

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)

**AGENDA- Estimated Time: 1 1/2 Hrs.  
February 16, 2023 @ 8:00 a.m.**

**REGULAR BOARD MEETING**

**TEMECULA PUBLIC CEMETERY DISTRICT**

**41911 C St, Temecula, Ca 92592  
951-699-1630**

**1. CALL TO ORDER:** Trustee Davis

**2. FLAG SALUTE :** Trustee Davis

**3. ROLL CALL:**

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

**4. MOTIONS TO EXCUSE:**

**5. VISITORS:** Carole Phillips

## **6 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 writing or 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.

## **7. CONSENT CALENDAR:**

All matters listed under Consent Calendar are considered routine and may all be approved by one motion. There will be no discussion of these items unless members of the Board or the public may request an item be removed from the Consent Calendar for separate action. A total of five minutes is provided for members of the public to address the Trustees on items that appear on the consent calendar. 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 January 19, 2023

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

*Recommendation:* That the Board approves the January 2023 Check Register Nos. 101100, 101200 and 101300.

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

*Recommendation:* That the Board receives and files the January 2023 Bookkeeper Report

**8. ACTION ITEMS:**

**A. CALIFORNIA SPECIAL DISTRICT ASSOCIATION**

*Recommendation:* That the Trustees discuss and decide if they want to nominate themselves for the 3-year seat on CSDA.

**B. LOCAL AGENCY FORMATION COMMISSION**

*Recommendation:* That the Trustees discuss and decide if they want to nominate themselves for the 4-year seat on LAFCO.

**C. SPECIAL DISTRICT RISK MANAGEMENT AUTHORITY**

*Recommendation:* That the Trustees discuss and decide if they want to nominate themselves for the 4-year seat on SDRMA.

**D. LOCAL AREA MEETING, BLYTH, CALIFORNIA**

*Recommendation:* That the Trustees let the manager know who will be in attendance so she may respond accordingly.

343 West 10<sup>th</sup> Avenue.

Blyth, Ca.92225

**E. 2022-2023- STATEMENT OF ECONOMIC INTERESTS**

*Recommendation:* That the Trustees complete and return the attached 700 forms to the manager at the March Board meeting.

**F. GENERAL MANAGERS CONTRACT FOR FISCAL YEAR 2022-2023**

*Recommendation:* General Counsel recommends that the Board of Trustees review and approve the 9 percent increase in the annual salary paid to the General Manager, commencing July 1, 2022, with all remaining provisions such as benefits remaining the same.

*Background:*

The Board of Trustees has offered to increase the General Manager's annual salary by 9 percent, commencing July 1, 2022, which the General Manager accepted. However, before it can take effect, the Board of Trustees must approve the increase at an open session of the Board of Trustees meeting. The Brown Act further requires that prior to taking final action on any adjustments in the salary paid to a local agency executive such as the General Manager, the Board of Trustees must orally report a summary of the recommend final action (e.g. annual salary increase). As such, before a motion is made to approve the 9 % increase in the General Manager's annual salary, the Board of Trustees must announce that the proposal is to increase the General Manager's annual salary by 9 percent, commencing July 1, 2022. After this announcement is made, a motion can then be made to memorialize the 9 percent increase, which shall be subject to a second and a vote.

#### **G. CAROLE PHILLIPS LETTER OF CONCERN**

*Recommendation:* That the Trustees review the Health and Safety Code and respond accordingly to Mrs. Phillips letter.

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#### **9. FINANCIAL REPORTS:**

- A. January 2023 Balance Sheet
- B. January 2023 Profit and Loss
- C. January 2023 Stifel Investments; principal and interest

## **10. GENERAL MANAGERS REPORTS:**

- A. January 2023 Revenues
- B. December 2022 Inventory
- C. Hired Compass HR, terminated Paychex HR
- D. Contractor has been on site for various repairs.
- E. WQMP being updated by RJM for the county planning dept.02/08/2023
- F. Rancho Ca. Water will provide water to the 52 acres,02/09/2023

## **11. FISCAL YEAR 2023-2024 SUBCOMMITTEES-**

- A. 52-acre Cemetery Property (**Qualm, Dugan**)
- B. Landscape Plan (**Vanderhaak, Davis**)
- C. Cenotaph/ Ossuary (**Dugan, Qualm**)
- D. Conférence Liaison (**Kelleher, Vanderhaak**)
- E. Polices (**Dugan, Kelleher**)
- F. General Price List (**Davis-Vanderhaak**)
- G. Investments (**Qualm-Dugan**)

## **12. ITEMS FOR FUTURE TRUSTEE AGENDAS**

Any Trustee may request an item to be placed on a future agenda. Any such request will be discussed only under this section. In making the request, a Trustee may briefly describe the topic of the proposed agenda item. This description shall not exceed 5 minutes. No substantive discussion on the subject or a motion may occur.

**13. GENERAL COUNSEL REPORTS: Nothing to Report**

**14. CLOSED SESSION ITEMS:**

**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:**

The Next Regular Meeting of the Temecula Public Cemetery Board of Trustees will be held on Thursday, March 16, 2023, at 8:00 a.m.

**15. ADJOURNMENT:**

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

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

**All in Favor:**

**POSTED February 13, 2023**

All supporting documentation is available for public review after the agenda has been posted and no less than 72 hours prior to the meeting date. The material will be made available at the Temecula Public Cemetery District Office during business hours, or on the website:

[www.temeculacemetery.org](http://www.temeculacemetery.org)

**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 writing or 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.



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)

January 19, 2023 @ 8:00 a.m.

# MINUTES

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

1. **CALL TO ORDER:** Trustee Davis @ 8:00 AM.

2. **FLAG SALUTE:** Trustee Davis @ 8 :00 AM

3. **ROLL CALL:**

Chair- Davis, Vice Chair- Dugan, Trustee Qualm,  
Trustee Vanderhaak, General Manager, Beaudet  
Legal Counsel, ~~Rick Wirick~~ Steve Quintanilla

4. **MOTIONS TO EXCUSE:** Motion was made by Trustee Davis to excuse Trustee Kelleher. The motion was seconded by Trustee Vanderhaak and passed with a 4/0 vote.

5. **VISITORS:** None

## **6 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 writing or 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.

**7. CONSENT CALENDAR:** A motion was made by Trustee Dugan to accept the consent calendar as presented. The motion was seconded by Trustee Vanderhaak and passed with a 4/0 vote.

All matters listed under Consent Calendar are considered routine and may all be approved by one motion. There will be no discussion of these items unless members of the Board or the public may request an item be removed from the Consent Calendar for separate action. A total of five minutes is provided for members of the public to address the Trustees on items that appear on the consent calendar. 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 November 17 ,2022

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

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

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

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

8. **ACTION ITEMS:**

9. **District Bookkeeper Engagement Letter:** A motion was made by Trustee Vanderhaak to accept the Bookkeepers engagement letter for the calendar year 2023. The motion was seconded by Trustee Qualm and passed with a 4/0 vote.

A.

*Recommendation:* That the Trustees move to accept the bookkeeper's engagement letter for the year 2023.

- B. **Trustees Compensation, Expense & Reimbursement Policy.** A motion was made by Trustee Dugan to accept the policy with corrections. The motion was seconded by Trustee Vanderhaak and passed with a 4/0 vote.

*Recommendation:* That the Trustees approve the policy with the changes they requested at the November 2022 regular Board meeting.

- C. **Family Follow Up Survey Complaint From Sharon Shafer:** Discussed

*Recommendation:* Response letter was mailed on 11/17/2022. Trustee Davis offered to reach out to Ms. Shafer by phone and report back to the Board with their discussion.

- D. **Correspondence from Jeffrey Tar:** Chair Davis will correspond with Mr. Tar. The Health and Safety Code dictates the Non-Resident fee, the District will not waive this fee.

*Recommendation:* The Trustees to review Mr. Tars request. This was prior to the hire of the General Manager. We do not know for sure what transpired between the Groundskeepers and Mr. Tar. The Health and Safety Code enforces non-resident fees to eligible non-residents of the District.

- E. **Property Line to be Surveyed:** A motion was made by Trustee Dugan to hire a surveyor. The motion was seconded by Trustee Qualm and passed with a 4/0 vote.

*Recommendation:* Based on the response from RJM Cemetery Designs engineer department, the photos and description of the stake locations possibly are not even survey stakes. To respond accordingly to the property owner and the trees they want us to maintain, it has been suggested the District will need those boundaries surveyed.

- 10. FINANCIAL REPORTS:** A motion was made by Trustee Vanderhaak to receive and file the December financials. The motion was seconded by Trustee Qualm and passed with a 4/0 Vote.

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

- 10. GENERAL MANAGERS REPORTS:** A motion was made by Trustee Dugan to receive the managers report. The motion was seconded by Trustee Qualm and passed with a 4/0 vote.

- A. December 2022 Revenues
- B. December 2022 Inventory
- C. Trustee Harassment due 01/2024
- D. Trustee Ethics due 12/2023
- E. Backhoe shut down during 01/12 burial

## **11. FISCAL YEAR 2023-2024 SUBCOMMITTEES-**

- A. 52-acre Cemetery Property (**Qualm-Dugan**)
- B. Landscape Plan (**Vanderhaak-Davis**)
- C. Cenotaph/ Ossuary (**Dugan-Qualm**)
- D. Conférence Liaison (**Kelleher-Vanderhaak**)
- E. Polices (**Dugan-Kelleher**)
- F. General Price List (**Davis-Vanderhaak**)
- G. Investments (**Qualm-Dugan**)

## **12. ITEMS FOR FUTURE TRUSTEE AGENDAS**

Any Trustee may request an item to be placed on a future agenda. Any such request will be discussed only under this section. In making the request, a Trustee may briefly describe the topic of the proposed agenda item. This description shall not exceed 5 minutes. No substantive discussion on the subject or a motion may occur.

- Trustee Davis out for May Board Meeting
- Trustee Dugan request options for bringing in income on remaining 26 acres

**13. GENERAL COUNSEL REPORTS: Nothing**

Into closed session @ 9:05 am

**14. 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. PUBLIC EMPLOYEE PERFORMANCE EVALUATION**

Pursuant to California Government Code Section 54957.

Public Employee: Cindi Beaudet, General Manager

**D. CONFERENCE WITH LABOR NEGOTIATOR REGARDING UNREPRESENTED EMPLOYEE**

Pursuant to California Government Code Section 54957

Designated Representative: Steven B. Quintanilla, General Legal Counsel

Unrepresented Employee: Cindi Beaudet, General Manager

Out of Closed Session @ 10:40 am

**E. CLOSED SESSION ANNOUNCEMENT: Nothing to Report**

The Next Regular Meeting of the Temecula Public Cemetery Board of Trustees will be held on Thursday, February 16, 2023, at 8:00 a.m.

**15. ADJOURNMENT: With no further business, a motion was made by Trustee Dugan to adjourn the board meeting at 10:43 am. The motion was seconded by Trustee Qualm and passed with a 4/0 vote.**

Temecula Public Cemetery District

2/8/2023 10:58 AM

Register: 101100 · US Bank Checking

From 01/01/2023 through 01/31/2023

Sorted by: Date, Type, Number/Ref

Date	Number	Payee	Account	Memo	Payment	C	Deposit	Balance
01/04/2023	8691	American Mini Storage	201100 · Accounts Pay...	January	115.00	X		37,660.96
01/04/2023	8692	EcoFert Inc	201100 · Accounts Pay...	5483- December	515.00	X		37,145.96
01/04/2023	8693	Protection One (corp)	201100 · Accounts Pay...	148559478-Jan...	228.97	X		36,916.99
01/04/2023	8694	Streamline	201100 · Accounts Pay...	7235D26B-002...	50.00	X		36,866.99
01/04/2023	8695	US Bank	201100 · Accounts Pay...	December	1,017.99	X		35,849.00
01/04/2023	8696	Wildlife Control Ser...	201100 · Accounts Pay...	WL3502-January	500.00	X		35,349.00
01/04/2023	01012023	Downs Energy	201100 · Accounts Pay...	CL-69803-DE...	109.50	X		35,239.50
01/08/2023	JE 21031		515100 · Life Insuranc...	Automatic with...	35.64	X		35,203.86
01/10/2023	8697	Joe Sands.	201100 · Accounts Pay...		3,478.36	X		31,725.50
01/11/2023	8699	Cindi Beaudet	201100 · Accounts Pay...		151.15	X		31,574.35
01/11/2023	8700	Terry Woodruff	201100 · Accounts Pay...		40.00			31,534.35
01/11/2023	JE 21032		101200 · US Bank Pay...	Monthly autom...	411.30	X		31,123.05
01/12/2023			523290 · Bank Charges	Service Charge	16.00	X		31,107.05
01/12/2023	8701	Arborquest Tree Serv...	201100 · Accounts Pay...		2,100.00	X		29,007.05
01/12/2023	8702	California Assoc of P...	201100 · Accounts Pay...		299.00	X		28,708.05
01/12/2023	8703	Crowne Hill Consulti...	201100 · Accounts Pay...	16705	373.51	X		28,334.54
01/12/2023	8704	Hank's Hardware & ...	201100 · Accounts Pay...	6960	400.87	X		27,933.67
01/12/2023	8705	Linda Glau CPA	201100 · Accounts Pay...	January	575.00	X		27,358.67
01/12/2023	8706	PureRite Drinking W...	201100 · Accounts Pay...	282093	83.39	X		27,275.28
01/12/2023	8707	Southern California ...	201100 · Accounts Pay...	2-03-325-4707	417.82	X		26,857.46
01/12/2023	8708	Standard Insurance C...	201100 · Accounts Pay...	160-513170-00...	286.12	X		26,571.34
01/12/2023	8709	Sun City Granite	201100 · Accounts Pay...	engraving-229...	310.00	X		26,261.34
01/12/2023	8710	Temecula Valley Cha...	201100 · Accounts Pay...	7155-Chamber ...	455.00	X		25,806.34
01/12/2023	8711	Lawsons Window Cl...	201100 · Accounts Pay...		60.00	X		25,746.34
01/13/2023	012023	CalPers 457 Plan	201100 · Accounts Pay...	payday 01/20	1,649.86	X		24,096.48
01/13/2023			101200 · US Bank Pay...	Funds Transfer	9,665.78	X		14,430.70
01/17/2023	8712	The Village News	201100 · Accounts Pay...	silent ad-20214	48.50	X		14,382.20
01/19/2023			101100G · Cash - Gen...	Deposit		X	71,470.07	85,852.27
01/20/2023	8713	California Dept of Ta...	201100 · Accounts Pay...	4TH QTR 2022	186.00	X		85,666.27
01/23/2023	8714	CR&R Incorporated	201100 · Accounts Pay...	001-395687	320.32	X		85,345.95
01/23/2023	8715	Home Depot Credit S...	201100 · Accounts Pay...	90224830-dece...	6.69	X		85,339.26
01/23/2023	8716	PSOMAS (inc)	201100 · Accounts Pay...	192084-DECE...	1,383.00	X		83,956.26
01/23/2023	8717	Brown Family Servic...	201100 · Accounts Pay...	0001801	862.20	X		83,094.06
01/26/2023	020123	CalPers 457 Plan	201100 · Accounts Pay...	payday 02/03	1,190.36	X		81,903.70
01/26/2023	020223	California Public Em...	201100 · Accounts Pay...	7490021932 ...	3,466.39	X		78,437.31
01/26/2023			101200 · US Bank Pay...	Funds Transfer	8,901.28	X		69,536.03



Temecula Public Cemetery District

2/8/2023 10:58 AM

Register: 101200 · US Bank Payroll  
 From 01/01/2023 through 01/31/2023  
 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>
01/06/2023	JE 21025		510040 · Regular Salar...	Bank Draft Am...	6,939.38	X		5,999.90
01/06/2023	JE 21025		510040 · Regular Salar...	Bank Draft Am...	3,404.00	X		2,595.90
01/06/2023	JE 21025		510040 · Regular Salar...	Monthly charg...	126.76	X		2,469.14
01/11/2023	JE 21032		101100 · US Bank Che...	Monthly autom...		X	411.30	2,880.44
01/13/2023			101100 · US Bank Che...	Funds Transfer		X	9,665.78	12,546.22
01/15/2023	JE 21034		525030 · Paychex HR ...		445.33	X		12,100.89
01/20/2023	JE 21033		510040 · Regular Salar...	Bank Draft Am...	5,173.57	X		6,927.32
01/20/2023	JE 21033		510040 · Regular Salar...	Bank Draft Am...	4,168.46	X		2,758.86
01/20/2023	JE 21033		510040 · Regular Salar...	Monthly charg...	323.75	X		2,435.11
01/26/2023			101100 · US Bank Che...	Funds Transfer		X	8,901.28	11,336.39

Temecula Public Cemetery District

2/8/2023 10:58 AM

Register: 101300 · US Wash Account

From 01/01/2023 through 01/31/2023

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>
01/25/2023	JE 21038		101300 · US Wash Ac...	Record deposit ...	140.00	X		8,673.16
01/25/2023	JE 21038		101300 · US Wash Ac...	Record deposit ...		X	140.00	8,813.16
01/31/2023			-split-	Deposit		X	17,775.00	26,588.16
01/31/2023			-split-	Deposit		X	25,785.00	52,373.16
01/31/2023	5044	County of Riverside ...	-split-	JANUARY Re...	43,560.00			8,813.16

Temecula Public Cemetery District

2/8/2023 11:00 AM

Register: 101300 · US Wash Account

From 01/01/2023 through 01/31/2023

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>
01/25/2023	JE 21038		101300 · US Wash Ac...	Record deposit ...	140.00	X		8,673.16
01/25/2023	JE 21038		101300 · US Wash Ac...	Record deposit ...		X	140.00	8,813.16
01/31/2023			-split-	Deposit		X	17,775.00	26,588.16
01/31/2023			-split-	Deposit		X	25,785.00	52,373.16
01/31/2023	5044	County of Riverside ...	-split-	JANUARY Re...	43,560.00			8,813.16

Date: 02/07/2023

*Shirley Ann*

Remote Tasks Performed:

- X Reconcile three US Bank Cash Accounts
- X Reconcile four County Cash Accounts Statements – Two Months
- X Enter Property Taxes - Code 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.

8697-8727- Check 8698 appears to be missing. GM is checking the bank activity each day to verify the check has not cleared.

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
8697	1/10/2023	Joe Sands	3,478.36	Final Pay	yes

X Verify all checks to the GM have two signatures.

Number	Date	Payee	Amount	Memo	2nd Sig
8699	1/11/2023	Cindi Beaudet	151.15	Mileage	Yes

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 Do not use

- 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: SDRMA WC Renewal Support. GM Retro Pay and Vacation Payout. Support Annual Bonus input to Paychex.

Open items:



**California Special  
Districts Association**

*Districts Stronger Together*

**DATE:** January 30, 2023  
**TO:** CSDA Voting Member Presidents and General Managers  
**FROM:** CSDA Elections and Bylaws Committee  
**SUBJECT: CSDA BOARD OF DIRECTORS CALL FOR NOMINATIONS  
SEAT C**

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The Elections and Bylaws Committee is looking for Independent Special District Board Members or their General Managers who are interested in leading the direction of the California Special Districts Association for the 2024 - 2026 term.

The leadership of CSDA is elected from its six geographical networks. Each of the six networks has three seats on the Board with staggered 3-year terms. Candidates must be affiliated with an independent special district that is a CSDA Regular Member in good standing and located within the geographic network that they seek to represent.  
(See attached CSDA Network Map)

The CSDA Board of Directors is the governing body responsible for all policy decisions related to CSDA's member services, legislative advocacy, education and resources. The Board of Directors is crucial to the operation of the Association and to the representation of the common interests of all California's special districts before the Legislature and the State Administration. Serving on the Board requires one's interest in the issues confronting special districts statewide.

**Commitment and Expectations:**

- Attend all Board meetings, usually 4-5 meetings annually, at the CSDA office in Sacramento.
- Participate on at least one committee, meets 3-5 times a year at the CSDA office in Sacramento.  
*(CSDA reimburses Directors for their related expenses for Board and committee meetings as outlined in Board policy).*
- Attend, at minimum, the following CSDA annual events: Special Districts Legislative Days - held in the spring, and the CSDA Annual Conference - held in the fall.  
*(CSDA does **not** reimburse expenses for the two conferences even if a Board or committee meeting is held in conjunction with the event)*
- Complete all four modules of CSDA's Special District Leadership Academy within 2 years of being elected.  
*(CSDA does **not** reimburse expenses for the Academy classes even if a Board or committee meeting is held in conjunction with the event).*



**California Special  
Districts Association**  
*Districts Stronger Together*

## 2023 BOARD OF DIRECTORS NOMINATION FORM

Name of Candidate: \_\_\_\_\_

District: \_\_\_\_\_

Mailing Address: \_\_\_\_\_

\_\_\_\_\_

Network: \_\_\_\_\_ (see map)

Telephone: \_\_\_\_\_

(PLEASE BE SURE THE PHONE NUMBER IS ONE WHERE WE CAN REACH THE CANDIDATE)

Fax: \_\_\_\_\_

E-mail: \_\_\_\_\_

Nominated by (optional): \_\_\_\_\_

Return this form, a Board resolution/minute action supporting the candidate, and Candidate Information Sheet by mail or email to:

CSDA  
Attn: Amber Phelen  
1112 I Street, Suite 200  
Sacramento, CA 95814  
(877) 924-2732

amberp@csda.net

***DEADLINE FOR RECEIVING NOMINATIONS:***

***March 31, 2023 at 5:00 p.m.***



**California Special  
Districts Association**  
*Districts Stronger Together*

## 2023 CSDA BOARD CANDIDATE INFORMATION SHEET

The following information **MUST** accompany your nomination form and Resolution/minute order:

Name: \_\_\_\_\_

District/Company: \_\_\_\_\_

Title: \_\_\_\_\_

Elected/Appointed/Staff: \_\_\_\_\_

Length of Service with District: \_\_\_\_\_

1. Do you have current involvement with CSDA (such as committees, events, workshops, conferences, Governance Academy, etc.):

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2. Have you ever been associated with any other state-wide associations (CSAC, ACWA, League, etc.):

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3. List local government involvement (such as LAFCo, Association of Governments, etc.):

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4. List civic organization involvement:

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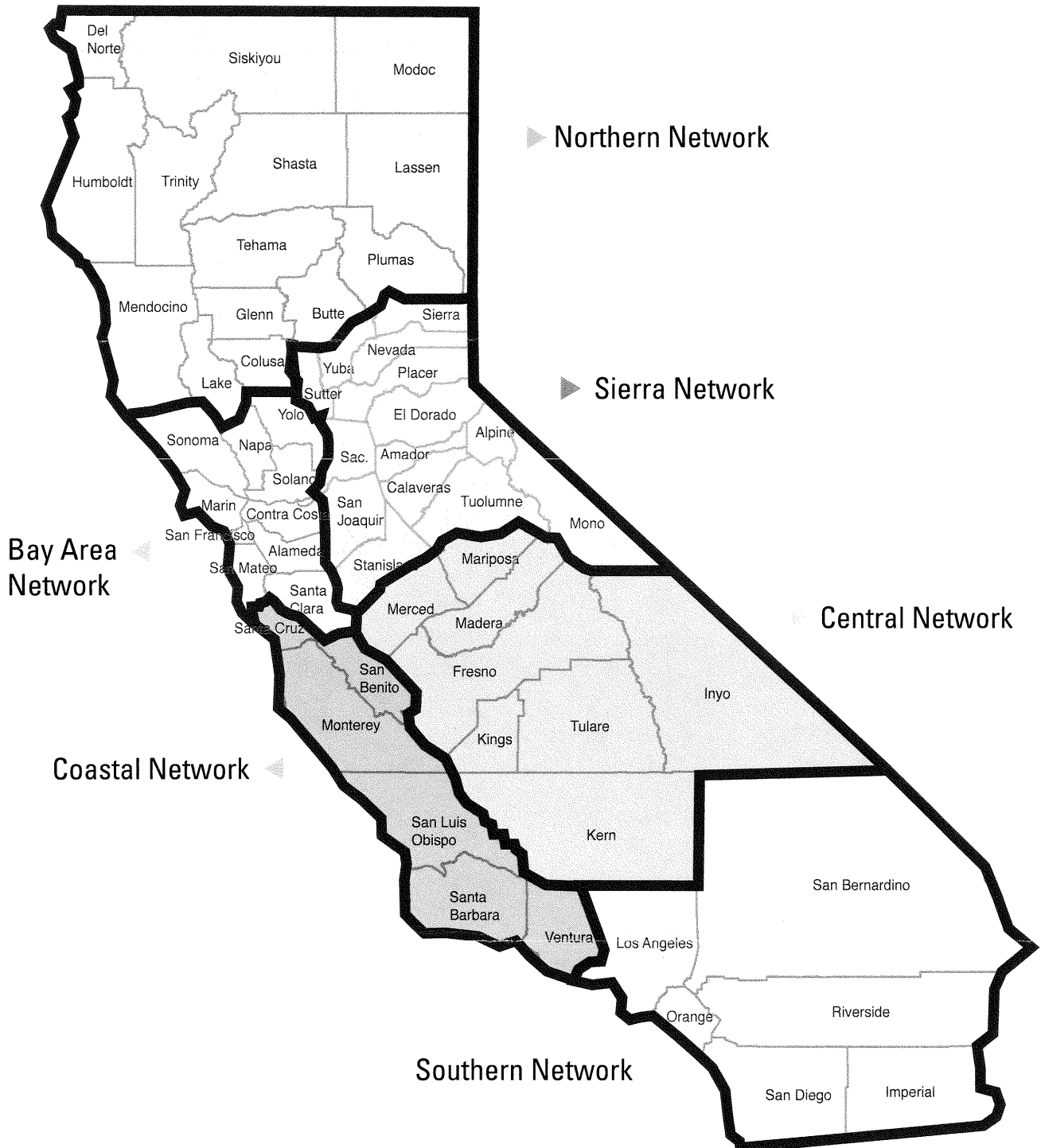
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**\*\*Candidate Statement** – Although it is not required, each candidate is requested to submit a candidate statement of no more than 300 words in length. **Any statements received in the CSDA office March 31, 2023, after 5:00 p.m. will not be included with the ballot.**



California Special Districts Association

# DISTRICT NETWORKS







via electronic mail

January 19, 2023

CALL FOR NOMINATIONS FOR TWO (2) SPECIAL DISTRICT MEMBERS  
OF THE RIVERSIDE LOCAL AGENCY FORMATION COMMISSION

To the Special District Selection Committee (Presiding Officers of Independent Special Districts of Riverside County c/o District Clerks):

As you were recently notified (see attached letter), we are commencing the appointment process for two (2) Regular Members of the Riverside Local Agency Formation Commission (LAFCO). I have determined that a physical meeting of the Special District Selection Committee (SDSC) is not feasible at this time. Therefore, selection proceedings will be conducted by electronic mail (e-mail). Specifically, the positions are as follows:

One (1) Regular Special District Member - must be a board member from a *district in the western portion of the County* (any district with the majority of its assessed value west of the intersection of Interstate 10 and Highway 111); and,

One (1) Regular Special District Member - must be a board member from a *district in the eastern portion of the County* (any district with the majority of its assessed value east of the intersection of I-10 and Highway 111).

Please see attached list for east and west districts.

Terms of LAFCO Members are generally four years and until appointment of a successor or reappointment of the incumbent. However, due to the vacancies occurring simultaneously, the term of the eastern vacant position will run until May 6, 2024. The term of the western vacant position will run until May 4, 2026.

The nomination period for the two positions will begin on Monday, January 23, 2023 and close on Tuesday, February 21, 2023. Any member of the Special District Selection Committee (presiding officer or an alternate board member designated by the governing body) may nominate a member of the legislative body of an independent special district board to fill the positions, consistent with the geographic requirements noted above.

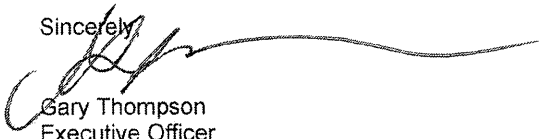
Since there are two vacant positions, separate nomination forms are provided for potential nominations to either/or, or both vacant positions. Note that any nomination must be consistent with the east or west region and the appropriate nomination form. Refer to the list attached for the east/west districts.

All nomination forms must be signed and dated by the presiding officer, or the designee of your District Board of Directors. Once complete, please scan the signed form and email it to Rebecca Holtzclaw at [rholtzclaw@lafco.org](mailto:rholtzclaw@lafco.org). **Nominations must be received in our office by 5 p.m., Tuesday, February 21, 2023.**

Following the nomination period, ballots and voting instructions will be sent to SDSC members. However, if only one candidate is nominated for either vacant position, that candidate will be deemed selected with no further proceedings.

If you have any questions, please contact our office.

Sincerely,



Gary Thompson  
Executive Officer

cc: Special District Managers

Att.: 2023 East & West Nomination Forms  
East/West Districts List  
Copy of Election Notice\_ 1-03-2023  
Seating Process



**SPECIAL DISTRICT SELECTION COMMITTEE  
2023 EASTERN REGION NOMINATION FORM**

I, \_\_\_\_\_ of the \_\_\_\_\_  
Print Name of Presiding Officer or alternate\* Name of District

hereby nominate(s) the following individual(s) for the position of:

**Regular Special District Member of the Riverside Local Agency Formation Commission - Eastern Area. The term of this position will run until May 6, 2024.**

Nominee: \_\_\_\_\_

District: \_\_\_\_\_

I hereby certify that I am the presiding officer of the above-named district or alternate designated by the governing body\*.

\_\_\_\_\_  
Signature Date

\*If an alternate has been designated by the governing body, please provide a resolution or minute order documenting the action.

**Note: Nomination forms are due no later than February 21, 2023. Please scan and email this form to [rholtzclaw@lafco.org](mailto:rholtzclaw@lafco.org).**



**SPECIAL DISTRICT SELECTION COMMITTEE  
2023 WESTERN REGION NOMINATION FORM**

I, \_\_\_\_\_ of the \_\_\_\_\_  
Print Name of Presiding Officer or alternate\* Name of District

hereby nominate(s) the following individual(s) for the position of:

**Regular Special District Member of the Riverside Local Agency Formation Commission - Western Area. The term of this position will run until May 4, 2026.**

Nominee: \_\_\_\_\_

District: \_\_\_\_\_

I hereby certify that I am the presiding officer of the above-named district or alternate designated by the governing body\*.

\_\_\_\_\_  
Signature Date

\*If an alternate has been designated by the governing body, please provide a resolution or minute order documenting the action.

Note: Nomination forms are due no later than February 21, 2023. Please scan and email this form to [rholtzclaw@lafco.org](mailto:rholtzclaw@lafco.org).

**SPECIAL DISTRICT SELECTION COMMITTEE**  
**LIST OF ELIGIBLE INDEPENDENT SPECIAL DISTRICTS OF RIVERSIDE COUNTY**

	<b>Independent Special Districts</b>	<b>Region</b>
1.	Chiriaco Summit County Water District	east
2.	Citrus Pest Control District No. 2	east
3.	Coachella Valley Mosquito & Vector Control District	east
4.	Coachella Valley Public Cemetery District	east
5.	Coachella Valley Resource Conservation District	east
6.	Coachella Valley Water District	east
7.	Desert Healthcare District	east
8.	Desert Recreation District	east
9.	Desert Water Agency	east
10.	Mission Springs Water District	east
11.	Palm Springs Cemetery District	east
12.	Palo Verde Cemetery District	east
13.	Palo Verde Healthcare District	east
14.	Palo Verde Irrigation District	east
15.	Palo Verde Resource Conservation District	east
16.	Palo Verde Valley Library District	east
17.	Southern Coachella Valley Community Services District	east
18.	Valley Sanitary District	east
19.	Banning Library District	west
20.	Beaumont Library District	west
21.	Beaumont-Cherry Valley Recreation & Park District	west
22.	Beaumont-Cherry Valley Water District	west
23.	Cabazon County Water District	west
24.	De Luz Community Services District	west
25.	Eastern Municipal Water District	west
26.	Edgemont Community Services District	west
27.	Elsinore Valley Cemetery District	west
28.	Elsinore Valley Municipal Water District	west
29.	Fern Valley Water District	west
30.	High Valleys Water District	west
31.	Home Gardens County Water District	west
32.	Home Gardens Sanitary District	west
33.	Idyllwild Fire Protection District	west
34.	Idyllwild Water District	west
35.	Jurupa Area Recreation & Park District	west
36.	Jurupa Community Services District	west
37.	Lake Hemet Municipal Water District	west
38.	Murrieta Valley Cemetery District	west
39.	Northwest Mosquito & Vector Control District	west
40.	Pine Cove Water District	west
41.	Pinyon Pines County Water District	west
42.	Rancho California Water District	west
43.	Riverside-Corona Resource Conservation District	west
44.	Rubidoux Community Services District	west
45.	San Geronimo Memorial Healthcare District	west
46.	San Geronimo Pass Water Agency	west
47.	San Jacinto Basin Resource Conservation District	west
48.	San Jacinto Valley Cemetery District	west
49.	Summit Cemetery District	west
50.	Temecula Public Cemetery District	west
51.	Temecula-Elsinore-Anza-Murrieta Resource Conservation District	west
52.	Temescal Valley Water District	west
53.	Tenaja Community Services District	west
54.	Valley-Wide Recreation & Park District	west
55.	Western Municipal Water District	west

**Notice to all Special District Board Presiding Officers c/o District Clerks**

January 3, 2023

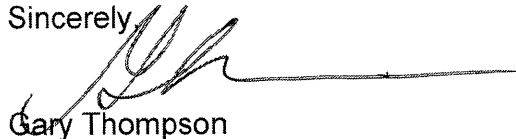
Page 2

Ballots will be due approximately 30 days from receipt and will be annotated with a required submittal date.

**Note:** *there are 55 voting districts in Riverside County. To meet the 50% + 1 quorum requirement for this election, we need at least 28 ballots returned from SDSC members for the election to be valid.*

Again, in order to expedite this process, please ensure this information is passed to your Presiding Officer when received. Please contact Rebecca Holtzclaw at [rholtzclaw@lafco.org](mailto:rholtzclaw@lafco.org) with any questions or concerns.

Sincerely



Gary Thompson  
Executive Officer

cc: District General Managers

Attachment:

Special District List by Areas

Resolution No. \_\_\_\_\_

**A RESOLUTION OF THE [GOVERNING BODY] OF THE [AGENCY NAME]  
NOMINATING [CANDIDATE'S NAME] AS A CANDIDATE FOR ELECTION TO THE  
SPECIAL DISTRICT RISK MANAGEMENT AUTHORITY BOARD OF DIRECTORS**

**WHEREAS**, the Special District Risk Management Authority (SDRMA) is a Joint Powers Authority formed under California Government Code, Section 6500 et.seq., for the purpose of providing risk management and risk financing for California Special Districts and other local government agencies; and

**WHEREAS**, the Joint Powers Agreement and Bylaws of SDRMA set forth director qualifications, terms of office and election requirements; and

**WHEREAS**, the Board of Directors of SDRMA established procedures and guidelines for the Director Election process; and

**WHEREAS**, the SDRMA Board of Directors adopted Board Policy 2022-06, which includes the following requirements for candidate qualification:

- a. A candidate seeking election, re-election or appointment to SDRMA's Board of Directors must be a member of the Governing Body or a management employee (as defined in Section 4.1) of a SDRMA member participating in both the Property/Liability and Workers' Compensation Programs.
- b. Each nominated candidate must submit a properly completed "Statement of Qualifications" with an original wet signature (electronic signatures are not acceptable) on or before the May 1, 2023 filing deadline in order for the candidate's name to be placed on the official ballot.
- c. Candidates seeking election or reelection must be nominated by action of their respective Governing Body through a resolution that must be received by the Authority on or before the May 1, 2023 filing deadline.

**NOW THEREFORE, BE IT RESOLVED**, the Board of Directors of the Special District Risk Management Authority hereby finds, determines, and resolves as follows:

1. The governing body of [AGENCY NAME] nominates [CANDIDATE'S NAME], its [POSITION TITLE], as a candidate for the Board of Directors of the Special District Risk Management Authority.
2. **ADD ONLY IF CANDIDATE IS NOT A MEMBER OF THE AGENCY'S GOVERNING BODY**

The [GOVERNING BODY] of [AGENCY NAME] has determined that [CANDIDATE'S NAME] is a management employee for purposes of SDRMA Election Policy 2022-06, Section 4.1.

3. The [GOVERNING BODY] of [AGENCY NAME] further directs that a copy of this

Resolution No. \_\_\_\_

Resolution shall be delivered to SDRMA on or before the May 1, 2023 filing deadline.

**PASSED, APPROVED, and ADOPTED**, by the [GOVERNING BODY] of [AGENCY NAME], on this [DAY] day of [MONTH], [YEAR], by the following roll call vote:

Ayes:

Noes:

Abstained:

Absent:

APPROVED:

ATTESTED:

\_\_\_\_\_  
President/Governing Body

\_\_\_\_\_  
Administrator/Secretary

*No seal*

## CANDIDATE'S STATEMENT OF QUALIFICATIONS

Provided are 2 sets of the Candidate's **Statement of Qualifications Form** and can be completed one of two ways as follows:

- 1 set is downloadable to be completed by hand, or
- 1 set is an online fillable PDF Form.



**Special District Risk Management Authority  
Board of Directors  
Candidate's Statement of Qualifications**

This information will be distributed to the membership with the ballot, "exactly as submitted" by the candidates – no attachments will be accepted. No statements are endorsed by SDRMA.

Candidate\* \_\_\_\_\_

District/Agency \_\_\_\_\_

Work Address \_\_\_\_\_

Work Phone \_\_\_\_\_ Cell Phone \_\_\_\_\_

\*The name or nickname and any designations (i.e. CPA, SDA, etc.) you enter here will be printed on the official ballot, exactly as submitted.

**Why do you want to serve on the SDRMA Board of Directors? (Response Required)**

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**What Board or committee experience do you have that would help you to be an effective Board Member? (SDRMA or any other organization) (Response Required)**

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**Special District Risk Management Authority  
Board of Directors  
Candidate's Statement of Qualifications**

What special skills, talents, or experience (including volunteer experience) do you have? **(Response Required)**

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What is your overall vision for SDRMA? **(Response Required)**

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**I certify that I meet the candidate qualifications as outlined in the SDRMA election policy. I further certify that I am willing to serve as a director on SDRMA's Board of Directors. I will commit the time and effort necessary to serve. Please consider my application for nomination/candidacy to the Board of Directors.**

Candidate Signature \_\_\_\_\_ Date \_\_\_\_\_

**Special District Risk Management Authority  
Board of Directors  
Candidate's Statement of Qualifications**

This information will be distributed to the membership with the ballot, "exactly as submitted" by the candidates – no attachments will be accepted. No statements are endorsed by SDRMA.

Candidate\*

District/Agency

Work Address

Work Phone

Home Phone

\*The name or nickname and any designations (i.e. CPA, SDA, etc.) you enter here will be printed on the official ballot, exactly as submitted.

**Why do you want to serve on the SDRMA Board of Directors? (Response Required)**

**What Board or committee experience do you have that would help you to be an effective Board Member? (SDRMA or any other organization) (Response Required)**

**Special District Risk Management Authority  
Board of Directors  
Candidate's Statement of Qualifications**

**What special skills, talents, or experience (including volunteer experience) do you have?  
(Response Required)**

**What is your overall vision for SDRMA? (Response Required)**

**I certify that I meet the candidate qualifications as outlined in the SDRMA election policy. I further certify that I am willing to serve as a director on SDRMA's Board of Directors. I will commit the time and effort necessary to serve. Please consider my application for nomination/candidacy to the Board of Directors.**

Candidate Signature \_\_\_\_\_ Date \_\_\_\_\_

Hello Fellow CAPC Managers & Staff,

Happy 2023 to you all. Let's gather and share a meal and our experiences over the past 3 years since the last local area meeting. We are thankful to the Palo Verde Cemetery District for their gracious offer to host this meeting at their cemetery on Thursday, April 27, 2023 from 10:00 am to 1:00 pm. Please discuss with your staff and trustees about attending. As we have done in the past, we will have an educational program, which will include topics regarding operations, legal, finance and personnel. We will get an opportunity to enjoy a lunch and then afterwards tour the grounds, facilities and office of the Palo Verde Cemetery District.

Further information will be sent out as we get closer to the date, but when you have an idea of the number of attendees from your district, please send me an email so that I can assist the host with all of the planning efforts needed.

Location:

Palo Verde Cemetery District  
343 West Tenth Avenue  
Blythe, CA 92225

**STATEMENT OF ECONOMIC INTERESTS  
COVER PAGE  
A PUBLIC DOCUMENT**

Date Initial Filing Received  
*Filing Official Use Only*

Please type or print in ink.

NAME OF FILER (LAST) (FIRST) (MIDDLE)

**1. Office, Agency, or Court**

Agency Name (Do not use acronyms)

Division, Board, Department, District, if applicable

Your Position

► If filing for multiple positions, list below or on an attachment. (Do not use acronyms)

Agency: \_\_\_\_\_ Position: \_\_\_\_\_

**2. Jurisdiction of Office (Check at least one box)**

State

Judge, Retired Judge, Pro Tem Judge, or Court Commissioner  
(Statewide Jurisdiction)

Multi-County \_\_\_\_\_

County of \_\_\_\_\_

City of \_\_\_\_\_

Other \_\_\_\_\_

**3. Type of Statement (Check at least one box)**

**Annual:** The period covered is January 1, 2022, through  
December 31, 2022.

**Leaving Office:** Date Left \_\_\_\_/\_\_\_\_/\_\_\_\_\_  
(Check one circle.)

-or-

The period covered is \_\_\_\_/\_\_\_\_/\_\_\_\_\_, through  
December 31, 2022.

The period covered is January 1, 2022, through the date of  
leaving office.

-or-

**Assuming Office:** Date assumed \_\_\_\_/\_\_\_\_/\_\_\_\_\_  
and office sought, if different than Part 1: \_\_\_\_\_

The period covered is \_\_\_\_/\_\_\_\_/\_\_\_\_\_, through  
the date of leaving office.

**Candidate:** Date of Election \_\_\_\_\_ and office sought, if different than Part 1: \_\_\_\_\_

**4. Schedule Summary (required)**

► Total number of pages including this cover page: \_\_\_\_\_

**Schedules attached**

**Schedule A-1 - Investments** – schedule attached

**Schedule C - Income, Loans, & Business Positions** – schedule attached

**Schedule A-2 - Investments** – schedule attached

**Schedule D - Income – Gifts** – schedule attached

**Schedule B - Real Property** – schedule attached

**Schedule E - Income – Gifts – Travel Payments** – schedule attached

-or-  **None** - No reportable interests on any schedule

**5. Verification**

MAILING ADDRESS STREET CITY STATE ZIP CODE  
(Business or Agency Address Recommended - Public Document)

DAYTIME TELEPHONE NUMBER EMAIL ADDRESS  
( )

I have used all reasonable diligence in preparing this statement. I have reviewed this statement and to the best of my knowledge the information contained herein and in any attached schedules is true and complete. I acknowledge this is a public document.

I certify under penalty of perjury under the laws of the State of California that the foregoing is true and correct.

Date Signed \_\_\_\_\_  
(month, day, year)

Signature \_\_\_\_\_  
(File the originally signed paper statement with your filing official.)

# TEMECULA PUBLIC CEMETERY DISTRICT

## **Recommendation:**

General Counsel recommends that the Board of Trustees review and approve the 9 percent increase in the annual salary paid to the General Manager, commencing July 1, 2022, with all remaining provisions such as benefits remaining the same.

## **Background:**

The Board of Trustees has offered to increase the General Manager's annual salary by 9 percent, commencing July 1, 2022, which the General Manager accepted. However, before it can take effect, the Board of Trustees must approve the increase at an open session of the Board of Trustees meeting. The Brown Act further requires that prior to taking final action on any adjustments in the salary paid to a local agency executive such as the General Manager, the Board of Trustees must orally report a summary of the recommend final action (e.g. annual salary increase). As such, before a motion is made to approve the 9 % increase in the General Manager's annual salary, the Board of Trustees must announce that the proposal is to increase the General Manager's annual salary by 9 percent, commencing July 1, 2022. After this announcement is made, a motion can then be made to memorialize the 9 percent increase, which shall be subject to a second and a vote.

## Cindi Beaudet

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**From:** Carole Phillips <carrazor5@gmail.com>  
**Sent:** Tuesday, January 17, 2023 9:24 AM  
**To:** Cindi Beaudet  
**Subject:** Re: Board meeting

I want to discuss the care of the wall and what the endowment covers. I believe that the cemetery is responsible for keeping the wall in good shape. My husband's faceplate is water stained from the tree. I believe that should be cleaned up of by the cemetery people.

On Tue, Jan 17, 2023 at 7:24 AM Cindi Beaudet <[Cindi@temeculacemetery.org](mailto:Cindi@temeculacemetery.org)> wrote:  
Carole-

You'll need to send in writing what you want to discuss at the meeting or it won't be acted on. As a reminder you will have 5 minutes to address the Board.

-----Original Message-----

**From:** Carole Phillips <[carrazor5@gmail.com](mailto:carrazor5@gmail.com)>  
**Sent:** Monday, January 16, 2023 11:44 AM  
**To:** Cindi Beaudet <[Cindi@temeculacemetery.org](mailto:Cindi@temeculacemetery.org)>  
**Subject:** Board meeting

Please put me on the agenda for the February board meeting

Thanks  
Carole Phillips

Sent from my iPhone



**Temecula Public Cemetery District**  
**Balance Sheet**  
As of January 31, 2023

	Jan 31, 23	Jan 31, 22	\$ Change
<b>ASSETS</b>			
<b>Current Assets</b>			
<b>Checking/Savings</b>			
101100 · US Bank Checking	69,536.03	59,094.22	
101200 · US Bank Payroll	11,336.39	12,975.33	
101300 · US Wash Account	8,813.16	8,118.16	
101100C · Cash -Accumulative Outlay Fund	1,588,620.97	2,934,109.87	
101100E · Cash - Endowment Fund	169,380.33	96,439.71	
1011004 · Cash - Retirement	180.00	180.00	
101100G · Cash - General	1,834,944.54	1,243,858.38	
<b>Total Checking/Savings</b>	<b>3,682,811.42</b>	<b>4,354,775.67</b>	<b>-671,964.25</b>
<b>Accounts Receivable</b>			
201125 · Accounts Receivable	2,900.00	0.00	
<b>Total Accounts Receivable</b>	<b>2,900.00</b>	<b>0.00</b>	
<b>Other Current Assets</b>			
<b>102200 · Stifel Investments</b>			
102210 · Stifel Endowment Care	2,339,885.03	2,457,319.22	
102220 · Stifel Endowment Interest	897,686.01	878,624.80	
<b>Total 102200 · Stifel Investments</b>	<b>3,237,571.04</b>	<b>3,335,944.02</b>	<b>-98,372.98</b>
112011 · Inventory Asset	187,755.00	198,988.00	
102100 · Taxes Receivable	0.00	10,677.30	
<b>116100 · Interest Receivable</b>			
116100P · Interest Receivable - End Prin	13,573.52	12,815.31	
116100I · Interest Receivable - End Int	7,424.08	4,181.83	
<b>Total 116100 · Interest Receivable</b>	<b>20,997.60</b>	<b>16,997.14</b>	
117000 · PrePaid Expenses	17,955.93	11,060.95	
<b>Total Other Current Assets</b>	<b>3,464,279.57</b>	<b>3,573,667.41</b>	
<b>Total Current Assets</b>	<b>7,149,990.99</b>	<b>7,928,443.08</b>	<b>-778,452.09</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	3,468,296.98	2,796,531.49	
191100 · Buildings and Improvements	318,605.07	318,605.07	
191400 · Structures and Improvements	363,678.03	363,678.03	
191500 · Equipment	188,672.05	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>3,960,903.55</b>	<b>3,339,028.51</b>	

**Temecula Public Cemetery District**  
**Balance Sheet**  
 As of January 31, 2023

	Jan 31, 23	Jan 31, 22	\$ Change
<b>TOTAL ASSETS</b>	<b>11,110,894.54</b>	<b>11,267,471.59</b>	<b>-156,577.05</b>
<b>LIABILITIES &amp; EQUITY</b>			
<b>Liabilities</b>			
<b>Current Liabilities</b>			
<b>Accounts Payable</b>			
201100 · Accounts Payable	-2,067.92	-504.09	
<b>Total Accounts Payable</b>	-2,067.92	-504.09	
<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>	12,703.24	18,581.05	
<b>Total Liabilities</b>	12,703.24	18,581.05	
<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	-307,389.85	389,799.37	
<b>Total Equity</b>	11,098,191.30	11,248,890.54	-150,699.24
<b>TOTAL LIABILITIES &amp; EQUITY</b>	<b>11,110,894.54</b>	<b>11,267,471.59</b>	<b>-156,577.05</b>

## Temecula Public Cemetery District Profit & Loss Budget Performance January 2023

	Jul '22 - Jan 23	Annual Budget
<b>Ordinary Income/Expense</b>		
<b>Income</b>		
700001 · Property Taxes		
700020 · Prop Tax Current Secured	385,446.22	696,200.00
701020 · Prop Tax Current Unsecured	32,029.44	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	6,440.48	4,500.00
706000 · Teeter Settlement	8,500.69	10,000.00
707000 · RDV Apportionment	53,312.78	40,000.00
752800 · CA-Homeowners Tax Relief	3,024.31	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>492,713.76</b>	<b>800,000.00</b>
740020 · Interest and Dividend Income		
740024 · Dividend Income - Stifel	5,801.31	5,000.00
740023 · Interest - Stifel	42,905.40	68,900.00
740020G · Interest on General Fnd at Cnty	6,905.94	5,000.00
740020E · Interest on Endow Fnd at County	650.45	100.00
740020O · Interest on ACO at County	10,466.19	10,000.00
<b>Total 740020 · Interest and Dividend Income</b>	<b>66,729.29</b>	<b>89,000.00</b>
770001 · Other Revenue		
777700 · Non-Resident Fee Income	22,500.00	0.00
770100E · Endowment	39,902.00	145,000.00
777030 · Marker Setting	10,600.00	18,000.00
777031 · Niche Engraving	2,230.00	3,000.00
777040 · Open, Close Fees	28,950.00	37,000.00
777520 · Sale of Lots	37,898.00	56,800.00
777530 · Cremation	30,100.00	17,000.00
777600 · Cenotaph	0.00	300.00
777650 · Graveside Service	17,500.00	16,000.00
780160 · Vaults, Flower Vases, etc.	14,642.69	16,000.00
781360 · Other Misc. Revenue	750.00	400.00
<b>Total 770001 · Other Revenue</b>	<b>205,072.69</b>	<b>309,500.00</b>
<b>Total Income</b>	<b>764,515.74</b>	<b>1,198,500.00</b>
<b>Gross Profit</b>	<b>764,515.74</b>	<b>1,198,500.00</b>

## Temecula Public Cemetery District Profit & Loss Budget Performance January 2023

	<u>Jul '22 - Jan 23</u>	<u>Annual Budget</u>
<b>Expense</b>		
<b>510000 · Salaries and Employee Benefits</b>		
<b>510040T · Regular Salaries.</b>		
510040 · Regular Salaries	140,515.58	319,000.00
510330 · Year End Bonuses	6,454.25	6,500.00
510335 · Hazard Pay	0.00	0.00
515100 · Life Insurance Policy	249.48	450.00
<b>Total 510040T · Regular Salaries.</b>	<b>147,219.31</b>	<b>325,950.00</b>
<b>510320T · Temporary Salaries.</b>		
510320 · Temporary Salaries	40.00	0.00
510320T · Temporary Salaries. - Other	0.00	0.00
<b>Total 510320T · Temporary Salaries.</b>	<b>40.00</b>	<b>0.00</b>
<b>513000T · Retirement - Miscellaneous</b>		
518000 · Employer Contributions-457	9,790.64	23,500.00
551000 · Employee Contributions	0.00	
<b>Total 513000T · Retirement - Miscellaneous</b>	<b>9,790.64</b>	<b>23,500.00</b>
<b>513120T · Retirement - Social Security</b>		
513120 · Social Security	9,288.81	21,500.00
513140 · Medicare Tax	2,172.49	5,000.00
<b>Total 513120T · Retirement - Social Security</b>	<b>11,461.30</b>	<b>26,500.00</b>
<b>515080T · Health Insurance (eer share)</b>		
515081 · Health Insurance	23,756.90	52,000.00
515082 · Vision Insurance	322.64	800.00
515083 · Dental Insurance	2,002.84	3,200.00
<b>Total 515080T · Health Insurance (eer share)</b>	<b>26,082.38</b>	<b>56,000.00</b>
<b>515260T · Unemployment Insurance</b>		
517000 · Workers Comp Insurance	9,611.88	22,000.00
515060 · State Unemployment Ins EDD	0.00	1,500.00
513130 · CA SUI	430.05	2,000.00
515260T · Unemployment Insurance - Other	0.00	0.00
<b>Total 515260T · Unemployment Insurance</b>	<b>10,041.93</b>	<b>25,500.00</b>
<b>Total 510000 · Salaries and Employee Benefits</b>	<b>204,635.56</b>	<b>457,450.00</b>
<b>520000 · Services and Supplies</b>		
<b>529540T · Utilities</b>		
520845 · Trash	2,516.97	4,400.00
529500 · Electricity	3,904.96	6,000.00
<b>Total 529540T · Utilities</b>	<b>6,421.93</b>	<b>10,400.00</b>

**Temecula Public Cemetery District**  
**Profit & Loss Budget Performance**  
January 2023

	<b>Jul '22 - Jan 23</b>	<b>Annual Budget</b>
<b>524520T · Administrative Expenses</b>		
518160 · Board Stipend	2,850.00	11,250.00
520115 · Uniforms - Replacement Clothing	1,519.24	3,600.00
520230 · Cellular Phone	1,280.74	3,300.00
520705 · Food	45.90	1,200.00
520930 · Insurance - Liability	11,943.05	20,500.00
523100 · Memberships	3,184.00	3,600.00
523290 · Bank Charges	136.00	300.00
523621 · Subscriptions	0.00	500.00
523660 · Computer Service	5,557.23	7,000.00
523700 · Office Supplies	0.00	1,000.00
523720 · Photocopies	1,318.03	3,000.00
523760 · Postage/Mailing	275.00	1,000.00
523840 · Computer Equip/Software/T1	4,477.83	2,500.00
524520 · County Journal Recording	1,244.83	2,400.00
524530 · Storage Fees	815.00	1,400.00
524540 · Payroll Processing Services	2,342.02	4,100.00
524560 · Auditing	10,500.00	10,500.00
524561 · Accounting	6,526.25	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	420.00	30,000.00
525030 · Paychex HR Support	3,117.31	5,400.00
526420 · Advertising	275.50	1,800.00
527280 · Awards/Recognition	0.00	300.00
527880 · Training/ Staff	250.00	2,500.00
528140 · Conferences and Meetings	9,849.78	30,000.00
528980 · Meals	531.88	2,000.00
528990 · Semi-Annual Team Dinner	2,666.28	5,000.00
529040 · Private Mileage Reimbursement	0.00	2,500.00
529050 · Website	300.00	800.00
529550 · Water	528.56	1,600.00
<b>Total 524520T · Administrative Expenses</b>	<b>71,954.43</b>	<b>177,950.00</b>

## Temecula Public Cemetery District Profit & Loss Budget Performance January 2023

	Jul '22 - Jan 23	Annual Budget
<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	8,896.92	18,000.00
522360 · Maintenance-Extermination	3,684.00	6,800.00
523250 · Repurchase	0.00	2,650.00
523800 · Engraving Expense	1,395.00	3,000.00
525320 · Security Guard Services	0.00	400.00
525600 · Security	1,602.79	7,500.00
527100 · Fuel	1,975.74	4,800.00
527180 · Operational Supplies	7,908.51	13,000.00
528020 · Inventory	9,652.02	8,500.00
<b>Total 524500T · Operational Expenses.</b>	<b>36,772.74</b>	<b>82,150.00</b>
<b>Total 520000 · Services and Supplies</b>	<b>115,149.10</b>	<b>270,500.00</b>
<b>530000 · Other Charges</b>		
530100 · Miscellaneous non-operating exp	204.45	4,000.00
<b>Total 530000 · Other Charges</b>	<b>204.45</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	850.00	6,000.00
542065 · Tree Renovaton	2,100.00	7,500.00
548300 · Office Renovation	0.00	6,000.00
<b>Total 542060T · Cemetery Grounds</b>	<b>2,950.00</b>	<b>119,500.00</b>
<b>540040T · Land, Purchase of Land</b>		
540042 · Future Cemetery Property	709,769.44	1,600,000.00
<b>Total 540040T · Land, Purchase of Land</b>	<b>709,769.44</b>	<b>1,600,000.00</b>
<b>546020T · Equipment, etc</b>		
542070 · Well Motor	0.00	60,000.00
546020 · Equipment - Automotive	862.20	17,000.00
546240 · Mapping Software	2,040.00	6,000.00
<b>Total 546020T · Equipment, etc</b>	<b>2,902.20</b>	<b>83,000.00</b>
<b>Total 540000 · Capital Assets</b>	<b>715,621.64</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	0.00	-1,802,500.00
<b>Total Expense</b>	<b>1,035,610.75</b>	<b>1,198,500.00</b>
<b>Net Ordinary Income</b>	<b>-271,095.01</b>	<b>0.00</b>

Temecula Public Cemetery District  
Profit & Loss Budget Performance  
January 2023

	<u>Jul '22 - Jan 23</u> <u>Annual Budget</u>	
Other Income/Expense		
Other Income		
731000 · Realized Gain (Loss) on Invest	1,755.89	0.00
731100 · Unrealized Gain (Loss) on Invst	-38,050.73	0.00
Total Other Income	-36,294.84	0.00
Net Other Income	-36,294.84	0.00
Net Income	<b>-307,389.85</b>	<b>0.00</b>



STIFEL PRESTIGE® ACCOUNT STATEMENT

1 1 1 D373120 SSNO001003

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**

What are your financial resolutions for 2023? Put away more for retirement? Start saving for college? Review estate planning matters? Whatever your goals may be, your Stifel Financial Advisor can help.

**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.

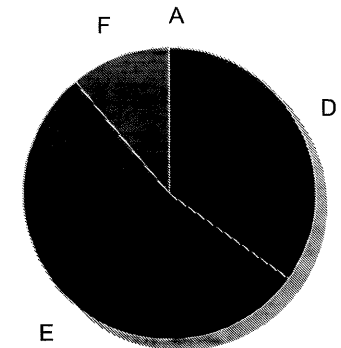
Thank you for allowing Stifel to serve you. In order to protect your rights, including rights under the Securities Investor Protection Act (SIPA), please promptly report, in writing, any inaccuracies or discrepancies in this account or statement to the Compliance Department of Stifel at the address below. 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).

PORTFOLIO SUMMARY	January 31	December 31
Net Cash Equivalents **	695.77	695.33
Net Portfolio Assets held at Stifel	2,339,189.26	2,322,465.13
Net Portfolio Assets not held at Stifel		
<b>Net Portfolio Value</b>	<b>\$2,339,885.03</b>	<b>\$2,323,160.46</b>
YOUR CHANGE IN PORTFOLIO VALUE	January 31	December 31
Net Cash Flow (Inflows/Outflows) <sup>2</sup>	-3,742.48	-3,908.58
Securities Transferred In/Out		
Income and Distributions	4,371.63	3,934.36
Change in Securities Value	16,095.42	1,060.58
<b>Net Change in Portfolio Value</b>	<b>\$16,724.57</b>	<b>\$1,086.36</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.  
You have securities maturing and/or options expiring.

**YOUR ASSET SUMMARY**

	Value on January 31, 2023 (\$)	Percentage of your account
A Net Cash Equivalents**	695.77	0.03%
D Fixed Income-Muni	815,911.10	34.87%
E Fixed Income-Other	1,265,518.85	54.08%
F Mutual Funds	257,759.31	11.02%
<b>Total Assets</b>	<b>\$2,339,885.03</b>	<b>100.00%</b>







STIFEL PRESTIGE® ACCOUNT STATEMENT

1 1 1 D373121 SSNOO01003

**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**

What are your financial resolutions for 2023? Put away more for retirement? Start saving for college? Review estate planning matters? Whatever your goals may be, your Stifel Financial Advisor can help.

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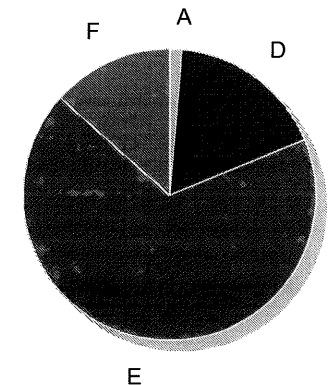
Thank you for allowing Stifel to serve you. In order to protect your rights, including rights under the Securities Investor Protection Act (SIPA), please promptly report, in writing, any inaccuracies or discrepancies in this account or statement to the Compliance Department of Stifel at the address below. 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).

PORTFOLIO SUMMARY	January 31	December 31
Net Cash Equivalents **	12,026.10	7,079.68
Net Portfolio Assets held at Stifel	885,659.91	878,896.87
Net Portfolio Assets not held at Stifel		
<b>Net Portfolio Value</b>	<b>\$897,686.01</b>	<b>\$885,976.55</b>
YOUR CHANGE IN PORTFOLIO VALUE	January 31	December 31
Net Cash Flow (Inflows/Outflows) <sup>2</sup>	3,742.48	3,908.58
Securities Transferred In/Out		
Income and Distributions	1,505.88	2,159.17
Change in Securities Value	6,461.10	-1,687.38
<b>Net Change in Portfolio Value</b>	<b>\$11,709.46</b>	<b>\$4,380.37</b>

<sup>\*\*</sup> 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 January 31, 2023 (\$)	Percentage of your account
A Net Cash Equivalents**	12,026.10	1.34%
D Fixed Income-Muni	155,966.30	17.37%
E Fixed Income-Other	608,823.88	67.82%
F Mutual Funds	120,869.73	13.46%
<b>Total Assets</b>	<b>\$897,686.01</b>	<b>100.00%</b>



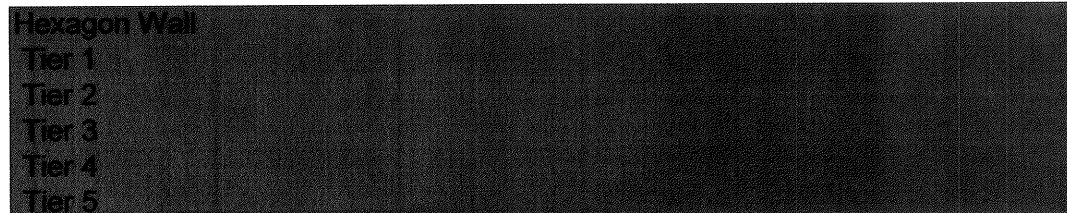
A1 Monthly Revenues  
July 2022-June 2023

<u>FYE 06/30/23</u>	<u>July</u>	<u>August</u>	<u>September</u>	<u>October</u>	<u>November</u>	<u>December</u>	<u>January</u>
Single	-	-	-	-	-	3,200.00	9,600.00
Single End	-	-	-	-	-	1,000.00	3,000.00
Single/Dual	0	0	3000	0	-	9000	0
S/D End	-	-	1,000.00	-	-	3,000.00	-
Dual	4,000.00	-	-	-	5,100.00	-	5,100.00
Dual End	2,000.00	-	-	-	1,000.00	-	1,000.00
Collum	-	1,400.00	1,400.00	2,600.00	-	2,600.00	2,700.00
Collum End	-	1,000.00	1,000.00	2,000.00	-	2,000.00	2,000.00
cenotaph	-	-	-	-	-	-	-
Ground Crem	-	5,500.00	1,700.00	7,200.00	1,700.00	1,700.00	1,700.00
G Crem End	-	3,000.00	1,000.00	4,000.00	1,000.00	1,000.00	1,000.00
O/C -B	2100	4000	2350	2150	2400	5700.00	5350.00
O/C/-C	-	200.00	400.00	1,000.00	1,500.00	200.00	900.00
Vault	440.00	472.00	592.69	504.00	252.00	870.00	870.00
Crem Vase	-	210.00	190.50	190.50	-	190.50	381.00
Grave Vase	75.00	165.00	84.00	196.00	84.00	280.00	196.00
Set Fee	750.00	1,550.00	1,500.00	1,250.00	1,150.00	2,000.00	1,750.00
Niche	-	-	-	-	-	-	-
Non-Res	3,000.00	6,000.00	-	3,000.00	4,500.00	3,000.00	1,500.00
Disinter	-	-	-	-	-	-	-
Graveside	1,500.00	1,800.00	1,650.00	2,200.00	2,400.00	3,500.00	4,400.00
Engraving	-	250.00	-	250.00	500.00	250.00	500.00
2nd End	-	2,400.00	1,000.00	900.00	2,000.00	-	-
Bench	-	700.00	400.00	1,500.00	-	-	-
Taxes	45.07	55.74	24.02	77.92	29.40	117.28	1485.80
Labor	774.93	1182.26	376.48	1331.58	604.6	1827.22	127.2
<b>Total</b>	<b>14,685.00</b>	<b>29,885.00</b>	<b>17,667.69</b>	<b>30,350.00</b>	<b>24,220.00</b>	<b>41,435.00</b>	<b>43,560.00</b>
YTD Total	14,685.00	44,570.00	62,237.69	92,587.69	116,807.69	158,242.69	201,802.69

A2Cemetery Property  
Fiscal Year 2022-2023 (2)

**FY 06/30/23**

	Jul	Aug	Sep	Oct	Nov	Dec	Jan
Dual Lower -GM	243	243	243	243	243	243	243
Dual Upper -GP	323	323	323	323	322	321	320
Dual/ Single	45	45	44	44	44	42	42
Dual Manager	27	27	27	27	27	27	27
Singles	105	105	105	105	105	104	101



Tier 1							
Tier 2							
Tier 3							
Tier 4							
Tier 5							
Tier F-1	18	17	16	15	15	14	13
Tier F-2	25	25	25	25	25	25	24
Tier F-3	26	26	26	25	25	24	24
Tier F-4	28	28	28	28	28	28	28
Tier F-5	10	10	10	10	10	10	10
Grd Crem	15	15	15	15	15	15	15
Dual Grd Crem	85	82	81	76	75	74	73
Cenotaph	46	46	46	46	46	46	46
Ossuary	334	333	333	332	332	332	332



# COMPASSHR

HUMAN RESOURCES. HANDLED.

## Human Resources Check-Up

Date: 1/23/2023

### COMPANY INFORMATION

Company name:

Temecula Public Cemetery District

Address:

41911 C-Street Temecula CA 92592

Telephone number:

951 699 1630

Date business started:

Number of owners:

Contact Name:

Cindi Beaudet

Contact Phone/Email Address

951 541 8734

### GENERAL BUSINESS INFORMATION



Name/DBA:



Entity Type: Sole Proprietor/LLC/C-Corp/S-Corp

Special District



Where do you want to be in the next five years?



How did you get started



a) How many employees do you have?

Total # 5 + 5 (Trustees) stipend



Exempt ~~nonexempt~~



Pay for those employees?

\$17.93

### HIRING PROCESS (DESCRIBE)



Are you currently Hiring?

Yes

No

+ 2



When were your job descriptions last updated?

Yes. Reviewed annually



Do you have an application?

Yes

No