 minutes to address the Board of Trustees; in accordance with State Law, (Brown Act) all items to be acted on must be posted 72 hours in advance.

#### **5. CONSENT CALENDAR:**

All matters on the Consent Calendar are considered routine and may all be approved by one motion. Any member of the Board or the public may request an item be removed from the Consent Calendar for discussion or separate action. Unless otherwise specified in the request to remove an item from the Consent Calendar, all items shall be considered immediately following action on the remaining items on the Consent Calendar.

##### **A. APPROVAL OF MINUTES**

*Recommendation:* That the Board approve the minutes of the Regular Board Meeting of September 15 ,2022

##### **B. APPROVAL OF CHECK REGISTERS**

*Recommendation:* That the Board approves the September and October 2022 Check Register Nos. 101100, 101200 and 101300.

##### **C. APPROVAL OF BOOKKEEPER REPORT**

*Recommendation:* That the Board receives and files the September and October 2022 Bookkeeper Report

## **6. ACTION ITEMS:**

### **A. Policy Uniforms and Protective Footwear # 3055**

*Recommendation:* That the Trustees agree to change item 3055.6 from new protective footwear every two years to every year. On average the soles of the boots are lasting anywhere from 1-16 months before breaking open. The grounds are wet every morning and contain a lot of pesticides which may lead to the decay of the boots quicker.

### **B. CAPC 65<sup>TH</sup> Annual Conference- Seaside, Ca.**

*Recommendation:* That the Trustees let the manager know who will be in attendance March 23-25, 2023

### **C. Family Follow Up Survey Complaint From Sharon Shafer**

*Recommendation:* That the Trustees receives the follow up survey and letter to Trustee Davis. Manager suggests an open dialog amongst the Trustees and manager followed by a response letter to Sharon Shafer.

**D. Palm Springs CSDA annual Conference**

*Recommendation:* Trustee Davis had charged some of his meals to his room. Davis was late at getting his receipts turned in so by the time the manager contacted the hotel they had closed out the month and could not provide the paid receipts from the restaurant. The Trustees need to give the manager direction as to how they want her to proceed. The manager has reimbursed Davis for the receipts he provided, there is a difference in room charges of \$236.27

**E. Property Owners along Dottie Ct, request the cemetery remove or cut back Trees**

*Recommendation:* The cemetery received a call from the Perez family stating that trees have fallen and destroyed their chain link fence in areas. They have requested that the cemetery remove or cut the trees back as they believe it is on our property line. I have submitted pictures to RJM, they feel we should have the property surveyed because it is unknown who placed those existing stakes.

**F. Nigro & Nigro**

*Recommendation:* That the Trustees make a motion to have the manager reimburse the General Fund in the amount of \$ 105,874.00 from the ACO Fund. This is to replace the funds that were spent in this past Fiscal Year 2021-2022 which were for Capital Outlays and used for the future cemetery.

**7. FINANCIAL REPORTS:**

- A. October 2022 Balance Sheet
- B. October 2022 Profit and Loss
- C. September and October 2022 Stifel Investments; principal and interest

**8. GENERAL MANAGERS REPORTS:**

- A. September-October 2022 Revenues
- B. September-October 2022 Inventory
- C. September-October 2022 Depletion
- D. Entry Road inspected and completed by the County of Riverside
- E. RJM in queue with the County for the Substantial Conformance Use Permit.
- F. PSOMAS change order
- G. Local Area Meeting- Cancelled
- H. Foreman's Report

**9. GENERAL COUNSEL REPORT:**

## **10. FISCAL YEAR 2022-2023 SUBCOMMITTEES**

- A. 52-acre Cemetery Property (**Vanderhaak-Davis**)
  - **Entry Road Construction began 02/24/2022**
- B. Landscape Plan (**Dugan-Qualm**)
- C. Cenotaph/ Ossuary (**Vanderhaak-Kelleher**)
- D. Conférence Liaison (**Davis-Dugan**)
  - Lake Tahoe CAPC report from Trustee Dugan
- E. Polices (**Qualm-Davis**)
- F. General Price List (**Kelleher-Vanderhaak**)
- G. Investments (**Davis-Dugan**)

## **11. FUTURE TRUSTEE AGENDA ITEMS:**

Stewart Title- Pending  
Lender

**12. CLOSED SESSION ITEMS: Gustavo Lamanna- Attorney at Law**

**A. CONFERENCE WITH LEGAL COUNSEL—ANTICIPATED INITIATION OF LITIGATION**

Pursuant to Government Code of Section 54956.9 (d) (**one potential case**)

**B. CONFERENCE WITH LEGAL COUNSEL—ANTICIPATED LITIGATION**

Significant Exposure to Litigation

Pursuant to Government Code of Section 54956.9 (d) (**one potential case**)

**C. Closed Session Announcement:**

**13. BOARD COMMENTS:**

**14. ANNOUNCEMENTS:**

**January 2023- Trustees assume their new position on the Board.**

**Chair-Trustee Davis**

**Vice-Chair-Trustee Dugan**

**Term to run : January 2023- December 2024**

Next Regular Board Meeting –Dark in December?

**15. ADJOURNMENT:**

**1<sup>st</sup> Motion:**

**2<sup>nd</sup> Motion:**

**All in Favor:**

In compliance with the Americans with Disabilities Act, if you need special assistance in this meeting, please contact the District Secretary at (951) 699-1630. Notification 72-hours prior to the meeting will generally enable District staff to make reasonable arrangements to ensure accessibility. (28 CFR 35.102.35.104 ADA Title II)

All supporting documentation is available for public review at the Temecula Public Cemetery District Office located at 41911 C Street, Temecula, California during regular business hours, 8:00 a.m. – 4:00 p.m., Monday through Friday. Or at [www.temeculacemetery.org](http://www.temeculacemetery.org) posted November 14, 2022



**TEMECULA PUBLIC CEMETERY DISTRICT  
FINANCIAL STATEMENTS  
AND  
INDEPENDENT AUDITORS' REPORT  
For the Fiscal Year Ended  
June 30, 2022  
(With Comparative Information as of June 30, 2021)**

**NIGRO & NIGRO<sup>PC</sup>**

TEMECULA PUBLIC CEMETERY DISTRICT  
BOARD OF TRUSTEES  
REGULAR BOARD MEETING  
41911 C St, Temecula, Ca 92592

SEPTEMBER 15, 2022 @ 8:00 a.m.

MINUTES

1. **CALL TO ORDER:** @8:00 a.m. by Trustee Qualm
2. **INVOCATION:** Trustee Qualm
3. **ROLL CALL**

Chair- Qualm, Vice Chair- Vanderhaak, Trustee Dugan,  
Trustee Davis, Trustee Kelleher, General Manager, Beaudet,  
Foreman, Sands

**MOTIONS TO EXCUSE:**

**VISITORS:**

#### **4. PUBLIC COMMENTS:**

At this time, members of the public are invited to address the Board concerning any items on the agenda, or on any other matters that are not on the agenda but are within the subject matter jurisdiction of the District. Request must be submitted in person prior to the start of the meeting. Every person will be allowed 5 minutes to address the Board of Trustees; in accordance with State Law, (Brown Act) all items to be acted on must be posted 72 hours in advance.

**5. CONSENT CALENDAR:** A motion was made by Trustee Vanderhaak to accept the consent calendar as presented, seconded by Trustee Kelleher and passed unanimously.

All matters on the Consent Calendar are considered routine and may all be approved by one motion. Any member of the Board or the public may request an item be removed from the Consent Calendar for discussion or separate action. Unless otherwise specified in the request to remove an item from the Consent Calendar, all items shall be considered immediately following action on the remaining items on the Consent Calendar.

#### **A. APPROVAL OF MINUTES**

*Recommendation:* That the Board approve the minutes of the Regular Board Meeting of August 18 ,2022

#### **B. APPROVAL OF CHECK REGISTERS**

*Recommendation:* That the Board approves the August 2022 Check Register Nos. 101100, 101200 and 101300.

C. **APPROVAL OF BOOKKEEPER REPORT**

*Recommendation:* That the Board receives and files the August 2022 Bookkeeper Report

6. **ACTION ITEMS:**

A. **License and Insurance Policy**

*Recommendation:* That the Trustees give the manager their current auto insurance documentation and copy of DL. For the FY 2022-2023.

B. **TPCD Strategic Plan for Fiscal Year 2022-2023**

*Recommendation:* That the Trustees review the strategic plan and suggest any additions or deletions.

C. **General Managers' Performance Review Template**

*Recommendation:* That the Trustees complete the managers review template included and return it to the Chair.

7. **FINANCIAL REPORTS:** A motion was made by Trustee Davis to receive and file the August financials, seconded by Trustee Kelleher and passed unanimously.

- A. August 2022 Balance Sheet
- B. August 2022 Profit and Loss
- C. August 2022 Stifel Investments; principal and interest

8. **GENERAL MANAGERS REPORTS:**

- A. August 2022 Revenues
- B. August 2022 Inventory
- C. August 2022 Depletion
- D. Local Area Meeting Cancelled
- E. Rancho California Water- Final Release
- F. Foreman report

9. **GENERAL COUNSEL REPORT:**

To be discussed in closed Session

## **10. FISCAL YEAR 2022-2023 SUBCOMMITTEES with GM**

- A. 52-acre Cemetery Property (**Vanderhaak-Davis**)
  - **Construction began 02/24/2022**
  - **Constructed completed September 01, 2022**
  
- B. Landscape Plan (**Dugan-Qualm**)
  
- C. Cenotaph/ Ossuary (**Vanderhaak-Kelleher**)
  
- D. Conférence Liaison (**Davis-Dugan**)
  - General Manager Report
- E. Polices (**Qualm-Davis**)
  
- F. General Price List (**Kelleher-Vanderhaak**)
  
- G. Investments (**Davis-Dugan**)

## **11. FUTURE TRUSTEE AGENDA ITEMS:**

Stewart Title- Pending  
Lender  
October 22, 2022, Company Dinner

A motion was made by Trustee Kelleher to close the open session at 10:00 am and move into Closed session, the motion was seconded by Trustee Vanderhaak and passed unanimously.

## **12. CLOSED SESSION ITEMS: Gustavo Lamanna- Attorney at Law**

### **A. CONFERENCE WITH LEGAL COUNSEL—ANTICIPATED INITIATION OF LITIGATION**

Pursuant to Government Code of Section 54956.9 (d) (**one potential case**)

### **B. CONFERENCE WITH LEGAL COUNSEL—ANTICIPATED LITIGATION**

Significant Exposure to Litigation

Pursuant to Government Code of Section 54956.9 (d) (**one potential case**)

A motion was made by Trustee Vanderhaak to close the session at 10:10 am and move back into open session, the motion was seconded by Trustee Davis and passed unanimously.

**c. Closed Session Announcement: Nothing to report**

**13. BOARD COMMENTS:**

CSDA Conference reports

What can be put on the unused acreage for future revenue

**14. ANNOUNCEMENTS:**

Next Regular Board Meeting –October 20,2022

**15. ADJOURNMENT: 10:17 am**

**1<sup>st</sup> Motion:** Trustee Dugan

**2<sup>nd</sup> Motion:** Trustee Kelleher

**All in Favor:** Unanimous



Temecula Public Cemetery District

10/14/2022 9:58 AM

Register: 101100 · US Bank Checking

From 09/01/2022 through 09/30/2022

Sorted by: Date, Type, Number/Ref

Date	Number	Payee	Account	Memo	Payment	C	Deposit	Balance
09/01/2022	8573	Joe Sands.	201100 · Accounts Pay...		97.01	X		39,604.63
09/07/2022	8574	Patricia Kelleher	201100 · Accounts Pay...	CSDA Mileage...	96.25			39,508.38
09/08/2022	AJE170		515100 · Life Insuranc...	Automatic with...	35.64	X		39,472.74
09/09/2022	091622	CalPers 457 Plan	201100 · Accounts Pay...		1,404.54	X		38,068.20
09/09/2022			101200 · US Bank Pay...	Funds Transfer	10,339.95	X		27,728.25
09/11/2022	AJE172		101200 · US Bank Pay...	Monthly autom...	411.30	X		27,316.95
09/12/2022			523290 · Bank Charges	Service Charge	16.00	X		27,300.95
09/13/2022	8575	California Assoc of P...	201100 · Accounts Pay...		355.00	X		26,945.95
09/15/2022	8577	Michael Dugan	201100 · Accounts Pay...		96.25	X		26,849.70
09/15/2022	8578	Dale Qualm.	201100 · Accounts Pay...	CSDA- PALM ...	393.33	X		26,456.37
09/16/2022	8579	CR&R Incorporated	201100 · Accounts Pay...	001-364-461	371.20	X		26,085.17
09/16/2022	8580	Crowne Hill Consulti...	201100 · Accounts Pay...	16229-August	372.01	X		25,713.16
09/16/2022	8581	EcoFert Inc	201100 · Accounts Pay...	5335-August	515.00	X		25,198.16
09/16/2022	8582	Metlife	201100 · Accounts Pay...	KMO5754030-...	40.33	X		25,157.83
09/16/2022	8583	Protection One (corp)	201100 · Accounts Pay...	146487730-Au...	228.97	X		24,928.86
09/16/2022	8584	SDRMA	201100 · Accounts Pay...	71868	1,876.67	X		23,052.19
09/16/2022	8585	Southern California ...	201100 · Accounts Pay...	2-03-325-4707	944.34	X		22,107.85
09/16/2022	8586	Sparkletts	201100 · Accounts Pay...	5728175-090422	143.25	X		21,964.60
09/16/2022	8587	Standard Insurance C...	201100 · Accounts Pay...	160-513170-00...	286.12	X		21,678.48
09/16/2022	8588	Streamline	201100 · Accounts Pay...	7235D26B-002...	50.00	X		21,628.48
09/16/2022	8589	Wildlife Control Ser...	201100 · Accounts Pay...	WL3445-Sept...	500.00	X		21,128.48
09/16/2022	8590	Cindi Beaudet	201100 · Accounts Pay...	CSDA -08/22*...	84.12	X		21,044.36
09/27/2022	093022	CalPers 457 Plan	201100 · Accounts Pay...		1,368.06	X		19,676.30
09/27/2022	101022	California Public Em...	201100 · Accounts Pay...	7490021932 ...	3,382.20	X		16,294.10
09/27/2022			101200 · US Bank Pay...	Funds Transfer	10,754.02	X		5,540.08
09/30/2022			101100G · Cash - Gen...	Deposit		X	66,854.82	72,394.90
09/30/2022	8591	County of Riverside L...	201100 · Accounts Pay...	IT 5417-August	197.78			72,197.12
09/30/2022	8592	GEO Soils Inc	201100 · Accounts Pay...	27088	2,673.50			69,523.62
09/30/2022	8593	Hank's Hardware & ...	201100 · Accounts Pay...	433112	140.18			69,383.44
09/30/2022	8594	Home Depot Credit S...	201100 · Accounts Pay...	9292954	94.63			69,288.81
09/30/2022	8595	Linda Glau CPA	201100 · Accounts Pay...	September	1,121.25			68,167.56
09/30/2022	8596	Prudential Overall Su...	201100 · Accounts Pay...	September-	266.55			67,901.01
09/30/2022	8597	PSOMAS	201100 · Accounts Pay...	188110-Sept...	5,698.00			62,203.01
09/30/2022	8598	RJM	201100 · Accounts Pay...		4,958.30			57,244.71
09/30/2022	8599	South County Pest C...	201100 · Accounts Pay...	026-7971-August	46.00			57,198.71
09/30/2022	8600	Verizon Wireless	201100 · Accounts Pay...	951-9214638	212.28			56,986.43
09/30/2022	8601	Whited Cemetery Ser...	201100 · Accounts Pay...	IN-051740	830.00			56,156.43
09/30/2022	093122	Downs Energy	201100 · Accounts Pay...	CL-55667-Sept...	386.85	X		55,769.58

Temecula Public Cemetery District

11/9/2022 3:49 PM

Register: 101100 · US Bank Checking

From 10/01/2022 through 10/31/2022

Sorted by: Date, Type, Number/Ref

Date	Number	Payee	Account	Memo	Payment	C	Deposit	Balance
10/03/2022	8602	US Bank	201100 · Accounts Pay...	08/23*09/19	4,170.55	X		51,599.03
10/04/2022	8603	American Mini Storage	201100 · Accounts Pay...	October	115.00	X		51,484.03
10/04/2022	8604	EcoFert Inc	201100 · Accounts Pay...	5335-September	515.00	X		50,969.03
10/04/2022	8605	Streamline	201100 · Accounts Pay...	7235D26B-002...	50.00	X		50,919.03
10/04/2022	8606	Wildlife Control Ser...	201100 · Accounts Pay...	WL3445-Octo...	500.00	X		50,419.03
10/04/2022	8607	Craig Davis	201100 · Accounts Pay...	Conference Rei...	126.36	X		50,292.67
10/08/2022	JE 21002		515100 · Life Insuranc...	Automatic with...	35.64	X		50,257.03
10/11/2022	101422	CalPers 457 Plan	201100 · Accounts Pay...	payday 10/14	1,402.28	X		48,854.75
10/11/2022	JE 21003		101200 · US Bank Pay...	Monthly autom...	411.30	X		48,443.45
10/11/2022			101200 · US Bank Pay...	Funds Transfer	10,319.66	X		38,123.79
10/12/2022			523290 · Bank Charges	Service Charge	16.00	X		38,107.79
10/12/2022	8608	CR&R Incorporated	201100 · Accounts Pay...	001-364-461	402.69	X		37,705.10
10/12/2022	8609	Crowne Hill Consulti...	201100 · Accounts Pay...	16411-Septem...	372.98	X		37,332.12
10/12/2022	8610	Garcia's Lowering D...	201100 · Accounts Pay...	0005	650.00	X		36,682.12
10/12/2022	8611	Hank's Hardware & ...	201100 · Accounts Pay...	436016	363.63	X		36,318.49
10/12/2022	8612	Nutrien Ag Solutions	201100 · Accounts Pay...	49584997	55.72	X		36,262.77
10/12/2022	8613	Protection One (corp)	201100 · Accounts Pay...	146487730-Oct...	228.97	X		36,033.80
10/12/2022	8614	Southern California ...	201100 · Accounts Pay...	2-03-325-4707	663.29	X		35,370.51
10/12/2022	8615	Sparkletts	201100 · Accounts Pay...	5728175-090422	87.40	X		35,283.11
10/12/2022	8616	Standard Insurance C...	201100 · Accounts Pay...	160-513170-00...	286.12	X		34,996.99
10/12/2022	8617	Sun City Granite	201100 · Accounts Pay...	engraving-24174	155.00	X		34,841.99
10/12/2022	8618	Metlife	201100 · Accounts Pay...	KMO5754034-...	40.33	X		34,801.66
10/12/2022	102022	Downs Energy	201100 · Accounts Pay...	CL-55667-Oct...	211.24	X		34,590.42
10/13/2022	8619	Michael Dugan	201100 · Accounts Pay...	Mileage, meals,...	1,479.60	X		33,110.82
10/13/2022	8620	Paradise Chevrolet	201100 · Accounts Pay...	Service	1,007.76	X		32,103.06
10/18/2022	8621	California Dept of Ta...	201100 · Accounts Pay...	3rd QTR 2022	128.00	X		31,975.06
10/20/2022	8622	Brett Beaudet	201100 · Accounts Pay...	Trivia Host	200.00			31,775.06
10/20/2022	8623	Caleb Kliewer	201100 · Accounts Pay...	Magician	200.00	X		31,575.06
10/20/2022	102822	CalPers 457 Plan	201100 · Accounts Pay...	payday 10/28	1,389.86	X		30,185.20
10/20/2022	111022	California Public Em...	201100 · Accounts Pay...	7490021932 ...	3,382.20	X		26,803.00
10/20/2022			101200 · US Bank Pay...	Funds Transfer	10,023.02	X		16,779.98
10/25/2022	8624	Asco Pacific	201100 · Accounts Pay...	68311	6,128.20			10,651.78
10/25/2022	8625	RJM	201100 · Accounts Pay...	#35266	6,871.85	X		3,779.93
10/27/2022			101100G · Cash - Gen...	Deposit		X	67,922.75	71,702.68

Temecula Public Cemetery District

10/14/2022 10:00 AM

Register: 101200 · US Bank Payroll

From 09/01/2022 through 09/30/2022

Sorted by: Date, Type, Number/Ref

<b>Date</b>	<b>Number</b>	<b>Payee</b>	<b>Account</b>	<b>Memo</b>	<b>Payment</b>	<b>C</b>	<b>Deposit</b>	<b>Balance</b>
09/02/2022	AJE166		510040 · Regular Salar...	Bank Draft Am...	7,442.87	X		6,267.72
09/02/2022	AJE166		510040 · Regular Salar...	Bank Draft Am...	3,393.68	X		2,874.04
09/02/2022	AJE166		510040 · Regular Salar...	Monthly charg...	154.78	X		2,719.26
09/09/2022			101100 · US Bank Che...	Funds Transfer		X	10,339.95	13,059.21
09/11/2022	AJE172		101100 · US Bank Che...	Monthly autom...		X	411.30	13,470.51
09/15/2022	AJE173		525030 · Paychex HR ...		445.33	X		13,025.18
09/16/2022	AJE171		510040 · Regular Salar...	Bank Draft Am...	6,918.69	X		6,106.49
09/16/2022	AJE171		510040 · Regular Salar...	Bank Draft Am...	3,293.24	X		2,813.25
09/16/2022	AJE171		510040 · Regular Salar...	Monthly charg...	128.02	X		2,685.23
09/27/2022			101100 · US Bank Che...	Funds Transfer		X	10,754.02	13,439.25
09/30/2022	AJE174		510040 · Regular Salar...	Bank Draft Am...	7,341.78	X		6,097.47
09/30/2022	AJE174		510040 · Regular Salar...	Bank Draft Am...	3,250.87	X		2,846.60
09/30/2022	AJE174		510040 · Regular Salar...	Monthly charg...	161.37	X		2,685.23

Temecula Public Cemetery District

11/9/2022 3:50 PM

Register: 101200 · US Bank Payroll

From 10/01/2022 through 10/31/2022

Sorted by: Date, Type, Number/Ref

<b>Date</b>	<b>Number</b>	<b>Payee</b>	<b>Account</b>	<b>Memo</b>	<b>Payment</b>	<b>C</b>	<b>Deposit</b>	<b>Balance</b>
10/11/2022	JE 21003		101100 · US Bank Che...	Monthly autom...		X	411.30	3,096.53
10/11/2022			101100 · US Bank Che...	Funds Transfer		X	10,319.66	13,416.19
10/14/2022	AJE177		510040 · Regular Salar...	Bank Draft Am...	6,895.37	X		6,520.82
10/14/2022	AJE177		510040 · Regular Salar...	Bank Draft Am...	3,281.27	X		3,239.55
10/14/2022	AJE177		510040 · Regular Salar...	Monthly charg...	143.02	X		3,096.53
10/15/2022	JE 21004		525030 · Paychex HR ...		445.33	X		2,651.20
10/20/2022			101100 · US Bank Che...	Funds Transfer		X	10,023.02	12,674.22
10/28/2022	JE 21005		510040 · Regular Salar...	Bank Draft Am...	6,705.23	X		5,968.99
10/28/2022	JE 21005		510040 · Regular Salar...	Bank Draft Am...	3,191.03	X		2,777.96
10/28/2022	JE 21005		510040 · Regular Salar...	Monthly charg...	126.76	X		2,651.20

Temecula Public Cemetery District

10/14/2022 10:00 AM

Register: 101300 · US Wash Account

From 09/01/2022 through 09/30/2022

Sorted by: Date, Type, Number/Ref

<b>Date</b>	<b>Number</b>	<b>Payee</b>	<b>Account</b>	<b>Memo</b>	<b>Payment</b>	<b>C</b>	<b>Deposit</b>	<b>Balance</b>
09/28/2022			-split-	Deposit		X	5,300.00	13,955.77
09/28/2022			-split-	Deposit		X	10,467.69	24,423.46
09/29/2022			100499 · Revenues to ...	Deposit		X	1,250.00	25,673.46
09/29/2022	5038	County of Riverside ...	-split-	September Rev...	17,667.69			8,005.77

Temecula Public Cemetery District

11/9/2022 3:52 PM

Register: 101300 · US Wash Account

From 10/01/2022 through 10/31/2022

Sorted by: Date, Type, Number/Ref

<b>Date</b>	<b>Number</b>	<b>Payee</b>	<b>Account</b>	<b>Memo</b>	<b>Payment</b>	<b>C</b>	<b>Deposit</b>	<b>Balance</b>
10/25/2022			-split-	Deposit		X	5,570.00	13,575.77
10/25/2022			-split-	Deposit		X	19,760.00	33,335.77
10/25/2022			100499 · Revenues to ...	Deposit		X	150.00	33,485.77
10/27/2022			100499 · Revenues to ...	Deposit			2,700.00	36,185.77
10/27/2022			100499 · Revenues to ...	Deposit		X	2,170.00	38,355.77
10/27/2022	5039	County of Riverside ...	-split-	October Reven...	27,000.00			11,355.77
10/27/2022	5040	County of Riverside ...	-split-	October Reven...	2,700.00			8,655.77

Date: 10/11/2022

Remote Tasks Performed *056 10/11/22*

- Reconcile three US Bank Cash Accounts
- X Reconcile four County Cash Accounts Statements
- X Enter Property Tax Deposits as Necessary
- X Support Voucher Balance to County

- X Journal activity and Reconcile two Stifel Accounts using Stifel Balancing spreadsheet.
- X Save the Stifel Account Statements for the auditor
- X Reconcile two Stifel interest receivable accounts
- X Print Stifel Snapshot- for Board Packets

X Verify check sequence is intact.  
8574-8607

X Verify each check over \$2500 from the US Bank General account has two signatures. Note: US Bank Wash account checks to the county are exempt from this requirement.

Number	Date	Payee	Amount	Memo	2nd Sig
8597	9/30/2022	Psomas	5,698.00	Geological Biological and	OK
8598	9/30/2022	RJM Design Group	4,958.30	Cemetery Design	OK
8591	9/30/2022	Geo Soils	2,673.50	Soil New Cemetery	OK
8602	10/3/2022	US Bank	4,170.55	Credit Card	OK

X Verify all checks to the GM have two signatures.

Number	Date	Payee	Amount	Memo	2nd Sig
8590	9/16/2022	Cindi Beaudet	84.12	CSDA Palm Springs	No

X Check monthly credit card statements for receipts and reasonableness. Initial credit card. Note that receipts are attached and expenses are reasonable. \*One charge does not appear reasonable.

X Discuss Management Use Only financial statements with the GM - Profit and loss two month, Balance sheet with prior year figures, and Profit and Loss Budget Performance.

X For the GM – Add Difference to Balance Sheet. In Excel, change the difference column text to white. Then for all reasonable totals/subtotals, change it to black.

X On the Profit and Loss – Show only the Year to Date and Annual Budget Figures. Check Pagination. \*\*Add in ytd Contrib to and from other funds

- X Update Endowment Allocation Schedule.
- X Update Wash Account Analysis.
- X Update Prepaid subledger and validate QB information.
- X Read Agenda and Minutes of the previous Board Meeting

Items to note, Additional Work:

- Continue work to support the 21-22 Audit
- Check to GM did not have second signature
- One Credit Card Charge does not appear reasonable.
- Open items:

Date: 11/08/2022

Remote Tasks Performed

*J. Dalton*

- X Reconcile three US Bank Cash Accounts
- X Reconcile four County Cash Accounts Statements
- X Enter Property Tax Deposits as Necessary
- X Support Voucher Balance to County

- X Journal activity and Reconcile two Stifel Accounts using Stifel Balancing spreadsheet.
- X Save the Stifel Account Statements for the auditor
- X Reconcile two Stifel interest receivable accounts
- X Print Stifel Snapshot- for Board Packets

X Verify check sequence is intact.  
8608-8640

X Verify each check over \$2500 from the US Bank General account has two signatures. Note: US Bank Wash account checks to the county are exempt from this requirement.

Number	Date	Payee	Amount	Memo	2nd Sig
8624	10/25/2022	Asco Pacific	6,128.20	New Property <i>Vases</i>	ok
8625	10/25/2022	RJM	6,871.85	New Property	ok
8635	10/27/2022	US Bank	3,449.27	Credit Card Bill	ok

X Verify all checks to the GM have two signatures. None this cycle.

Number	Date	Payee	Amount	Memo	2nd Sig

X Check monthly credit card statements for receipts and reasonableness. Initial credit card. Note that receipts are attached and expenses are reasonable.

X Discuss Management Use Only financial statements with the GM - Profit and loss two month, Balance sheet with prior year figures, and Profit and Loss Budget Performance.

X For the GM – Add Difference to Balance Sheet. In Excel, change the difference column text to white. Then for all reasonable totals/subtotals, change it to black.

X On the Profit and Loss – Show only the Year to Date and Annual Budget Figures. Check Pagination. \*\*Add in ytd Contrib to and from other funds Use the Actuals an a formula. For For ACO Negative Asset purchases plus interest..

- X Update Endowment Allocation Schedule.
- X Update Wash Account Analysis.
- X Update Prepaid subledger and validate QB information.
- NA Read Agenda and Minutes of the previous Board Meeting \*No Board Meeting in October

Items to note, Additional Work:

Continue work to support the 21-22 Audit

Open items:



TEMECULA PUBLIC CEMETERY DISTRICT  
POLICY MANUAL

**POLICY NAME:** Uniforms and Protective Footwear Policy  
**POLICY NUMBER:** 3055

3055.1 The cost of uniforms and/or protective clothing and footwear that employees are required to wear shall be borne by the District. The District pays for the laundering and repairs of said uniforms. Uniforms and protective footwear shall be worn at all times while the Groundskeeper employees are performing the duties and responsibilities of their jobs.

3055.2 The purpose of requiring groundskeeper employees to wear protective footwear while performing the duties and responsibilities of their jobs is to protect the employees from incurring injuries to their feet that may be caused by slips and falls, falling or rolling objects, stepping on sharp objects, mishandling of hot, corrosive and poisonous materials, and being exposed to unusually wet conditions and electrical hazards.

3055.3 Protective footwear must comply with the American National Standards Institute Standard ANZI Z41, OR ASTM F2413 and meet the following specifications: (a) must contain a non-slip sole; (b) must have ankle support of at least 6" up to 12"; (c) must have protective toe features; (d) must be water resistant or water proof; and (e) must have a non-conductive sole to prevent electric shock.

3055.4 All full-time groundskeeper employees shall be eligible for reimbursement up to an amount as may be approved by the District for the purchase of protective footwear that meets the safety standards set forth in this policy.

3055.5 Unless other arrangements are approved by the District Manager, the employee shall submit the original purchase receipt and shoe tags or other documentation showing the protected footwear purchased by the employee meets the safety standards set forth in this policy.

3055.6 The District shall reimburse groundskeeper employees for a new pair of protective footwear every 2 years of employment with the District.

3055.7 A groundskeeper employee may be entitled to reimbursement for a replacement pair of protective footwear if the District Manager determines that the damage was caused while the employee was performing the duties and responsibilities of his/her job in a reasonable manner.

3055.8 Groundskeeper employees shall be responsible for the reasonable care and maintenance of their protective footwear.

3055.9 An employee's failure to wear protective clothing and footwear at all times while performing the duties and responsibilities of his or her job may result in disciplinary action, including but not limited to, termination.

**Conference Agenda**

**Thursday, March 23, 2023**

- 6:00-9:00 a.m. Cooked-to-Order breakfast for registered Hotel Guests
- 8:00 a.m. Exhibitor's set-up displays
- 8:00 a.m. **Annual Golf Tournament - Pacific Grove Golf Links**
- 4:30-7:00 p.m. Registration Desk Open
- 5:30-7:00 p.m. **Hospitality in Exhibitor's Showroom**

**Friday, March 24, 2023**

- 6:00-9:00 a.m. Cooked-to-Order breakfast for registered Hotel Guests
- 7:15 a.m. Registration Desk Opens
- 8:00 a.m. Call To Order - Pledge of Allegiance
- 8:15 a.m. Welcome/Program Introductions
- 8:30 a.m. Featured Cemetery - Davis Cemetery District  
*Presented by:* Jessica Smithers, Superintendent
- 8:30 a.m. They're Not Your Friends, They're Your Employees,  
*Presented by:* Robert Hunt, Attorney
- 10:30 a.m. Break: Visit Exhibits
- 11:00 a.m. Prevailing Wages and The Public Works Projects 101,  
*Presented by:* Mark Velasquez, Attorney
- 12:00 Noon Lunch: Exhibitors Introduction  
"Mel Lewis Memorial Awards"
- 1:20 p.m. Donation Drawing
- 1:30 p.m. Harassment Prevention Training,  
*Presented by:* Karen O'Neil, Attorney of Kirk & Simas
- 3:30 p.m. Adjournal - Visit Exhibits
- 4:00-5:30 p.m. Board of Directors Meeting - Observers Welcome
- 6:00 p.m. Dinner/Music/Dancing/Photo Booth  
"Honorary Membership Awards"

**Saturday, March 25, 2023**

- 7:00-10:30 a.m. Cooked-to-Order breakfast for registered Hotel Guests
- 7:15 a.m. Registration Desk Opens
- 8:00 a.m. Combined Group Session:  
Trustees/Managers/Secretaries
- 10:00 a.m. Break: Visit Exhibits
- 10:50 a.m. Exhibitor's Drawing
- 11:00 a.m. Combined Group Session: *(continue)*
- 12:00 Noon Lunch
- 1:20 p.m. Donation Drawing
- 1:30 p.m. Annual Meeting - Board of Directors Election
- 2:30 p.m. Budget Preparation Training,  
*Presented by:* Kevin Brejnak, Cemetery District CPA
- 3:30 p.m. Adjournal "Grand Prize Drawing"
- 4:00 p.m. Board of Directors Meeting-Election of Officers
- 6:00 p.m. Annual Awards Dinner

**Door Prizes**

**CONFERENCE LOCATION**  
**Embassy Suites Monterey Bay**  
**1441 Canyon Del Rey**  
**Seaside, CA**

**Make your hotel reservations with the Embassy Suites Hotel.** The hotel is charging CAPC guests \$233.12 for a King and \$255.56 for a Bay View or a Double (Tax included).

For Reservations call (800) 362-2779 or the hotel directly at (831) 241-9136 (For Ana) mention you are with California Association of Public Cemeteries.

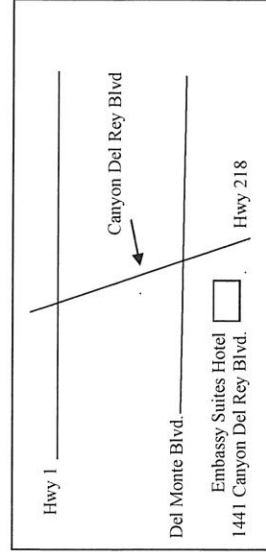
Or go to [www.embassysuitesmontereybay.com](http://www.embassysuitesmontereybay.com) under special rates enter group code "APC".

**The hotel is holding a block of rooms for us until Sunday, February 19, 2023**

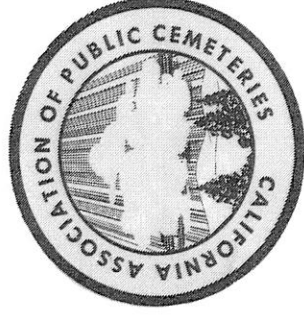
**Hotel check-in time is 4:00 p.m. and check-out time is 11:00 a.m. Hotel room rate includes cooked-to-order breakfast each day. Free standard guestroom Wi-Fi. Self Parking is \$ 10.00 per night.**

For additional information call the CAPC office at: (951) 925-1111 or toll free (888) 344-9858.

**Directions to Embassy Suites Hotel**



**California Association**  
**of**  
**Public Cemeteries**



**65th**

**Annual Conference**

**March 23 - 25, 2023**

**Embassy Suites Monterey Bay**  
**1441 Canyon Del Rey**  
**Seaside, CA 93955**

**CALIFORNIA ASSOCIATION OF PUBLIC CEMETERIES**  
**65th ANNUAL CONFERENCE**  
**March 23rd-25th, 2023**  
**REGISTRATION**

Name \_\_\_\_\_ Position \_\_\_\_\_  
 Guest Name \_\_\_\_\_  
 District \_\_\_\_\_  
 Address \_\_\_\_\_  
 City/State/Zip \_\_\_\_\_

First time attendee at CAPC event, Yes  No   
**Please complete separate registration for each attendee and return with payment no later than Friday, February 24, 2023. Refunds will only be made on cancellations received in the CAPC office by February 24, 2023.**

**Member Registration Fee (For One Person): \$ 535.00**  
 (Non-Member Registration Fee For One Person \$ 635.00)

Includes:

- Thursday Evening Hospitality
- Friday Lunch (Buffet)
- Friday Dinner (Buffet)
- Saturday Lunch (Plated)
- Saturday Awards Dinner (Plated)
- (Special Need: \_\_\_\_\_ Vegetarian Lunch)
- (Special Need: \_\_\_\_\_ Vegetarian Dinner)

**Guest Friday Buffet Lunch @ \$ 58.00 each** \$ \_\_\_\_\_  
 (Del) Buffet: Mixed Green Salad, Artichoke Pasta Salad, Homemade potato Salad, Chips, Roast Beef or Turkey Sandwich and Chef's Desserts

**Guest Friday Buffet Dinner @ \$ 99.00 each** \$ \_\_\_\_\_  
 Canyon Del Rey Buffet: Caesar Salad, Spinach Salad, Sliced New York Strips, Tortellini with Cream Sauce, Grilled Chicken, Veggies, Rice, Dinner Rolls and Assorted Desserts

**Guest Saturday Plated Lunch @ \$ 47.00 each** \$ \_\_\_\_\_

(Special Need: \_\_\_\_\_ Vegetarian Lunch)  
 Cobb Grilled Chicken Salad, Artisan Bread and Chef's Desserts

**Guest Saturday Awards Plated Dinner @ \$ 89.00 each** \$ \_\_\_\_\_  
 (Special Need: \_\_\_\_\_ Vegetarian Dinner)  
 Grilled Sliced Tri-Tip, Veggies, Potatoes, Salad, Dinner Rolls and Assorted Desserts

Hospitality Co-Sponsor (Optional)  
 \$ 50.00 to \$ 99.00 Silver  
 \$ 100.00 to \$ 199.00 Gold  
 \$ 200.00 and up Platinum

**Total Enclosed:** \$ \_\_\_\_\_  
 Send completed registration and check to:  
 California Association of Public Cemeteries Phone: 951-925-1111  
 P.O. Box 119 Toll Free (CA): 888-344-9858  
 San Jacinto, CA 92581 Fax: 951-652-3643

**No refunds for cancellations received after February 24, 2023. Applications from CAPC member districts are being accepted until January 20, 2023 for Scholarships to attend the conference. Contact CAPC.**

**CAPC CONFERENCE HIGHLIGHTS**

**Who should attend:** Trustees, Managers, Secretaries and employees interested in increasing their knowledge of public cemetery district governance, operation and administration.

**Featuring:**

- **They're Not Your Friends, They're Your Employees:** "A Discussion of the Dangers and Difficulties in Managing and Supervising Employees in the Small Workplace"
- **Prevailing Wages and The Public Works Projects 101:** This seminar will review what are Prevailing Wages and Public Works Projects as well as when and how they apply. Mr. Velasquez will also discuss the language needed in the contracts for these projects, and explain a District's duties and requirements reporting the project to the California Department of Industrial Relations.
- **Harassment Prevention Training:** Required Training for Trustees & Designated Staff Members.
- **Budget Preparation Training:** Crafting a data driven budget that meets the needs of your stakeholders takes significant time and energy. Budget planning involves a realistic appraisal of your revenue targets and expenditure needs. Some considerations involve an outlook longer than one year and lest we forget economics, people, politics and nature can flip that script in a heartbeat. This presentation will address many aspects where your preparation may be falling short and teach you how to develop data driven budget assumptions.

**Problem Solving:** Trustees, Managers/Secretaries combined breakout session will provide the opportunity to share information and ask questions about problems that are common to other districts.

- **To ensure your problem will be addressed, submit your problem/question in advance with the attached Registration.**

**Exhibitors of Cemetery:** Equipment, supplies, computer programs, liability/property & workers' compensation insurance and much more.  
**Door Prizes:** Traditionally, Districts bring door prizes that are common to their area of the state. These are distributed to attendees at the evening events.

**Grand Door Prize:** A drawing for the Grand Door Prize will be held at the end of the conference programs on Saturday afternoon. You have to be present to win.

**"AND MUCH MORE"**

**Special Events:**

**Thursday, March 23, 2023:**

- **CAPC Annual Golf Tournament:** Pacific Grove Golf Links
- **Hospitality:** Don't miss the Thursday evening Exhibitor's Hospitality from 5:30 - 7:00 p.m. Co-Sponsored by CAPC. Participating Districts and Exhibitors. There will be a tempting variety of hors d'oeuvres and fellowship with other cemeteryans from districts throughout the state.

• Districts and Exhibitors are encouraged to help make this another successful event. All co-sponsors funds collected will be used for the Thursday evening Exhibitor's Hospitality.

• **Recognition for Hospitality Co-Sponsors:**

- \$ 50.00 to \$ 99.00 Silver
- \$ 100.00 to \$ 199.00 Gold
- Over \$ 199.00 Platinum

**Friday, March 24, 2023:**

**Join us Friday Evening**

- Dinner
- Music
- Dancing
- Photo Booth

"Honorary Membership Awards"

**Saturday, March 25, 2023:** Saturday evening will be our Annual Awards Dinner which will include announcing the selection of the Presidents' Award, Trustee & Manager of the Year, Cemeteryan of the Year and Ruben Siemens-Wayne Byington Memorial Award.

**"Donated Door Prizes are encouraged and appreciated"**

Drawings for door prizes donated by Districts and Exhibitors will be held at Friday and Saturday evening events.

Any one FORE...

# *GOLF*

California Association of Public Cemeteries  
Annual Golf Tournament  
2023

## **Pacific Grove Golf Links**

77 Asilomar Blvd.  
Pacific Grove, CA 93950  
Thursday, March 23, 2023  
8:00 AM First Tee Time

**Longest Drive  
One Women's  
and One Men's  
Prize**

**Closest to the  
Pin  
One Women's  
and One Men's  
Prize**

**Sponsored by GSRMA**

# California Association of Public Cemeteries

Annual Golf Tournament

**Pacific Grove Golf Links**  
77 Asilomar Blvd.  
Pacific Grove, CA 93950  
www.playpacificgrove.com  
(831) 375-1313

Thursday, March 23, 2023  
8:00 AM (1st Tee Time)

It is time for all CAPC golfers to get ready for your yearly golf outing. We will be playing on the beautiful course in Pacific Grove.

**The cost for green fees and a shared cart is \$ 90.00 per person. All payments must be received by February 24, 2023.** Please fill out the registration form and make checks payable to:

California Association of Public Cemeteries  
P.O. Box 119  
San Jacinto, CA 92581  
(888) 344-9858

Notes:

This course is very busy and is adamant about an accurate head count. We will not be able to add players at the last minute, so if you are interested in playing please be prompt with your registration. This course requires proper golf attire – collared shirt and no short shorts.

Onsite:

The Grill at Point Pinos Restaurant is open daily 8am - 3pm (per website)  
Cafe -Expresso Bar to grab and go is open daily 7am - 3pm (per website)

Please visit them at [www.grillatpointpinos.com](http://www.grillatpointpinos.com)

(Please cut and enclose with check)

-----  
CAPC Golf Tournament – March 23, 2023 at the Pacific Grove Golf Links

\_\_\_\_\_ Golf @ \$ 90.00 Each

**Total enclosed:** \_\_\_\_\_

Golfers Name(s)

Cemetery District or Vendor

\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

Please note any golfers you would like to have included in your foursome (no guarantees).

\_\_\_\_\_  
\_\_\_\_\_

# **California Association of Public Cemeteries**

## **Trustee of the Year Award**

### **Manager of the Year Award**

Nominations are being accepted by the CAPC Awards Committee for selection of the "Trustee and Manager of the Year" for 2023.

#### **Trustee of the Year**

This award will be given to a trustee who has been nominated by his/her district for exceptional performance on behalf of the cemetery district. A committee appointed by the president will select the winning recipient.

#### **Areas to be considered for the award are:**

- Commitment of time and energy to working with others to improve and enhance their district.
- Developed new approaches, methods and systems to improve organizational effectiveness.
- Demonstrated imagination and creativity in finding solutions to problems and fostered changes that have benefitted their district.
- Developed a plan to achieve excellence within their district.

The nominee shall have served on a board of a public cemetery district for not less than four (4) years or one (1) full term, and is currently serving as a Trustee or recently retired within the past 12 months.

Any CAPC member district may submit a nominee from their district for consideration by the Awards Committee.

#### **Manager of the Year**

This award will be given to a manager who has been nominated by his/her district for innovative costs savings, beautification of the cemetery, etc.... A committee appointed by the president will select the winning recipient.

#### **Areas to be considered for the award are:**

- A manager who has gone above their job description to understand and meet the immediate as well as underlying needs of their district.
- Act as role model, displaying a positive and professional image at all times.
- Does whatever it takes to accomplish a task.
- Demonstrates a commitment to providing a positive, supportive and welcoming environment, bringing out the best in other individuals recognizing the potential in every employee.
- An individual that understands the financial concerns of their cemetery district and continually has ideas to keep expenses down, and at the same time allow their district to continue to improve, grow and expand.

The nominee shall have served as a district manager for not less than two (2) years, and is currently serving as a Manager or recently retired within the past 12 month.

Any CAPC member district may submit a nominee from their district for consideration by the Awards Committee.

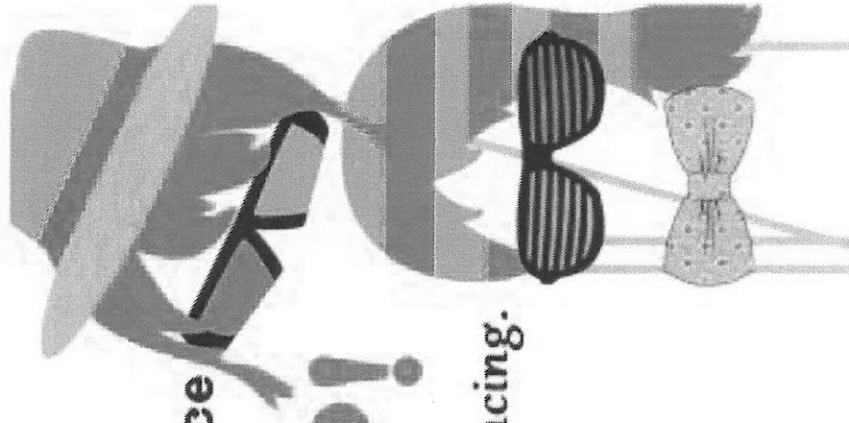
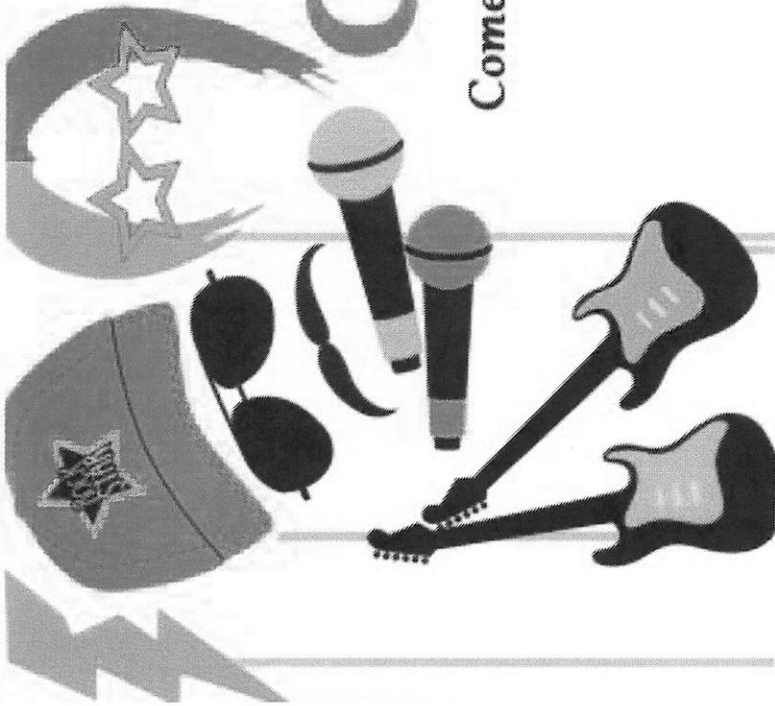
**Nominations and supporting material must be received by the CAPC office no later than January 20, 2023.**

# CAPC

65th Annual Conference

# Oh SNAP!

Come join the fun with music & dancing.



Grab a Prop

& Strike a

# POSE



Friday, March 24th, 2023

7pm - 9pm



Temecula Public Cemetery District  
41911 C Street  
Temecula CA, 92592

FAMILY FOLLOW-UP SURVEY

We would like to extend our deepest sympathy to you and your family during this difficult time. Thank you for entrusting Temecula Public Cemetery District with your loved one and giving us the honor and opportunity to serve your entire family. In our continuing efforts to improve the quality of our professional service to others, we are requesting your assistance in providing information that is vital to us. Your cooperation is sincerely appreciated.

Name of deceased: Richard Shafer  
Name of person completing this form: SHARON Shafer wife

Why did you choose Temecula Public Cemetery District?

- |  |  |
|--|--|
| <input type="checkbox"/> Recommended by clergy                   | <input type="checkbox"/> Reputation                          |
| <input type="checkbox"/> Recommended by friend / family member   | <input checked="" type="checkbox"/> Location                 |
| <input checked="" type="checkbox"/> Previously served our family | <input type="checkbox"/> Price                               |
| <input type="checkbox"/> Had pre-arrangement with funeral home   | <input type="checkbox"/> Recommended by Funeral Staff member |
| <input type="checkbox"/> Other                                   |  |

Beautiful place in city we lived & raised our family for 32 yrs.

Did our staff provide all the <sup>not</sup> professional services and assistance that you needed?  
 Yes  No, Comment: \_\_\_\_\_

Were all members of the staff courteous, helpful and available when you needed them?  
 Yes  No, Comment: Cindi Beaudet WAS rude on phone every time and disrespectful to me at Board Meeting

Is there an employee you would like to comment on?  
 No  Yes, Comment: Joe Sam's Very polite, helpful and sensitive to my loss.

I am sure Cindi is a nice person but I have now worked with her 3 times. She has always been the same. My mother's burial 5 1/2 yrs ago, my father's 4 1/2 yrs ago & now my husband's. She never gives sympathy for your loss, or seems to not understand.

Temecula Public Cemetery District  
41911 C Street  
Temecula CA, 92592

Was the pricing of all the products and services fully explained during your arrangement?

Yes  No, Comment: \_\_\_\_\_

Did you feel (please select one):

- Prices were lower than expected  
 Prices were reasonable  
 Prices were higher than expected

Were there any products or services not offered that you would have liked to have purchased?

Yes  No, Comment: \_\_\_\_\_

How would you rate your overall experience and satisfaction with the Temecula Public Cemetery District?

(5 = very good and 1=not good at all)

\_\_\_ 5 \_\_\_ 4 \_\_\_ 3  2 \_\_\_ 1

Would you recommend Temecula Public Cemetery District?

\_\_\_ Yes  No, Comment: No more space

Are you aware that we are a Special District Cemetery?

\_\_\_ Yes  No Don't understand this.

Would you like more information regarding Special District Cemeteries?

\_\_\_ Yes, Please  No, Thank you not now

Additional comments or suggestions:

cont.

and very emotionally upset over loss. She is not nice when has to repeat what she said.

She should not be in a customer service position in my opinion after years myself in training of good customer service.

She definitely knows the business well but needs help in communicating respect, sincerity, & kindness.

10-20-22

Dear Craig Davis,

I was so happy to get approval from the board & lawyer board to have Rick & myself rest at Jamezula Cemetery. The marker just came in & will be set soon!

I have wanted to fill out this survey because I figured Cindi would be the one opening it & then it would get trashed.

I hope you don't mind me sending it to you personally. You'll know why after reading the survey.

I wanted to thank you for making me & my daughter feel comfortable and at ease at the board meeting till Cindi started her rude & disrespectful attitude.

Please get this to the board or someone who can do.

something in making  
Cindi aware + accountable  
for her disrespect + rudeness  
I'm sure I'm not the  
only one who has  
felt this.

Thank you  
Sincerely  
Sharon Skaper

951 526-7167  
39677 Vanderbilt Ave  
Murrieta, CA 92563

by the way moving  
back to Temecula  
soon!



U.S. BANCORP SERVICE CENTER  
P. O. Box 6343  
Fargo, ND 58125-6343

TEMECULA PUBLIC CEMETERY DIST

ACCOUNT NUMBER 4246-0470-0108-1394  
STATEMENT DATE 09-22-22  
TOTAL ACTIVITY \$ 4,170.55

000020337 01 SP 0.570 106481557719595 P

CINDI L BEAUDET  
TEMECULA CEMETERY  
41911 C ST  
TEMECULA CA 92592-3053

"MEMO STATEMENT ONLY"  
DO NOT REMIT PAYMENT

*Receipts are attached  
Other than the Bk2kz charge for 589.69,  
all charges appear reasonable.*

*Indaban*

*10/12/22*

We certify that all purchases listed on this statement, unless annotated to the contrary, are true, correct and for official business only. Payment is authorized.

Cardholder Date Approver Date

NEW ACCOUNT ACTIVITY

POST DATE	TRAN DATE	TRANSACTION DESCRIPTION	REFERENCE NUMBER	MCC	AMOUNT
08-25	08-23	MARRIOTT DESERT SPR F& PALM DESERT CA M23748 ARRIVAL: 08-23-22	24692162238100017805214	3509	72.97 ✓
08-29	08-22	MARRIOTT DESERT SPRING PALM DESERT CA M23984 ARRIVAL: 08-22-22	24692162238101662566075	3509 *	589.69 ✓ CO
08-29	08-25	MARRIOTT DESERT SPRING PALM DESERT CA M23936 ARRIVAL: 08-25-22	24692162238101662567107	3509	200.81 ✓ CO
08-29	08-25	MARRIOTT DESERT SPRING PALM DESERT CA M23937 ARRIVAL: 08-25-22	24692162238101662567115	3509	353.42 ✓ CO
08-29	08-22	MARRIOTT DESERT SPRING PALM DESERT CA M23911 ARRIVAL: 08-22-22	24692162238101662568006	3509	353.42 ✓ CO
08-29	08-26	MARRIOTT DESERT SPRING 895-980-4000 CA M23917 ARRIVAL: 08-26-22	24692162238101662568063	3509	336.32 ✓ CO
09-02	09-01	SMART AND FINAL 489 MURRIETA CA PUR ID: 6801 TAX: 0.00	24231682245837000024998	5411	46.65 ✓
09-05	09-02	1909 951-2521909 CA PUR ID: 1394 TAX: 0.00	24027312247018021705679	5812	93.68 ✓
09-05	09-02	IN *AEROSURF-SPEEDBAND 951-3049986 CA PUR ID: AQXBPYSX TAX: 0.00	24692162245106855369816	7372	199.95 ✓
09-12	09-10	Z CAFE BONSALL CA	24717052254162549329197	5813	59.10 ✓

*(\$236.22)*

Default Accounting Code:

CUSTOMER SERVICE CALL  800-344-5696	ACCOUNT NUMBER 4246-0470-0108-1394		ACCOUNT SUMMARY	
		STATEMENT DATE 09-22-22	DISPUTED AMOUNT \$ .00	PREVIOUS BALANCE
			PURCHASES & OTHER CHARGES	\$4,170.55
SEND BILLING INQUIRIES TO:  C/O U.S. BANCORP SERVICE CENTER, INC U.S. BANK NATIONAL ASSOCIATION P.O. BOX 6335 FARGO, ND 58125-6335	AMOUNT DUE  \$ 0.00  DO NOT REMIT		CASH ADVANCES	\$ .00
			CASH ADVANCE FEE	\$ .00
			CREDITS	\$ .00
			TOTAL ACTIVITY	\$4,170.55

## Cindi Beaudet

---

**From:** Tom Carcelli (civTEC) <tec@civtec.net>  
**Sent:** Thursday, October 13, 2022 9:46 AM  
**To:** 'Tamara McClory'; Cindi Beaudet  
**Cc:** 'Craig Sensenbach'  
**Subject:** RE: Easement

Good Morning

Unless we know who and why those stakes were set, I would not consider them indicative of anything (could be marking underground lines or something else).

And I do not find any evidence of an easement along this edge of the property in the files previously sent. If there is an easement, it would show on a current Prelim. Title Report.

The tree trunks do not show on the topo. The topo shows the southerly edge of the dirt road about 6 to 8-feet north of the property line, but again this is a general estimate. The best way to be sure where the trees land relative to the property line is to have a surveyor stake the property line along this edge.

Please let me know if you have any questions, comments or need anything else.

Thank you.

Tom

Thomas E. Carcelli, P.E., Q.S.D.

999 Corporate Dr., Suite 100

Ladera Ranch, CA 92694

e: tec@civtec.net <mailto:tec@civtec.net>

p: 949.463.8822

From: Tamara McClory <Tamara@rjmdesigngroup.com>

Sent: Thursday, October 13, 2022 9:07 AM

To: Cindi Beaudet <Cindi@temeculacemetery.org>

Cc: tec@civtec.net; Craig Sensenbach <craig@rjmdesigngroup.com>

Subject: RE: Easement

Hi Cindi,

Thanks for the photos. It's still pretty tough to tell what's what. Are the stakes from the survey crew or were they there previously?

Based on the survey file, it looks like the dirt road is about 2'-2.5' wide and the edge of the dirt road varies from 2'-4.5' away from the lot / property line. Those dimensions look like the first picture you sent, which makes me think the eucalyptus trees are on your property, planted right at the property line. The chainlink fence in the photos is not evident on the survey, which also makes me think it's on the center of the property line.

Overall, I am unsure what the stakes represent. Maybe Tom can weigh in? Tom, Cindi is trying to decipher whether the eucalyptus trees east of Dottie Ct are on her property or the neighbors. There was one portion of fence that was picked up on the survey (see screenshot below, lot line is yellow and fence line is in yellow)... .... which follows my above thinking.

Thanks for your help.

Tamara McClory

Associate Landscape Architect, LLA #6144

Office: 949.493.2600

Email: [tamara@rjmdesigngroup.com](mailto:tamara@rjmdesigngroup.com) <<mailto:tamara@rjmdesigngroup.com>>

Website: [www.RJMdesigngroup.com](http://www.RJMdesigngroup.com) <<http://www.rjmdesigngroup.com/>>

vcard <<https://rjmdesigngroup.com/ameyer/>> | Instagram  
<[https://www.instagram.com/rjm\\_design/?hl=en](https://www.instagram.com/rjm_design/?hl=en)> | Facebook  
<<https://www.facebook.com/RJM-Design-Group-Inc-142886449072519>> | YouTube  
<<https://www.youtube.com/user/rjmdesigngroupvideo>> | Map  
<<https://www.google.com/maps/place/RJM+Design+Group+Inc/@33.504018,-117.664224,15z/data=!4m5!3m4!1sox0:0x51c1c2b5739c34cd!8m2!3d33.5040333!4d-117.6641711>>



From: Cindi Beaudet <Cindi@temeculacemetery.org <mailto:Cindi@temeculacemetery.org>  
>  
Sent: Thursday, October 13, 2022 7:24 AM  
To: Tamara McClory <Tamara@rjmdesigngroup.com  
<mailto:Tamara@rjmdesigngroup.com> >  
Subject: FW: Easement

Good morning-

The first picture is going east along Dottie CT, That marker is the beginning of the second property, the last picture is the end of their property. (That picture was facing west.)

It looks as if it runs along or in the middle of a easement, I can't image our property goes smack to their fence line.

From: Cindi Beaudet <Cindi@temeculacemetery.org <mailto:Cindi@temeculacemetery.org>  
>  
Sent: Thursday, October 13, 2022 7:20 AM  
To: Cindi Beaudet <Cindi@temeculacemetery.org <mailto:Cindi@temeculacemetery.org> >  
Subject: Easement

Sent from my iPhone Cindi Beaudet

**TEMECULA PUBLIC CEMETERY DISTRICT**  
*Budgetary Comparison Schedule – General Fund*  
*For the Fiscal Year Ended June 30, 2022*

	<u>Final Budget</u>	<u>Actual</u>	<u>Variance Positive (Negative)</u>
<b>Revenues:</b>			
Property taxes	\$ 726,800	\$ 754,586	\$ 27,786
Redevelopment taxes	40,000	97,865	57,865
Charges for services	178,200	324,630	146,430
Investment earnings	10,000	(23,665)	(33,665)
Other income	-	414	414
<b>Total revenues</b>	<u>955,000</u>	<u>1,153,830</u>	<u>198,830</u>
<b>Expenditures:</b>			
Current:			
Salaries and wages	301,950	287,288	14,662
Employee benefits	121,466	77,136	44,330
Materials and services	259,150	199,268	59,882
* <u>Capital outlay</u>	<u>351,500</u>	* <u>105,874</u>	* <u>245,626</u>
<b>Total expenditures</b>	<u>1,034,066</u>	<u>669,566</u>	<u>364,500</u>
<b>Excess of revenues over expenditures</b>	<u>\$ (79,066)</u>	484,264	<u>\$ 563,330</u>
<b>Fund balance:</b>			
Beginning of year		<u>1,216,168</u>	
End of year		<u>\$ 1,700,432</u>	

**Temecula Public Cemetery District**  
**Balance Sheet**  
 As of October 31, 2022

	Oct 31, 22	Oct 31, 21	\$ Change
<b>ASSETS</b>			
<b>Current Assets</b>			
<b>Checking/Savings</b>			
101100 · US Bank Checking	71,702.68	90,564.05	
101200 · US Bank Payroll	2,651.20	1,710.31	
101300 · US Wash Account	8,655.77	5,006.28	
101100C · Cash -Accumulative Outlay Fund	1,688,640.35	2,932,442.51	
101100E · Cash - Endowment Fund	152,238.25	76,311.65	
1011004 · Cash - Retirement	180.00	180.00	
101100G · Cash - General	1,314,047.74	879,425.20	
<b>Total Checking/Savings</b>	<b>3,238,115.99</b>	<b>3,985,640.00</b>	<b>-747,524.01</b>
<b>Other Current Assets</b>			
<b>102200 · Stifel Investments</b>			
102210 · Stifel Endowment Care	2,301,193.42	2,492,455.29	
102220 · Stifel Endowment Interest	869,768.63	875,189.67	
<b>Total 102200 · Stifel Investments</b>	<b>3,170,962.05</b>	<b>3,367,644.96</b>	<b>-196,682.91</b>
112011 · Inventory Asset	183,438.00	194,527.00	
102100 · Taxes Receivable	23,543.09	12,235.99	
<b>116100 · Interest Receivable</b>			
116100P · Interest Receivable - End Prin	11,943.28	10,015.48	
116100I · Interest Receivable - End Int	5,372.76	4,995.21	
<b>Total 116100 · Interest Receivable</b>	<b>17,316.04</b>	<b>15,010.69</b>	
117000 · PrePaid Expenses	26,389.47	17,935.15	
<b>Total Other Current Assets</b>	<b>3,421,648.65</b>	<b>3,607,353.79</b>	
<b>Total Current Assets</b>	<b>6,659,764.64</b>	<b>7,592,993.79</b>	<b>-933,229.15</b>
<b>Fixed Assets</b>			
191650 · Intangible Assets	24,470.00	24,470.00	
198950 · Accum Depr - Software	-4,893.99	-3,262.66	
191000 · Future Cemetery Property	3,467,644.98	2,795,379.49	
191100 · Buildings and Improvements	318,605.07	318,605.07	
191400 · Structures and Improvements	363,678.03	363,678.03	
191500 · Equipment	188,322.08	188,322.08	
191700 · Non-Depreciable Assets	77,561.02	77,561.02	
191800 · Grounds Improvements	22,079.50	22,079.50	
191900 · Paving 2015	143,560.00	143,560.00	
198100 · Accumulated Depreciation - Bldg	-166,004.34	-147,187.18	
198400 · Accumulated Depr - Struct/Imp	-255,214.97	-237,860.30	
198500 · Accum Depr - Equipment	-163,194.07	-159,171.68	
198800 · Accum Depr- Grnd Imp	-5,473.71	-4,236.84	
198900 · Accum Depr-Pav 15	-51,238.02	-44,060.02	
<b>Total Fixed Assets</b>	<b>3,959,901.58</b>	<b>3,337,876.51</b>	<b>622,025.07</b>
<b>TOTAL ASSETS</b>	<b>10,619,666.22</b>	<b>10,930,870.30</b>	<b>-311,204.08</b>

**LIABILITIES & EQUITY**

**Temecula Public Cemetery District**  
**Balance Sheet**  
 As of October 31, 2022

	Oct 31, 22	Oct 31, 21	\$ Change
<b>Liabilities</b>			
<b>Current Liabilities</b>			
<b>Accounts Payable</b>			
201100 · Accounts Payable	899.84	5,428.78	
<b>Total Accounts Payable</b>	899.84	5,428.78	
<b>Other Current Liabilities</b>			
212200 · Accrued Vacation Pay	14,771.16	19,085.14	
<b>Total Other Current Liabilities</b>	14,771.16	19,085.14	
<b>Total Current Liabilities</b>	15,671.00	24,513.92	
<b>Total Liabilities</b>	15,671.00	24,513.92	-8,842.92
<b>Equity</b>			
36001 · Net Investments in Cap Assets	3,309,357.00	3,322,836.00	
36002 · Endowment Care Corpus	2,635,110.00	2,454,556.00	
36003 · Endowment Care Earnings	821,514.00	807,065.00	
36004 · Unrestricted Earnings ACO Fund	2,930,348.00	1,874,732.00	
36005 · Unrestricted Earnings Gen Fund	882,307.00	882,307.00	
308100 · General Reserve	3,634.00	198,834.00	
325100G · Unreserved Fund Balance - Gen	280,455.17	657,426.04	
390000 · Retained Earnings	542,855.98	661,335.13	
Net Income	-801,585.93	47,265.21	
<b>Total Equity</b>	10,603,995.22	10,906,356.38	-302,361.16
<b>TOTAL LIABILITIES &amp; EQUITY</b>	<b>10,619,666.22</b>	<b>10,930,870.30</b>	<b>-311,204.08</b>

# Temecula Public Cemetery District

## Profit & Loss Budget Performance

October 2022

	<u>Jul - Oct 22</u>	<u>Annual Budget</u>
Ordinary Income/Expense		
Income		
700001 · Property Taxes		
700020 · Prop Tax Current Secured	0.00	696,200.00
701020 · Prop Tax Current Unsecured	30,853.23	25,000.00
703000 · Prop Tax Prior Unsecured	547.33	0.00
704000 · Prop Tax Curr Supplemental	3,412.21	9,600.00
705000 · Prop Tax Prior Supplemental	952.59	4,500.00
706000 · Teeter Settlement	0.00	10,000.00
707000 · RDV Apportionment	0.00	40,000.00
752800 · CA-Homeowners Tax Relief	0.00	4,000.00
770100 · Property Tax - SBE	0.30	10,500.00
770102 · Other Taxes	0.00	200.00
<b>Total 700001 · Property Taxes</b>	<b>35,765.66</b>	<b>800,000.00</b>
740020 · Interest and Dividend Income		
740024 · Dividend Income - Stifel	3,396.30	5,000.00
740023 · Interest - Stifel	24,544.47	68,900.00
740020G · Interest on General Fnd at Cnty	2,549.53	5,000.00
740020E · Interest on Endow Fnd at County	231.99	100.00
740020O · Interest on ACO at County	4,611.57	10,000.00
<b>Total 740020 · Interest and Dividend Income</b>	<b>35,333.86</b>	<b>89,000.00</b>
770001 · Other Revenue		
777700 · Non-Resident Fee Income	12,000.00	0.00
770100E · Endowment	21,902.00	145,000.00
777030 · Marker Setting	5,600.00	18,000.00
777031 · Niche Engraving	980.00	3,000.00
777040 · Open, Close Fees	12,400.00	37,000.00
777520 · Sale of Lots	5,898.00	56,800.00
777530 · Cremation	19,700.00	17,000.00
777600 · Cenotaph	0.00	300.00
777650 · Graveside Service	6,700.00	16,000.00
780160 · Vaults, Flower Vases, etc.	7,177.69	16,000.00
781360 · Other Misc. Revenue	600.00	400.00
<b>Total 770001 · Other Revenue</b>	<b>92,957.69</b>	<b>309,500.00</b>
<b>Total Income</b>	<b>164,057.21</b>	<b>1,198,500.00</b>
<b>Gross Profit</b>	<b>164,057.21</b>	<b>1,198,500.00</b>

**Temecula Public Cemetery District**  
**Profit & Loss Budget Performance**  
 October 2022

	<b>Jul - Oct 22</b>	<b>Annual Budget</b>
<b>Expense</b>		
<b>510000 · Salaries and Employee Benefits</b>		
<b>510040T · Regular Salaries.</b>		
510040 · Regular Salaries	78,548.71	319,000.00
510330 · Year End Bonuses	0.00	6,500.00
510335 · Hazard Pay	0.00	0.00
515100 · Life Insurance Policy	142.56	450.00
<b>Total 510040T · Regular Salaries.</b>	<b>78,691.27</b>	<b>325,950.00</b>
<b>510320T · Temporary Salaries.</b>		
510320 · Temporary Salaries	0.00	0.00
510320T · Temporary Salaries. - Other	0.00	0.00
<b>Total 510320T · Temporary Salaries.</b>	<b>0.00</b>	<b>0.00</b>
<b>513000T · Retirement - Miscellaneous</b>		
518000 · Employer Contributions-457	5,497.09	23,500.00
551000 · Employee Contributions	0.00	0.00
<b>Total 513000T · Retirement - Miscellaneous</b>	<b>5,497.09</b>	<b>23,500.00</b>
<b>513120T · Retirement - Social Security</b>		
513120 · Social Security	5,000.20	21,500.00
513140 · Medicare Tax	1,169.46	5,000.00
<b>Total 513120T · Retirement - Social Security</b>	<b>6,169.66</b>	<b>26,500.00</b>
<b>515080T · Health Insurance (eer share)</b>		
515081 · Health Insurance	13,526.11	52,000.00
515082 · Vision Insurance	201.65	800.00
515083 · Dental Insurance	1,144.48	3,200.00
<b>Total 515080T · Health Insurance (eer share)</b>	<b>14,872.24</b>	<b>56,000.00</b>
<b>515260T · Unemployment Insurance</b>		
517000 · Workers Comp Insurance	6,296.79	22,000.00
515060 · State Unemployment Ins EDD	0.00	1,500.00
513130 · CA SUI	-94.86	2,000.00
515260T · Unemployment Insurance - Other	0.00	0.00
<b>Total 515260T · Unemployment Insurance</b>	<b>6,201.93</b>	<b>25,500.00</b>
<b>Total 510000 · Salaries and Employee Benefits</b>	<b>111,432.19</b>	<b>457,450.00</b>
<b>520000 · Services and Supplies</b>		
<b>529540T · Utilities</b>		
520845 · Trash	1,454.25	4,400.00
529500 · Electricity	2,435.21	6,000.00
<b>Total 529540T · Utilities</b>	<b>3,889.46</b>	<b>10,400.00</b>

## Temecula Public Cemetery District Profit & Loss Budget Performance October 2022

	<u>Jul - Oct 22</u>	<u>Annual Budget</u>
<b>524520T · Administrative Expenses</b>		
518160 · Board Stipend	2,100.00	11,250.00
520115 · Uniforms - Replacement Clothing	903.25	3,600.00
520230 · Cellular Phone	424.70	3,300.00
520705 · Food	30.90	1,200.00
520930 · Insurance - Liability	6,824.60	20,500.00
523100 · Memberships	65.00	3,600.00
523290 · Bank Charges	88.00	300.00
523621 · Subscriptions	0.00	500.00
523660 · Computer Service	1,126.07	7,000.00
523700 · Office Supplies	0.00	1,000.00
523720 · Photocopies	701.44	3,000.00
523760 · Postage/Mailing	275.00	1,000.00
523840 · Computer Equip/Software/T1	824.16	2,500.00
524520 · County Journal Recording	618.78	2,400.00
524530 · Storage Fees	470.00	1,400.00
524540 · Payroll Processing Services	1,310.14	4,100.00
524560 · Auditing	5,000.00	10,500.00
524561 · Accounting	3,478.75	9,500.00
524566 · Temp for e-File	0.00	9,000.00
524800 · Drug Testing/Pre-Employment	0.00	400.00
525025 · Legal - General Counsel	225.00	30,000.00
525030 · Paychex HR Support	1,781.32	5,400.00
526420 · Advertising	0.00	1,800.00
527280 · Awards/Recognition	0.00	300.00
527880 · Training/ Staff	250.00	2,500.00
528140 · Conferences and Meetings	5,699.78	30,000.00
528980 · Meals	392.93	2,000.00
528990 · Semi-Annual Team Dinner	2,461.10	5,000.00
529040 · Private Mileage Reimbursement	0.00	2,500.00
529050 · Website	200.00	800.00
529550 · Water	249.04	1,600.00
<b>Total 524520T · Administrative Expenses</b>	<b>35,499.96</b>	<b>177,950.00</b>



## Temecula Public Cemetery District Profit & Loss Budget Performance October 2022

	<u>Jul - Oct 22</u>	<u>Annual Budget</u>
<b>524500T · Operational Expenses.</b>		
521420 · Maint-Field Equipment	1,657.76	15,000.00
522310 · Maint-Building Improvements	0.00	2,500.00
522320 · Maint - Grounds	5,342.69	18,000.00
522360 · Maintenance-Extermination	2,092.00	6,800.00
523250 · Repurchase	0.00	2,650.00
523800 · Engraving Expense	620.00	3,000.00
525320 · Security Guard Services	0.00	400.00
525600 · Security	915.88	7,500.00
527100 · Fuel	1,167.22	4,800.00
527180 · Operational Supplies	3,592.10	13,000.00
528020 · Inventory	7,400.15	8,500.00
<b>Total 524500T · Operational Expenses.</b>	<b>22,787.80</b>	<b>82,150.00</b>
<b>Total 520000 · Services and Supplies</b>	<b>62,177.22</b>	<b>270,500.00</b>
<b>530000 · Other Charges</b>		
530100 · Miscellaneous non-operating exp	361.84	4,000.00
<b>Total 530000 · Other Charges</b>	<b>361.84</b>	<b>4,000.00</b>
<b>540000 · Capital Assets</b>		
<b>542060T · Cemetery Grounds</b>		
542040 · - Buildings, Capital Projects	0.00	100,000.00
542060 · Improvements -Building	0.00	6,000.00
542065 · Tree Renovaton	0.00	7,500.00
548300 · Office Renovation	0.00	6,000.00
<b>Total 542060T · Cemetery Grounds</b>	<b>0.00</b>	<b>119,500.00</b>
<b>540040T · Land, Purchase of Land</b>		
540042 · Future Cemetery Property	703,812.44	1,600,000.00
<b>Total 540040T · Land, Purchase of Land</b>	<b>703,812.44</b>	<b>1,600,000.00</b>
<b>546020T · Equipment, etc</b>		
542070 · Well Motor	0.00	60,000.00
546020 · Equipment - Automotive	0.00	17,000.00
546240 · Mapping Software	2,040.00	6,000.00
<b>Total 546020T · Equipment, etc</b>	<b>2,040.00</b>	<b>83,000.00</b>
<b>Total 540000 · Capital Assets</b>	<b>705,852.44</b>	<b>1,802,500.00</b>
551100G · Contrib to Other Funds - Gen	0.00	145,100.00
551100E · Contrib to Other Funds - Endow	0.00	321,450.00
551100C · Cont from Other Funds - ACO	-701,240.87	-1,802,500.00
<b>Total Expense</b>	<b>178,582.82</b>	<b>1,198,500.00</b>
<b>Net Ordinary Income</b>	<b>-14,525.61</b>	<b>0.00</b>

Temecula Public Cemetery District  
**Profit & Loss Budget Performance**  
October 2022

	<u>Jul - Oct 22</u> <u>Annual Budget</u>	
Other Income/Expense		
Other Income		
731000 - Realized Gain (Loss) on Invest	352.51	0.00
731100 - Unrealized Gain (Loss) on Invest	-86,171.96	0.00
Total Other Income	-85,819.45	0.00
Net Other Income	-85,819.45	0.00
Net Income	<u>-100,345.06</u>	<u>0.00</u>

1 1 1 D369378 SSNH01013  
**TEMECULA PUBLIC CEMETERY**  
**DIST ENDOWMENT INTEREST**  
**41911 C ST**  
**TEMECULA CA 92592-3053**

*Your Financial Advisor (LU04):*  
 SANDRA HEDSTROM WHEELER  
 Telephone: (805) 783-2921

*Office Serving Your Account:*  
 4460 BROAD STREET  
 SUITE 210  
 SAN LUIS OBISPO, CA 93401

**PRIMARY INVESTMENT OBJECTIVE: Income**  
**RISK TOLERANCE: Moderate**

For a full definition of this objective and risk tolerance, including the use of margin, please see [www.stifel.com](http://www.stifel.com), **IMPORTANT DISCLOSURES**, or contact your Financial Advisor. If you have any questions concerning your investment objective or risk tolerance, or wish to make a change, please contact your Financial Advisor or the Branch Manager for this office.

**TRADING TAX LOT RELIEF METHOD: First In, First Out**  
**INVESTOR UPDATE**

At July 31, 2022, Stifel, Nicolaus & Company, Incorporated had net capital of \$623,044,295 or \$594,559,083 in excess of the minimum requirement of \$28,485,212. The June 30, 2022 Statement of Financial Condition is available at no charge by calling (800) 488-0970 or logging onto [www.stifel.com](http://www.stifel.com).

**ACCOUNT PROTECTION**

Stifel, Nicolaus & Company, Incorporated provides up to \$150 million of coverage for securities held in client accounts, of which \$1.15 million may be in cash deposits. Ask your Financial Advisor for more details.

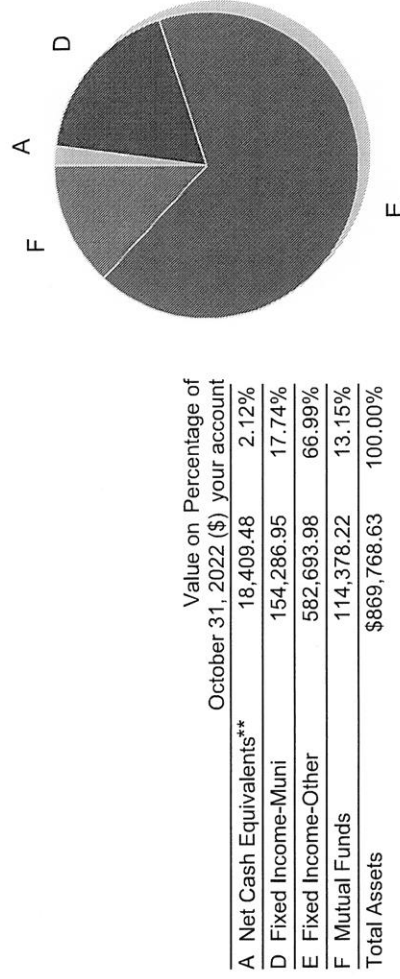
Thank you for allowing Stifel to serve you. In order to protect your rights, including rights under the Securities Investor Protection Act (SIPA), please promptly report, in writing, any inaccuracies or discrepancies in this account or statement to the Compliance Department of Stifel at the address below. If you have any questions regarding your account or this statement, please contact your Financial Advisor or the Branch Manager for this office. For additional information regarding your Stifel account, please refer to the current Stifel Account Agreement and Disclosure Booklet, which is available at [www.stifel.com/disclosures/account-agreement](http://www.stifel.com/disclosures/account-agreement).

STIFEL PRESTIGE® ACCOUNT STATEMENT

PORTFOLIO SUMMARY	October 31	September 30
Net Cash Equivalents **	18,409.48	7,463.73
Net Portfolio Assets held at Stifel	851,359.15	855,311.64
Net Portfolio Assets not held at Stifel		
<b>Net Portfolio Value</b>	<b>\$869,768.63</b>	<b>\$862,775.37</b>
YOUR CHANGE IN PORTFOLIO VALUE	October 31	September 30
Net Cash Flow (Inflows/Outflows) <sup>2</sup>	8,124.51	2,624.80
Securities Transferred In/Out		
Income and Distributions	3,019.36	980.20
Change in Securities Value	-4,150.61	-16,274.39
<b>Net Change in Portfolio Value</b>	<b>\$6,993.26</b>	<b>-\$12,669.39</b>

\*\* See the Stifel Insured Bank Deposit Program Disclosure Statements for additional information.  
<sup>2</sup> Does not include cost or proceeds for buy or sell transactions.

**YOUR ASSET SUMMARY**



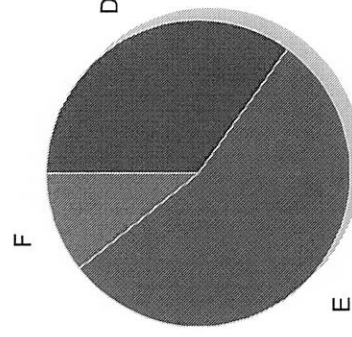
## STIFEL PRESTIGE® ACCOUNT STATEMENT

PORTFOLIO SUMMARY	October 31	September 30
Net Cash Equivalents **	114.75	2,754.53
Net Portfolio Assets held at Stifel	2,301,078.67	2,309,556.95
Net Portfolio Assets not held at Stifel		
<b>Net Portfolio Value</b>	<b>\$2,301,193.42</b>	<b>\$2,312,311.48</b>
YOUR CHANGE IN PORTFOLIO VALUE	October 31	September 30
Net Cash Flow (Inflows/Outflows) <sup>2</sup>	-8,124.51	-2,624.80
Securities Transferred In/Out		
Income and Distributions	5,918.46	5,986.50
Change in Securities Value	-8,912.01	-42,906.75
<b>Net Change in Portfolio Value</b>	<b>-\$11,118.06</b>	<b>-\$39,545.05</b>

\*\* See the Stifel Insured Bank Deposit Program Disclosure Statements for additional information.  
<sup>2</sup> Does not include cost or proceeds for buy or sell transactions.

### YOUR ASSET SUMMARY

	October 31, 2022 (\$)	Percentage of your account
A Net Cash Equivalents**	114.75	0.00%
D Fixed Income-Muni	805,280.30	34.99%
E Fixed Income-Other	1,250,395.32	54.34%
F Mutual Funds	245,403.05	10.66%
<b>Total Assets</b>	<b>\$2,301,193.42</b>	<b>100.00%</b>



1 1 1 D369377 SSNH01013  
**TEMECULA PUBLIC CEMETERY**  
**DIST ENDOWMENT PRINCIPAL**  
**41911 C ST**  
**TEMECULA CA 92592-3053**

*Your Financial Advisor (LU04):*  
**SANDRA HEDSTROM WHEELER**  
 Telephone: (805) 783-2921

*Office Serving Your Account:*  
 4460 BROAD STREET  
 SUITE 210  
 SAN LUIS OBISPO, CA 93401

### PRIMARY INVESTMENT OBJECTIVE: Income

### RISK TOLERANCE: Moderate

For a full definition of this objective and risk tolerance, including the use of margin, please see [www.stifel.com](http://www.stifel.com), **IMPORTANT DISCLOSURES**, or contact your Financial Advisor. If you have any questions concerning your investment objective or risk tolerance, or wish to make a change, please contact your Financial Advisor or the Branch Manager for this office.

### TRADING TAX LOT RELIEF METHOD: First In, First Out

### INVESTOR UPDATE

At July 31, 2022, Stifel, Nicolaus & Company, Incorporated had net capital of \$623,044,295 or \$594,559,083 in excess of the minimum requirement of \$28,485,212. The June 30, 2022 Statement of Financial Condition is available at no charge by calling (800) 488-0970 or logging onto [www.stifel.com](http://www.stifel.com).

### ACCOUNT PROTECTION

Stifel, Nicolaus & Company, Incorporated provides up to \$150 million of coverage for securities held in client accounts, of which \$1.15 million may be in cash deposits. Ask your Financial Advisor for more details.

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# STIFEL

1 1 1 D369286 SSNH02112

TEMECULA PUBLIC CEMETERY  
DIST ENDOWMENT PRINCIPAL  
41911 C ST  
TEMECULA CA 92592-3053

Your Financial Advisor (LU04):  
SANDRA HEDSTROM WHEELER  
Telephone: (805) 783-2921

Office Serving Your Account:  
4460 BROAD STREET  
SUITE 210  
SAN LUIS OBISPO, CA 93401

## PRIMARY INVESTMENT OBJECTIVE: Income

### RISK TOLERANCE: Moderate

For a full definition of this objective and risk tolerance, including the use of margin, please see [www.stifel.com](http://www.stifel.com), IMPORTANT DISCLOSURES, or contact your Financial Advisor. If you have any questions concerning your investment objective or risk tolerance, or wish to make a change, please contact your Financial Advisor or the Branch Manager for this office.

## TRADING TAX LOT RELIEF METHOD: First In, First Out INVESTOR UPDATE

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## ACCOUNT PROTECTION

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## STIFEL PRESTIGE® ACCOUNT STATEMENT

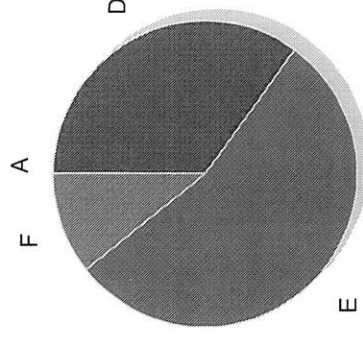
PORTFOLIO SUMMARY	September 30	August 31
Net Cash Equivalents **	2,754.53	113.77
Net Portfolio Assets held at Stifel	2,309,556.95	2,351,742.76
Net Portfolio Assets not held at Stifel		
<b>Net Portfolio Value</b>	<b>\$2,312,311.48</b>	<b>\$2,351,856.53</b>
YOUR CHANGE IN PORTFOLIO VALUE		
Net Cash Flow (Inflows/Outflows) <sup>2</sup>	-2,624.80	-3,412.56
Securities Transferred In/Out		
Income and Distributions	5,986.50	4,064.71
Change in Securities Value	-42,906.75	-24,951.79
<b>Net Change in Portfolio Value</b>	<b>-\$39,545.05</b>	<b>-\$24,299.64</b>

\*\* See the Stifel Insured Bank Deposit Program Disclosure Statements for additional information.

<sup>2</sup> Does not include cost or proceeds for buy or sell transactions.

## YOUR ASSET SUMMARY

	Value on Percentage of	
	September 30, 2022 (\$)	your account
A Net Cash Equivalents**	2,754.53	0.12%
D Fixed Income-Muni	807,382.30	34.92%
E Fixed Income-Other	1,254,382.47	54.25%
F Mutual Funds	247,792.18	10.72%
Total Assets	\$2,312,311.48	100.00%



# STIFEL

1 1 1 D369287 SSNH02112  
TEMECULA PUBLIC CEMETERY  
DIST ENDOWMENT INTEREST  
41911 C ST  
TEMECULA CA 92592-3053

Your Financial Advisor (LU04):  
SANDRA HEDSTROM WHEELER  
Telephone: (805) 783-2921

Office Serving Your Account:  
4460 BROAD STREET  
SUITE 210  
SAN LUIS OBISPO, CA 93401

## PRIMARY INVESTMENT OBJECTIVE: Income

### RISK TOLERANCE: Moderate

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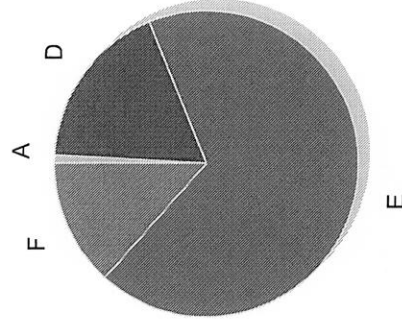
## STIFEL PRESTIGE® ACCOUNT STATEMENT

PORTFOLIO SUMMARY	September 30	August 31
Net Cash Equivalents **	7,463.73	4,222.16
Net Portfolio Assets held at Stifel	855,311.64	871,222.60
Net Portfolio Assets not held at Stifel		
<b>Net Portfolio Value</b>	<b>\$862,775.37</b>	<b>\$875,444.76</b>
YOUR CHANGE IN PORTFOLIO VALUE		
September 30	August 31	
Net Cash Flow (Inflows/Outflows) <sup>2</sup>	2,624.80	3,412.56
Securities Transferred In/Out		
Income and Distributions	980.20	2,856.20
Change in Securities Value	-16,274.39	-9,389.50
<b>Net Change in Portfolio Value</b>	<b>-\$12,669.39</b>	<b>-\$3,120.74</b>

\*\* See the Stifel Insured Bank Deposit Program Disclosure Statements for additional information.  
<sup>2</sup> Does not include cost or proceeds for buy or sell transactions.

## YOUR ASSET SUMMARY

	Value on Percentage of	
	September 30, 2022 (\$)	your account
A Net Cash Equivalents**	7,463.73	0.87%
D Fixed Income-Muni	155,136.65	17.98%
E Fixed Income-Other	584,614.08	67.76%
F Mutual Funds	115,560.91	13.39%
Total Assets	\$862,775.37	100.00%



FYE 06/30/23	July	August	September	October
Single	-	-	-	-
Single End	-	-	-	-
Single/Dual	-	-	3,000.00	-
S/D End	-	-	1,000.00	-
Dual	4,000.00	-	-	-
Dual End	2,000.00	-	-	-
Collum	-	1,400.00	1,400.00	2,600.00
Collum End	-	1,000.00	1,000.00	2,000.00
cenotaph	-	-	-	-
Ground Crem	-	5500	1,700.00	7,200.00
G Crem End	-	3000	1,000.00	4,000.00
O/C - B	2100	4000	2350.00	2150.00
O/C/-C	-	200	400.00	1,000.00
Vault	440.00	472	592.69	504.00
Crem Vase	-	210.00	190.50	190.50
Grave Vase	75.00	165	84.00	196.00
Set Fee	750.00	1550	1,500.00	1,250.00
Niche	-	-	-	-
Non-Res	3,000.00	6000	-	3,000.00
Disinter	-	-	-	-
Graveside	1,500.00	1800	1,650.00	2,200.00
Engraving	-	250.00	-	250.00
2nd End	-	2400	1,000.00	900.00
Bench	-	700.00	400.00	1,500.00
Taxes	45.07	55.74	24.02	77.92
Labor	774.93	1182.26	376.48	1,331.58
<b>Total</b>	<b>14,685.00</b>	<b>29,885.00</b>	<b>17,667.69</b>	<b>30,350.00</b>
YTD Total	14,685.00	44,570.00	62,237.69	92,587.69

A2Cemetery Property  
 Fiscal Year 2022-2023 (2)

**FYE 06/30/23**

	Jul	Aug	Sep	Oct
Dual Lower -GM	243	243	243	243
Dual Upper -GP	323	323	323	323
Dual/ Single	45	45	44	44
Dual Manager	27	27	27	27
Singles	105	105	105	105

Hexagon Wall				
Tier 1				
Tier 2				
Tier 3				
Tier 4				
Tier 5				
Tier F-1	18	17	16	15
Tier F-2	25	25	25	25
Tier F-3	26	26	26	25
Tier F-4	28	28	28	28
Tier F-5	10	10	10	10
Grd Crem	15	15	15	15
Dual Grd Crem	85	82	81	76
Cenotaph	46	46	46	46
Ossuary	334	333	333	332



# SEPTEMBER 2021 Burial Depletion Sales

## Pre-Need

Single Lots	
Dual Lots	
Wall	
Cremation Ground	

## At Need

Single Lots	
Dual Lots	
Wall	1
Cremation Ground	1
Dual Single	1

# OCTOBER 2022 Burial Depletion Sales

## Pre-Need

Single Lots	
Dual Lots	
Wall	2
Cremation Ground	3
Bench	1

## At Need

Single Lots	
Dual Lots	
Wall	
Cremation Ground	1

## Cindi Beaudet

---

**From:** Shelby Burson <agapeconstruction@aol.com>  
**Sent:** Wednesday, October 5, 2022 3:54 PM  
**To:** Cindi Beaudet  
**Subject:** Fw: Completion letter Temecula cemetery / lemon Hills dr

----- Forwarded Message -----

**From:** Doi, Kevin <kdoi@rivco.org>  
**To:** Shelby Burson <agapeconstruction@aol.com>  
**Cc:** Yzaguirre, Alec <ayzaguir@rivco.org>  
**Sent:** Wednesday, October 5, 2022 at 03:46:35 PM PDT  
**Subject:** RE: Completion letter Temecula cemetery / lemon Hills dr

Shelby,

We have received your as-built plans and letter of completion from Rancho water district. We are in the process of completing the NOC which will take some time, but for all intents and purposes the Temecula Public Cemetery job Ref:ENC22010671 has been inspected and completed.



### KEVIN DOI

Engineering Technician II

Permit Division

County Administration Center

4080 Lemon St. 8<sup>th</sup> Fl, Riverside, CA 92501

P.O. Box 1090, Riverside, CA 92502-1090

Office: 951-955-6790

Mobile: 951-2171273

Email: kdoi@rivco.org

**How are we doing? Click the Link and Tell us!**



## Cindi Beaudet

---

**From:** Tamara McClory <Tamara@rjmdesigngroup.com>  
**Sent:** Tuesday, October 11, 2022 8:35 AM  
**To:** Cindi Beaudet  
**Cc:** Craig Sensenbach; tec@civtec.net  
**Subject:** RE: County Plans

Good morning Cindi,

According to our online account our substantial conformance review is still pending, although it has been assigned. See screenshots below. The General Planning Department Application has been processed, so hopefully that means we're just in the queue for the CUP review. I thought I had read somewhere that review time could be about a month long. I may be incorrect. We're about a week away from that month timeline.

**Plan Number: CUP03606S01**

[Plan Details](#) | [Tab Elements](#) | [Main Menu](#)

<b>Type:</b>	MARES - SC01 - Substantial Conformance Circulated	<b>Status:</b>	Assigned	<b>Project Name</b>
<b>Applied Date:</b>	09/19/2022	<b>Expiration Date:</b>		
<b>District:</b>	District 3	<b>Assigned To:</b>	Mitchell, Kathleen	<b>Completion Date</b>
<b>Description:</b>	Ministerial Action - Substantial Conformance to Conditional Use Permit No#03606 Temecula Public Cemetery - There are no existing uses, structures or buildings on site. The proposed improve the approved CUP, which includes the development of a new Temecula Public Cemetery with an administration building, interment spaces, hardscape, parking, landscaping, committal chapel and niche walls. The updated alignment of the approved loop road, maintenance yard design and location and administration building design a plan eliminates the extension of the entry road past the loop road and relocates the committal chapel to a central plaza that is easily accessible by pedestrians. The updated site plan also eliminates the need for a pond, and sears offsite storm runoff underground within the loop road, while maintaining existing drainage patterns upstream at proposed improvements. A centralized BMP is proposed to treat the storm runoff from the new development as tank systems are proposed at the administration building and maintenance yard. As part of the phase 1 improvement portion of the loop road will be built, terminating in cul de sac turnarounds. A gravel access road will continue from towards serving the maintenance yard.			

<b>Type:</b>	General Planning Department Application	<b>Status:</b>	Completed	<b>Project Name:</b>	
<b>Applied Date:</b>	09/09/2022	<b>Expiration Date:</b>			
<b>District:</b>	District 1	<b>Assigned To:</b>	Bernardino, Blanca	<b>Completion Date:</b>	
		<b>Approval Expiration Date:</b>	09/19/2022		
<b>Description:</b>	Ministerial Action - Substantial Conformance to Conditional Use Permit No#03606 Temecula Public Cemetery - There are no existing uses, structures or buildings on site. The proposed improvement includes the development of a new Temecula Public Cemetery with an administration building, interment spaces, hardscape, parking, landscaping, committal chapel and niche walls. The updated alignment of the approved loop road, maintenance yard design and location and administration building design plan eliminates the extension of the entry road past the loop road and relocates the committal chapel to a central plaza that is easily accessible by pedestrians. The updated site plan also eliminates the need for a pond, and sends offsite storm runoff underground within the loop road, while maintaining existing drainage patterns upstream of proposed improvements. A centralized BMP is proposed to treat the storm runoff from the new development tank systems are proposed at the administration building and maintenance yard. As part of the phase 1 improvement of the loop road will be built, terminating in cul de sac turnarounds. A gravel access road will continue towards serving the maintenance yard.				



**Tamara McClory**  
 Associate Landscape Architect, LLA #6144  
 Office: 949.493.2600  
 Email: [tamara@rjmdesigngroup.com](mailto:tamara@rjmdesigngroup.com)  
 Website: [www.RJMdesigngroup.com](http://www.RJMdesigngroup.com)  
[vcard](#) | [Instagram](#) | [Facebook](#) | [YouTube](#) | [Map](#)

**From:** Craig Sensenbach <craig@rjmdesigngroup.com>  
**Sent:** Tuesday, October 11, 2022 8:27 AM  
**To:** Tamara McClory <Tamara@rjmdesigngroup.com>  
**Subject:** FW: County Plans

Fyi

**Craig Sensenbach, LLA, ISA**  
 Principal, Landscape Architect  
 D 949.374.6220 | O 949.493.2600

**From:** Cindi Beaudet <Cindi@temeculacemetery.org>  
**Sent:** Tuesday, October 11, 2022 8:24 AM

**To:** Craig Sensenbach <[craig@rjmdesigngroup.com](mailto:craig@rjmdesigngroup.com)>

**Subject:** County Plans

Good Morning-

Any response from the county?

## TEMECULA PUBLIC CEMETERY DISTRICT



**Cindi Beaudet**  
*General Manager*

Phone: 951-699-1630

Cell: 951-541-8736

Fax: 951-699-1633

[cindi@temeculacemetery.org](mailto:cindi@temeculacemetery.org)

October 30, 2022

Cinde Beaudet  
Temecula Public Cemetery District  
41911 C Street  
Temecula, California 92592

VIA EMAIL  
cindi@temeculacemetery.org

Subject: Change Order for Positive Findings for the Temecula Public Cemetery District Project

Ms. Beaudet:

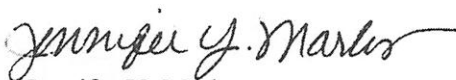
As you are aware, Psomas encountered multiple cultural resources during our recent construction monitoring efforts for the Temecula Cemetery Project. As noted in our original scope of work, we did not include processing of any positive findings, thus the work required to process these resources is out of scope and will require a budget augment.

Each resource requires a California Department of Parks and Recreation (DPR) 523 Form, map of the resource, and a cultural resources location map. To finish the task, are requesting a change order (CO) to cover editing and QA/QC of the report, and comments from the County of Riverside Archaeologist. Psomas is requesting CO for \$5,500.00 to finish the deliverables and consult with County.

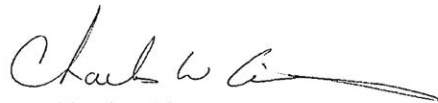
Please contact Charles Cisneros by phone at 626-351-2000 or by email at Charles.Cisneros@Psomas.com if you have any questions or need additional information on this change order request.

Sincerely,

PSOMAS



Jennifer Y. Marks  
Vice President



Charles Cisneros, RPA  
Senior Archaeologist/Project Manager

**Authorization**

Please sign below to authorize this Scope of Work.

\_\_\_\_\_

Name

\_\_\_\_\_

Signature

\_\_\_\_\_

Title

\_\_\_\_\_

Date

5 Hutton Centre Drive  
Suite 300  
Santa Ana, CA 92707

Tel 714.751.7373  
Fax 714.545.8883  
www.Psomas.com

**Cindi Beaudet**

---

**From:** t.deutsch orccd.com <t.deutsch@orccd.com>  
**Sent:** Friday, October 7, 2022 3:29 PM  
**Subject:** RESCHEDULED - Local Area Meeting - Wednesday, November 16, 2022 - Elsinore Valley Cemetery District

Dear Fellow CAPC Managers & Staff,

I have been working with Stephanie Garcia from Elsinore Valley Cemetery District, and we have rescheduled the Local Area Meeting to Wednesday, November 16<sup>th</sup>, 2022, from 10:00 am to 1:00 pm. Please discuss with your staff and board and please RSVP back to me no later than Monday, November 7<sup>th</sup> so that we can get an idea of the number of attendees for seating and lunch. The program will include educational presentations/discussions, lunch and then opportunity to tour the cemetery grounds and buildings.

Please let me know if you have any questions. We look forward to seeing you all then.

Sincerely,

**Tim Deutsch, CSDM**  
*General Manager*  
Orange County Cemetery District  
25751 Trabuco Road  
Lake Forest, CA 92630  
949.951.9102, ext. 112  
[www.occemeterydistrict.com](http://www.occemeterydistrict.com)

CANCELLED



**TRANSPARENCY NOTICE**

Some or all of the content of this email and its attachments may be subject to disclosure pursuant to the California Public Records Act (Government Code Section 6250, et seq.)

---

**From:** t.deutsch orccd.com  
**Sent:** Tuesday, September 6, 2022 3:19 PM  
**Subject:** POSTPONED - Local Area Meeting - Wednesday, September 21, 2022 - Elsinore Valley Cemetery District

Dear Fellow CAPC Managers & Staff,

I was informed today by the Elsinore Valley Cemetery District that one of their senior employees passed away. They are already down a couple of staff and with this passing, it is a lot for them to deal with, so unfortunately they have asked if we could postpone the meeting to a date later in the year. Please keep them in your thoughts and prayers as they go



## Cindi Beaudet

---

**From:** Michael Dugan <mdugan1218@gmail.com>  
**Sent:** Wednesday, October 12, 2022 3:10 PM  
**To:** Cindi Beaudet  
**Subject:** Fwd: CAPC Annual Education Seminar

----- Forwarded message -----

**From:** **Michael Dugan** <mdugan1218@gmail.com>  
**Date:** Wed, Oct 12, 2022 at 3:07 PM  
**Subject:** Fwd: CAPC Annual Education Seminar  
**To:** Deborah Herbrandson <dherby@verizon.net>

----- Forwarded message -----

**From:** **Michael Dugan** <mdugan1218@gmail.com>  
**Date:** Wed, Oct 12, 2022 at 2:55 PM  
**Subject:** CAPC Annual Education Seminar  
**To:** Cindi Beaudet <Cindi@temeculacemetery.org>

On Friday and Saturday October 7 and 8 2022  
I attended the CAPC Annual Education Seminar at Lake Tahoe California.

On Friday the Seminar began with the featured Cemetery, Roseville Cemetery District. It was presented by Kelly Ehrman, District Manager  
The Cemetery's first known burial was a Rachel Berry in 1861.  
In 1872 the Odd Fellows Lodge took over the Cemetery as they did for many pioneer Cemeteries in those days. In 1909 the Odd Fellows bought the Roseville Cemetery for \$10 gold coin.  
In 1939 the District was formed but still operated by the Odd Fellows.  
In 1951 the Odd Fellows quickly deeded the Cemetery for \$7500. It also quickly deeded the the Union Cemetery which became part of the District.  
Many of these events include the Annual  
Christmas Parade  
4th of July Parade  
Memorial DAY Gathering and  
Dinners for both Trustees and Employees.  
They finished their new office in 2021.  
They have much history in their Cemetery including the burial of the last of then living World War 2 Congressional Medal of Honor Winner.

"Setting Direction and Community Leadership" took up the rest of the morning and all of the Afternoon.  
The Presenter was Martin Rose Rauch, President of Rauch Communication Consultants.  
Fulfilling your District's Mission  
Charting the Course  
Setting Direction

Opportunities and Challenge

Board Communications

We're the Main topics of Martins presentation.

He used a very interesting analogy of the 1950's Space Race between the USA

And Russia to illustrate how a major problem was turned into a big success.

Applying this strategy to a Board of Trustees and a Manager seeking to accomplish goals and plan for the future was very apt.

Developing Issue Areas into Goals, key points in developing a Strategic Plan,

The core values of a District's Vision Statement were key points in his presentation. He ended the afternoon by having all present breaking up at different tables to discuss our Districts main problems and how we planned to solve them.

I found Mr Rauch's presentation both informative and educational, yet still entertaining.

Saturday began with Breakout Split Sessions.

Managers and Staff in one room, Trustees-in another.

The Trustees were asked to submit questions about problems their Districts were having, solutions if any, and new trends in the cemetery operations.

It was no surprise that water ( or the lack of it ) was the main topic. No one seemed to have any valid solution responses.

One Trustee suggestion was to attend your local water District Board meetings and try to get their help. This suggestion was not accepted very cordially.

Green Burials and the recent new law re: Human composting was also brought up.

No one present saw either happening at their cemetery in the near future.

Vandalism and angry clients was another topic brought up. The Trustee session

Ended with a long discussion on Cemetery Events like Memorial Day and Day of the Dead and how to address security and cemetery regulations during these events.

After a break, the Managers and Staff returned to talk about each of their session's

Water again was the Managers main topic.

Cemetery events was also part of their discussions.

Cemetery security was a big problem for some of the Managers as they have neither security cameras or police monitoring available.

They also discussed the new Human composting law.

Cyber security practices ended the morning session. I found this presentation as being too rushed. Too much information in too short a time.

Saturday's afternoon was Strategic Planning by Martin Rauch.

We once again broke up into 4 or 5 person groups to discuss how Boards and Managers reach decisions on many different topics.

In all I found the two days very informative and also an opportunity to meet new Trustees and Managers from different Districts.

Mike Dugan