

Coachella Valley Public Cemetery District
Board of Trustee Meeting Minutes
Friday, March 13, 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, March 13, 2026, at 8:00 a.m.

Public Notices were posted by the Clerk of the Board on Monday, March 9, 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 8:01 a.m., those in attendance were as follows:

Trustees present:

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

Trustees absent:

Marcos Coronel, Trustee *(Excused, Board action: Underwood/Vossler, 3-0)*

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
David Farnsworth, Auditor *(via Zoom)*
Robert Pantanella, Contractor
Nicholas Keathley, LSL CPAs *(via Zoom)*
Ryan Domino, LSL CPAs *(via Zoom)*

Additional participants for Public Comment:

Yvonne Gonzalez of Indio

FLAG SALUTE

MOMENT OF SILENCE

During the Moment of Silence, Chair Rosales recognized the passing of Trustee John Rios and noted his lasting impact on the community through his career and volunteer service, stating he was loved and will be missed.

PUBLIC COMMENT

Yvonne Gonzalez of Indio addressed the Board, thanked GM Bonner for responding to her concerns, and emphasized the importance of community education and engagement.

ADDITIONS TO THE AGENDA

None

1. PRESENTATIONS

1.1 Presentation by David J. Farnsworth

Annual comprehensive financial report for fiscal year ending June 30, 2025

David Farnsworth reported the financial statements were prepared through a collaborative effort between the Finance Department, Management, and Eide Bailly. He reported an unmodified (clean) audit opinion and stated there were no indications or allegations of fraud. He noted an audit finding related to fraudulent checks, which was classified as a significant deficiency, and included recommendations to strengthen internal controls. David Farnsworth thanked the Finance team, staff, and Eide Bailly for their assistance.

1.2 Presentation by Robert Pantanella

Findings from workplace violence and general safety assessment

GM Bonner reported the District completed a required safety assessment, presented by retired Police Chief Robert Pantanella, which focused on public access and identified areas for improvement such as lighting, equipment checks, and additional security measures. GM Bonner stated the District is updating its safety approach, including increased monitoring and target-hardening at key facilities, and noted staff will continue coordinating safety meetings and follow-up actions.

Due to a late arrival, Chair Rosales approved allowing public comment to be heard before the Consent Calendar.

2. CONSENT CALENDAR

2.1 Trustee Minutes

- a. Board Meeting – February 13, 2026

2.2 Finance and Administration

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

Motion: Vossler – Move for approval of consent calendar

Second: Underwood

Yes: Rosales, Vossler, Underwood

Abstain: None

No: None

Absent: Coronel

Vacant: One Board seat

Motion passed.

3. ACTION ITEMS

3.1 Acceptance of the Annual Comprehensive Financial Report

For fiscal year ending June 30, 2025

***Staff Recommendation:** Accept the Annual Comprehensive Financial Report (ACFR) and independent financial audit for the fiscal year ending June 30, 2025.*

***Financial Analysis:** There is no fiscal impact associated with acceptance of the report. The cost of the independent audit services was previously approved by the Board and included in the adopted budget.*

Discussion: GM Bonner reviewed the audit results presented by David Farnsworth, CPA, and noting that salaries represent 42% of fees, and emphasized that property tax and endowment revenue must remain sufficient to support perpetual care of the Cemetery, which the District is well positioned to maintain at this time.

Motion: Underwood – Move approval

Second: Vossler

Yes: Rosales, Vossler, Underwood

Abstain: None

No: None

Absent: Coronel

Vacant: One Board seat

Motion passed.

3.2 Direction on Casting LAFCO Election Ballot

Regular Special District Member (Riverside LAFCO – Western Region)

Staff Recommendation: *Provide direction to the Board Chair regarding the District’s ranked voting preferences for the 2026 Special District Selection Committee election for the Regular Special District Member representing the Western Region on the Riverside Local Agency Formation Commission, and authorize the Chair to execute and submit the official ballot on behalf of the District.*

Financial Analysis: *There is no fiscal impact associated with participation in this election.*

Discussion: GM Bonner reported the item related to the Western Region LAFCO election and noted there were originally six candidates, with one withdrawing. GM Bonner stated candidate communications were provided to the Board for review. The Board discussed candidate preferences and agreed to vote for Steve Corona of Eastern Municipal Water District, selecting one candidate only.

Motion: Underwood – Move to vote for Steve Corona as Western Representative to LAFCO

Second: Vossler

Yes: Rosales, Vossler, Underwood

Abstain: None

No: None

Absent: Coronel

Vacant: One Board seat

Motion passed.

3.3 Consideration of Nomination for the CSDA Board of Directors

California Special Districts Association Southern Network Seat C (2027–2029 Term)

Staff Recommendation: *Provide direction regarding whether the District should submit a nomination for the California Special Districts Association (CSDA) Board of Directors for Southern Network Seat C for the 2027–2029 term.*

Financial Analysis: *There is no fiscal impact associated with submitting a nomination. If a candidate from the District were elected to the CSDA Board, participation in Board and committee meetings may involve travel commitments; however, CSDA reimburses expenses related to official Board and committee meetings consistent with its Board policies.*

Discussion: GM Bonner noted the item was a call for nominations and asked whether the Board wished to nominate anyone. The Board discussed the item and agreed to take no action.

3.4 Selection of Financial and Accounting Services Provider

2026 request for proposals

Staff Recommendation: *Staff recommends that the Board select Starting Line Advisory as the District’s financial and accounting services provider and authorize the General Manager to execute the associated professional services agreement, subject to approval as to form by General Counsel.*

Financial Analysis: *The estimated cost for these services is \$29,100 annually. Funding will be drawn from the District’s Consulting budget (Account 6140). The current budget would accommodate this expense and no budget adjustment is required as a result of this action.*

Discussion: GM Bonner reported the District’s current accounting firm contract has expired and an RFP was issued. GM Bonner noted five qualified proposals were received and one firm declined to submit. GM Bonner stated the top two proposals tied after review, and staff recommended Starting Line Advisory because the firm has personnel with prior experience working with the District.

Motion: Underwood – Move to accept staff recommendation

Second: Vossler

Yes: Rosales, Vossler, Underwood

Abstain: None

No: None

Absent: Coronel

Vacant: One Board seat

Motion passed.

4. INFORMATION ITEMS

4.1 Discussion of Education Policy

Potential expansion of tuition reimbursement eligibility

Discussion: GM Bonner reviewed a Board request to expand the District’s education policy by extending tuition reimbursement eligibility to all employees under a uniform annual allowance to support advanced education, trade schools, or degree programs as a retention tool. The Board directed staff to return with a policy revision applying the benefit to all employees, with an emphasis on job-related training and certifications.

4.2 Discussion of Potential Community Forum for Public Engagement

Community forum proposed as an alternative to guided tours

Discussion: GM Bonner reviewed holding community forums in place of the previously discussed guided tours, which were discouraged by insurance and security vendors due to liability concerns in maintenance areas. GM Bonner proposed hosting two public events each year, in the fall and spring, behind the administration office to answer questions and address concerns. Counsel Campos recommended limiting Board participation to two Trustees per forum due to potential concerns depending on the topics. GM Bonner noted current outreach includes the website, social media, email, and quarterly newsletters, with plans to add a section to the newsletters for additional public education. The Board expressed support and encouraged staff to proceed.

4.3 Discussion of Potential Extension of District Benefits to Trustees

Eligibility for health and other District offered benefits

Discussion: GM Bonner reviewed options for Trustee benefits, noting one option would require changing the District’s CalPERS contract to provide employee-level benefits. GM Bonner also noted a potential no-cost option to explore through a 457 savings plan. The Board discussed staying focused on the District’s core mission and expressed support for exploring no-cost benefits.

4.4 Certification Support for District Employees

Discussion of potential notary certification pay

Discussion: GM Bonner reviewed a request from the February meeting for notary certification pay. GM Bonner stated it would be better addressed through the Class & Comp Study by adding the duty to the job description and incorporating compensation into the classification, rather than creating separate certification pay, which Finance Manager Winder noted would be an administrative burden to track and report. The Board agreed no further action was needed.

4.5 Memorial Tributes for Trustee John Rios

Discussion of District recognition for Trustee John Rios

Discussion: GM Bonner expressed condolences on the passing of Trustee John Rios and, on behalf of staff, noted Trustee Rios regularly visited the cemetery and was kind and supportive. GM Bonner stated staff wished to be thoughtful about the timing for updating District displays and communications and asked for Board direction on appropriate memorial recognition options. Board discussion ensued regarding ways to honor Trustee Rios, including placing a black ribbon across photos and name plates and adding an “In Memoriam” notice under his photos with his birth year, death year, and years of service, to remain in place until the appointment of a new Trustee. The Board also discussed providing recognition in the CSDA magazine and other tribute options, including a possible road naming. Chair Rosales asked Counsel Campos whether any legal action was required, and none was noted.

5. COMMITTEE UPDATES

5.1 LAFCO MSR Ad Hoc Committee

Trustee Underwood reported the committee did not meet but received a memo from Counsel Campos with guidance on next steps. Counsel Campos stated the memo outlined the process and noted the District may need to prepare the required map, with follow-up needed from the County. Trustee Underwood stated he believes annexation has a public benefit and that a financial risk analysis would help demonstrate the costs and benefits. Counsel Campos noted a CEQA exemption may apply, which could reduce time and costs.

6. TRUSTEE/GENERAL MANAGER COMMENTS

6.1 Trustee Comments and Event/Function Report Out

Chair Rosales reported he attended the viewing for Trustee John Rios but was unable to attend the service. Chair Rosales also reported he met with Congressman Raul Ruiz to receive the \$1 million check and thanked staff for their support in securing the funding.

Vice Chair Vossler reported attending Trustee John Rios' memorial and stated she was grateful to be there. Vice Chair Vossler also reported participating in a meeting with GM Bonner and Trustee Coronel regarding the vehicle allowance, attending the \$1 million check presentation with Congressman Raul Ruiz, and being active in her new Board seat with the GCVCC. Vice Chair Vossler stated she completed the required SB 827 training and requested that Clerk Winder review Form 700 filing requirements with the Board.

Trustee Underwood requested that his February meeting attendance be read into the record, and Clerk Winder read his reported activities from an email, including meetings with Conserve LandCare; Trustee Coronel and legal counsel regarding potential annexation of property into CVPCD boundaries; a networking meeting at NPO in Palm Desert with the nonprofit community; and an online CALAFCO meeting representing the District within the California LAFCO community. Trustee Underwood also reported meeting with lobbyist Jayson Braude to discuss potential state-level funding opportunities. GM Bonner clarified that funding requests are limited to Board-approved projects and noted a \$500,000 request was submitted for new roads associated with the cemetery section expansion. GM Bonner also noted CSDA provides a national special district funding website and that legal counsel typically tracks those opportunities for the District. Trustee Underwood questioned how the ribbon-cutting date was selected and suggested using a better process to determine schedules in the future. GM Bonner stated he selected the date due to timing needs and the Board not identifying an alternative date.

6.2 General Manager Update

GM Bonner reported the District is beginning the demolition process for the former executive office. GM Bonner also noted upright headstones are being laid down for nonresponsive families and stated six families responded and resolved the identified issues. GM Bonner reported he presented on authentic leadership at the WACE conference and has been asked to teach decision framing for board decisions at the CSDA General Manager conference in June. GM Bonner also noted recent employee departures were included in the GM report.

Meeting was adjourned to closed session at 9:41 a.m.

7. CLOSED SESSION ITEMS

7.1 CONFERENCE WITH LEGAL COUNSEL – ANTICIPATED LITIGATION
Significant Exposure to Litigation, Pursuant to Government Code Section
54956.9(d)(2)/(e)(1) One (1) Potential Case

Meeting resumed from closed session at 10:10 a.m.

Counsel Campos reported received direction, no reportable action.

8. ADJOURNMENT

Meeting was adjourned at 10:12 a.m.

NEXT MEETING TIME, DATE AND LOCATION

Friday, April 10, 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.