

Registration Form

“Public Cemetery District

Annual Education Seminar & Area Meeting”

Friday, October 11, & Saturday, October 12, 2024

Name \_\_\_\_\_ Position \_\_\_\_\_

District \_\_\_\_\_

Address \_\_\_\_\_

City/State/Zip \_\_\_\_\_

Telephone \_\_\_\_\_ Fax \_\_\_\_\_

First time attendee at CAPC event, Yes \_\_\_\_ No \_\_\_\_

Guest \_\_\_\_\_

Please complete separate registration for each attendee and return with payment no later than September 13, 2024. Refunds will only be made on cancellations received in the CAPC office by September 13, 2024.

Member Registration Fee (For One Person): \$ 398.00

Includes:

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

Friday, October 11, 2024

(Lunch: “Make Your Own Taco Bar” - Chipotle Caesar Salad, Tortillas Strips, Cheese, Tomatoes, Rice, Beans, Sour Cream, Guacamole, Carnitas, Carne Asada, and Cheesecake with Caramel Pecan)

\_\_\_\_ Guest Buffet Lunch @ \$ 60.00 each \$ \_\_\_\_\_

Saturday, October 12, 2024

(Lunch: “California Vineyard” - Mix Greens with Dried Cranberries, Goat Cheese, Pasta Salad, Mushroom Marsala Chicken Breast, Herb Crusted Tri-Tip, Onions, Bacon, Roasted Veggies, Bread Rolls and Chocolate Mosaic Cake)

\_\_\_\_ Guest Plated Lunch @ \$ 65.00 each \$ \_\_\_\_\_

\*Special Need: \_\_\_\_ Vegetarian Lunch

Total Enclosed: \$ \_\_\_\_\_

To: CAPC
P.O. Box 119
San Jacinto, CA 92581
Telephone: (888) 344-9858
Fax: (951) 652-3643

No refunds for cancellations received after September 13, 2024. Scholarship Applications to attend the seminar are being accepted from CAPC member districts until August 16, 2024. Contact CAPC.

California Association of Public Cemeteries
Annual Education Seminar & Area Meeting
Embassy Suites San Luis Obispo
San Luis Obispo, California

Education Seminar

Thursday, October 10, 2024

4:30-6:00 p.m. Registration
4:30-6:00 p.m. Hotel Managers Reception
Dinner on Your Own

Friday, October 11, 2024

6:30-8:00 a.m. Breakfast for Registered Attendees
7:15 a.m. Registration Desk Opens
8:00 a.m. Welcome and Program Introduction
8:15 a.m. Featured Cemetery: Santa Maria Cemetery District, Presented By: Brendan Hannegan, District Manager
8:30 a.m. “The Board’s Role in Finance & Fiscal Accountability”, Presented By: David Becker, Director of Assurance Services for James Marta & Company
10:30 a.m. Break
10:45 a.m. “The Board’s Role in Finance & Fiscal Accountability”, Presented By: David Becker, Director of Assurance Services for James Marta & Company
Noon: Lunch
1:30 p.m. “The Board’s Role in Finance & Fiscal Accountability”, Presented By: David Becker, Director of Assurance Services for James Marta & Company
4:00 p.m. Adjourn
4:20 p.m. CAPC Board of Directors Meeting
Dinner on Your Own

Area Meeting

Saturday, October 12, 2024

7:00-8:30 a.m. Breakfast for Registered Attendees
7:45 a.m. Registration Desk Opens
8:30 a.m. Split Sessions:
Trustees Discussion Group, Facilitated By: Gina Lopez, Coalinga-Huron Cemetery District & Kelly Rivers, Orange County Cemetery District
Managers/Secretaries Discussion Group, Facilitated By: Belinda Ellis, Galt-Arno Cemetery District & Patricia Howard, Alamo-Lafayette/Byron-Brentwood-Knightsen Union Cemetery District
10:30 a.m. Break
10:50 a.m. Recap of Discussion Groups
11:00 a.m. “Understanding Special District Investments & What is the Trustee’s Fiduciary Responsibility”, Presented by: Sandra Hedstrom Wheeler, Vice President Investment Officer of Stifel Investment Services
Noon: Lunch
1:30 p.m. “Digging into the Health & Safety Code”, Presented By: Robert “Bob” Hunt, Attorney
3:30 p.m. Adjourn
Dinner on Your Own

## WHO SHOULD ATTEND:

Public Cemetery District Trustees, Managers, Secretaries and Key Employees.

## Education Seminar

### BOARD'S ROLE IN FINANCE AND FISCAL ACCOUNTABILITY

In a continuing joint venture with California Special Districts Assoc., this year's education seminar will feature the third of a series of four curriculum-based courses designed specifically for special district directors and trustees. General Managers are encouraged to enroll in the program as a member of the governance team.

The Academy represents the core set of knowledge created and accepted by the Special District Community and encompasses everything trustees need to know about:

1. Governance Foundations
2. Setting Direction and Community Leadership
3. The Board's Role in Finance and Fiscal Accountability
4. The Board's Role in Human Resources

The first of the series "Governance Foundations", was presented at the Embassy Suites San Luis Obispo, in October 2021.

The second session "Setting Direction & Community Leadership", was presented at the Lake Tahoe Resort Hotel in October 2022.

Although recommended, it is not necessary to have attended the first two sessions prior to attending any of the other two.

The third and this year's session "**The Board's Role in Finance and Fiscal Accountability**", focuses on how to develop a method for approving the district's annual budget, communicate budget information to the public, establish financial goals for the district, review district finances, develop and analyze capital improvement plans and reserve guidelines, comprehend the relationship between district finance and district belief and values as set forth in the district mission and strategic goals.

## Area Meeting

### Breakout Sessions: Problem Solving

- Enjoy the fellowship and share knowledge with other cemeterians from all areas of the state.
- Participate in discussion of operational problems common to public cemetery districts.
- Bring your questions and participate in group discussions of cemetery district problems and concerns.
- **Understanding Special District Investments & What is the Trustee's Fiduciary Responsibility:** Sandra H. Wheeler, industry experienced financial advisor, will cover the benefits of implementing an Investment Management Program for your District. This includes understanding permitted investments and provider options per Government Code 53601. The importance of having an Investment Policy Statement. Group Discussion on what is the Trustee's fiduciary responsibility? Including investment policy reviews, monthly/quarterly reports and Board/Committee communications. Sandra will wrap up the session with an update on the current Interest Rate Environment.
- **Digging into the Health & Safety Code:** In this presentation Bob will discuss Interment and Disinterment. He will sort out and clarify authorization requirements for various aspects of Interment and Disinterment.

**Location:** The education seminar and area meeting will be held at the: **Embassy Suite San Luis Obispo, San Luis Obispo, CA.**

For hotel accommodations call the hotel directly at 1-805-549-0800 and identify yourself as being part of "California Association of Public Cemeteries" & mention Group Code **XPC**.

You can also go online to:

[www.embassysuitessanluisobispo.com](http://www.embassysuitessanluisobispo.com) and use Group Code **XPC** inside the Special Rates box.

- A special room rate of \$ 235.36 (Tax included) per night has been obtained for CAPC participants.
- Check in-time is 4:00 p.m. and check-out time is 11:00 a.m.
- Free high speed wireless internet in meeting rooms and registered guest rooms.
- Free overnight parking is available.

**Make your hotel reservations today!**

**Deadline for hotel reservations is  
Wednesday, September 11, 2024**

## California Association of Public Cemeteries

Presents the  
**CAPC  
Annual  
Education Seminar  
Friday, October 11, 2024**



**Area Meeting  
Saturday, October 12, 2024**

**Embassy Suites San Luis Obispo  
333 Madonna Rd.  
San Luis Obispo, CA 93405**