

Coachella Valley Public Cemetery District
Board of Trustee Meeting Minutes
Friday, May 8, 2026
8:00 a.m.

A meeting of the Governing Board of the Coachella Valley Public Cemetery District (“District”) was held at the Coachella Valley Public Cemetery District Executive Building at 44801 Village Ct., Suite 104, Palm Desert, CA 92260 on Friday, May 8, 2026, at 8:00 a.m.

Public Notices were posted by the Clerk of the Board on Monday, May 4, 2026, at the following locations:

1. CVPCD Administrative Office – 82895 Avenue 52, Coachella, CA 92236
2. CVPCD Executive Office – 44801 Village Ct., Suite 104, Palm Desert, CA 92260
3. The CVPCD website – <http://coachellacemetery.org>

Chair Ernesto Rosales called the meeting to order at 8:03 a.m., those in attendance were as follows:

Trustees present:

Ernesto Rosales, Chair
Judy Vossler, Vice Chair
Marcos Coronel, Trustee
Bruce Underwood, Trustee

One Board seat was vacant due to the passing of Trustee John Rios.

Additional participants:

Josh Bonner, General Manager
Sherry Winder, Finance Manager/Clerk of the Board
Carlos Campos, General Counsel
Marlene Navarro-Lupian, Cemetery Services Manager
Annabelle Gamez, unCOMPLICATE HR *(via Zoom)*
Vanessa Schneider, unCOMPLICATE HR *(via Zoom)*

Additional participants for Public Comment:

Robert Zarco, Southwest Landscape & Maintenance

FLAG SALUTE

MOMENT OF SILENCE

PUBLIC COMMENT

Robert Zarco of Southwest Landscape & Maintenance provided an operations update, noting the transition from two mowing days per week to one day per week went well. He reported nutsedge will be microdosed through the fertigation system and noted upcoming work includes refreshing

landscape rock near the flagpole, aerating turf, and weed treatments. The Board requested signatures be added to the monthly inspection report, and GM Bonner stated a mini-audit sheet will be created and signed by both GM Bonner and Southwest Landscape & Maintenance.

Trustee Coronel read a message from Norma Guitron into the record expressing gratitude for staff, with special recognition of Enda Rodriguez and Rudy Estrella, for the service provided for her sister, Gloria Jaquez.

ADDITIONS TO THE AGENDA

None.

1. PRESENTATIONS

1.1 Presentation by Annabelle Gamez & Vanessa Schneider unCOMPLICATE HR Classification and Compensation Study

Vanessa Schneider and Annabelle Gamez of unCOMPLICATE HR presented a high-level overview of the Classification and Compensation Study, noting it evaluated positions (not individuals) and compared job functions to the market using updated job descriptions and a minimum 70% match standard. They reported CVPCD is generally market-competitive for staff-level positions (within 5% of the median), with four positions at least 5% above market, one position 0.01%–5% above market, and two positions below the market midpoint; part-time positions were not included. Recommendations included establishing an ongoing job description review schedule with employee input (potentially during annual evaluations), evaluating management-level pay, increasing pay grade spreads from 22% to 30% for non-exempt and 40% for exempt positions, reviewing employer health insurance contributions annually, and updating salary tables more regularly based on comparator agencies' average 3.7% annual COLA. The presenters also recommended developing a written compensation philosophy and commended the District for its intentional approach to maintaining competitive pay and staying current with evaluation cycles.

Discussion: The Board thanked the presenters for their time and presentation. GM Bonner noted this was the consultant's presentation and stated he will return at the next meeting with staff recommendations; he also noted the item will be discussed in both open and closed session due to potential impacts to positions.

The Board discussed the need for broader discussion on the recommendations, including annual increases, pay scale spread adjustments, and the structure of executive and management levels, and noted the District remains competitive and employee friendly. The Board also discussed local burial trends, noting current activity is strong but may not remain at the same level over the next 10 years. GM Bonner noted state trends have been delayed locally due to factors such as urban density and culture, and emphasized payroll as a key planning consideration.

1.2 Presentation by Joshua Bonner & David Turner

District Construction Update and Planning

David Turner congratulated the District on receiving federal funding for the road rehabilitation project and reported that, due to road conditions, portions may require removal and replacement instead of overlay, increasing the project cost by an estimated 20%. He recommended completing the Avenue 52 improvements later to help offset the increase.

Counsel Campos noted the project was originally bid before federal funding was anticipated and HUD requirements were not included. Counsel Campos stated staff will need to bring formal action to a future meeting to reject all bids and rebid the project and noted there may be costs to exit the current bid process. GM Bonner stated staff will return with updates as the project advances, with a target of completing roads by the end of 2026 or early 2027.

GM Bonner discussed planning for Sections 31–35 and recommended pre-laying vaults in two sections due to cost and lead times. GM Bonner also noted planning will include irrigation design, a second well pump, and future reservoir expansion. Mr. Turner reviewed potential site plan updates, including roadway and entrance adjustments, planning for a future median on Avenue 52, and adding parking near the administration building, and stated he will coordinate with staff and the County to finalize a layout for approval before mapping proceeds.

GM Bonner reviewed a proposed columbarium location near the Purple Heart Memorial and discussed needed landscape lead time, space for public events, the condition and potential relocation of the Purple Heart Memorial, and potential Veterans Memorial enhancements pending legal review. The Board directed GM Bonner to speak with local veterans groups regarding these items.

GM Bonner reviewed administration development options and requested direction on ingress and egress planning. GM Bonner noted the District has approximately 25–30 years of capacity remaining and recommended considering a permanent modular administration building as a lower-cost option, with the current building continuing as the Customer Service and Sales Center. The Board expressed general support for the planning concepts and noted the final building decision can be made at a future date.

A recess was called at 10:07 a.m.

The meeting resumed at 10:23 a.m.

1.3 Presentation by Joshua Bonner & Sherry Winder

2026-2027 Budget Proposal

Finance Manager Winder reviewed the draft operating budget, noting it does not yet reflect potential impacts from the Fee Study or the Classification and Compensation Study, which will depend on Board direction. GM Bonner reviewed the proposed 26–27 capital budget at approximately \$1.3 million and outlined key items, including targeted work in Sections 1–7 (with \$20,000 proposed for

highest-need visible areas), initial design and landscaping for a new columbarium, replacement of aging equipment (forklift request with potential backhoe decommissioning, one side-by-side, and two shade structures), and future vault needs, including pricing for a potential pre-purchase to support new section development. GM Bonner also noted security upgrades will be needed following demolition of the former executive office, including additional monitoring measures near the maintenance area.

The Board expressed concern regarding the capital outlay deficit and the forklift cost. GM Bonner suggested leasing a Pettibone forklift for one month to evaluate effectiveness, with safety and time savings as key considerations. The Board discussed funding and noted the District's long-term planning has set aside sufficient funds to cover most anticipated capital needs over the next 10 years.

2. CONSENT CALENDAR

2.1 Trustee Minutes

- a. Board Meeting – April 10, 2026

2.2 Finance and Administration

- a. Approval of Expenditures – Checks and ACH transactions as detailed (April 2026)
- b. Investment Report (April 2026)
- c. Budget to Actual (April 2026)

2.3 Approval of Trustee Travel

Approval of attendance at the CSDA General Manager Leadership Summit

Staff Recommendation: *When a Trustee submits a request for travel that qualifies as “high-cost training,” staff will place the item on the consent agenda for Board approval as a matter of standard practice, provided the request is within the adopted budget. Any Board member may request that the item be pulled from the consent agenda for further discussion.*

Financial Analysis: *The total estimated cost of attendance, including registration, travel, and lodging, is expected to exceed \$2,000 and will be paid from the District's approved trustee training and travel budget.*

2.4 Audit RFP Results

Approval of annual financial statement audit contract

Staff Recommendation: *Award the contract for annual financial statement audit services to Harshwal & Company, LLP, and authorize the General Manager to execute an agreement consistent with the Request for Proposals.*

Financial Analysis: *The proposed fee for audit services is \$43,660 for the initial three-year term, with an optional single audit fee identified if needed. The cost of audit services will be included*

within the District's adopted budget(s) and will be allocated across the term of the agreement as specified in the Harshwal & Company response (page 5).

2.5 Budget Adjustments

Requested adjustments to the 2025/2026 budget based on current trends and expenses

Staff Recommendation: *Adjust the Operating and Capital Budgets for 2025/2026 as recommended by staff.*

Financial Analysis: *Total adjustments to Operating Budget: \$151,350
Total adjustments to Capital Budget: \$0*

Discussion: Trustee Coronel requested that Item 2.5 be pulled from the Consent Calendar for further discussion.

Motion: Coronel – Pull 2.5 and approve the rest

Second: Underwood

Yes: All in favor

Abstain: None

No: None

Absent: None

Vacant: One Board seat

Motion passed.

2.5 Budget Adjustments

Requested adjustments to the 2025/2026 budget based on current trends and expenses

Staff Recommendation: *Adjust the Operating and Capital Budgets for 2025/2026 as recommended by staff.*

Financial Analysis: *Total adjustments to Operating Budget: \$151,350
Total adjustments to Capital Budget: \$0*

Discussion: The Board discussed an adjustment to Other Benefits, including Vacation Buyouts, noting the program is working as intended by providing an optional benefit while reducing accrued leave balances and related separation liability; however, higher usage this year resulted in the line item being underfunded and requiring an adjustment.

The Board also discussed the legal services adjustment, and staff noted the increase reflects multiple unanticipated legal matters, not only the LAFCO annexation.

GM Bonner requested increasing the Grounds Maintenance adjustment to \$19,000 for curb removal and refreshing landscape rock at the front of the cemetery office.

Motion: Coronel – Move for approval

Second: Underwood

Yes: All in favor

Abstain: None

No: None

Absent: None

Vacant: One Board seat

Motion passed.

3. ACTION ITEMS

3.1 Board Meeting Schedule for 2026-2027

Annual adoption of upcoming board meeting schedule

***Staff Recommendation:** Staff recommends the Board approve the proposed schedule and provide direction for staff to present a formal resolution at the June meeting to codify the adopted calendar.*

***Financial Analysis:** There is no known financial impact resulting from this action.*

Discussion: GM Bonner reviewed the proposed Board meeting schedule, noting it maintains the second Friday meeting date, excludes a December meeting, and includes adjustments around CAPC conferences. The Board discussed adding periodic evening meetings to improve public access and noted this may not work for all Trustees; however, the approved Saturday public information sessions, with up to two Board members attending, may help address that need.

Motion: Coronel – Move approval

Second: Underwood

Yes: All in favor

Abstain: None

No: None

Absent: None

Vacant: One Board seat

Motion passed.

3.2 Tuition Reimbursement Program

Expansion of existing policy

***Staff Recommendation:** Approve an amendment to the District's Education Policy to expand tuition reimbursement eligibility to regular full-time employees and establish an annual reimbursement cap of \$7,500 per employee, not to exceed \$30,000 in lifetime benefits, subject to budget appropriation and administrative guidelines.*

***Financial Analysis:** The fiscal impact of the proposed tuition reimbursement program is currently indeterminate, as the District does not have historical data regarding employee participation in a broad-based education assistance program.*

The proposed program would apply to approximately 11 eligible full-time employees. At the established annual cap of \$7,500 per employee, the maximum potential annual exposure would be \$82,500 if all eligible employees fully utilized the benefit. It is important to note that full participation at the maximum level is unlikely. Actual program costs will depend on employee interest, program enrollment, and successful course completion. Based on typical utilization patterns in similar programs, participation is expected to be limited and variable.

Given the District's size and the capped structure of the program, the overall financial impact is anticipated to be manageable within the context of the District's operating budget and subject to annual appropriation by the Board.

Discussion: GM Bonner reviewed the proposed education reimbursement policy, including eligibility after a 180-day probationary period and limits of \$7,500 annually and \$30,000 lifetime. Staff recommended limiting the benefit to full-time employees, noting part-time employees may work up to 19 hours per week and this would be the only District benefit available to them. The Board discussed the benefit as a strong employee incentive, including its relationship to the Classification and Compensation Study, and noted prior public comment from a staff member on its value. The Board supported the program and, after discussion, increased the annual cap to \$15,000 while maintaining the \$30,000 lifetime cap.

Motion: Underwood – Move for approval as recommended

Second: Vossler

After discussion, the motion was amended to increase the annual cap to \$15,000 and include a six-month report on program performance.

Yes: All in favor

Abstain: None

No: None

Absent: None

Vacant: One Board seat

Motion passed.

3.3 Shutter Engraving Process

Allowance for customer selection of shutter engraving vendors

Staff Recommendation: *Staff is recommending the following change (addition) be made to the District's General Rules and Regulations: Niche Shutters Only District-issued shutters may be used on District grounds. All niche shutter engraving services shall be performed by vendors approved by the District. Constituents shall coordinate directly with their selected vendor for all aspects of design development, revisions, and associated costs. The District shall not participate in design coordination but shall retain final approval authority to ensure compliance with established standards.*

The District's responsibilities shall be limited to providing design guidelines, reviewing and approving final artwork, and removing and reinstalling niche shutters. All vendors must meet

District requirements, including maintaining appropriate insurance and accepting liability for any damage resulting from their work. The District reserves the right to revoke vendor approval for noncompliance.

Niche shutters must be picked up and returned by the authorized vendor selected by the niche owner. Once a niche shutter is removed from District grounds, it becomes the responsibility of the niche owner until it is returned to the District. Any damage occurring during this period shall be the financial responsibility of the niche owner, including replacement of the shutter at current market rates.

Financial Analysis: *While the exact financial impact of this change may vary based on volume and individual cases, staff estimates that the proposed process would reduce administrative time by approximately two hours per niche order. This reduction represents a meaningful decrease in staff workload and is expected to result in cost savings to constituents through reduced billable administrative time.*

Discussion: GM Bonner reviewed that staff is proposing allowing families to select an engraver of their choosing, rather than limiting shutter engraving to a single vendor.

Motion: Coronel – move approval

Second: Vossler

Yes:

Abstain: None

No: None

Absent: None

Vacant: One Board seat

Motion passed.

3.4 Fee Study Adoption

Staff recommendations from the 2026 fee study

Staff Recommendation: *Approve the adoption of the Cost of Services User Fee Study as presented in Exhibit B.*

Financial Analysis: *The adoption of the Fee Study will align District fees with the cost of providing services, supporting long-term financial sustainability and cost recovery. The proposed multi-year schedule reflects both current cost conditions and projected increases, including labor related adjustments. The specific financial impacts of these changes will be most accurately reflected in the District's annual budgets as they are developed and presented to the Board.*

Discussion: GM Bonner reviewed the proposed Fee Study adoption based on the prior month's presentation and stated the recommended schedule includes a 5% annual fee increase to align with projected 5% annual labor cost increases. GM Bonner noted some fees would decrease and not all fees are increasing.

Motion: Coronel – Move approval as recommended

Second: Underwood

Yes: All in favor
Abstain: None
No: None
Absent: None
Vacant: One Board seat
Motion passed.

4. INFORMATION ITEMS

4.1 10-Year Master Plan Review

Timelines and updates for the 2026-2027 budget year

GM Bonner noted this item will be included in all Planning Sessions and stated the District is on schedule for this year.

4.2 Project Update for the 2026-2027 Budget Year

Ongoing and planned projects

GM Bonner reviewed the list of work items carrying into next year and requested that the Board avoid adding new items due to upcoming capital projects. The Board discussed interest in implementing agenda management software and expressed concerns about the increased landscaping budget cost and the impacts of not moving forward with the prior staff recommendation.

5. COMMITTEE UPDATES

5.1 LAFCO MSR Ad Hoc Committee

Counsel Campos reported the committee has not met and stated a meeting is being scheduled once Paula returns from vacation. Counsel Campos noted LAFCO will require a surveyor and stated that, under the default Master Tax Sharing provisions, taxes do not shift, which may allow room for negotiation through the County on the District's behalf.

The Board discussed prior conversations regarding an out-of-jurisdiction arrangement with IPD and the possibility of outsourcing DDLM.

6. TRUSTEE/GENERAL MANAGER COMMENTS

6.1 Trustee Comments and Event/Function Report Out

Chair Rosales stated he does not attend many events but appreciates the Board's active role in representing the District, and noted he is available as needed.

Vice Chair Vossler reported she had been out of town and had no report.

Trustee Coronel reported attending many of the same events referenced by Trustee Underwood and noted the SDARC Luncheon is upcoming. Trustee Coronel thanked Finance Manager Winder and Cemetery Services Manager Navarro-Lupian for attending and participating in the meeting.

Trustee Underwood reported attending a Disaster Preparedness meeting focused on computer backup disasters, the GCVCC State of Education for Riverside County, and the PDACC Annual Business Awards, where the District was nominated for the Healthy Living Award. Trustee Underwood congratulated Trustee Coronel on earning his doctorate and wished everyone a Happy Mother's Day.

6.2 General Manager Update

GM Bonner reported his General Manager's report was presented as provided.

Meeting was adjourned to closed session at 11:55 a.m.

7. CLOSED SESSION ITEMS

7.1 PUBLIC EMPLOYEE PERFORMANCE EVALUATION

Title: General Manager

Meeting resumed from closed session at 12:13 p.m.

Counsel Campos reported received direction, no reportable action.

8. ADJOURNMENT

Meeting was adjourned at 12:14 p.m.

NEXT MEETING TIME, DATE AND LOCATION

Friday, June 12, 2026

8:00 a.m.

Coachella Valley Public Cemetery District Executive Office

44801 Village Ct., Suite 104

Palm Desert, CA 92260

Respectfully Submitted,

Sherry Winder

Clerk of the Board

Approved: _____ BOT Mtg.