



NORTH COUNTY
CEMETERY DISTRICT

2024 STRATEGIC PLAN

NORTH COUNTY CEMETERY DISTRICT (NCCD)

Prepared by: Rauch Communication Consultants Inc.



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Introduction

Planning is strategic when it helps move an organization forward from its current situation to its desired future.

Purpose of the Plan

This three-year Strategic Plan is North County Cemetery District's (NCCD's) highest-level planning document and represents the Board's and Staff's direction for the future. The Plan identifies the District's mission, vision, and core values while providing a set of goals and objectives that serve as a framework for decision-making.

The Plan is also a practical working tool that provides clear direction to the Staff regarding the Board's goals and objectives. It includes a Work Plan developed by the Staff to meet those goals and objectives. The Board and Staff will regularly refer to it as a guide to the District's actions during the period covered.

Plan Development

Background Research. The consultants began by holding discussions with the General Manager and the Board.

Confidential Interviews. This was followed by a series of confidential interviews carried out by the consultant. The goal was for the interviewees to candidly express their interests and perspectives on the District and its priorities. The interviewees included the five members of the Board of Directors, the General Manager, and the Administration Manager.

Strategic Planning Workshop. The interviewees also participated in two workshops. At the workshop, the group reviewed the results of the interviews, undertook exercises and extensive discussions to examine the current state of the District, identified issues and opportunities expected to confront the District in the future, and discussed priorities.

Staff and Board Work. Drawing from the interviews, workshops, and other information, the consultant, General Manager, and Leadership Team developed a draft strategic plan.

Board Review. The draft was distributed to the Board and leadership team, and the participants reviewed, discussed, and refined the draft plan, including mission, vision, and values, and provided direction for additional changes.

Staff Work Plan. The Leadership Team and consultant developed a staff Work plan designed to meet the mission of the District and strategic goals and objectives.

North County Cemetery District Overview

On July 1, 1984, the Escondido Cemetery District and the San Marcos Cemetery District were consolidated to form the North County Cemetery District. The consolidated Districts provide a higher level of service and common policies and prices for residents and taxpayers.

North County Cemetery District is governed by a five-member Board of Trustees appointed by the San Diego County Board of Supervisors representing the electors residing within the District.

Oak Hill Memorial Park

Located at the eastern end of the "Hidden Valley" is Oak Hill Memorial Park. This is the present-day outgrowth of a community burial spot established by the early settlers of the Escondido area in the 1800's.

In the early decades of its history, the cemetery was expanded into independently run sections for Catholic, Mennonite, Masonic, Grand Army of the Republic, and Odd Fellows.

On May 9, 1930, a public district cemetery, known as the Escondido Cemetery District, was formed as a tax-supported body to maintain Oak Hill Memorial Park as a non-denominational cemetery for the use of the district's residents, taxpayers, and certain members of their families.

Today, Oak Hill Memorial Park has approximately 42 acres of developed land and 70 acres undeveloped for future use.

San Marcos Cemetery

The San Marcos Cemetery lies on Mulberry Drive just north of Mission Avenue. The cemetery was created in 1894 when a pioneering family named Littlefield needed a place to bury its matriarch, Nellie Littlefield. The Littlefields got together with other families in the isolated area and formed the San Marcos Cemetery Association. The Association members maintained their own areas of responsibility within the seven-acre cemetery.

During the Depression, on April 28, 1930, when workers throughout the nation were looking for employment through federal programs, the cemetery association became a Public Cemetery District. This made it eligible for road improvements through a public works program. The cemetery's roads were improved, and gutters were installed by the public workers. They graded the land and landscaped the cemetery by planting trees and shrubs. Water was piped in from the nearby Vista Water District flume. Water supplies are currently obtained from an on-site well and the Vallecitos Water District

Today, the San Marcos Cemetery covers 22 acres, has over 4,100 interments, and less than half the land is currently developed.

Services

Oak Hill Memorial Park

The cemetery provides interment rights for single, dual (Companion), and cremated remains interments. Cremated remains can be interred in the ground, the Niche Wall, or a repository (underground vault). There are now over 22,300 interments in the cemetery.



San Marcos Cemetery

Although most of the burial sites in the original section have been purchased, over 2,500 companion vaults have been placed in the ground for future use. The Cemetery provides interment rights for single interments, dual (Companion) interments, and cremated remains interments. Cremated remains can be interred in the ground or in a Niche Wall.



Strategic Framework

NCCD built the Strategic Plan from a series of logical and integrated components, described below.

Mission. The mission statement explains why the organization exists. It articulates the organization's essential work in a brief sentence or two.

Vision. The vision articulates what the organization will become at a given time in the future. It is the strategic target that, when achieved, fulfills the organization's mission. As such, it is at the heart of the strategic planning process.

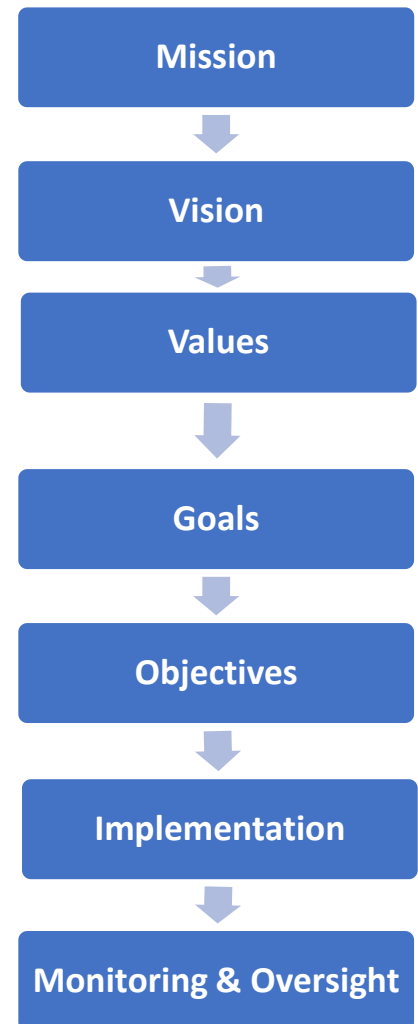
Values. Values provide guidance when an organization is faced with challenging decisions that require trade-offs, help govern attitudes and behaviors, and generally remain constant over time. The Board sets values.

Goals. Goals describe broad, primary areas of management, operations, and planning that need to be addressed to accomplish the mission. Goals are not connected to timelines.

Objectives. Objectives are specific directions established by the Board, which expand upon and refine the goals. There may be multiple objectives for each goal. Objectives are related to goals but more specific, measurable, attainable, and have a time frame.

Implementation Plan. The Implementation Plan contains actions required to accomplish the mission, goals, and objectives. The actions in the plan are assigned to members of the Leadership Team and have timelines. There may be multiple tasks for each objective.

Monitoring/Oversight. Actions developed that will be taken by the Board, Leadership Team, and Staff to ensure that the plan is implemented and updated over time.



Mission, Vision and Values

Mission

It is the mission of the North County Cemetery District to provide respectful, dignified, and cost-effective cemetery services that meet the needs of families and the community.

Vision

Beauty — A beautiful and peaceful final resting place.

Value — Reasonable fees and charges compared to private facilities for quality services.

Pride — Facilities and quality services that are a source of pride.

Values

Supportive — We provide a warm, welcoming, and supportive environment.

Service — In all our actions and decisions, we are mindful that our sole purpose is to serve the community.

Transparency — We provide the public clear access to information and welcome input about our services, actions, and decisions.

Quality — The people we serve deserve beautiful, high-quality facilities that meet or exceed their expectations.

Big Picture View of the Strategic Direction

NCCD's strategy, highest priority, and new direction are summarized below.

Our Highest Priority

The District's highest strategic priority is to attain **financial and organizational excellence**. There are many elements to achieving financial and organizational excellence. Areas of focus in this plan include:

Reach closure on the conservancy so that long-term financial options for the District are clearer.

Develop additional sources of revenue, including from the conservancy, a potential foundation or 501c3, donations, and more.

Develop a comprehensive property and facility master plan that details long-term building, facility, equipment, and landscape needs, in a cohesive architectural style and is linked to funding. It will guide long-term decisions and ensure parity between the site. Examples of needs for each cemetery, include:

- Oak Hill Memorial Park: A new office building for staff and public use, a committal building, low-water-use landscaping, a front gate, conservancy use, and energy conservation.
- San Marcos Cemetery: A new office building for staff and the public, including maintenance facilities, a landscape, a front gate, and energy conservation.

Strategy

The District's strategies are straightforward:

Faithfully implement the strategic plan, including following all the monitoring, reporting, oversight, and accountability actions outlined in the Plan

We will continue to reach out to the public and incorporate public input through surveys, social media, the website, and community presentations.

New Areas of Strategic Focus

There are three new areas of strategic focus that result from this Strategic Plan:

- Development of a property and facility Master Plan.
- Build up a meaningful level of volunteer support for events, cleanup and more.
- Increased interaction with regional and statewide leaders and legislators to help with fundraising and grants.

Goals and Objectives

The following pages contain goals and objectives for the next three years. Staff developed a work plan to fulfill these Board-level goals and objectives.

Key Areas of Change. This strategic business plan focuses only on key areas where there is a change or a desire for additional clarity of direction. Numerous existing and ongoing initiatives, programs, and actions are not incorporated into this Plan.

The goals and objectives are presented on the following pages. They, along with the mission, vision, and values, represent the core strategic direction provided in this plan.

Note on Timing. Work plan elements marked 'annually' or 'ongoing' will be reported at least once each year in January when the General Manager provides a report on the progress of the strategic business plan.

GOAL 1: COMMUNICATION AND ENGAGEMENT. Communication and Engagement in the Community.

Strategic challenge. The District maintains a customer satisfaction survey and has conducted some outreach, but not enough of the public knows about the district's services or that there is a public cemetery in the community. In addition, volunteers and potential volunteers do not receive adequate communication from the District. Potentially, additional volunteers could provide more support if the District engaged them. The District receives a wide variety of requests to accommodate cultural practices around death and needs to consider and clarify what its response will be.

Strategic response. The District will continue engaging with the community through community education, events, and volunteer activities. It will also develop new cultural events and evaluate accommodating various cultural practices.

The objectives and work plan projects below must be consistently carried out to achieve the goal above.

OBJECTIVE 1.1: The District follows an up-to-date outreach plan to educate the community about its services, seeks input, and reports on a scheduled basis on these to the Board of Directors.

OBJECTIVE 1.2: The District has an engaged, educated, supportive and active group of volunteers.

OBJECTIVE 1.3: The District carries out a variety of appropriate cultural events like Day of the Dead that engage and serve the community and make the District more relevant.

OBJECTIVE 1.3: Approved and up-to-date policies clarify acceptable burial and visitation practices and accommodations and the process for considering new ones.

GOAL 2: FACILITIES. Facilities and Infrastructure are Well Maintained and Serve the Needs of the Public.

Strategic challenge. Regulatory hurdles, limited funding, and lack of long-term planning have led to the cemetery facilities and infrastructure becoming outdated. For example, at Oak Hill the break room for employees has no air conditioning and is small; the office space does not give a good impression or meet community needs for privacy and grieving; the Main Gate is narrow and unattractive; there is lack of parking and restrooms; and there is an overall a need for more beautification of the grounds.

At San Marcos Cemetery, there is a desire for the front gate to have a consistent architectural style with what is chosen for the rest of the cemetery buildings and landscaping. The current office is old, too small, and has no separate spaces for staff or the public. There is a vacant old house that needs to be utilized as a committal center or for other purposes or demolished.

Additional District-wide facility challenges include:

Water Smart Landscaping. Long-term regional water supply shortages and high water costs require an eventual change to more water-efficient landscaping.

Trends in burials, including green, hybrid, cremation, and others, may affect facility needs.

A plan for long-term use of the conservancy property is needed.

Need for More Proactive Planning. The district tends to focus on short-term corrections of deficiencies but doesn't engage in long-term planning or seeking out proactive measures to prevent issues from coming up in the first place.

Strategic response. A comprehensive master plan to develop and improve the infrastructure, landscaping, and conservancy lands is a key to addressing the issues above.

The objectives and work plan projects below must be consistently carried out to achieve the goal above.

OBJECTIVE 2.1: The resolution of options for the land conservancy is complete, including the potential to gain revenue from a mitigation bank.

OBJECTIVE 2.2: An up-to-date long-term facility master plan and financial plan lays out the long-term needs, outlines locations, sizes of facilities, style, etc. of both cemeteries.

Note: This plan should include uses, location, and size of key facilities, an architectural approach, long-term water-smart landscaping conversion, and affordable near-term improvements that fit within the larger long-term plan

OBJECTIVE 2.3: The District has a capital infrastructure plan and realistic budgets that detail facility improvements over the next five years.

OBJECTIVE 2.4: The District obtains substantial grants to maintain, update and develop new facilities.

OBJECTIVE 2.5: Facilities are maintained at the lowest long-term costs and reliability due to an effective, proactive, maintenance management program.

GOAL 3: ORGANIZATIONAL EXCELLENCE. An Efficient, Effective, Financially Sustainable Organization.

Strategic challenge. The District has a capable and motivated staff that has been systematically improving operations, administration, finance and management in recent years. However, there is more to be done. Funding the extensive long-term facility needs is a challenge. In addition, the district faces changing state environmental laws and regulations, such as those requiring reduced air pollution and the use of electric-powered vehicles and equipment, as well as requirements for landscaping and burials. Finally, the Board believes it would be beneficial to have an annual opportunity to interact with the staff and recognize their work.

Strategic response. Staff will ensure that facility plans are backed by realistic funding, that there is a plan in place for transitioning to electric vehicles and that there is at least one opportunity for the board to interact with and recognize the staff.

The objectives and work plan projects below must be consistently carried out to achieve the goal above.

OBJECTIVE 3.1 The facility master plan is linked to a realistic long-term financial plan for the District.

OBJECTIVE 3.2: A plan and budget for transitioning to electric vehicles and equipment in line with state regulations is in place.

OBJECTIVE 3.3: The District provides at least one opportunity annually for the Board and staff to interact and for the Board to recognize the work of the staff.

OBJECTIVE 3.4: The District's management, operations, administration, and finance continue improving in efficiency, effectiveness, professionalism, and overall competence.

OBJECTIVE 3.5: Given the small number of staff, the District has programs in place to ensure that the loss of one or more key employees can be managed effectively.

Monitoring, Reporting, Oversight, and Accountability

Communicate and Lead

General Manager and Leadership Team meet with all employees to review the plan and make sure everyone understands the overall plan and the parts they are responsible for.

Report at least annually to the entire staff progress on strategic goals and objectives.

Publish the mission, vision, values, goals, and objectives on posters, handouts and display them where appropriate.

Incorporate the Mission, Vision, Values, Goals, and Objectives into the employee handbook and orientation and training materials for new employees and Board and Committee members.

Clarify Roles and Expectations

Build Strategic responsibilities into job descriptions, so each team member knows what initiatives and objectives they are responsible for driving forward or contributing to. (start with the leadership team)

Build accomplishment of strategic priorities into performance review format.

- General Manager

Allocate Resources to Meet Strategic Objectives

- The budget and hiring reflect strategic goals and objectives.
- Hiring reflects strategic goals and objectives.

Board Oversight and Monitoring

Staff will reference Strategic Plan items on Board meeting agendas as appropriate.

The Board and Board committees will consider the strategic plan when deliberating.

Staff will provide a comprehensive report to the Board on the progress of the strategic plan annually early in the budget development process.

Update the Plan

Formal review and update of goals and objectives in 5 years. With a brief annual review during budget season.

Staff updates implementation plan as appropriate over time.

Single-Page View of the Core Elements of the Strategic Plan

MISSION	provide respectful, dignified, and cost-effective cemetery services that meet the needs of families and the community.		
VISION	Beauty	Value	Pride
VALUES	Supportive	Service	Transparency Quality
GOALS	COMMUNICATION AND ENGAGEMENT. Increased Communication and Engagement in the Community.	2. FACILITIES. Facilities and Infrastructure are Well Maintained and Serve the Needs of the Public.	3. ORGANIZATIONAL EXCELLENCE. An Efficient, Effective, Financially Sustainable Organization.
OBJECTIVES	<p>OBJECTIVE 1.1: The District follows an up-to-date outreach plan to educate the community about its services, seeks input, and reports on a scheduled basis on these to the Board of Directors.</p> <p>OBJECTIVE 1.2: The District has an engaged, educated, supportive and active group of volunteers.</p> <p>OBJECTIVE 1.3: The District carries out a variety of appropriate cultural events like Day of the Dead that engage and serve the community and make the District more relevant.</p> <p>OBJECTIVE 1.3: Approved and up-to-date policies clarify acceptable burial and visitation practices and accommodations and the process for considering new ones.</p>	<p>OBJECTIVE 2.1: The resolution of options for the land conservancy is complete, including the potential to gain revenue from a mitigation bank.</p> <p>OBJECTIVE 2.2: An up-to-date long-term facility master plan and financial plan lays out the long-term needs, outlines locations, sizes of facilities, style, etc. of both cemeteries.</p> <p>OBJECTIVE 2.3: The District has a capital infrastructure plan and realistic budgets that detail facility improvements over the next five years.</p> <p>OBJECTIVE 2.4: The District obtains substantial grants to maintain, update and develop new facilities.</p> <p>OBJECTIVE 2.5: Facilities are maintained at the lowest long-term costs and reliability due to an effective, proactive, maintenance management program.</p>	<p>OBJECTIVE 3.1 The facility master plan is linked to a realistic long-term financial plan for the District.</p> <p>OBJECTIVE 3.2: A plan and budget for transitioning to electric vehicles and equipment in line with state regulations is in place.</p> <p>OBJECTIVE 3.3: The District provides at least one opportunity annually for the Board and staff to interact and for the Board to recognize the work of the staff.</p> <p>OBJECTIVE 3.4: The District’s management, operations, administration, and finance continue improving in efficiency, effectiveness, professionalism, and overall competence.</p> <p>OBJECTIVE 3.5: Given the small number of staff, the District has programs in place to ensure that the loss of one or more key employees can be managed effectively.</p>



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DISTRICT MANAGEMENT STAFF

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