



OCEAN VIEW CEMETERY, ASTORIA CEMETERY MASTER PLAN



Cemetery Master Plan
Astoria

March 11, 2020



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Executive Summary

This Ocean View Cemetery Master Plan is the first comprehensive foundational document that provides a “road map” for the City of Astoria to guide its operation and development of the cemetery over the coming decades.

The RFP for this project identified its core objectives as fostering financial stability, consistent maintenance and sustainable development. This Master Plan will help to achieve these objectives by equipping the City’s leadership and staff with a data-based framework for decision-making and operations that are consistent with current management and financial best practices.

The project was awarded to the consultant team of LEES+Associates Cemetery Planners (Vancouver, BC) and David Evans and Associates (Portland, Oregon) in July 2019. Over the subsequent eight months, the team collaborated closely with the City of Astoria, visited the site and undertook an extensive engagement process. Working with data provided by the City of Astoria, the consultants completed a cemetery needs analysis, an operations and governance analysis, a products and services review, and a financial plan. The consultants also reviewed the Cemetery’s Rules and Regulations and proposed a cemetery marketing strategy.

The team made multiple visits to the cemetery, which provided a sound basis for site evaluation and physical master plan concept. Potential site improvement projects were identified, along with budget level costs and potential funding sources. The Master Plan includes a summary table of Recommendations for Operational and Capital Improvements in Chapter 10: Strategic Development and Implementation Plan.

The master plan concept identifies improvements in all areas of the site, reflecting the site analysis and the outcome of the engagement process, notably the public survey. Improvements are focused in the active sales and interment zones and include new interment options. They address key overall issues, such as the need for a new water supply, wayfinding and entry area improvements. The Ocean View Abbey Mausoleum and chapel site are areas for further consideration.

The Recommendations for Operational and Capital Improvements table identifies the four areas of the cemetery operation where the City can initiate changes to improve its administration, financial performance, site operations, and maintenance. It also identifies twenty proposed capital projects, by priority, where the City undertake capital improvements to improve the site’s appeal and relevance to the residents of Astoria and the greater Clatsop County. Proposed phasing and the rationale for the project ranking is outlined in Appendix F, Matrix of Proposed Site Improvements by ROI. Budget level construction cost estimates for these capital projects are provided in Appendix G, Proposed Capital Improvements and Cost Estimates.

KEY FINDINGS INCLUDE:

CEMETERY NEED ANALYSIS

Ocean View Cemetery serves all of Clatsop County, which has an older demographic than most counties in Oregon. Its residents are primarily of European descent, and self-identify as Christian.

Over the next 25 years¹:

- Clatsop County is expected to grow by 50%, with most of this growth concentrated in Warrenton and Gearhart;
- There will be about 12,700 deaths in the County, and its cremation rate of 82%, the highest in the state, will continue to rise.

Once fully platted, at the projected rate of demand, the developed area at Ocean View has space for:

- 82 years of casket plot and 120 years of cremation plot sales, and
- 64 years of casket plot and 15 years of cremation plot interments.

Including the 30 acres of undeveloped land available at Ocean View Cemetery, the City has a total of **over 200 years of cemetery land sales capacity**.

Ocean View Cemetery is on par with the best practice for cemeteries of offering in the order of 100 years' worth of cemetery space. Based on this, the City of Astoria could consider other uses for the most northerly area of Ocean View Cemetery's undeveloped area. Any revenue generated could contribute to the care and maintenance fund.

¹ Clatsop County and City of Astoria population figures and projections shown in this report do not reflect those used in other City and County documents due to differing sources: The City of Astoria uses data provided by Portland State University; this report uses data drawn from the US Census. Historic population data in this report are from the US Census publication: Annual Estimates of the Resident Population: April 1, 2010 to July 1, 2018. Population projections in this report are based on an assumption that the average growth rate for each of the five cities and the rural population within this study area over the past five years would continue forward into the future. The effect of any discrepancies between PSU and US Census figures was deemed immaterial to the purposes of this study. The City of Astoria acknowledges the difference but has chosen to retain the data and analysis as it appears in this report.

SITE EVALUATION

Ocean View Cemetery has a **unique environmental character**. Set within an ecologically rich context, its overall quality reflects its original design as a rural, garden cemetery. The study identified fifteen “character zones,” which were reviewed in light of the interment layout plan of casket and cremation sections. The outcome was a plan that identified **improvement opportunity areas**.

GOVERNANCE AND OPERATIONS

Operations challenges at the site are the result of physical characteristics, aging or nonfunctional infrastructure, the lack of sufficient resources to properly manage the operation, and records keeping systems that are labor-intensive and do not accurately capture all costs. Staffing levels are below industry standards, though efforts to improve site care over the past year has reduced complaints. **Increasing staffing levels** and **investing in digital cemetery management software** is recommended.

ENGAGEMENT SUMMARY

Engagement included presentations to internal stakeholders (Staff and elected officials), external stakeholders (mortuaries, monument suppliers and other interested parties). A public open house was held, and the consultants met with the City of Astoria Parks and Recreation Department and City Council. **A public survey posted on the City of Astoria’s website yielded over 200 responses.**

Overall, respondents confirmed that conditions at the site had improved, but that **grounds improvements are still the main priority**. Other priorities included **restrooms, signage, outdoor events space, and entry area improvements**. **New cremation interment options** was the highest-ranked choice among cemetery product offerings, followed by **green burial**.

PRODUCTS AND SERVICES REVIEW

Ocean View Cemetery currently offers only in-ground casket and cremation burial, which is below industry standards. **New interment and memorialization options are recommended**, especially those that would serve the area’s growing cremation market. The City should consider introducing a non-resident premium on its prices, but reducing annual fee increases to below the 10% that it has been charging annually since 2015 to maintain its mid-level pricing relative to other area cemeteries.

MARKETING STRATEGY

The review determined that the City of Astoria should **allocate a budget for cemetery marketing**, improve its digital presence with an enhanced web page, and consider increased use of social media. A printed brochure was suggested as an effective way to reach the primary market of older adults. Other marketing initiatives include increased community engagement, including offering tours and public events, hosted by the cemetery.

FINANCIAL PLAN

A detailed review of the City's cemetery records determined that its current financial management system does not meet best practices and requires improved tracking. That said, the cemetery appears to be **generating a small profit**, and its **Perpetual Care Fund (PCF) is being managed as required**. It is **now 50% funded** relative to what will be needed to maintain the site once it is full and no longer generating revenue.

Two financial scenarios were developed to show the site's performance operating according to "Status quo" (no changes to pricing etc.) and the site's performance operation according to an "Alternative Model." This revealed the merits of the "Alternate Model," which includes **changes to pricing, the introduction of non-resident fees, adjusting the management of the cemetery's PCF fund, and the creation of an independent Development Fund**.

Also recommended for the City to **establish new cemetery accounts, system codes, financial management policies and reporting protocols**, which will enhance the City's ability to easily track and report, and to evaluate the results of these changes five years after implementation.

CEMETERY RULES AND REGULATIONS

The City of Astoria should commission an update of its current (2011) rules and regulations to:

- Clarify and update its terminology;
- Identify the specific responsibilities of the City and cemetery customers;
- Expand the document to include new interment options to be offered (such as for cremation and green burial);
- Review the number and types of interments allowed in the types of plots offered;
- Revise the specification section for monuments, and
- Remove any references to pricing; placing this and other points that are subject to change in an attached schedule.

STRATEGIC DEVELOPMENT AND IMPLEMENTATION PLAN

The proposed plan indicates improvements in all areas of the site, reflecting the site analysis and the outcome of the public engagement process, notably the public survey. Improvements are focused in active sales and interment zones but also address key overall issues, such as the need for **a new water supply, wayfinding signage, and entry area improvements**. The Ocean View Abbey Mausoleum and chapel site are key areas for consideration.

CONCLUSION

Ocean View Cemetery has the existing land base, natural and heritage features, and community interest required to achieve financial, social and environmental sustainability. With strategic management, the site has the ability to meet the needs and wishes of Clatsop County residents for at least the next 100 years.

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1. Introduction

Ocean View Cemetery is a 70-acre active cemetery located at 575 SW 18th Avenue, Warrenton, Oregon. Owned and operated by the City of Astoria, the site encompasses 40 acres of developed interment area and 30 acres of undeveloped land. Ocean View was established in 1897 to replace a small urban cemetery situated within the City of Astoria. It has been serving the residents of Astoria and greater Clatsop County for over 120 years, but without the guidance of a comprehensive master plan.

The initiative to prepare this Cemetery Master Plan arose out of the City's concern regarding the cemetery's current and future financial viability and the quality of its care and maintenance, and the desire to foster its sustainable development. In 2016, the City of Astoria's Parks and Recreation Plan identified aging infrastructure at the cemetery and rated its overall condition as "Poor."

Physical challenges posed by the cemetery's development on an historic sand dune and physically outside the City of Astoria were compounded by a lack of clarity regarding its current and future sustainability. Ocean View Cemetery is operated under the City's Parks and Recreation and Finance Departments, but over recent years, it has not had adequate resources or dedicated personnel.

Public complaints had led to questions about how well the cemetery was meeting the needs of residents in terms of its products and services and its pricing relative to other cemeteries, especially in view of the changing market for cemetery products and services across the state of Oregon. As well, there were questions about marketing, investments needed to improve the site and its infrastructure (including an historic mausoleum), and what those investments should be.

The following chapters summarize the tasks completed by the consultant team, working closely with City of Astoria staff and elected officials and area residents and stakeholders. The final sections of this report include a physical site master plan, a list of recommendations, budget level estimates for funding capital projects, and funding sources and strategies.

The RFP for this project referred to the City's original burial ground, Hillside Cemetery, now known as Pioneer Cemetery Park, and the Ocean View Abbey Mausoleum, still a key feature at Ocean View Cemetery. Both of these sites are relevant to this Cemetery Master Plan. The Mausoleum is addressed in detail as **Appendix A** at the end of this document. Hillside Cemetery/Pioneer Cemetery Park is addressed in detail in **Appendix B**.



2. Cemetery Needs Analysis

This chapter identifies the communities served by Ocean View Cemetery, their demographic profile, death rates, cremation and burial trends, as well as other cemetery service providers within Ocean View's market area. These are the variables that will drive the demand for the cemetery's land and services over the foreseeable future.

The purpose of this analysis is to compare the City's currently available inventory with its capacity to develop new interment space. The outcome will inform the City's long term financial planning, and the design and development of its cemetery land to best serve local residents over the next 25- 50 years.

LAND NEEDS ANALYSIS - KEY FINDINGS

The following section is a summary of the key findings from this plan's cemetery land needs analysis:

HISTORIC DEMOGRAPHIC TRENDS, INTERMENT RATES AND COMMUNITY SERVED

- In 2018, the Clatsop County's (the County) death rate was 10.5 deaths per 1,000 residents;
- In 2014, 61% of Oregon residents identify as Christian and 8% with other faiths. 31% of Oregon residents report having no religious affiliation;

OVER THE PAST 5 YEARS:

- There were 1,975 deaths of County residents from 2014 to 2018, averaging 395 per year;
- 82% of County residents chose cremation, 15% chose casket burial, and 3% chose an alternative form of disposition (e.g. alkaline hydrolysis, medical donation) or were sent outside of the State;
- Ocean View Cemetery served 53% of residents choosing casket burial (below average for municipal cemeteries in North America), and 14% of residents choosing cremation (on par with the average for municipal cemeteries in North America);
- 158 caskets and 219 cremations were interred at Ocean View Cemetery, averaging 32 casket and 44 cremation interments per year;
- 120 casket plots and 24 cremation plots were sold at Ocean View Cemetery, averaging 24 casket plot and 5 cremation plot sales per year;

- There were 9 times as many cremation interments as there are cremation plot sales. Therefore, the majority of cremation interments appear to be taking place in casket plots;
- Ocean View Cemetery has an at-need to pre-need sales ratio of 0.50.
33% of plot sales are pre-need, there are 3 at-need sales for every 2 pre-need sales, and
- Ocean View cemetery has a resident to non-resident sales ratio of 0.50.
33% of plot sales are non-resident, there are 3 resident sales for every 2 non-resident sales.

PROJECTED DEMOGRAPHIC TRENDS, INTERMENT RATES AND COMMUNITY SERVED

- Starting in 2021, Baby Boomers will begin to reach their projected life expectancy, and there will be a slow, but steady increase in the need for cemetery services over the next 25 years;

OVER THE NEXT 25 YEARS THERE WILL BE¹:

- 50% population growth, wherein the County will reach a population of 56,225;
- An increase in the County's death rate to 11.2 deaths per 1,000 residents, due to the passing of the Baby Boomer generation;
- 12,700 deaths in the County, averaging 500 deaths per year;
- 1,300 deaths in the County that will result in casket burials, averaging 50 casket burials per year;
- 11,400 deaths in the County that will result in cremation, averaging 460 cremations per year;
- 700 caskets and 1,600 cremated remains interments at Ocean View Cemetery, averaging 28 caskets and 64 cremated remains interments per year, and
- 500 casket plots and 200 cremation plots sales at Ocean View Cemetery, averaging 20 caskets plots and 8 cremated remains plots per year.

¹ Clatsop County and City of Astoria population figures and projections shown in this report do not reflect those used in other City and County documents due to differing sources: The City of Astoria uses data provided by Portland State University; this report uses data drawn from the US Census. Historic population data in this report are from the US Census publication: Annual Estimates of the Resident Population: April 1, 2010 to July 1, 2018. Population projections in this report are based on an assumption that the average growth rate for each of the five cities and the rural population within this study area over the past five years would continue forward into the future. The effect of any discrepancies between PSU and US Census figures was deemed immaterial to the purposes of this study. The City of Astoria acknowledges the difference but has chosen to retain the data and analysis as it appears in this report.

INVENTORY AND CAPACITY

OVER THE NEXT 25 YEARS THERE WILL BE:

- 700 caskets and 1,600 cremated remains interments at Ocean View Cemetery, averaging 28 caskets and 64 cremated remains interments per year, and
- 500 casket plots and 200 cremation plots sales at Ocean View Cemetery, averaging 20 caskets plots and 8 cremated remains plots per year.

Ocean View Cemetery currently developed inventory will support:

- **14 years** of casket plot and **22 years** of cremation plot sales, and
- **16 years** of casket and **3 years** of cremation interments.

Ocean View Cemetery inventory currently planned for development will support an additional:

- **68 years** of casket plot and **98 years** of cremation plot sales in the area planned for development;
- **48 years** of casket and **12 years** of cremation interments in the area planned for development, and
- Ocean View Cemetery can gain **107 years** of casket plot sales by developing its underdeveloped expansion lands.

The methodology, detailed analyses and key components of this cemetery land needs analysis are outlined in sections to follow.

MARKET STUDY

This section of the plan describes Ocean View Cemetery’s market and outlines the demographic variables and market participants that will affect demand for Ocean View Cemetery’s land and services. These include:

- Catchment area;
- Age distribution;
- Ethnicity and religious distribution, and
- Bereavement service providers.

CATCHMENT AREA

This analysis assumes the primary market served by Ocean View Cemetery are the communities of Clatsop County (the County).

Residents from within the catchment area, inside the boundaries of Clatsop County, are expected to drive demand at Ocean View Cemetery.

The City of Astoria is the largest of these five cities, the seat of Clatsop County, Oregon, and the sole owner and operator of Ocean View Cemetery.



Figure 1: City of Astoria Cemetery Catchment Area, Source: LEES+Associates.

Clatsop County includes five municipalities that exceed 1,000 population and 25 unincorporated rural communities. The five cities in the County served by Ocean View cemetery include:

- Astoria;
- Seaside;
- Warrenton;
- Cannon Beach, and
- Gearhart.

Founded in 1811, Astoria is the one of the oldest cities in the state of Oregon and the oldest American settlement west of the Rocky Mountains. Astoria is located on the south shore of the Columbia River, where the river meets the Pacific Ocean. The City has a total area of 10.11 square miles (26.18 km²), of which 6.16 square miles (15.95 km²) is land and 3.95 square miles (10.23 km²) is water.²

² United States Census Bureau.

Ocean View Cemetery is physically located within the City of Warrenton. Warrenton is 5 miles west of Astoria, across the Youngs Bay Bridge, which spans the Youngs Bay estuary at the mouth of the Columbia River.³

In addition to Clatsop County residents, Ocean View Cemetery serves residents from other counties in the State of Oregon, as well as other states.

AGE DISTRIBUTION

The following figure summarizes the current age distribution profile of Clatsop County's residents.

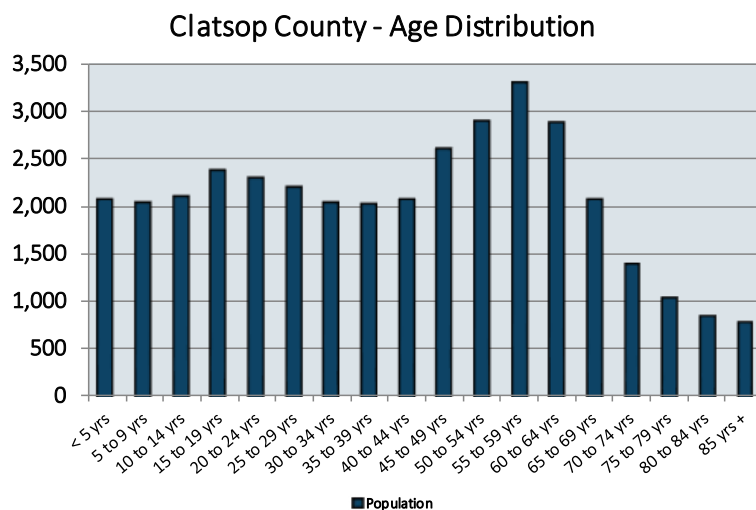


Figure 2: Age Distribution of Residents in Clatsop County, Source: United States Census Bureau, 2010.

KEY FINDINGS

Analysis of Clatsop County's and the State of Oregon's resident age distribution finds that:

- 55-59 year olds are the largest age group in Clatsop County;
- 50-54 year olds are the largest age cohort in Oregon, and
- The average age of County residents is 43.2, higher than the average age of Oregon residents at 38.4.

Clatsop County residents are, on average, older than the average resident in the State of Oregon. Older communities usually have a higher average death rate, which typically increases the need for cemetery land and services.

³ United States Census Bureau.

RELIGIOUS + ETHNIC MARKET PROFILE

IMPACT OF RELIGIOUS + ETHNIC AFFILIATIONS

Understanding the ethnic and religious profile of Clatsop County residents is important to help the City to meet local demand for different types of interment and memorialization. This is because ethnic and religious affiliations can be a significant influence on an individual's end-of-life choices. Some religions require specific forms of disposition and interment, such as full body burial; others prohibit this option. As some groups discourage or even forbid cremation, we expect there will always be a segment of the population that will seek in-ground casket burial.

An example of an ethnically-based influence is the preference of many Italian and Portuguese families to be interred in mausoleum crypts or columbaria rather than being buried in graves.⁴ An example of religiously-based influence is the prohibition of cremation for Orthodox Jews. Reform and Conservative Jewish authorities also frown on the practice, although the cremation rate is increasing within the Jewish community, world-wide.⁵ Since Vatican II, which took place in 1962⁶, cremation has been allowed by the Catholic Church provided the cremated remains are kept together and are not scattered. Catholics are more likely to choose interment in a cemetery due to church-mandated funeral and burial customs.⁷ Some other branches of Christianity; however, oppose cremation, including minority Protestant and Orthodox groups, such as Greek and Serbian Christians. Most notably, the Eastern and Oriental Orthodox Churches still forbid cremation.

The following figure illustrates the religious distribution of residents in the State of Oregon. It is assumed for the purpose of this analysis, that Clatsop County residents have a similar religious profile as those in the rest of the State.

4 Space and ethnic practices put heavy demands on cemeteries

<https://www.sbs.com.au/news/space-and-ethnic-practices-put-heavy-demands-on-cemeteries>

5 Cremation Becoming Increasingly Popular Among Jews, Funeral Professionals Say

<https://www.haaretz.com/jewish/news/cremation-becoming-increasingly-popular-among-jews-funeral-professionals-say-1.447873>

6 Changing Catholic Attitudes about Cremation

<http://www.catholicworldreport.com/2012/11/03/changing-catholic-attitudes-about-cremation/>

7 Vatican issues new rules on Catholic cremation- Remains cannot be scattered, divided, or kept at home

<http://www.cbc.ca/news/world/vatican-catholic-cremation-1.3820336>

The following figure illustrates the ethnic distribution of residents in the Clatsop County.

KEY FINDINGS

Oregon - Religious Profile

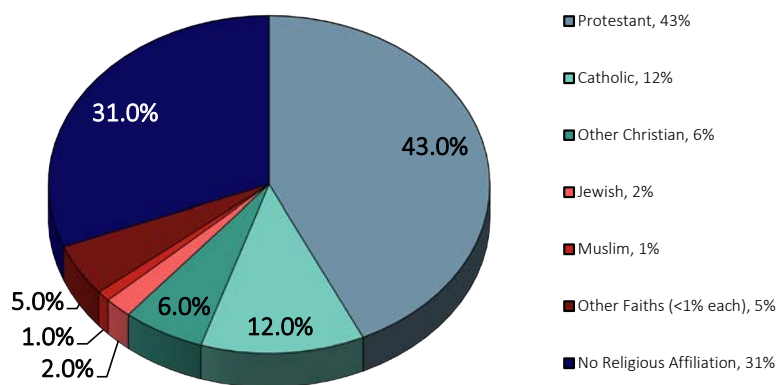


Figure 3: : Religious Profile of Residents in the State of Oregon, Source: Pew Research, 2014

Clatsop County - Ethnic Profile

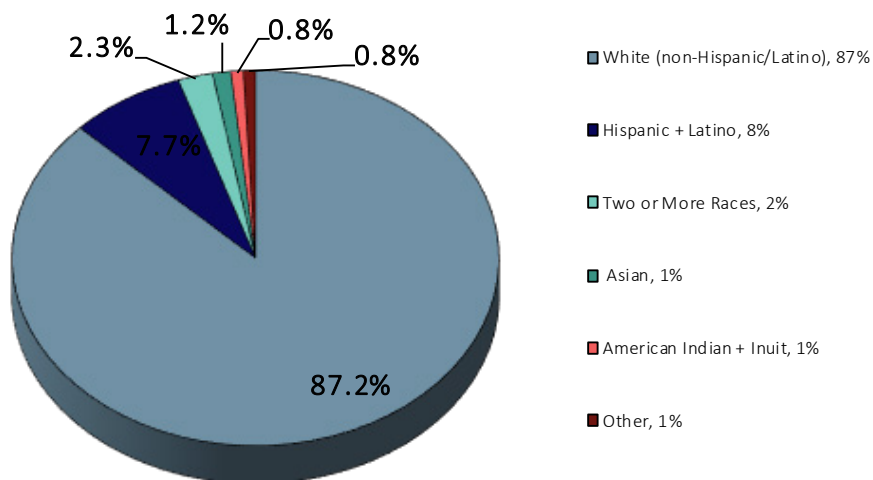


Figure 4: Ethnic Profile of Residents in Clatsop County, Source: United States Census Bureau, 2010.

Analysis of Clatsop County's religious distribution finds that:

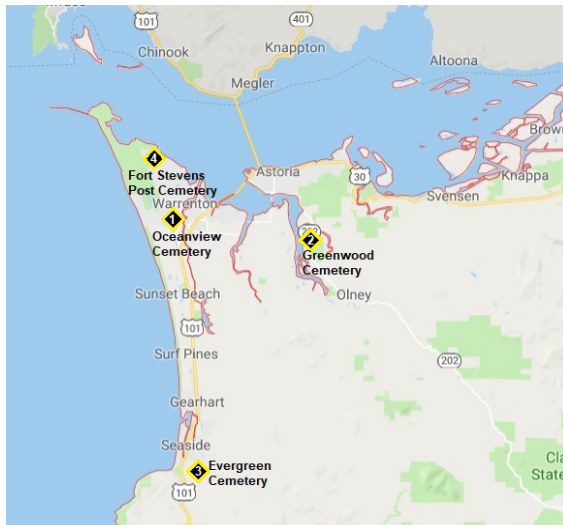
- Christianity is the primary religion in Clatsop County, with 61% of the resident population identifying as Christian;
- The largest Christian group that residents identified with was Protestant, at 43%, and
- The second largest single group identified in this study, aside from Christianity, were residents that reported having no religious affiliation, at 31% of the population.

Analysis of Clatsop County's ethnic distribution finds that:

- The majority of County residents (87%) are primarily of European descent.
- A high proportion of residents of European descent, report their families as originating from the British Isles, Germany, Finland and Norway, and
- 8% of County residents have a Hispanic and Latino heritage, and 5% claim other origins.

BEREAVEMENT SERVICE PROVIDERS

Clatsop County has **4 main cemeteries** with evidence of recent interments. These sites have a robust on-line presence, with current contact information available to connect with cemetery operators to ask questions and arrange services. These sites include:



1. Ocean View Cemetery – Warrenton;
2. Greenwood Cemetery – Astoria (within an unincorporated area outside the City's limits);
3. Evergreen Cemetery – Seaside, and
4. Fort Stevens Post Cemetery – Hammond (veterans only).

Figure 5: Map of Active Cemeteries in Clatsop County,
Source: LEES+Associates.

Clatsop County also has **14 inactive and semi-active cemeteries** within its boundaries. These sites are typically referred to as pioneer or historic cemeteries, and typically have few to no burials each year. They have a low on-line presence with contact information for arranging services.

These sites include:

1. Astoria Pioneer Cemetery (the former Hillside Cemetery) – Astoria;
2. Osanik Family Cemetery – Astoria;
3. Clatsop Plains Cemetery – Warrenton;
4. Clatsop Plains Pioneer Cemetery – Warrenton;
5. Warrenton Pauper Cemetery – Warrenton;
6. Lewis & Clark Cemetery – Miles Crossing;
7. Cloutrie Cemetery – Seaside;
8. Forest Hill Cemetery – Svensen;
9. Jewell Cemetery – Jewell;
10. Hanberg Homestead Cemetery – Jewell;
11. Maplewood Cemetery – Knappa;
12. Knappa Prairie Cemetery – Knappa;
13. Hamlet Cemetery – Hamlet, and
14. Sunny Hill Cemetery – Elsie.

There are three primary funeral and cremation service providers in Clatsop County that regularly visit Ocean View Cemetery. These service providers include:

- Hughes-Ransom Funeral Home and Cremation Services – Astoria
- Caldwell's Luce-Layton Mortuary; North Coast Crematory, and Caldwell's Funeral & Cremation Arrangement Center – Astoria + Seaside, and
- Ocean View Cremation and Burial Service – Astoria.

Representatives from Clatsop County's active cemeteries and service providers were contacted and invited to participate in the stakeholder consultation phase of this plan.

DEMOGRAPHIC STUDY

This section outlines the key demographic variables that will affect future demand for plots and services offered at Ocean View Cemetery. These variables include:

- Historic and projected population growth, and
- Historic and projected deaths.

HISTORIC + PROJECTED POPULATION GROWTH

The term “community” in this section, refers to the municipality served by the City, whose members have died, or are projected to die and could potentially be interred in the Ocean View Cemetery.

The following table summarizes Clatsop County and its cities’ historic and projected population numbers. Projected numbers assumes that the historic average growth rate will continue over the next 25 years:

Community	Population 2014	Population 2018	Average Growth 2014-2018	Population 2043	% of Clat- sop County
City of Astoria	9,536	9,976	1.15%	13,263	24%
City of Warrenton	5,201	5,685	2.13%	9,618	17%
City of Seaside	6,484	6,795	0.99%	8,690	15%
City of Gearhart	1,437	1,587	2.31%	2,809	5%
City of Cannon Beach	1,682	1,749	0.82%	2,146	4%
Other County Communities	13,100	13,972	1.46%	19,700	35%
Clatsop County	37,440	39,764	1.40%	56,225	100%

Table 1: Clatsop County Communities Historic + Projected Population and Growth Rates, Source: United States Census Bureau, 2013 to 2018 data.

Key Findings

Analysis of Clatsop County’s population and its growth rates finds that:

- The cities of Gearhart and Warrenton are growing the most quickly, and
- The County’s population is forecast to increase 50%, reaching 56,225 over the next 25 years.

HISTORIC + PROJECTED DEATHS

The “Baby Boom” generation in the United States includes those born between 1946 and 1964. As this cohort reaches its life expectancy, the average death rate across the population is expected to increase and the need for cemetery services is also expected to increase.

The average life expectancy for this cohort is about 80 years. The oldest of this generation will reach the age of 80 in 2026. Due to the number of residents in this cohort, their demise over the next few decades is expected to raise the County’s death rate, as well as the need for cemetery and funeral-related goods and services.

The following table summarizes Clatsop County’s historic and projected death numbers:

Community	Annual Deaths 2018	Deaths per 1,000 in 2017	Annual Deaths 2043	Deaths per 1,000 in 2044
Clatsop County	416	10.50	630	11.2

Table 2: Clatsop County’s Historic + Projected Deaths and Death Rates, Source: Oregon Health Authority- Death Data + United States Census Bureau, 2013 to 2018 data.

Key Findings

Analysis of Clatsop County’s deaths and its death rates finds that:

- There were 1,975 deaths of County residents from 2014 to 2018, averaging 395 per year;
- Over the next 25 years, there will be 12,700 deaths in the County, averaging 500 per year; and
- Over the next 25 years, annual deaths will increase 51% due to population growth and the increasing death rate of the Baby Boom generation.

DISPOSITION TRENDS

NATIONAL + STATE CREMATION RATES

Disposition refers to the manner in which the body is handled after death. According to US Health Authority records, the most common disposition options are casket burial and cremation disposition.

NATIONAL RATE

The national average cremation rate rose over the past five years, from 43.3% in 2012 to 51.6% in 2017. Cremation is now the preferred disposition option across the US, and the cremation rate is expected to continue rising across the country.

The following map illustrates the preference for cremation in American States as of 2018.

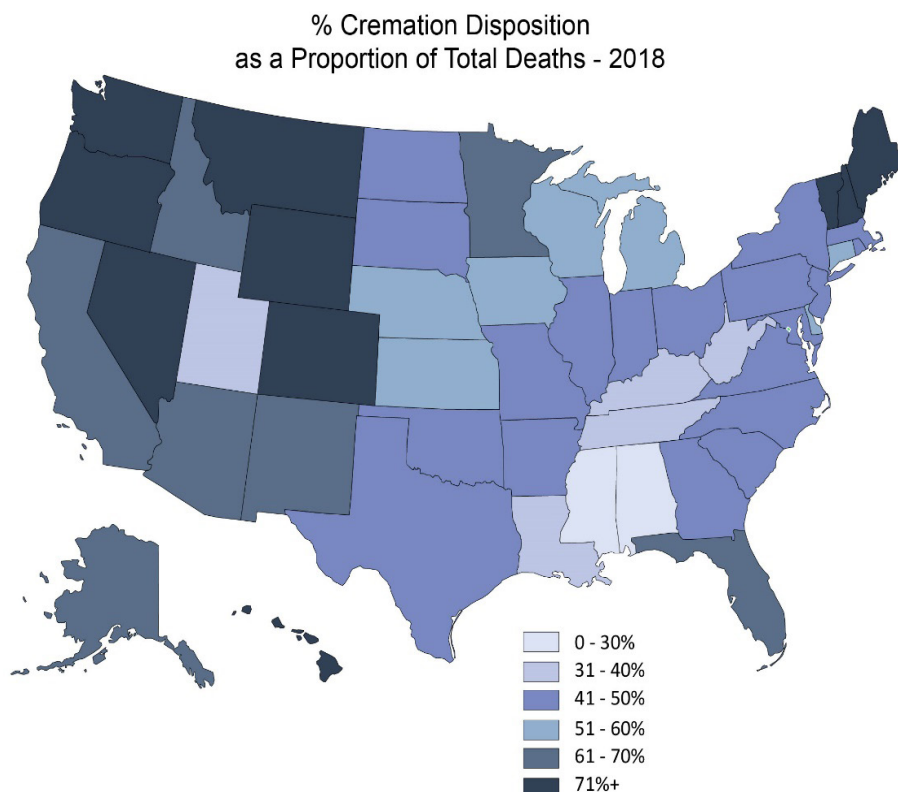


Figure 6: 2018 United States Cremation Rates Map, Source: Cremation Association of North America (CANA) Annual Statistics Report, Vol 54, No. 2

STATE RATE

Historically, the cremation rate in Oregon has been significantly higher than the rest of the country. The State's cremation rate rose over the past five years, from 73.9% in 2012 to 75.9% in 2017. During this time, Oregon's cremation rate averaged **74.9%**

The Cremation Association of North America (CANA) predicts that Oregon's cremation rate will continue to rise to **80.5%** by 2022.

COUNTY CREMATION RATE

Over the past five years, Clatsop County has annually averaged 395 deaths, 60 casket burials, 322 cremations per year, and 13 alternative dispositions (e.g. alkaline hydrolysis, medical donation, sent out of State).

The County average cremation rate rose over the past five years, from 76.0% in 2012 to 83.8% in 2017. During this period, the County cremation rate averaged **81.5%**.

The trend analysis in this cemetery master plan assumes that the County's cremation rate will continue to grow at the same rate predicted for the State by the Cremation Association of North America (CANA).

Given the County's ethnic and religious market profile and our professional expertise, we anticipate that cremation in the County will not rise beyond **90%** of dispositions over the next 25 years.

KEY FINDINGS

- The cremation rate in Clatsop County has historically been higher than the Oregon state average;
- The County's cremation rate is expected to increase to **90%** by 2022.

DEMAND AND CAPACITY ANALYSIS

RESIDENT VS NON-RESIDENT DEMAND

The City's Cemetery Rules and Regulations do not currently define "resident;" nor does the City currently charge a premium to non-residents interred at Ocean View Cemetery.

North American municipalities usually define a non-resident in their guiding legislation as anyone who does not live and/or own property within the municipality's limits. The qualifying time period for residency usually ranges between one and five years. A few communities require upwards of 10 years of residence.

City staff who manage Ocean View Cemetery records have historically referred to individuals that resided in Clatsop County (not just the City of Astoria or City of Warrenton) as "residents." Residency is not formally tracked in Ocean View Cemetery's records. Historically, about two thirds of those who have been interred at Ocean View Cemetery have had a record of residency at their time of death. City staff were; however, able to review records from the past five years and provide a breakdown of cemetery sales and interments to residents and non-resident for analysis in this plan.

Based on this, the following figure illustrates the death location distribution of all interment records at Ocean View Cemetery.

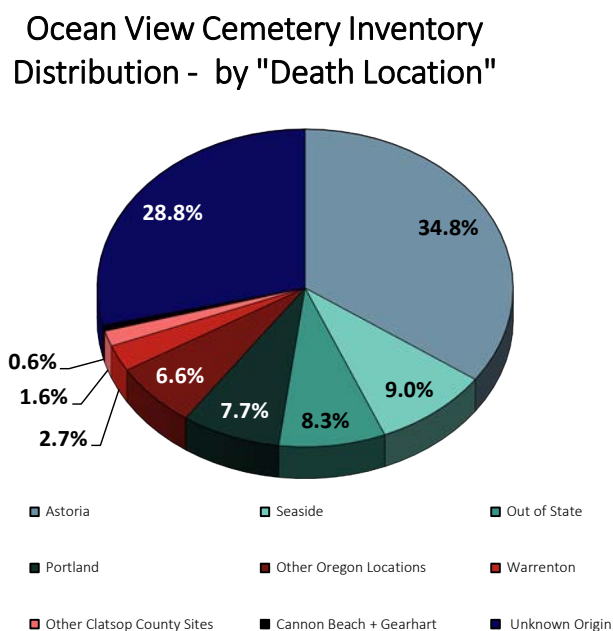


Figure 7: Ethnic Profile of Residents in Clatsop County, Source: City of Astoria Cemetery Records.

Of those Ocean View Cemetery records, for which a death location was listed, City staff report that:

- **49%** of interments were from those who died in Astoria;
- **19%** of interments were from those who died in Clatsop County (excluding Astoria), and
- **32%** of interments were from those who died outside of the County.

These cemetery inventory records are not a precise reflection of residency due to the imperfect nature of record keeping over time, and the fact that these figures are skewed towards communities with hospitals and senior care homes (such as Astoria). Residents may get moved from their residence to another location prior to their death. There is no hospital for people to die at in Warrenton, which may lead to some Warrenton residents being listed as residents of Astoria at their time of death.

HISTORIC MARKET - COUNTY DEMOGRAPHIC + DISPOSITION PROFILE

The following graph summarizes the demographic and disposition trends that define the County's communities served by Ocean View Cemetery from 2014 to 2018. In this graph, population data aligns with the left vertical axis, while death, cremation and casket burial data aligns with the right vertical axis.

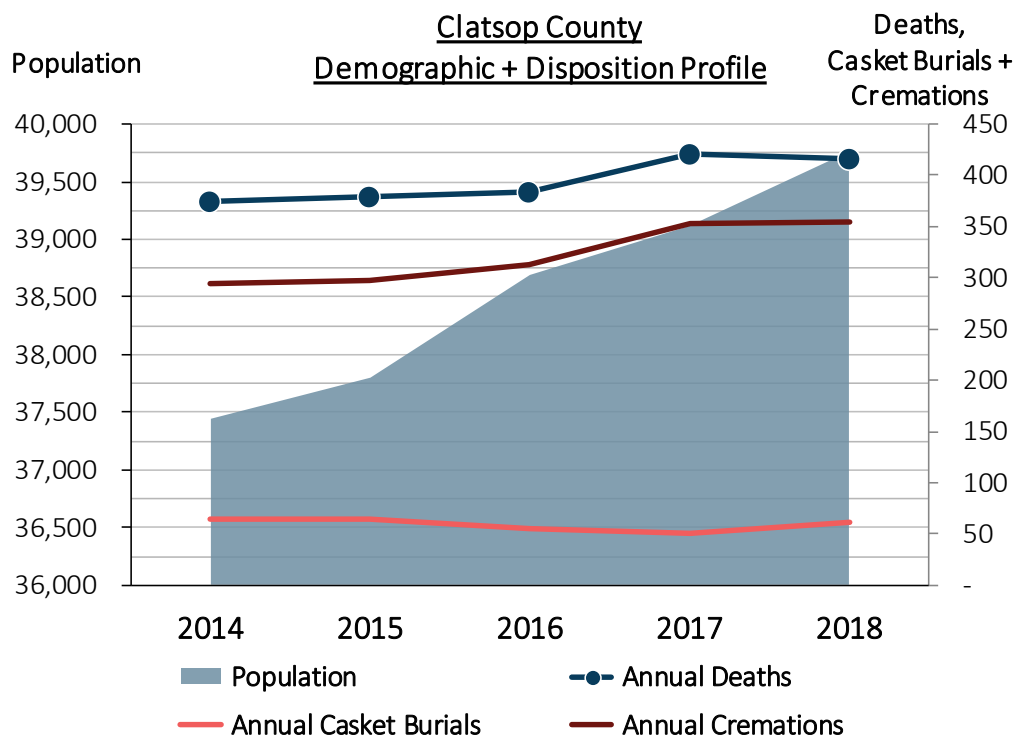


Figure 8: Clatsop County Demographic & Disposition Profile, 2014 to 2018, Source: US Census Bureau + Oregon Health Authority.

Key Findings

Demographic and disposition profile analyses find that over the past five years, from 2014 to 2018, there were:

- 298 deaths in the County that resulted in casket burial, averaging 60 per year, and
- 1,612 deaths in the County that resulted in cremation, averaging 322 per year.

HISTORIC DEMAND – OCEAN VIEW CEMETERY SALES + INTERMENTS

This section reviews the historic demand for the City's services and cemetery space. Demand is measured in terms of the number of annual sales and interments at Ocean View Cemetery, as a proportion of the number of deaths in the cemetery's market (the County) in the same year.

The following graph summarizes Ocean View Cemetery's historic sales and interments from 2014 to 2018.

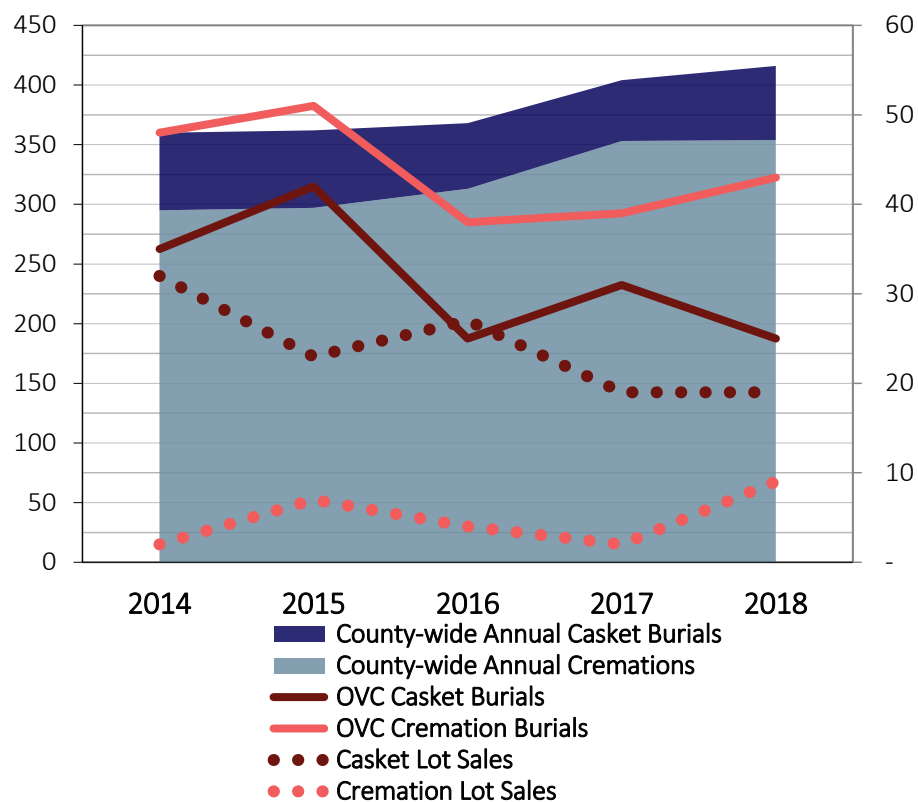


Figure 9: Summary of the Historic Demand (Sales + Interments) at Ocean View Cemetery, 2014 to 2018,
Source: City of Astoria Cemetery Records.

Key Findings

Historic demand analyses for the past five years, from 2014 to 2018 finds that:

- 53% of casket burials from County residents took place at Ocean View Cemetery;
- 14% of cremations from County residents were interred at Ocean View Cemetery;
- 158 caskets and 219 cremations were interred at Ocean View Cemetery, averaging 32 casket and 44 cremation interments per year;
- 120 casket plots and 24 cremation plots were sold at Ocean View Cemetery, averaging 24 casket plot and 5 cremation plot sales per year;
- There were 9 times as many cremation interments as there were cremation plot sales. This indicates that most cremation interments are taking place in casket plots;
- Ocean View cemetery has an at-need to pre-need sales ratio of 0.50.
 - 33% of plot sales are pre-need, there are 3 at-need sales for every 2 pre-need sales, and
- Ocean View cemetery has a resident to non-resident sales ratio of 0.50.
 - 33% of plot sales are non-resident, there are 3 resident sales for every 2 non-resident sales.

Non-residents are defined as individuals that resided outside of the County at the time of death.

PROJECTED MARKET – COUNTY DEMOGRAPHIC + DISPOSITION PROFILE

The following graph summarizes the demographic and disposition trends that will define the County's resident needs for cemetery space and services over the next 25 years. In this graph, population data aligns with the left vertical axis, while death, cremation and casket burial data aligns with the right vertical axis.

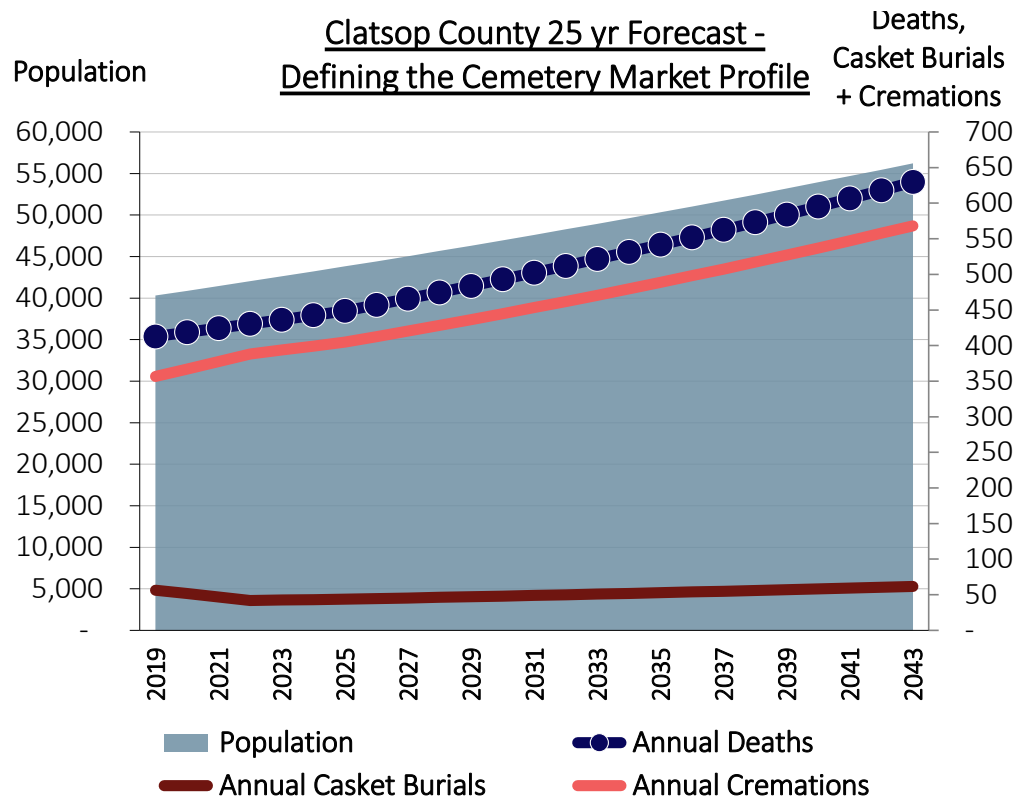


Figure 10: Clatsop County Demographic & Disposition Profile, 25 Year Forecast, Source: LEES+Associates.

Key Findings

Demographic and disposition projections over the next 25 years, 2019 to 2043, estimates there will be:

- 12,700 deaths in the County, averaging 500 deaths per year;
- 1,300 deaths in the County that will result in casket burial, averaging 50 casket burials per year;
- 11,400 deaths in the County that will result in cremation, averaging 460 cremations per year;
- An increase in County residents choosing cremation from 354 per year in 2018 to 568 per year in 2043, due to the projected population growth and the increasing trend towards cremation, and
- No significant change in the number of residents choosing casket burial each year. The County's population growth and increasing death rate related to the demise of the large Baby Boomer cohort, is expected to maintain the current level of casket burials and offset the rising cremation rate.

TRENDS IN CEMETERY SERVICES

The proportion of residents that choose to be buried in a cemetery varies significantly and is influenced by several factors. These includes: the attractiveness of existing cemetery sites; the diversity of their product and service options; their ability to meet religious/ethnic traditions; the level of community engagement, their proximity to residential areas and residents, along with their level of universal accessibility, pricing and other considerations.

A high cremation rate affects the number of customers that come to the cemetery because many cremated remains are not interred in a cemetery. Typically, 80% to 90% of residents choosing cremation will not inter in cemeteries. This reflects the fact that most cremated remains in North America are not interred in cemeteries but are kept at home or scattered in a place of personal meaning. In contrast, the majority of families choosing casket burial will inter in their local cemetery. Recent research of cemeteries finds that on average local cemeteries typically serve 10% to 20% of families that choose cremation and 80% to 90% of families that choose casket burial within the community where they lived.

Ocean View Cemetery is below average with respect to the number of caskets it inters (53% of the community served) but is on par for the number of cremation remains it inters (14% of the community served), based on these benchmarks for the proportion of its market served.

The following graph shows the expected distribution of deaths by County residents, and summarizes how it the regional interment demand is expected to be accommodated over the next 25 years.

Distribution of County Resident Deaths over the next 25 years

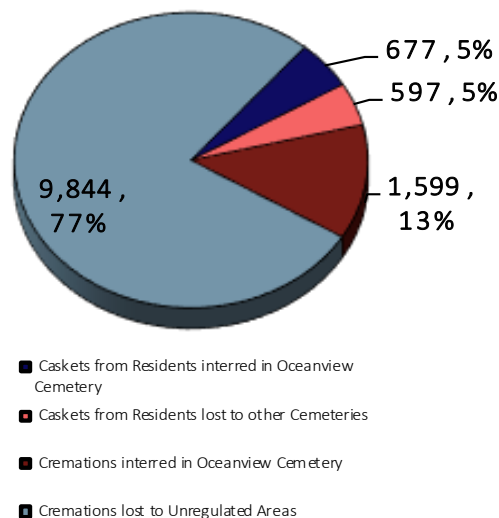


Figure 11: Distribution of Deaths from County Residents over the next 25 years, Source: LEES+Associates.

PROJECTED DEMAND – OCEAN VIEW CEMETERY SALES + INTERMENTS

This section estimates the projected demand for the City’s services and cemetery land. This analysis assumes historic service rates, interment patterns, sales trends and average annual growth in the County’s communities will remain consistent and continuous over the next 25 years. It also assumes the City will continue to develop cemetery inventory similar to its existing offerings to meet market demand.

The following graph summarizes Ocean View Cemetery’s projected sales and interments over the next 25 years, from 2019 to 2043.

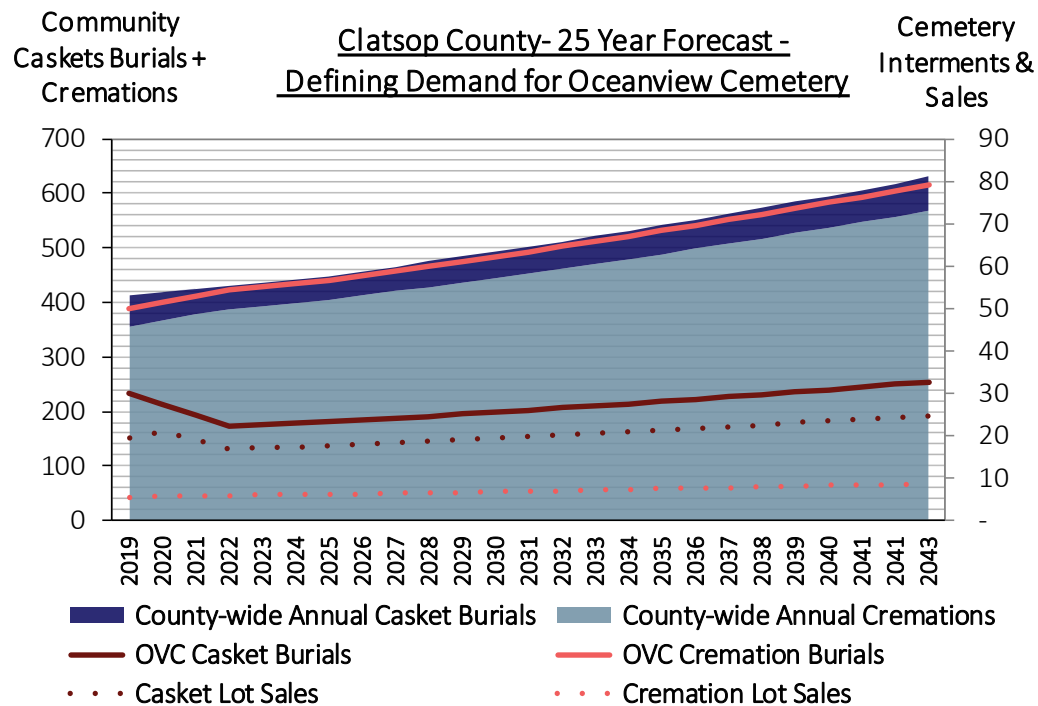


Figure 12: Summary of the Projected Demand (Sales + Interments) at Ocean View Cemetery, 25 Year Forecast, Source: LEES+Associates.

Key Findings

Sales and interment projections over the next 25 years, 2019 to 2043, estimates there will be:

- 700 caskets and 1,600 cremated remains interments at Ocean View Cemetery, averaging 28 caskets and 64 cremated remains interments per year, and
- 500 casket plots and 200 cremation plots sales at Ocean View Cemetery, averaging 20 caskets plots and 8 cremated remains plots per year.

LAND NEED ASSESSMENT

This section of the report analyzes the current inventory and potential capacity of undeveloped land at Ocean View Cemetery and compares it to the land needed to meet demand over the next 25 years. In this section, soon-to-be developed land refers to cemetery areas that are currently being maintained but are not yet platted with burial plots that are available for sale, for example, Sections 1 and 2.

In this needs assessment, we compare the anticipated demand to the available supply in two ways.

- We compare the projected number of plot sales to the number of plots available for sale, and
- We compare the projected number of interments to the number of interment spaces available to accommodate an interment (including plots purchased pre-need).

In this plan, all references to **“sales”** includes all purchases of a right-of-interment for in-ground burial plot (“grave”) that can accommodate a casket or an urn at Ocean View Cemetery. A sale may take place significantly in advance of the need for interment services.

In this plan, all references to **“interments”** includes the opening and closing service provided to the purchaser of a right-of interment after they have died (also known as the decedent). At Ocean View Cemetery, interment entails the burial of the decedent’s casket or urn in a grave.

CURRENT INVENTORY – DEVELOPED OCEAN VIEW CEMETERY LAND + PLOTS

In this plan, **“casket plots”** refers to all in-ground burial plots at Ocean View Cemetery that could accommodate caskets.

In this plan, **“interment spaces”** refers to the total capacity of a plot, as defined by the number of caskets and urns that could be placed within it.

According to the City’s cemetery Standard Operating Procedures (SOPs), the interment capacity of a casket plot is one casket and up to 4 urns. This is the number of interments allowed within an in-ground grave space of approximately 5’ x 10’ (including a liner or vault). The City also allows up to two urns in a cremation plot, which is in-ground burial grave space of 2’x 3’.

The City’s Cemetery Rules and Regulations also refers to niches and inurnment throughout the document; however, there are no columbaria niches or mausoleum crypts currently available at Ocean View Cemetery.

City records show 17,753 plots (developed and soon to be developed), including:

- 16,477 casket plots, and
- 1,276 cremation plots.

In addition, the City owns eight crypts in the Ocean View Abbey mausoleum, but the City does not own this facility and therefore does not currently offer any products or services associated with it. Ownership of the mausoleum is understood to be by the families of those interred in the 92 occupied crypts.

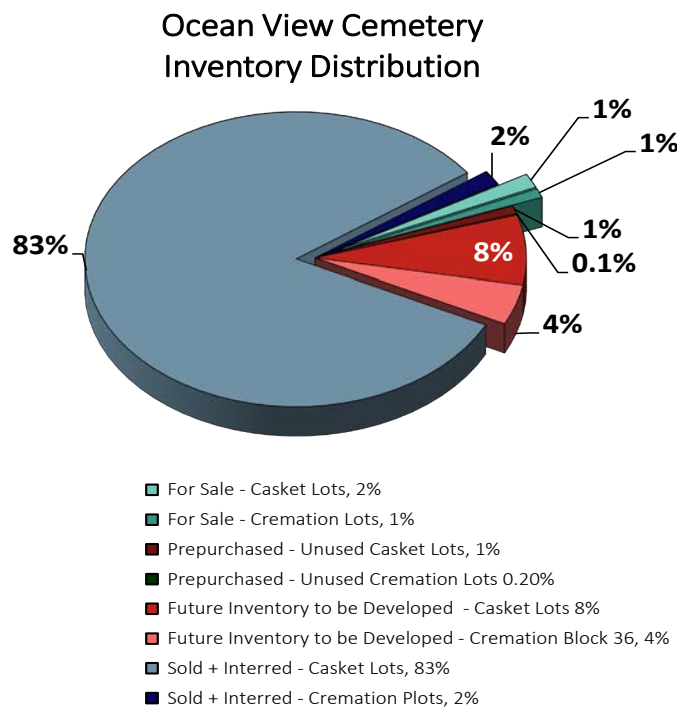


Figure 13: Ocean View Cemetery Inventory Distribution, Source: City of Astoria Cemetery Records

The following figure summarizes the current distribution and availability of casket and cremation plot inventory at Ocean View Cemetery.

After the City sells its last plot, it will continue to inter families in graves that were purchased pre-need. Since graves are permitted to accommodate more than one interment (i.e. up to five), Ocean View Cemetery's interment capacity (potential interments in any plot) is five times that of its sales capacity.

However, in the analysis of supply and anticipated need, it is prudent and a best practice to conservatively assume that every grave will accommodate only one interment as designated by the size of the plot. This analysis therefore conservatively assumes that each future casket burial will take place in one casket plot, and each interment of cremation remains will take place in one cremation plot.

The following table summarizes Ocean View Cemetery's plot inventory that is developed and currently **available for sale**, inventory planned to be developed and expected to become available in the near future, average annual sales per year (over the next 25 years) and the years of sales remaining.

Inventory Type	Available for Sale (A)	To Be De-veloped (B)	Total for Sale ⁸ (A + B) = C	Sales per Year	Years of Available Sales	Years of Total Sales (current+ future inventory)
Casket Plots	278 plots	1,359 plots	1,637 plots	20 sales	14 years	82 years
Cremation Plots	179 plots	780 plots	959 plots	8 sales	22 years	120 years
Total	457 plots	2,139 plots	2,596 plots	27 sales		

Table 3: Summary of Ocean View Cemetery Inventory Sales Capacity, Source: LEES+Associates + City of Astoria Cemetery Records.

The casket plot inventory that City staff expected to be developed is located in areas Blocks 1, 2, and 27 of Ocean View Cemetery. The cremation plot inventory that City staff expected to be developed is an area approximately 17,000 square feet, located in Block 36 of Ocean View Cemetery.

The following table summarizes Ocean View Cemetery's inventory of plots **available for burial**. This includes all spaces available for sale, expected to be developed and made available for sale, as well as all reserved spaces that have been purchased in advance of need.

Inventory Type	Total for Sale (C)	Pre-Purchased Plots (D)	Available for Burial ⁹ (C + D)=E	Burials per Year	Years of Total Burials
Casket Plots	1,637 plots	158 plots	1,795 plots	28 burials	64 years
Cremation Plots	959 plots	26 plots	985 plots	64 burials	15 years
Total	2,596 plots	184 plots	2,780 plots	92 burials	

Table 4: Summary of Ocean View Cemetery Inventory Interment Capacity, Cremations in Cremation Plots Only, Source: LEES+Associates + City of Astoria Cemetery Records.

⁸ "Total for Sale" Plots = "Available for Sale" Plots + "To Be Developed" Plots

⁹ "Available for Burial" Plots = "Total for Sale" Plots + "Pre-Purchased" Plots

It is important to note, however, that at Ocean View Cemetery, the majority of cremated remains are interred within casket plots rather than cremation plots. Cremated remains interments also significantly exceed cremated remains plots sales. Under these conditions, the interment space capacity of Ocean View Cemetery's casket plots will be less than projected, using the methodology in Table 4.

In the most aggressive land use scenario, where all 92 casket and cremation interments per year would be interred in individual casket plots designated for burials, there would be **20 years of burials** remaining.

KEY FINDINGS

Inventory analyses find that over the next 25 years, 2019 to 2043, Ocean View Cemetery can expect:

- 700 caskets and 1,600 cremated remains interments, averaging 28 caskets and 64 cremated remains interments per year, and
- 500 casket plots and 200 cremation plots sales, averaging 20 caskets plots and 8 cremated remains plots per year.

Conservatively assuming each casket is interred in a casket plot and each cremation is interred in a cremated remains plot, Ocean View Cemetery's **currently developed inventory** will support:

- **14 years** of casket plot and **22 years** of cremation plot sales¹⁰, and
- **16 years** of casket and **3 years** of cremation interments¹¹.

Ocean View Cemetery's inventory report has also identified further plots that are to be developed, and soon to be made available for sale. This **new inventory will provide an additional**:

- **68 years** of casket plot and **98 years** of cremation plot sales¹², and
- **48 years** of casket and **12 years** of cremation interments¹³.

10 Table 3. Table 3.0 Available for Sale divided by Table 3.0 Sales per Year

11 Table 4. Table 3.0 Available for Sale + Table 3.0 Pre-purchased Plots divided by Table 4.0 Burials per Year.

12 Table 3. Table 3.0 To be Developed Plots divided by Table 3.0 Sales per Year

13 Table 3. To be Developed Plots divided by Table 4.0 Burials per Year = To Be Developed Burials

These areas, which surround the more level central section, could easily accommodate cremation interment for many years without impacting the more level, casket area. As a result, even allowing space for a significant number of new cremation interment spaces, the undeveloped area of the site would still provide at least 107 years of casket plot capacity.

It should be noted that interment trends will likely change over such a long-time horizon and these projections should be reviewed periodically to update projected lifespan and capacity of this site.

DENSIFICATION INFILL STRATEGY

In addition to undeveloped cemetery land, there are often opportunities inside the developed area to develop space that was not originally allocated for interments. The capacity of the already developed area could be densified through strategies, such as:

1. Closing low-traffic paths, roads and other amenities, and reclaiming their space for new plots;
2. Strategically placing new in-ground plots, such as smaller cremation plots and scattering gardens, that have a smaller, more flexible footprint (such as cremation plots and scattering gardens), and
3. Adding above-ground interment options, , such as family vessels, columbaria and memorial walls in areas unsuitable for in-ground interment.

UNCLAIMED PLOTS RECLAMATION STRATEGY

Another option to increase site capacity is to reclaim pre-purchased plots sold many years ago but remain unused. These are plots whose owners have not been in contact with the City and since the time of purchase.

The first step in a reclamation strategy would be for the City to identify and confirm the location of all existing sold, used and unclaimed plots. Some cemeteries seek to increase their capacity and conserve land through the reuse and resale of unclaimed graves. Best practices surrounding this strategy include:

1. Identifying individuals/families that purchased burial plots more than 50 years ago;
2. Attempting to find the last known lease/plot owner;
3. Advertising in the local media (e.g. newspapers), and
4. Where no contact can be established with the buyer or family members, confirm the status of these plots as abandoned.

The circumstances for reclamation and expiry date of a right-of-interment in an unclaimed plot should be fully delineated in the City Cemetery rules, regulations and ordinances. Unclaimed plots that are determined to be abandoned can then be resold, typically at the current fair market value. It is important to note that just because a plot was sold 50 or more years ago, it may not necessarily indicate a lack of family interest. Significant staff time may be required to fully investigate and determine if unclaimed plots are in fact abandoned and therefore available.

CONCLUSION - LAND NEEDS ANALYSIS

Cemeteries are unique in that their land use designation is legislated to remain unchanged in perpetuity. For this reason, it is prudent for Cities to plan to have enough cemetery capacity to meet community needs for at least 100 years.

This cemetery land needs analysis finds that Ocean View Cemetery is on par with this best practice, based on there being 90 years of casket plots and 120 years of cremation plots already for sale, or soon to be platted and made available for sale in the currently developed area of the cemetery property.

Including the 30 acres of undeveloped land available at Ocean View Cemetery, the City has a total of **over 200 years of cemetery land sales capacity**.

Due to this, the City could confidently consider selling, leasing or otherwise redesignating the use of the most northerly area of Ocean View Cemetery's undeveloped land. Any revenue from this could be used to fund future land development, contribute to the care and maintenance fund, or be used for other municipal endeavors.

3. Site Evaluation

PHYSICAL CONTEXT

Ocean View Cemetery is located about 8 miles west of the City of Astoria and is typically reached from the City via the Youngs Bay Bridge. In spite of its name, there are no views from the site to the Pacific Ocean, and it's not clear if there were views to the ocean when the site was established.

From a planning perspective, Ocean View Cemetery is located within the Coastal Lowlands Eco-region. Key conservation issues relevant to this Eco-region and the cemetery site include land use changes, habitat fragmentation, invasive species recreational use, and changing watershed processes and functions.

The cemetery sits within a rare environmental context. Located near the Pacific Ocean between a linear, dune slack lake (natural wetland between old sand dunes) and a remnant section of spruce forest. Ocean View Cemetery falls within the natural habitat of the endangered Oregon silver-spot butterfly, which requires the early blue violet (*Viola adunca*) for its survival. Elk inhabit the area and are frequently seen inside the cemetery.

The cemetery lies within the City of Warrenton's urban growth boundary. The site's west edge, on the west side of Cemetery Lake, is designated for development to become part of the City's Spirit Loop Trail. Ocean View Cemetery also lies partly within the hazard/evacuation zone of the "local Cascadia earthquake and tsunami." Due to the cemetery's relatively higher elevation and proximity to two public schools, it is also designated as a tsunami refuge site.

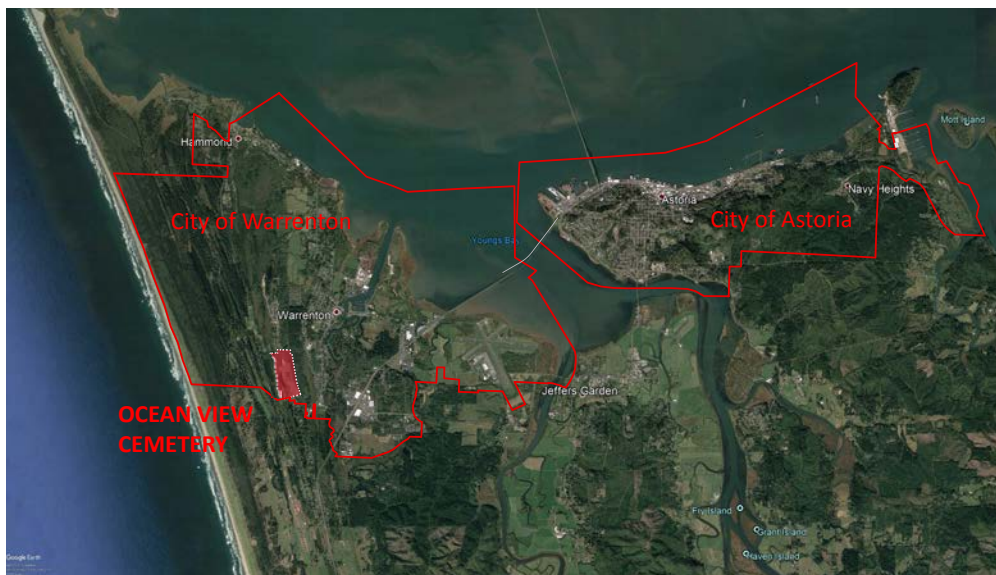


Figure 15: Site context, Locations Source: LEES+Associates

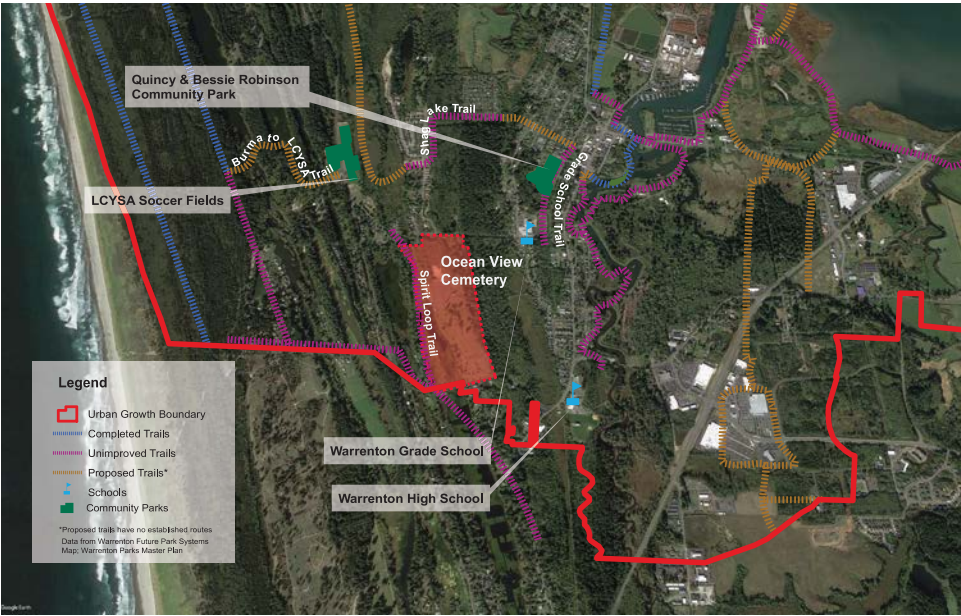


Figure 16: Site context, Community Connections, Source: LEES+Associates



Figure 17: Site context, Natural Surroundings, Source: LEES+Associates

CULTURAL CONTEXT

Ocean View Cemetery was originally laid out according to early 20th century design principles. The intent of cemetery designers of the time was to create a pastoral, rural or garden quality, with curvilinear drives and straight avenues when there was an opportunity to establish an axial view to a focal point. Ocean View's oldest graves are near the center of the developed area, not far from a symmetrical earthen mound, the top of which is a small paved area with a veterans' memorial plaque and a flagpole. Further north, the main site feature is the historic Ocean View Abbey Mausoleum.

SITE EVALUATION PROCESS

The site evaluation process was based on multiple visits to Ocean View Cemetery. The cemetery has a visually unassuming aspect along its front edge but this changes as one moves north and up the gradual slope, through diverse "neighborhoods." Most large trees concentrated near the center.

Overall, the site has a tranquil and generally open character--a relatively rare quality in parks and public open space in this area of Oregon. This open, expansive quality, especially in the newer, north end of the cemetery, links the site and the nearby ocean and the Oregon coast. Most of the current sales and interment activity takes place in this north end of the developed area of the site.

Based on site visits, visual character areas were identified across the cemetery property. These are represented on the following graphic, Ocean View Cemetery Site Character Areas Schematic.

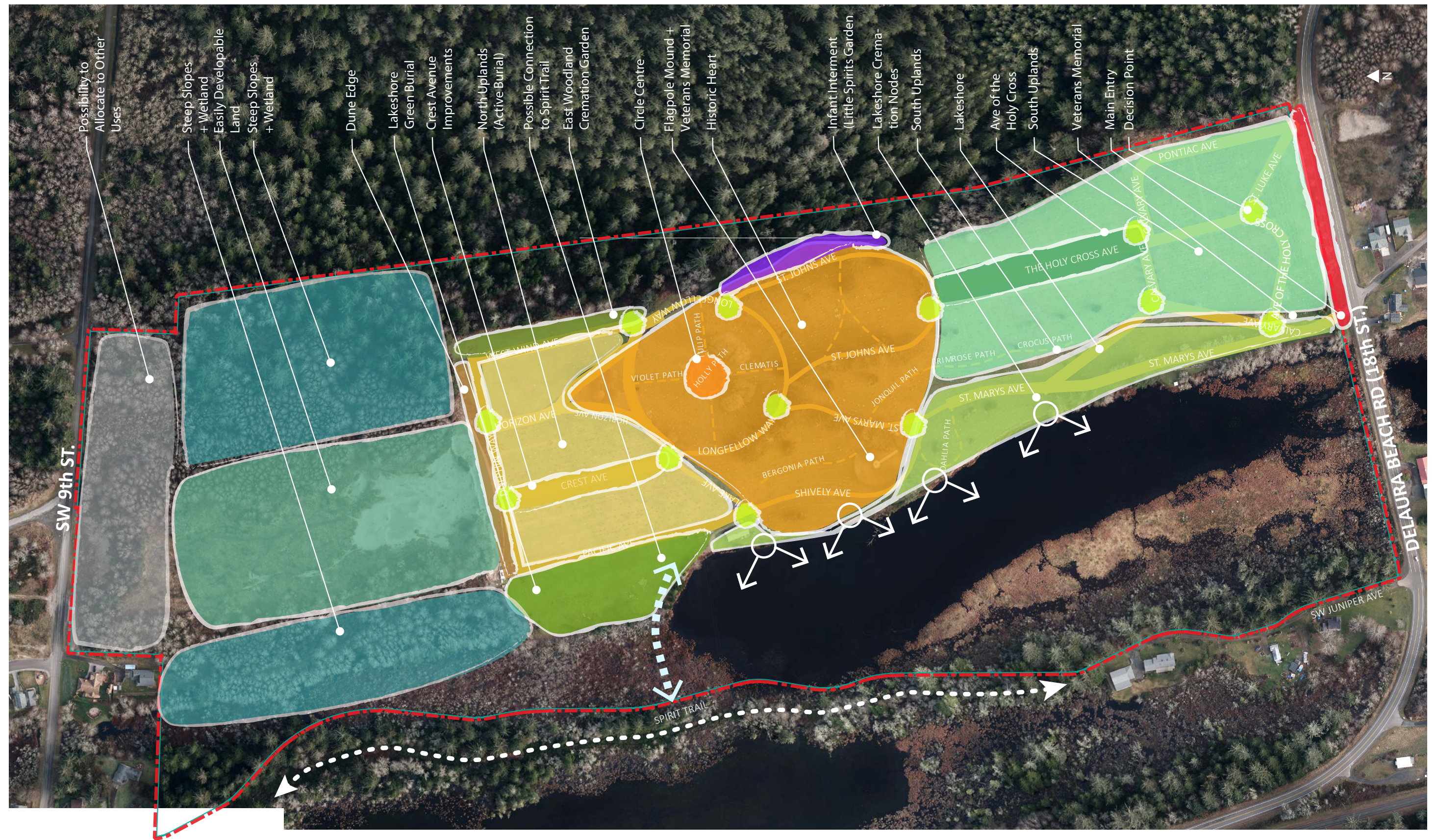
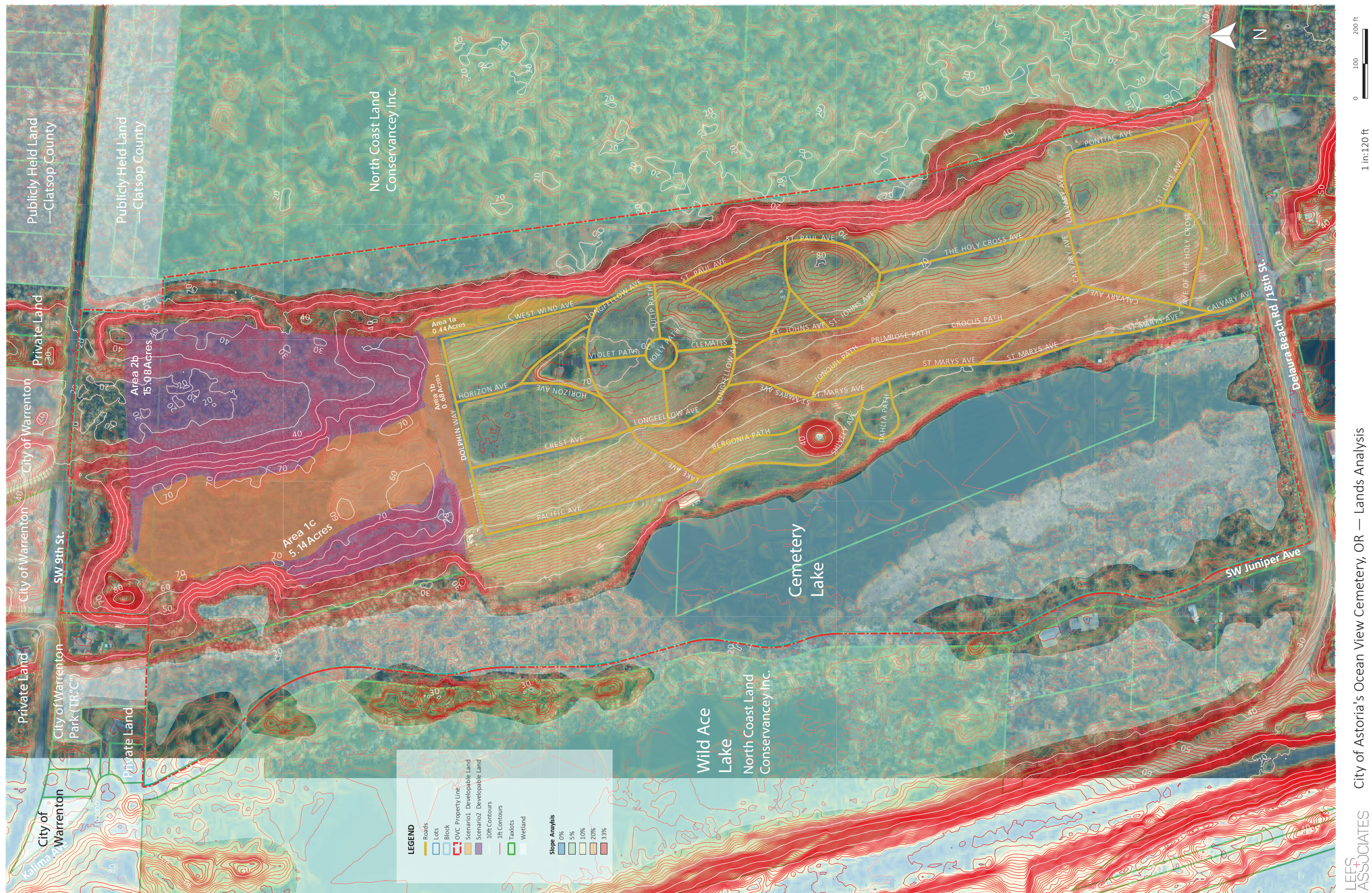


Figure 18: Ocean View Cemetery Character Areas Schematic, Source: LEES+Associates



Topographic information for the site and broad scale, high resolution air photos informed the evaluation of the site's character and the potential interment capacity of the northerly section of the property. This is the undeveloped 30 acre area immediately north of the actively maintained, currently developed area.

This 30 acre segment has no formal points of access or egress. It has dune-like characteristics, due to the center section being higher, more level and open, which reflects the linear dune that underlies the site. Colonized by broom and scrubby non-native plants, sand is visible on the surface over part of this area, especially near where it meets the active cemetery. This section appears to have been rough graded sometime in the past decade. The east and west edges of this area are steeply sloped, and more densely vegetated with trees and shrubs. The north edge also has this wooded character where it slopes down, just before it levels out, at the approach to the north property boundary of Ocean View Cemetery at SW 9th Street.



Figure 20: Ocean View Cemetery, Undeveloped Area, Source: LEES+Associates

The outcome of the site evaluation process was the preparation of three presentation graphics:

- **Site Character Areas:** Identifies the 15 character zones visible at the cemetery.
- **Interment Areas:** Identifies the interment type of each area by the type of person interred (for example, infants or veterans) and the prevailing type of monuments (for example, flat or upright).
- **Improvement Opportunities:** Identifies the areas that appear most in need of upgrading or that have the most potential to enhance the site and/or generate sales revenue.

These graphics were presented to Astoria's City Council and Parks and Recreation Board and were available at the public open house that was held in Astoria on November 13, 2019. They were also posted for reference with the on-line public survey, the outcome of which is summarized in the next chapter.

The three presentation graphics are provided on the following pages.



WEST WOODLAND



AVAILABLE GRAVE SPACE



GROVE



CIVIL WAR VETERANS MEMORIAL



AVENUE OF THE HOLY CROSS



LOWLANDS



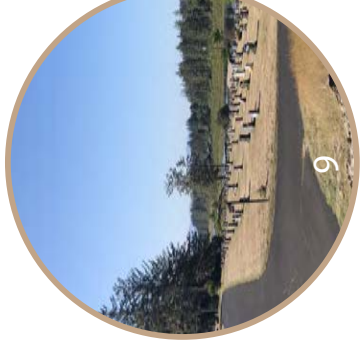
CEMETERY LAKE



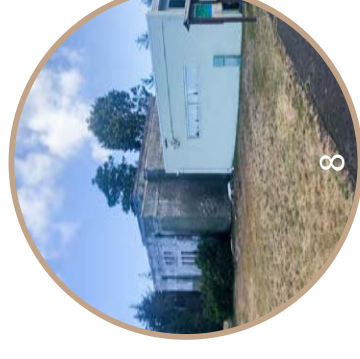
UNDEVELOPED CEMETERY LANDS



DUNE LANDSCAPE



CENTRAL UPLANDS



MAUSOLEUM & CHAPEL



MATURE TREES



EAST WOODLAND



SOUTH UPLANDS



ENTRY



OCEAN VIEW CEMETERY

Site Character Areas (1-15)



LEES+ASSOCIATES



DAVID EVANS
AND ASSOCIATES INC.

1

Figure 21: Ocean View Cemetery Site Character Areas, Source: LEES+Associates



MAUSOLEUM EXTERIOR



MAUSOLEUM INTERIOR



MAUSOLEUM DETAIL



VETERANS (HISTORIC)



FLAT MARKERS



UPRIGHT MARKERS



HISTORIC



INFANT / CREMATION



VETERAN (FLAT MARKERS)



UPRIGHT MARKERS



CREMATION



OCEAN VIEW CEMETERY

Interment Areas

November 13 2019



LEES ASSOCIATES
DAVID EVANS AND ASSOCIATES INC.

2

Figure 22: Ocean View Cemetery Interment Areas, Source: LEES+Associates

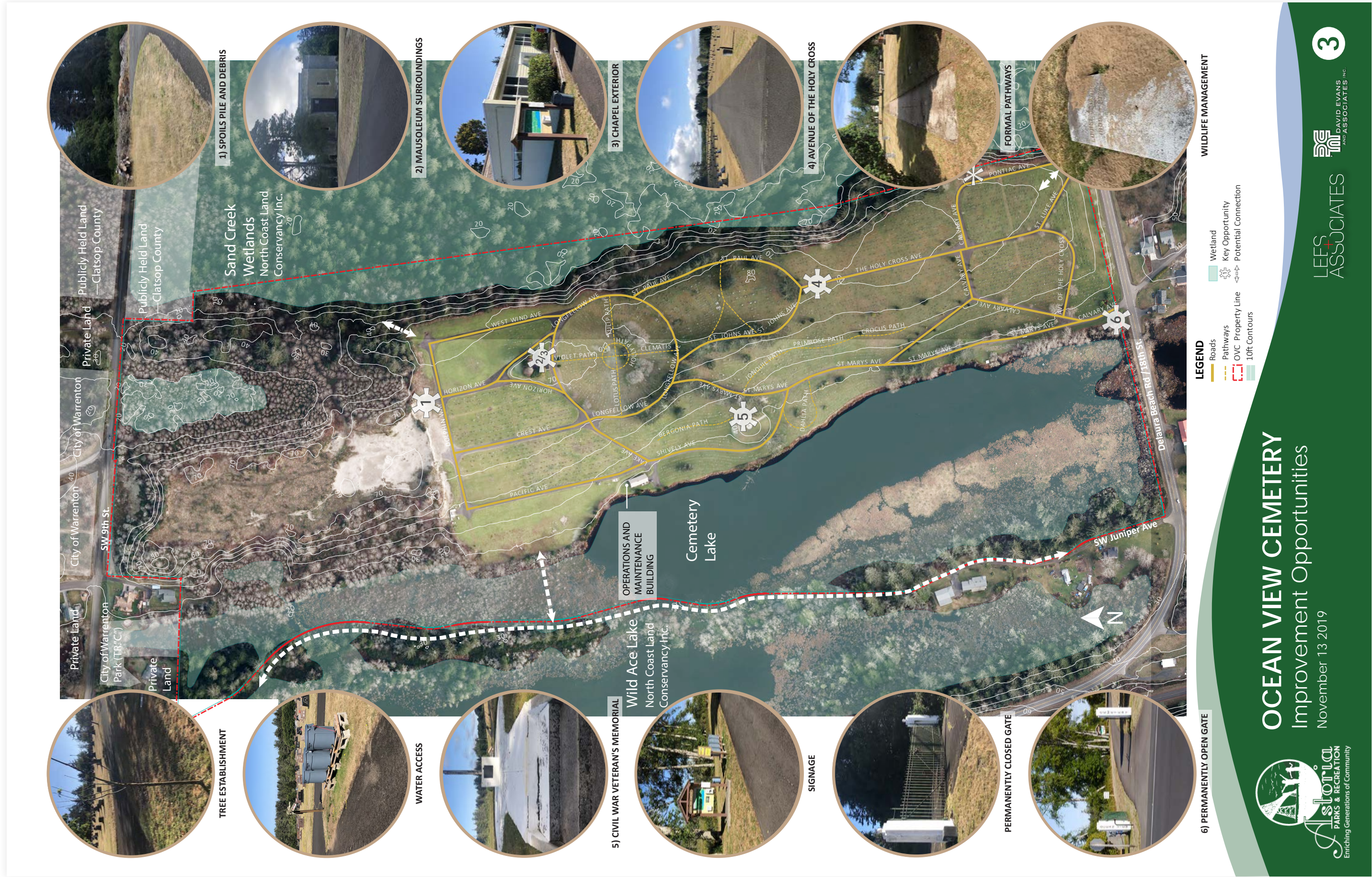


Figure 23: Ocean View Cemetery Improvement Opportunities, Source: LEES+Associates

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4. Governance and Operations

This section reviews the leadership structure, policies, procedures, and organizational resources relevant to the current operation of Ocean View Cemetery. It touches on partnership and outsourcing options, including the feasibility of alternative governance models. It also reviews the City's current records management in light of its influence on the overall operation.

Governance in this instance describes the form of management and oversight of the cemetery. The City of Astoria owns Ocean View Cemetery and administers it through its Parks and Recreation Department. This model of a municipal cemetery operating through a Parks and Recreation Department is common across North America. The benefits and challenges of a typical, municipal cemetery are summarized below.

Benefits	Challenges
Community confidence in the operation based on the perception that the cemetery will always be there.	Cemeteries are often under-supported; marketing of municipal services is often not optimal.
Operational efficiencies through use of Parks services.	Inefficiencies that can arise without a "business-like" approach to running the operation.
Potential to optimize community's heritage, culture, public art, architecture & environmental objectives, including preservation of historic structures & landscapes.	Organizational structures can limit cemetery services' ability to be nimble/innovative.
Community focus for commemoration and memorialization across multiple layers of society.	Rarely are municipal cemeteries endowed with a clear mandate, which can limit their ability to extend into other areas of service, such as offering new products or events.
Can be a net revenue generator if operated with both adequate autonomy and support.	Revenue, sales planning and delivery can be hampered by a lack of business skills.
Quality of impartiality and service to the community can build community support.	Capital development and innovation is limited by tax payer's willingness to pay and/or borrow.
Credibility of operation due to length of operation and legislation regarding rights of perpetual interment.	Responsibilities for perpetual care adds to the cost burden.

Table 5: Benefits and Challenges of a Municipal Cemetery System, Source LEES+Associates

Some of the most effective public cemetery operations are founded on coordination with an outside entity, such as a volunteer Cemetery Advisory Board or Board of Trustees, which is empowered to offer oversight and contribute to the strategic vision and direction of the operation.

For Ocean View Cemetery, this would involve identifying individuals with skills in specific areas that could be appointed to meet quarterly with staff and/or elected representatives from Astoria, Warrenton and Clatsop County. The potential value of this model lies in its capacity to tap into skills and energies of individuals with specialist expertise and interests relevant to the cemetery that may not already be present in the organization. This group could include those with the following expertise, education, skills or credentials:

- Financial planning, investment practices, accounting, and sales & operations performance;
- Business management;
- The death care industry;
- Heritage resource management;
- Nonprofit organizations, volunteer boards and/or community engagement, and
- Personal ties to the site, such a family history of relatives interred at Ocean View.

Operations in this context refers to the processes and resources associated with cemetery administration and customer service, such as the marketing and sale of cemetery plots, products and services, providing coordination between families and mortuaries/funeral homes, record-keeping and financial management.

The administration of Ocean View Cemetery is provided through the City's Finance Department. Specifically, this involves one staff member with technical and financial expertise being available part-time to handle cemetery customer enquiries and sales, liaise with funeral homes and monument suppliers, schedule burials and coordinate with Parks staff, along with issuing burial permits; managing financial transactions and record-keeping, and registering paperwork with the State. Cemetery administration follows a Cemetery Procedures document that details the steps of each task.

The cemetery administrator also takes reservations for the use of the chapel building, handles complaints and assists with variance enquiries, arranges transfers and buy-backs, and is responsible for directing people looking for existing burials and plots available for sale. As the City allows customers to purchase pre-need graves over time by carrying a contract, the Administrator also manages this process.

Cemetery record keeping in Astoria still involves multiple formats: printed copies in binders and on index cards, entry into a general ledger and in excel, entry onto a paper map, the updating of a digital map, and digital photos are also sometimes used to help direct customers. Record keeping therefore also entails filing and digital records management. The City of Astoria also provides

cemetery mapping services, managing the GIS work associated with the site. A marketing agency retained under contract with the Parks Department manages cemetery marketing, which includes posting notices, circulating cemetery info in a Parks and Recreation newsletter, and the posting cemetery news and updates on the Parks and Rec web page.

Site Operations includes interment services (openings and closings) along with the physical care and maintenance of the cemetery site. The City provides Standard Operating Procedures for the types of interment services it offers. All site operations are handled by one Parks supervisor, three full time and seasonal temporary workers. Work includes carrying out all tasks associated with interments, including locating and digging ("opening and closing") of graves (each grave can take up to 8 laborer hours), setting up for funerals (80% of which are for graveside cremation interment services); assisting with burial and monument permits, and conducting disinterments when required.

Other tasks include filing records at the chapel; preparing the chapel for public use (typically funeral services two or three times a year); coordinating with monument installers; grave-finding and directing cemetery visitors, and preparing for and cleaning up after events such as Memorial Day (which requires provision of water and portable toilets) and the Talking Tombstones event, which takes place at several sites, including at Ocean View Cemetery, every few years.

Routine work includes lawn mowing and edging, cleaning up storm damage and addressing wildlife impacts (primarily ground squirrel holes and tree damage by elk and deer), trash removal, power washing, arranging for tree care as needed, horticultural maintenance and maintaining equipment. Specialist services are called in for large tree services pruning and removals and wildlife control. The Parks Maintenance Supervisor also manages personnel and coordinates paperwork. Site operations staff use a Cemetery Procedures document that details the steps to be followed in opening a grave for an interment.

Since Ocean View is located in Warrenton, and travel time between the Parks and Rec offices in Astoria and the cemetery (about 20 minutes away) is a consideration. Other issues are the current lack of a functional water service at the site and the poor quality of the chapel building, which underwent cosmetic renovation in 2013 but remains substandard in terms of basic utilities and aesthetic appeal.

The City Manager provides overall guidance on long-term cemetery operation decisions and is the authority to grant or deny variance requests that are not within the rules and regulations of the site. The City Attorney provides legal opinions and guidance on an as-needed. The City of Astoria Code posted on the City website states that the supervision of the cemetery is under the direction of a cemetery superintendent; however, there is currently no one in this position. The cost of administering the cemetery and the related services provided by other City staff are not broken out and are therefore not included in the accounting of the operation.

By way of background, the following are two governance and operations scenarios used by similarly-sized communities for managing their municipal cemetery operations:

Scenario 1: Cemetery Admin and Operation Duties - 100% controlled by the City (*minor outsourcing only*)

All Cemetery Admin, Operations and Maintenance by the City of Astoria	
Pros	Cons
<ul style="list-style-type: none"> ▪ Enables the City to manage the entire cemetery operation, with the potential to integrate systems and achieve cost savings and other efficiencies. (For example: the outsourcing of Saturday interments to a private contractor is more cost-effective than using City crews.) ▪ Has the advantage of utilizing the existing structure, personnel and expertise already in place at the City of Astoria. ▪ Allows City staff to cultivate their respective strengths to deliver the best possible site care and customer service to families. ▪ Offers the highest level of clarity to City and County residents regarding cemetery services. ▪ Keeps costs low due to staff time being charged to the operation on as-needed basis (by season and event). 	<ul style="list-style-type: none"> ▪ Requires a clear, consistent understanding across the City of Astoria's organization, including its Parks and Rec Department, re the unique legal, financial and operational obligations of being a cemetery owner and operator. ▪ Requires excellent communication systems to ensure accuracy in record-keeping, financial management, and scheduling and field work. ▪ Requires excellent records management systems to track cemetery-related revenues and costs and overall performance ▪ Places the full responsibility for providing cemetery services to residents of Clatsop County on the City of Astoria, including the risk of any financial or staffing shortfalls. ▪ In the absence of specialist expertise, puts the onus on staff to "learn the ropes" – which includes the risk that industry best practices are not implemented.

Table 6: Scenario 1 Cemetery 100% owned and operated by the City, Source: LEES+Associates

This first scenario is how Ocean View Cemetery currently operates, with admin, operations and site operations being handled by the City of Astoria with the exception of Saturday interments, which are currently contracted out to Wilbert Vaults.

Scenario 2: Cemetery Administration Duties controlled by the City; Cemetery Field Work, Services and Site Care outsourced to a Contractor.

This second scenario is for the City being responsible for the administrative duties of the cemetery, and a local contractor is responsible for all openings, closings and all site maintenance, with direction and oversight only as-needed by City staff. The main difference here is that all site operations and maintenance would be outsourced to a contractor.

Cemetery Admin by the City; Site Op's & Maintenance outsourced to a Contractor	
Pros	Cons
<ul style="list-style-type: none"> ▪ City Admin staff would continue in their current roles, performing the same tasks as they do now. ▪ Parks staff would no longer need to travel to/from Ocean View Cemetery as frequently to accommodate cemetery-specific tasks such as openings and closings, and allow Parks staff to focus on parks work within the City limits. ▪ A contractor may be able to deliver improved site conditions based on specialized training, and may have access to specialized equipment. ▪ The City would not need to train any new staff to operate and maintain the cemetery, providing the cemetery supervisor stayed the same. ▪ The City would continue to be responsible for the cemetery (including in the eyes of the public) but could potentially achieve costs savings through outsourcing the field work. ▪ City staff would have fewer staff/less resources allocated to delivering cemetery services and site care. 	<ul style="list-style-type: none"> ▪ The City would lose direct control over most cemetery field work processes. ▪ City staff would need to make regular inspections to monitor contractor practices and site conditions to ensure that the desired level of care is maintained, including the correct enforcement of Rules and Regulations. ▪ The City would be held responsible for the work done by the contractor. ▪ The City would incur additional risk in terms of ensuring that interments were conducted as required by State and City Codes. ▪ Any cost savings may not be sustainable over time. ▪ Contracts would be required to be awarded through a competitive process and may not result in on-going cost savings or consistent, quality of site care over the long run. ▪ Could result in a loss of continuity of standards and potentially public confidence.

Table 7: Scenario 2 Cemetery Admin by the City; site operations & maintenance by a private contractor. Source: LEES+Associates

Historically, Astoria has had access to juvenile offenders who have performed maintenance work at the site as court mandated restitution in the form of community service. Though not a significant value, the County has stated that this arrangement may be made available again in the future.

CEMETERY STAFFING NEEDS

Parks and Recreation Systems often use the measure of FTE or “full time equivalent” to quantify their human resource needs, manage budgets, and evaluate the efficiency of their operations. One FTE represents the number of hours worked by one full time employee over one year. FTE is an especially helpful metric to use in systems where employees work different number of hours or on tasks with different operating budgets, as is the case in the City of Astoria.

There is wide variability in how public cemeteries across North America operate. This precludes establishing credible FTE standards for this type of facility. Large public cemeteries are typically operated by municipal employees shared with Public Works, Parks and Recreation or other Departments. Small to mid-sized cemeteries are frequently maintained by contractors but supervised by municipal supervisors. Rural cemeteries that are small enough may be run entirely by community volunteers. The number of employees and contract workers running cemeteries therefore varies widely.

Factor influencing the efficiency of cemetery operations (and the FTEs needed to run them) include:

- Area of the cemetery site;
- Physical characteristics (topography, layout, type of vegetation, subsurface conditions etc.);
- Local climate;
- Range and nature of services offered;
- Number of residents served/local demographics (age/mortality rate/disposition preferences);
- Travel distance between other facilities (especially with shared off-site equipment);
- Quality of equipment, clarity of operating procedures, the skills and expertise of personnel, and
- The degree of digital automation on the admin and field work sides of the operation.

FTE levels reported by public cemeteries in western North America can be measured by the area of the cemetery or the number of interments. These guidelines, relating to the parameters of site area (amount of area to be maintained) and number of interments (the annual number of openings and closings) suggest that a reasonable standard for public cemeteries is:

One FTE per:

- a. 5 to 8 acres of developed cemetery area, or
- b. 35 to 40 interments.

The current best practice for the number of workers needed to administer, operate and maintain a municipal cemetery is four: two administrative staff to manage customer service, records management and financial reporting; and two on-site workers to provide maintenance and conduct interments.

The two administrative staff can be assigned on a part-time basis. One field work person should be assigned full time. A second field work person should be assigned on a part time, as-needed basis to provide support during unusually busy periods or when the primary cemetery employee is away on leave. This would amount to a minimum of 2.5 FTE to run a basic municipal cemetery operation.

Historically, Ocean View was operated by 3 FTEs, plus up to 6 part time, seasonal workers (6 x 0.5) or an additional 1.5 FTEs, for a total of 4.5 FTEs. Since 2011, budget cuts have led to the cemetery operating with less than 1 FTE, and not one full-time person currently fully dedicated to its operation.

This low FTE rate was likely the cause of a significant increase in public complaints about site maintenance. In 2016, The Astoria Parks and Recreation Comprehensive Master Plan rated the condition of Ocean View Cemetery as “Poor.”

Based on the above criteria, by size (point a), the 40 acres currently developed at Ocean View Cemetery would require about 5 FTE.

Based on the above criteria, by volume (point b), the 80 interments currently being made at Ocean View Cemetery each year would require about 2 FTE.

Recent increases in maintenance, and the part-time worker present seasonally on-site, appear to have improved conditions and increased public satisfaction with the cemetery.

This, and other findings of this study, indicate that the City should increase staff levels and work to increase the number of interments conducted each year to generate the revenue needed to defray costs. For the City of Astoria to achieve sustainable development, consistent levels of maintenance, and financial stability at Ocean View, it will need to increase the human resources and improve record keeping and financial reporting to enable it to establish the appropriate FTE rate for this site and operation.

EVALUATION

The decision to undertake creating a master plan for Ocean View Cemetery was initiated in part in response to public complaints about poor site care. As shown by the generally positive response received through the public engagement process, this issue has now been largely addressed. Over the past year, the City has renewed its commitment to improved site operations. The improvements realized are the result of the work and dedication of the staff now involved with the site, along with City's hiring of a motivated, part-time seasonal worker stationed at the cemetery to manage grounds care and be a presence for visitors over the spring, summer and fall. The effect appears to be renewed confidence amongst visitors that their loved ones are being taken care of, and that the cemetery is again being treated as a valued landscape.

The cemetery's location on an former sand dune means that its soils are so sandy that cemetery staff is not able to maintain the manicured green lawn that many people expect. The in-ground irrigation system, which extends over most of the site, was turned off due to leakage. This makes it impossible to keep the lawn green over the dry summer months. Due to the lack of irrigation water, staff no longer routinely seed grave sites following an interment because grass seed and sod tend not to survive. During the wetter seasons, the site looks green and attractive. During the wetter seasons, regular mowing is needed to remove the flower heads of weeds such as dandelions and hawkweed, as their conspicuous flowers have historically triggered complaints. For many visitors, a tidy, green cemetery lawn symbolizes respect, and this is an on-going challenge for all cemeteries.

Due also to the sandy soil at Ocean View, excavating an opening for a casket burial, installing the required concrete liner and then placing the casket and completing the closing typically takes a total of eight labor hours. This is significantly longer than this would take in soils with more structural integrity.

The decision to create a cemetery master plan was initiated due to the City's lack of confidence in the financial well-being of the cemetery. This appears to underlie the decision by City Council in 2015 to implement fee increases that would lead to doubling cemetery fees by 2022. As with the first issue, this concern has been addressed by the determination that Ocean View is not currently incurring debt, and that the Perpetual Care Fund currently in place is healthy and being appropriately managed. As gaps remain in the City's accounting procedures, however, it is not possible to confirm that operation is as financially healthy as it appears to be.

A key finding of the master planning process is that the City should improve its cemetery records management to better track, and therefore, manage its performance. Currently, record keeping is antiquated and not fully harmonized between all departments or across all platforms. While this is very common amongst cemeteries, it comes at the cost of efficiency and accuracy. Staffing changes have slowed the review process during training.

An integrated, digital records management system would be streamlined, transparent, user-friendly and non-corruptible. A dedicated cemetery records management software such as Stone Orchard (a Central Square company) has the flexibility to integrate historic and current interment records with financial information, plot/niche data, and digital mapping. This type of cemetery-specific management software has the capacity to ensure legislative compliance and would allow staff to generate comprehensive reports, custom certificates, invoices and receipts. It has the capacity to link GIS maps and air photos to assist with grave-finding. It is also possible to set up an interface with a web based app that allows public access to cemetery information. Purchasing components of Stone Orchard Software or a comparable software will create a more effective management and operational system for Ocean View Cemetery.

Ocean View Cemetery serves all of Clatsop County but the work done to date on this plan does not indicate an urgent need to approach Clatsop County for a contribution towards the cemetery's operation. As noted in the financial section, the City could in the future negotiate an annual, per capita payment, or an in-kind contribution, such as providing water at the site at no charge from the City of Warrenton. Over time, the value of Astoria's provision of cemetery services to Warrenton and other communities in the surrounding rural areas should be considered as the vision and development plan for the site is confirmed.

Finally, if the City increases staffing levels at Ocean View, it should evaluate its arrangement with Wilbert Vaults to enable Ocean View to offer Saturday interments. While use of this contractor seems to have worked reasonably well, it has required additional administrative time to manage. It has also meant paying a contractor to provide a service that Parks staff is already quite capable of providing, and doing so to City of Astoria Parks standards. Cemeteries typically charge a premium for Saturday interments, which further justifies considering returning this scope of work back to Astoria Parks.

5. Engagement Summary

A round of engagement with internal stakeholders was held that included input from city Staff, followed by a meeting with external interested stakeholders, such as members of the community as well as death-care and bereavement industry. A collection of stakeholder comments can be found **Appendix C**.

The project team also created a public survey designed to gauge public opinion about Ocean View Cemetery and to gain input on possible operational and capital improvements. The Ocean View Cemetery Master Plan Public Survey included 25 multiple choice and open-ended questions, grouped by area of focus, and a summary of data collected can be found in the following pages.

The survey was hosted by Survey Monkey and was open from November 4th through December 1st 2019. Participation in the survey was actively promoted by the City of Astoria. A link to the survey was posted on the City's website (Home page, Parks and Recreation page and the Cemetery page), and posted on the City's Parks and Rec's Facebook page. The link was sent out in an email newsletter and in an email sent directly to all elected officials. The survey link was subsequently shared on social media.

Over the four weeks that the survey was open, it attracted 201 respondents. As a percentage of the local population, this is an excellent turnout, given that cemetery surveys typically do not attract many respondents.

WHO RESPONDED?

The majority of respondents (54%) reported that they have loved ones buried in the cemetery or that they own plots themselves.

Common theme in "other" responses was that they live nearby," own a plot, interested in buying a plot or are connect locally through a church, government or historic society.

A significant number (nearly 24%) visit frequently: 10+ times a year, other respondents visit once or twice a year (10.5%/14.7%) or slightly more frequently. 5 times a year (13.6%).

PERCEPTIONS OF MAINTENANCE AT THE CEMETERY

Respondents scored the cemetery as an average 4.5/10 for current level of care- however 76.3% of respondents believe the cemetery has improved since efforts have been made to improve site maintenance.

MAINTENANCE PRIORITIES

Under the survey category, Services/Events, respondents ranked the following options:

Wildlife management (e.g. ground squirrels, moles)
 Providing water for public use
 Tree care and establishment
 Waste management
 Monuments/headstones — edging and maintenance
 Lawn mowing

Respondents ranked **lawn mowing and edging and maintenance of headstones** as priorities for maintenance, followed by **waste management and tree care/establishment**. Water for public use was also important, and wild life management ranked as the last priority. Other maintenance priorities suggested included: controlling dogs on leashes and addressing dog waste and geese waste, moss and weed control, and mausoleum maintenance.

RESPONDENT INVESTMENT IN THE CEMETERY

Of respondents, 68.5% purchased a grave or arranged for burial or service at the cemetery; experience with administration rated at 5.6/10.

Of those that have purchased a grave 1 (9.1%), 2 (24.6%), 3 (13.6%), 4 (10.9%) or 10+(13.6% plots).

PRIORITIES FOR CEMETERY SERVICES OR EVENTS

Respondents voted for the types of services/events that should be held at the cemetery as follows:

1. Paying respects; visiting graves of family or loved ones
2. Funerals/burials or Celebrations of Life
3. Informational (historical; genealogical or environmental research)
4. Attending an annual event (Talking Tombstones, Memorial Day, etc.)
5. Passive recreation (walking, dog-walking, bird-watching, fishing, wildlife viewing etc.)

And also identified were:

- Opportunities for involving the community, such as clean up; or other acts of service (e.g. painting gates);
- Historical activities/walking tours;
- Visiting the Veterans Memorial;
- A future pet cemetery or pet memorial/scattering garden, and
- Opportunities for wildlife viewing.

ACCESSIBILITY

76.6% of respondents believe the cemetery is physically accessible.

VALUES FOR DECISION-MAKING

Respondents ranked **cost (43.4%)**, followed closely by **personal values- 41.3%** (location, being interred with family or according to my spiritual/cultural/religious traditions and beliefs) **as the top considerations for end-of-life decisions** for themselves or their family. **18.9%** selected **sustainability** as the top consideration factor.

Open comments about factors influencing their end-of-life decisions noted desire for:

- Cremation or for options that involve no embalming/green burial;
- A space that will be respectfully maintained;
- People to be able to find their ancestors;
- A place that is close by them, near family

DESIRED BURIAL OPTIONS

Respondents showed interest in many burial options, with particular interest in a **scattering garden (46.1%)**, followed closely by offering **Green Burial (44.4%)**, followed by **memorial features (41.7%)** and **Columbarium (40%)**. There was also a marked interest in the **Mausoleum (29.6%)**.

INTERMENT OPTIONS IMPROVEMENTS

The majority of respondents ranked the **development of cremation interment options** such as columbarium niches, scattering gardens, memorial walls, and above-ground family urns and ossuaries as **a priority for and memorialization at the cemetery**.

Provision of **Green burial was second priority**, and integration of new graves into older sections of the cemetery was the last priority.

Other suggestions included the mausoleum, veterans section, pet scattering garden, family-owned cremation space, and memorialization options, such as benches.

PRIORITIES FOR VISITOR SERVICES + AMENITIES IMPROVEMENTS

The following priorities emerged (1 as highest, 7 as lowest):

1. Grounds improvements (seating, shade trees and other plantings, water access for flowers etc.)
2. Restrooms
3. Improved wayfinding and site info (improved: kiosk, maps, signs, website or a wayfinding app)
4. A flexible outdoor space for celebrations/events
5. Interpretive signage (historical figures, environmental features etc.)
6. Entry improvements (fencing, gates, signage and planting)
7. Safety and security (on-site personnel, wildlife management)

While there was concern that the cemetery should not build more than it can maintain, other priorities for service and amenity improvements included:

- Improved maintenance such as;
 - Address moss
 - Lawn care
 - Retain integrity of historic sections/make 'destination' areas
 - Waste management
 - Ornamentation control
 - Edging around headstones
 - Clean headstones
 - Cemetery Lake
 - A balance of natural and maintained spaces
 - Mausoleum maintenance/restoration
- Pet scattering garden
- Small public gathering space for events
- Public water access
- Improved road direction, and
- Improved signage for sections

RECREATION + ACCESS TO NATURE

The following priorities emerged (1 as highest, 5 as lowest):

1. New seating areas/viewpoints for quiet contemplation
2. Ecological improvements (maintenance practices, naturalized plantings, habitat enhancement etc.)
3. Improved pathway connections with adjacent neighborhoods and natural areas
4. Partnerships with the North Coast Land Conservancy (or others) to manage and protect adjacent natural areas
5. Interpretive signage (site ecology and natural history)

Respondents were also interested in:

- A garden feature
- Improved and enhanced pathways to walk in amongst graves,
- Passive use areas
- A place that could be used for gathering and photos
- Continued dog walking access
- Rehabilitate lake to improve ecological functions and recreational opportunity
- Playground or
- Allowing unused lands to be used recreationally- e.g. Disc-golf course or walking/running loop

Respondents also noted that primary priority use of the cemetery should be for people visiting the graves of those buried there and that other use should be respectful to the primary purpose of the cemetery.

HISTORY AND HERITAGE

Respondents prioritized the **preservation and restoration of the 1915 Ocean View Abbey mausoleum and surrounding area**. Secondary priorities included enhancement of the Cemetery's identity and historical character along 18th Avenue/Delaura Beach Rd. and interpretive signage.

Respondents were also interested in :

- Improving the ability to find graves
- Inviting/encouraging statuary donations, fountains, seating etc.
- The Talking Tombstones event

- Re-establishing the historic landscape design and plantings
- Improve maintenance of grave site markers (e.g. Markers that are buried or overgrown)
- A memorial wall near the flag pole

Some responses noted acknowledgment that the Mausoleum is privately owned and understand the responsibility is currently on owners to maintain.

OTHER COMMENTS

Other comments contributed at the end of the survey express desire for:

- Public access to water
- Partnership with the City of Warrenton
- More options for cremation
- Prioritization of grounds improvements
- Provision of transportation services from Astoria?
- Ensuring graves are marked (temporary markers for unreadable graves)
- Addressing buried graves in infant section
- Higher maintenance standards
- Affordable green burial
- Integrating new additions in an understated way- blend with natural setting
- Caring for and maintain wetlands impacted by the cemetery

Some respondents expressed concern over long term care and financial stability of cemetery and were curious how the master plan will assure a high standard of care at Ocean View.

Note:

The following information was referenced/volunteered by a respondent:

Ruth Hope and Marietta Hope Zell have presented to City Council on ideas/issues related to the cemetery – all councilors and Angela Cosby, Former Director of Parks, were given a copy of their notes.

DEMOGRAPHICS

AGE

- 57% of respondents were age 26-63, and 37.5% of respondents were age 64-80.

LOCATION

- 52% of respondents entered their zip code at the end of the survey. Of the 111 individuals that provided their zip code, 96% were from Clatsop County and 3% were from the Portland area (Multnomah County).
- Of those from Clatsop County, 54% were from Astoria and 26% were from Warrenton.
- Other Clatsop County communities represented include Seaside (9%) and Hammond (3%); Tillamook County was also represented with (2%) of the respondents that indicated their location.

GENDER

- 64% of respondents were female, 33% male and 3% chose not to answer.

The high ratio of female to male respondents reflects the current trend of women taking the lead in making the decisions related to choices of types of disposition and memorialization.



6. Products and Services Review

This chapter offers a review of the range of Ocean View Cemetery's offerings and the prices of those offerings. It also identifies new products and services the City could introduce at the cemetery.

PRODUCTS + SERVICES - KEY FINDINGS

The following section is a summary of the key findings from this plan's products and services review:

- The diversity of Ocean View Cemetery offerings is significantly less than the typical range at other cemeteries in the United States;
- Ocean View Cemetery would benefit from introducing new attractive interment options (such as Green Burial and scattering services), a wider spectrum of memorialization alternatives and value added services;
- Ocean View would benefit from prioritizing the development of new cremated remains options (columbaria, scattering gardens, ossuaries, family vessels, etc.) to take advantage of the rising demand for cremated remains interments;
- The current plot sales rates for casket and cremated remains are below average at a regional level and on par with average rates at a national level;
- Ocean View Cemetery casket and cremated remains interment rates are above average at a regional and national level;
- Ocean View's rates are generally much higher than the region's rural cemeteries, but lower than rates in large urban communities, like Portland;
- The cemetery's pricing practices for annual increases (10% per year) are currently more aggressive than is common practice. The City should consider reducing future annual increases;
- The City should consider introducing a discounted rate on the plot sales and interment services for infants, children and veterans;
- Ocean View Cemetery can increase revenue by introducing a **25%** non-resident premium on its plot sale rates. This would align with best practices for cemetery pricing, preserving interment land for residents that pay taxes to the City which manages the cemetery, and
- The City could strengthen the cemetery's financial sustainability by introducing new revenue streams from additional offerings and service fees common at municipal cemeteries.

The methodology, details analyses, key components of this cemetery plan's product, services and pricing analysis are outlined in sections to follow.

CURRENT CEMETERY OFFERINGS - DIVERSITY

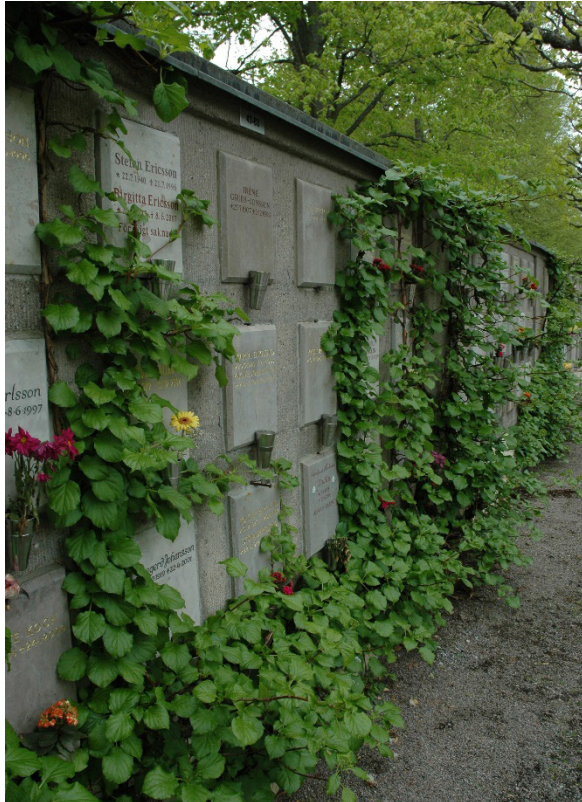


Figure 24: Columbarium Niches, Engravings + Flower Vases, Source: LEES+Associates.

Ocean View Cemetery currently offers in-ground interment services for full body and cremated remains. Full body casket burial plots are offered as 5' x 10' plots for adults and as 2' x 3' plots for infants/children. Ocean View offers 2'x3' cremation plots for the interment cremated remains only. All casket plots are single depth (one casket per plot, placed at the standard 6' depth) due to the difficulty of excavating any deeper in the site's very sandy soil. The cemetery requires that every casket be placed in a concrete grave liner. This holds the walls of the excavation as the grave is being dug as the sandy soil tends to be very unstable. Concrete liners or vaults also help prevent grave settlement and any movement of the monument over time.

Ocean View Cemetery Rules & Regulations permit up to five interments (one casket and four cremated remains) to be made in each casket plot and up to two interments of cremated remains in each cremation-only plot.

the remaining eight crypts are City-owned; however, under the terms of its contract with the builder, the City is not able to sell them. It does not currently offer and products or services in the mausoleum. (See Appendix A for additional information about the Abbey Mausoleum.)

The Ocean View Abbey Mausoleum contains 100 crypts but 92 of these are sold and occupied, and

Memorialization options and related services offered by Ocean View Cemetery presently includes:

- In-ground vases;
- Upright markers and monuments, and
- Flat markers.

There are other forms of memorialization and ornamentation present at Ocean View Cemetery, however these are not supplied by the City.

NEW INTERMENT + MEMORIALIZATION OPTIONS

There is a diverse range of products and services not currently present or directly offered by Ocean View Cemetery, but are available at other American cemeteries. These include:



Figure 25: Family Vessels Royal Oak Burial Park, Victoria, BC, Source: LEES+Associates.

- Ossuaries + Scattering Services;
- Family vessels;
- Lawn crypts;
- Green Burial;
- Muslim burial;
- Veterans section;
- Columbaria niches;
- Family estates + family columbaria, and
- Memorial options: e.g. statuary, benches, wreathes, boulders, flowers, and plantings.

Most of these offerings are common in American cemeteries, except for Green Burial and family vessels.

If the status of the Ocean View Abbey Mausoleum changes in the future, there may be an opportunity to market the eight unoccupied City-owned crypts.

OSSUARIES + SCATTERING SERVICES

An ossuary is a container used to hold the cremated remains of more than one individual. Frequently used where burial space is scarce, ossuaries can be above or below-ground.



Figure 26: Scattering Garden and Ossuary, Lakeview Cemetery, Penticton, BC, Source: LEES+Associates.

Scattering gardens are attractive natural or ornamental areas that offer a place for the scattering of cremated remains. Scattering gardens and ossuaries often include memorial walls.

With increasingly mobile families and people choosing not to inter the cremated remains of their loved ones in a cemetery environment, there is potentially large market for selling plaques or engravings on a memorial wall. Memorial walls enable people to memorialize family members or friends without interment, or individuals whose remains are interred or scattered elsewhere.

FAMILY VESSELS



Figure 27: Family Vessel at Shuswap Memorial Cemetery, Salmon Arm, BC, Source: LEES+Associates.

Family vessels are a new cremation interment option recently introduced to the North American market. Designed features for placement at key locations, such as along pathways and in cremation gardens, family vessels are granite urns about 30" tall with an interior capacity of about 14 cubic feet. Each vessel securely accommodates up to eight nested urns or ten sets of commingled cremated remains. Like a columbaria wall, each family vessel is owned by the cemetery, which sells families a right-of-interment for its use.

Included in this fee is the opening and closing and one bronze name plaque or engraving when purchased at-need. For subsequent interments, the family is charged an additional opening and closing fee, and an additional fee for additional plaques or engravings. Cemetery operators approve the size, design, and content of the bronze plaques or sandblasted inscriptions.

Family vessels are intended as a premium cremation interment option and have been placed in several cemeteries in Canada including at Royal Oak Burial Park, in Victoria (BC), Kelowna Memorial Park in Kelowna, BC, and in the Town of Slave Lake, in Alberta, Canada.

Since these vessels are a relatively new option in North America, the introduction of family vessels would require marketing to increase awareness. As such, family vessels should be installed in phases, beginning with one or two display units placed on offer in the cemetery.

COLUMBARIA NICHES

Columbaria niches have become increasingly popular across North America with the rising cremation rate. As an alternative to in-ground burial or scattering, columbaria are growing in popularity with customers and installing columbaria is a trend in cemeteries across the United States.

Columbaria construction costs vary widely, depending on size, design details and associated amenities placed in the adjacent landscape. Columbaria installations are typically very profitable due to their rising popularity and the low cost of the opening and closing of a niche interment. It takes significantly less time and cost to inter an urn in a niche (known as “inurnment”) than to inter cremated remains in the ground. Weather is also not typically not an issue in conducting an inurnment.

Due to the high return on investment (typically ~200% or more), columbaria niches can be a key source of new revenue. They also take very little space and can often be placed in areas unusable for other types of interment, both of which are assets in terms of conserving cemetery space.



Figure 28: Columbaria Niches, Kelowna Memorial Park, BC, Source: LEES+Associates.

FAMILY COLUMBARIA



Figure 29: Heritage Pagoda-Style Family Columbaria at Mountain View Cemetery, BC, Source: LEES+Associates.

Family columbaria vary significantly in size, price and design. A family columbarium is essentially the same as a standard columbarium, except they are scaled for a single family, which holds the right-of-interment to all the niches or other features, and all of its memorialization is dedicated to members of that family.

Custom features can be added in order to meet personal family tastes, customs, and religious practices as well as accommodate cemetery standards. Personalized engraving can be added to the roof line, side walls and doors for added detail.

FAMILY ESTATE PLOTS

Family estates vary in the number and type of interments permitted, and in size and features, between cemeteries across North America. The premium price of a family estates typically reflects the associated development costs and ongoing maintenance of features such as planting beds, benches, fences, and archways.

Traditional in-ground burial family estates typically permit the interment of cremated remains in addition to full body remains. Family estates are not commonly available in cemeteries across North America. These estates typically include:

- Two double depth lawn crypts, (four traditional in-ground burials);
- Cremation plots (16 cremation interments);
- Marker foundation;
- Granite memorial bench;
- Planting beds, and
- Fencing, with an arched gate feature that includes bronze name plate.

Other cemeteries offer larger, more elaborate cremation-only family estate plots. Examples are those that can accommodate four sets of cremated remains with a flat marker; or those that can accommodate up to eight sets of cremated remains with an upright marker.

GREEN BURIAL



Figure 30: Royal Oak Burial Park, Woodlands Natural Burial Area, Victoria, BC, Source: LEES+Associates.

Green burial emerged out of Europe in the 1990's as a simpler form of full body interment and is now attracting increasing interest across North America. Also known as "natural burial," "country burial" or "woodland burial," green burial is defined as earth burial with:

- No embalming;
- No use of burial plot liners or concrete vaults;
- A fully biodegradable casket or shroud;
- Some form of habitat restoration of the grave site such as planting with native species, and
- A communal marker, no marker, or at most a very simple marker made of natural materials.

Jewish, Muslim and the Bahá'í communities are the religious groups that have traditionally interred the deceased according to green burial principles. More recently, the Catholic Church has begun to actively embrace green burial, based on the tenets of green burial aligning well with their core beliefs and practices.

Consumers across North America are increasingly seeking environmentally sustainable products and services, including from within the bereavement sector. Green Burial often appeals to those that would otherwise not choose to be interred in a conventional cemetery. An Increasing number of cemeteries are now offering green burial interment options, either in a dedicated section with full habitat restoration, or anywhere within the cemetery, which typically means without the on-site habitat restoration component.

Most people have heard of Green Burial and are curious to learn more about it—which makes a cemetery simply committing to providing green burial a potential marketing opportunity. Media and social network sites are especially attuned to stories about Green Burial. The US-based Green Burial Council or GBC (<https://www.greenburialcouncil.org/>) is nonprofit organization whose web-site is good source of information about green burial and associated, more environmentally sustainable products. The GBC also offers a certification program to qualifying service providers and lists several Oregon cemeteries as offering some form of green burial. River View Cemetery in Portland is active in providing for a growing number of green burial customers. Locally, green burial is already being offered at Greenwood Cemetery.

A key issue is the requirement that casket or shroud burials take place without an outer container. Due largely to the sandy soil at Ocean View Cemetery (situated on an historic sand dune), concrete vaults are currently required for all full body burials. Offering green burial at Ocean View would require an operation change, as well as a change to the Cemetery Rules and Regulations. Cemetery staff are, however, confident that a shoring box could be used in lieu of a vault for green burials.

MEMORIALIZATION OPTIONS

Memorialization and related product offerings available at other North American municipal cemeteries but not at Ocean View Cemetery, include memorial walls, engraved rock markers, statuary, benches, niche vases, plaques, trees and wreaths.



Figure 31: Examples of a Range of Memorialization Options,
Source: LEES+Associates.

CEMETERY PRICING REVIEW

This section analyses the pricing of offerings at Ocean View Cemetery, as compared with other cemeteries in the region and across the United States.

MARKET TRENDS

Cemetery pricing in Canadian cemeteries generally follow consistent market trends. For example, large urban centers often have higher rates than small towns or rural communities due to the increased demand relative to local supply.

Cemeteries in large urban centers also tend to offer a greater diversity of offerings than small towns and rural communities. Families value a variety of interment options and are willing to pay a premium to accommodate their cultural, religious and personal preferences.

The following figure shows the standard pricing continuum for North American cemetery offerings:

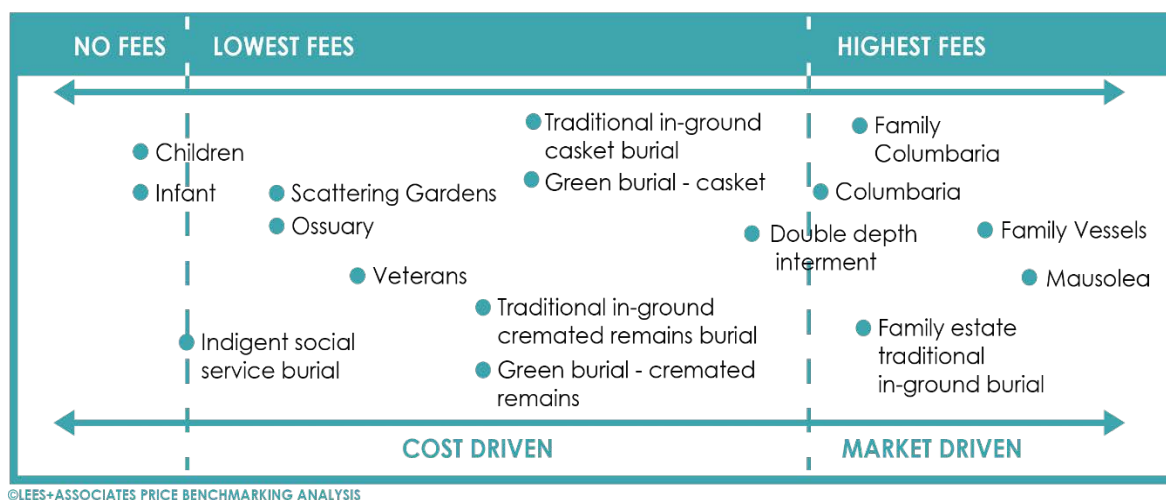


Figure 32: Pricing Continuum for Typical Canadian Cemetery Offerings, Source: LEES+Associates.

PRICE BENCHMARKING STUDY

Best practices for cemetery pricing includes comparing the rates of communities in the region with similar supply and demand, ideally annually. This involves reviewing the rates of other cemeteries with similar business models, populations, and ethnic/religious composition.

This price benchmarking study reviewed Ocean View Cemetery's current rates relative to averages at municipal cemeteries across the US, as well as the regional averages of a select cemeteries in the Astoria area with similar market profiles.

The following table summarizes the resident rates (including the cemetery care fund portion) and comparative findings for the primary offerings available for sale by the cemeteries in this study.

Cemetery Offering	City Rates ¹⁶	Regional Low-High Range ¹⁷	Regional Average ¹⁸	USA Average ¹⁹	Price Comparison Findings
Adult Casket Burial Plot	\$1,556	\$250 to \$11,000	\$1,679 to \$4,212	\$1,250 to \$2,000	Below Regional Average. On par with USA Average.
Child / Infant Burial Plot	\$282	\$50 to \$625	\$272 to \$377	\$250 to \$1,000	On par with Regional Average. On par with USA Average.
Crema-tion-Only Burial Plot	\$518	\$250 to \$3,995	\$633 to \$2,134	\$500 to \$1000	Below Regional Average. On par with USA Average.
Columbaria Niche	n/a	\$250 to \$6,795	\$463 to \$3,745	\$1,250 to \$4,000	Not available at Ocean View Cemetery.
Adult Interment	\$1,556	\$678 to \$1,495	\$1,189	\$750 to \$1,500	Above Regional Average. Above USA Average.
Child / Infant Interment	n/a	\$50 to \$695	\$373	\$250 to \$1,000	Not available at Ocean View Cemetery.
Cremated Remains Plot Interment	\$778	\$50 to \$795	\$513	\$200 to \$750	Above Regional Average. Above USA Average.
Cremated Re-mains Niche Inurnment	n/a	\$109 to \$795	\$530	\$200 to \$500	Not available at Ocean View Cemetery.
Scattering	n/a	\$175 to \$495	\$355	\$100 to \$400	Not available at Ocean View Cemetery.

Table 8: City, Regional + National Cemetery Resident Rates Comparison, Source: LEES+Associates.

16 The rate for Ocean View Cemetery including the Care & Maintenance Fund portion.

17 The lowest and highest rates for offerings at cemeteries with a market profile comparable to Ocean View Cemetery.

18 The average rate range for low to high quality offerings available, for a category of service in the region.

19 The average rate range for low to high quality offerings, found in LEES+Associates market research and price analyses of public, private and religious cemeteries in the United States.

High quality cemetery options at the higher end of the spectrum are typically located in a more readily accessible, more attractive location, have greater interment capacity, provide more memorialization opportunities and include additional landscape features.

In addition to the sites included in this price benchmarking study, Ocean View Cemetery has also historically compared itself to Greenwood Cemetery located just outside the City limits of Astoria. Greenwood Cemetery has opted to not disclose its rates for inclusion in this study. However, stakeholder consultation found that Ocean View Cemetery's current rates are more than twice that of what Greenwood Cemetery collects. The character of Greenwood Cemetery is more informal than Ocean View, which may explain in part its lower rates.

Clatsop County has an unusually polarized cemetery price spectrum, with its small rural cemeteries charging significantly less than the regional average and many urban cemeteries in the nearby Portland-Metro area charging significantly more than the regional average.

Additional details regarding the current cemetery pricing for Ocean View Cemetery and comparable cemeteries in the region can be found in **Appendix D – Detailed Price Benchmarking Study**.

COST OF SERVICE

Interment rates should always exceed the cost of service. The City estimates the current cost of service (the time, equipment, material and direct overhead cost for interment) at Ocean View Cemetery is:

- \$950 for each casket burial, and
- \$250 for each cremated remains burial.

Therefore, Ocean View Cemetery is currently accruing a 40% net margin on each casket burial and 70% net margin on each cremated remains burial. This "profit" is used by the City to pay for site care, administrative, development and other support costs.

NON-RESIDENT PREMIUMS

A significant number of North American municipal cemeteries, charge a non-resident premium on inventory sales. The City of Astoria does not currently charge a premium fee to non-residents, defined by City staff as those residing outside of Clatsop County at the time of death.

Non-residents typically pay a premium on top of the resident rate ranging from 25% to 100% on cemetery plots, crypts and niches. In this price benchmarking study, the **Ranier Cemetery District** was identified as a regional precedent for charging non-resident premiums.

Alternately, some North American communities intentionally opt to list their cemetery offerings at the upper end of the regional market price spectrum, and then offer their residents a “discount.” Community surveys undertaken by LEES+Associates have historically found that the majority of resident respondents typically support a pricing policy where non-residents pay more than residents.

PRICE INCREASES

There was a strong community response in April 2015, when the City implemented a large 40% increase implemented to bring the cemetery’s fees closer to regional standards. Prior to 2014, there had been no price increases at Ocean View Cemetery for over 10 years.

In July 2015, the City began increasing its cemetery fees 10% annually. The City’s last fee increase took place in July 2019, and further increases of 10% per year are currently planned through to 2022. These pricing increases are more aggressive than take place at most cemeteries.

The following table summarizes the future price list for Ocean View Cemetery by 2022, assuming the City continues to increase rates by 10% per year, and that regional cemeteries will increase their rates at the projected national rate of inflation, 2% per year.

The best practice for North American cemetery pricing is to increase fees annually by the rate of inflation, at a minimum. Consumer Price Index reports from the International Monetary Fund find that inflation has historically ranged from 2% to 3% in North American over the past decade.

A business case for greater price increases is typically expected to be justified to the community by the cemetery owner-operator identifying a significant gap between the:

- Current cemetery rates and the regional market average (identified in a benchmarking study);
- Cemetery's operating revenue and expenses, and/or
- Cemetery's care fund projected future balance and the balance needed to be fully funded. A care fund is fully funded when its future trust income is expected to support future care costs.

In addition, greater price increases can also be supported by a commitment by the owner operator to develop and improve a cemetery site's infrastructure, aesthetic, and interment capacity.

These strategies are the current best practices for rate changes at North American municipal cemeteries.

2019 Cemetery Rates Comparison								
	Current Rates 2019				Future Rates 2022			
	Oceanview Cemetery		Regional Average		Oceanview Cemetery, 10%/yr		Regional Average - 2%/yr	
	Resident	Non-resident	Resident	Non-resident	Resident	Non-resident	Resident	Non-resident
Right of Interment for Lots and Niches								
Adult Casket Lot - MIN	\$1,556.00	\$1,556.00	\$1,679	\$1,698	\$2,071.04	\$2,071.04	\$1,781	\$1,802
Adult Casket Lot - MAX	\$1,556.00	\$1,556.00	\$4,212	\$4,231	\$2,071.04	\$2,071.04	\$4,470	\$4,490
Child / Infant Lot - MIN	\$ 282.00	\$ 282.00	\$272	\$295	\$ 375.34	\$ 375.34	\$289	\$313
Child / Infant Lot - MAX	\$ 282.00	\$ 282.00	\$377	\$400	\$ 375.34	\$ 375.34	\$400	\$425
Cremation Lot - MIN	\$ 518.00	\$ 518.00	\$633	\$652	\$ 689.46	\$ 689.46	\$672	\$692
Cremation Lot - MAX	\$ 518.00	\$ 518.00	\$2,134	\$2,153	\$ 689.46	\$ 689.46	\$2,265	\$2,285
Opening / Closing Services								
Adult Burial - Single Depth	\$1,556.00	\$1,556.00	\$1,189	\$1,189	\$2,071.04	\$2,071.04	\$1,261	\$1,261
Cremated Remains Burial	\$ 778.00	\$ 778.00	\$513	\$513	\$1,035.52	\$1,035.52	\$545	\$545
Additional Fees								
Weekend Premium - MIN	\$ 226.00	\$ 226.00	\$401	\$401	\$ 300.81	\$ 300.81	\$425	\$425
Weekend Premium - MAX	\$ 445.00	\$ 445.00	\$665	\$665	\$ 592.30	\$ 592.30	\$705	\$705
After Hr Weekday Premium (/hr) - MIN	\$ 90.00	\$ 90.00	\$193	\$193	\$ 119.79	\$ 119.79	\$205	\$205
After Hr Weekday Premium (/hr) - MAX	\$ 90.00	\$ 90.00	\$193	\$193	\$ 119.79	\$ 119.79	\$205	\$205
Disinterment - MIN	\$ 226.00	\$ 226.00	\$1,228	\$1,228	\$ 300.81	\$ 300.81	\$1,304	\$1,304
Disinterment - MAX	\$ 733.00	\$ 733.00	\$2,478	\$2,478	\$ 975.62	\$ 975.62	\$2,630	\$2,630
Liner / Vaults - MIN	\$ 445.00	\$ 445.00	\$269	\$269	\$ 592.30	\$ 592.30	\$286	\$286
Liner / Vaults - MAX	\$1,332.00	\$1,332.00	\$1,488	\$1,488	\$1,772.89	\$1,772.89	\$1,579	\$1,579
Marker Permit - MIN	\$ 90.00	\$ 90.00	\$236	\$236	\$ 119.79	\$ 119.79	\$251	\$251
Marker Permit - MAX	\$ 271.00	\$ 271.00	\$601	\$601	\$ 360.70	\$ 360.70	\$638	\$638

Figure 33: 2019 + 2022 Price List for Ocean View Cemetery and other Regional Cemeteries, Source: LEES+Associates and 2019 Regional Cemetery Price Lists

SERVICE-ORIENTED PRICING STRATEGIES

Some North American communities have a social services policy, that direct its cemetery staff to offer free service or a discounted rate to select residents. This may include:

- Indigent rates for impoverished residents (for those on disability and in low-income households);
- Veteran rates for members of the military, police or other emergency responders, and
- Infant and/or child rates for residents that lose a young member of the family.

This discount is mostly commonly **50%** of the normal standard cost for its cemetery products and services. Offering discounts to these select residents often encourages good will from the community and can mitigate the resident reaction to other price increases at the cemetery.

The City of Astoria currently offers discounted rates to families for infant or child casket plot sales, but does not presently offer a lower interment rate for infants or children.

ADDED-VALUE SERVICE FEES

North American cemeteries often bill for additional complementary and support services. These include the following auxiliary fees in Ocean View Cemetery's price list:

- Liner storage fee;
- Disinterment fees;
- A fee for reserving the chapel;
- Premiums for Saturday services, and
- Premiums for services after 3:00 pm on weekdays.

Auxiliary rates charged by other North American cemeteries that are not currently listed in the City's price schedule and that could be added, includes new fees for:

- Administrative services;
- Replacement right-of-interment certificates;
- Reserving adjacent plots;
- Transfer of license;
- Preparing foundations and corner stone;
- Late arrival for funerals;
- Use of lowering device;
- Tent and chairs for graveside services;
- Concrete slabs for lanterns;
- Concrete pillow for brass markers;
- Pallbearer - assistant service;

- Marker care and maintenance;
- Premiums for winter interments, and
- Less-than-24 hours' notice for an interment.

Additional charges should, however, be kept to a reasonable level so that people do not feel that they are being overcharged for small, standard items.

STRATEGIC POSITIONING

Ocean View Cemetery's casket and cremated remains interment fees are above average compared to the Region and United States' average market rates.

Ocean View Cemetery casket and cremated remains plot sale rates are below average compared to the Region, but on par with the United States' average market.

Cemetery demand is relatively inelastic and there is usually little adverse resident response to price changes, provided they are within the normal market range. This means that cemeteries can typically increase their rates incrementally to offset inflation without a loss in revenue and with little risk of losing residents to other cemeteries.

Cemeteries with a wider range of burial options (like those in Portland) are often perceived as being more attractive and as having a higher-quality, premium value. This enables them to often charge higher rates than other sites.

Almost all municipal cemeteries are run as a service to their communities, and municipalities support the cemetery system, subsidizing them with tax dollars to some degree.

The City of Astoria must decide exactly where its business model sits on this spectrum of cost recovery. Few municipal cemeteries operate a full break-even cost recovery model. It is even more unusual for a municipal cemetery to operate a "for profit" model.



7. Marketing Strategy

Marketing a cemetery can be a challenge due to their implicitly negative connotation. In spite of this, municipal cemeteries are becoming increasingly aware of their need to establish a formal and informal marketing strategy that will help them to maintain their role in providing a community service and to communicate the positive aspects of cemeteries, including their place as unique, publicly-valued landscapes.

Formal marketing is everything expressly related to the cemetery operation, for example, signage, web pages, and public outreach. **Informal marketing** is everything done by the operation that leads to people being pleased with their experiences associated with past or present interments and memorialization (ideally leading to positive recommendations and referrals), to the site's reputation as an appealing landscape (ideally leading to people considering the cemetery for future interments and memorialization).

The effectiveness of any cemetery's marketing strategy depends on tangible as well as the intangible qualities. Key to this is the level of service experienced by current and prospective customers. This section reviews Ocean View's current marketing presence, outlines industry best practices, and presents recommended actions to guide developing and the implementation of the City's cemetery marketing strategy.

MARKETING STRATEGY - KEY FINDINGS

The following section is a summary of the key findings from this plan's marketing strategy:

- Ocean View Cemetery does not have a dedicated marketing budget or staff focused on the cemetery, separately from the Parks and Recreation Department.
- Ocean View Cemetery has historically had a low public profile in Clatsop County, where its presence is currently through the following avenues:
 - The Cemetery web page, accessed via a tab in the Parks and Recreation section of the City of Astoria's website and maintained by the marketing contractor retained by the Parks Department;
 - Clatsop County Historical Society and Vancouver Granite Works host the annual Talking Tombstones event, which has taken place several times over the years at Ocean View, and
 - Two Facebook groups dedicated to Ocean View Cemetery and Talking Tombstones (operated informally by Clatsop County residents, not overseen by City staff).



- Ocean View Cemetery has an opportunity to attract more Clatsop County residents and non-residents by investing in a cemetery marketing strategy that includes:
 - Cemetery website enhancement, with links to community partner pages;
 - Development of City-controlled social media accounts;
 - Development of a printed cemetery brochure to be made available at Ocean View, the City of Astoria and the City of Warrenton, as well as at local mortuaries and community partner facilities, and
 - Hosting of other public events and site tours with community partners.
- The City could in future consider developing a more detailed marketing plan with a professional promotions and media specialist.

CURRENT MARKETING PRESENCE

North American cemeteries commonly invest 2% to 5% of projected gross revenue in marketing, community engagement, and promotion. The City does not currently allocate funds specifically for the marketing of Ocean View; however, Parks and Recreation makes use of contract with a media firm to maintain the cemetery's website, post cemetery photos and announcements, and include news about the cemetery in the City's newsletter.

Ocean View Cemetery's current public presence includes:

- A cemetery web page embedded within the City's website²⁰, with:
 - Ocean View's Rules & Regulations;
 - Staff contact information;
 - Cemetery Fees - price list;
 - On-line grave locator and site map, and
 - Information about this master planning project.

20 Ocean View Cemetery https://www.astoriaparks.com/Parks/Ocean_View_Cemetery.aspx

- A listing on on-line cemetery databases: Find a Grave, Billion Graves and Roadside Thoughts²¹
- Two Ocean View Cemetery-related Facebook groups²² (not overseen by City staff), and
- Mention in news articles from the Daily Astorian.

The City is not currently a member of the Cemetery Association of Oregon (CAO), whose mission is to promote and safeguard industry and regulatory standards in Oregon. The annual cost to join this professional organization is nominal. While the benefits are not directly related to marketing, becoming a member could raise the profile of Ocean View Cemetery and could open up a helpful resource for all those involved with its operation.

BEST PRACTICES FOR CEMETERY PROMOTION

The best practice for cemetery marketing is to implement a detailed plan that increases community awareness, grows at-need and pre-need sales, and extends over a broad range of media.

LEES+Associates survey of North American cemeteries finds the following are the most commonly used means of cemetery marketing:

Referrals from allied industry professionals (such as funeral and monument suppliers);

- A cemetery website and social media;
- Hosting community events;
- Distribution of brochures;
- Direct email contact;
- Print media;
- Signage, and
- Radio and television.

21 Find a Grave <https://www.findagrave.com/cemetery/39229/ocean-view-cemetery>, Billion Graves <https://billiongraves.com/cemetery/Ocean-View-Cemetery/262649>, Roadside Thoughts <https://roadsidethoughts.com/or/cemeteries/ocean-view-cemetery-xx-clatsop-profile.htm>

22 HCCC Visits Talking Tombstones <https://www.facebook.com/events/721707344829904/>, Ocean View Cemetery, Landmark + Historical Place <https://www.facebook.com/pages/Ocean-View-Cemetery/120673351277935>

23 Clatsop County Historical Society <http://cumtux.org/default.asp?deptid=1&com=events&eventID=20>

This survey found that no single marketing method was believed to be significantly better. Municipal cemeteries typically rely on a variety of marketing techniques to engage the community and advertise their presence, services and products. The survey also found that “Signage” encompasses the on-site signs located at cemetery entries and the smaller signs placed within it, and the off-site signage of billboards, bus ads, and bench banners. A diverse marketing approach is best to capture the attention of everyone that might be served by the cemetery.

OFF-LINE MARKETING

Traditional promotion (newspaper, brochures, television and radio) continues to be an important marketing mechanism, especially for the older demographics of the community. The City has not engaged in radio or newspaper advertising, nor has it created a print brochure with Ocean View Cemetery information. Direct mail-outs can be effective in targeting specific groups for specific outreach, such as to announce a new product offering or service.

NEWSPAPERS

North American cemeteries often advertise in **newspapers** despite their declining presence in the media landscape. This is primarily due to the strength of paper readership in the 50-plus market. Rates are often favorable as a result of this market change. Promotion in newspapers should be in the lifestyle or news sections, rather than next to the Obituaries (where many cemeteries and mortuaries advertise), to distinguish Ocean View Cemetery from other sites.

RADIO + TELEVISION

North American cemeteries occasionally advertise on local **radio** stations and cable **television**, based on their target markets, such as those focusing on an older demographic.

PRINT BROCHURES

It is also a common practice for North American cemeteries to print a full color cemetery brochure. This type of brochure is typically designed to be made available on-site and at the Administration office (in this case, at the City of Astoria and Warrenton’s City Hall buildings). A folded brochure can also be mailed, and distributed to associated industry professionals. Cemetery print brochures often include:

- A Cemetery map, sometimes noting with self-guided tour routes;
- A calendar of cemetery events;
- A custom memorials guide;
- Public walking trails map, and
- Notation of significant trees and natural/environmental features.

ON-LINE MARKETING PRESENCE

WEBSITE

Websites are the foundation for market presence in the competitive cemetery market and are the primary hub for attracting people to a cemetery site. Cemeteries following best practices by measuring and monitoring their annual number of visitors and page views at their website.

The key aspects present in a strong cemetery website are summarized in the following table.

Website Feature	Present on the City Website
Contact Form	No
Directions	No
Prominent Google Presence	Yes – Opportunity to enhance
Photographs	No
Price List	Yes – Opportunity to enhance
Pre-Need Sales Information	No
Detailed Site Information + Maps	Yes – Opportunity to enhance
Staff Contact Information	Yes – Opportunity to enhance

Table 9: Table 6: Best Practices: Elements of a Strong Cemetery Website.

The City's current cemetery website has some of these features; however, as well as adding new aspects, the City could enhance some of its existing features by altering its graphic format to stand out slightly from the Parks and Rec format, with more details, presented in a more user-friendly format.

A detailed explanation of feature in the table above, is summarized below.

Contact Form: Once visitors arrive at the website, that website should provide as many ways of communicating with the City as possible. Along with phone numbers (hyperlinked so that mobile users can just click to call) and email addresses, a contact form can be created to access more information and to direct enquiries to the various departments for priority response. For example, maintenance requests could be automatically forwarded to the cemetery rather than another City office receiving the inquiry and then having to forward it to that department.

Directions: Some cemetery websites include a link to Google Maps, or identify prominent land marks, and provide detailed directions to help County residents find the cemetery site.

Prominent Google Presence: This is reflected in the results generated from common search terms associated with the local cemetery market. A prominent Google presence is important to enhancing community awareness of a local cemetery. For example, when searching “cemeteries Astoria Oregon” in a Google Search, the City’s Ocean View Cemetery website is the fourth listing.

Google AdWords is an effective tool that many premium cemeteries use to enhance their site’s on-line presence. Even though it is optimal to rank at the top of search engine results organically, by using pay-per-click advertising like Google AdWords a site can put its prescribed message in front of potential families who are using specific keywords to look for cemetery and memorialization options.

When attempting to rank as high as possible in search engine searches, having much relevant content on the website, is better than being brief and of limited usefulness to the searcher.

Photographs: Professional photos are one of the best ways to convey the feeling of a cemetery. It is very hard to describe a cemetery in words alone, and the cost of a good photographer is often worth the investment. The popularity of mobile devices has increased photo-sharing, and the expectation that customers will see high quality photos on-line. The City’s web site does not presently include any photographs of the cemetery landscape, nor any people, funeral processions or other images that might convey the quality of Ocean View Cemetery and what it offers.

Prices: As families undertake cemetery research, the number one piece of information they seek is pricing. While people may not necessarily be looking for the cheapest option, they will include price in their decision-making. When cemeteries don’t publish their prices, or describe their services and offerings in detail, consumers may think that something is being hidden.

Pre-need Info: In a competitive cemetery markets, with other companies actively promoting the benefits of pre-planning, it is a necessity to have pre-need information on a municipality’s cemetery website. This could include information on the benefits of planning ahead, a glossary of terms and Frequently Asked Questions section.

Detailed Site Information + Maps: A cemetery site should include details concerning the features of the property, a description of all services available, as well as genealogical, site availability and funeral location information. Families requesting this kind of information over the phone or via email can consume valuable staff time and can lead to customer frustration if they are not readily available. Having a detailed, interactive, mobile and PDF version of cemetery’s offerings and maps will not only increase the experience of the visitor to the cemetery but also reduce the demand on staff to provide this information when requested. Ocean View Cemetery’s website has a map and some of these details, however there is an opportunity for further development and expansion.

Staff Contact Information: During periods of grief and bereavement, making families comfortable is important. Listing Cemetery staff by name (as on the current website) helps to achieve this.

Social Media: Social media is a pro-active and progressive form of communication (already used by the City and some Astoria officials) with the power to link visitors with the cemetery website. In the future, Ocean View Cemetery could enhance its social media presence with accounts set up by the City’s IT department and managed by City staff. In the short term, the City should explore how to optimize social media within its current arrangement with its marketing contractor, to engage more broadly and with City and County residents.

COMMUNITY ENGAGEMENT

Hosted Events: An effective cemetery marketing strategy often includes hosting **events** at the site. Cemeteries across the US and Canada have expanded their role from providing just interment services, to actively seeking to become venues for non-interment-related events, which restores a link with their communities and brings in many people who may otherwise never visit the site.

Over the last few decades, progressive cemeteries across North America have been working to change the public perception of cemeteries as unhappy, unpleasant places that are best avoided, to attractive, appealing places that fulfill a unique role in the system of public open space and cultural landscapes.

This effort is founded on developing creative, site-specific programming (“programming” being everything that could/should take place at a site), for example, art displays, music performances, tours, and appropriate recreational activities.



Figure 34: Figure 24: Mountain View Cemetery “All Souls Night” Imagery, Source: City of Vancouver Website.

Over the past 15 years, Mountain View Cemetery in Vancouver BC has held an annual “Night for All Souls” , which brings over 1,000 people into the cemetery for an evening of walking through its grounds, lighting candles and leaving flowers, visiting art installations and listening to music and poetry. Visitors are invited to participate in diverse activities associated with remembering and honoring those who have died, whether buried at the site or not. This and related cemetery outreach has led to the cemetery experiencing a significant increase in sales, a reduction in inappropriate uses, and a much greater appreciation of the cemetery by the community at large.

Other cemetery initiatives include inviting school groups to visit and learn about those buried there, (for example, local veterans in the week leading up to Memorial Day); as well as hosting photography events, heritage tours, “morning chorus” bird watching events, picnics and fundraisers.

Ocean View Cemetery currently participates in events held at the site, including Memorial Day (for which staff provides water and portable toilets) and the Talking Tombstones²³ event.

Organized by the Clatsop County Historical Society, this event is held at Ocean View and other local cemeteries at the end of October, with volunteers using sound effects, props and costumes to assume the persona of former area residents to bring their stories back to life.

Over time, and with appropriate resources and on-site facilities, other programmed events and activities could be organized by City Staff in partnership with other community groups.



Figure 35: Figure 25: Sally Musemeche portrays Frances Ellen Hare at the 2014 'Talking Tombstones XI: Dead Man Talking' Event in Ocean View Cemetery, Source: Clatsop County Historical Society.

All cemetery events require City approval in terms of meeting desired standards and messaging. Cemetery managers need to review the effect of promotional initiatives in terms of:

- **Event Participation;**
 - Attendance should justify the level of effort required.
- **Community Awareness,**
 - Monitor public response and follow up with key participants to evaluate success.
- **New Leads** (interest or sales from those with no previous relationship with the site).
 - Ask clients where they heard about the cemetery.
- **Partnerships**
 - Cemeteries often partner with local community organizations to assist with heritage and genealogical research, as well as local tourism, and occasionally partner with the bereavement sector on promotional initiatives.

Ocean View Cemetery could expand awareness of its presence through outreach to:

- Local mortuaries (Caldwell's Luce-Layton, Hughes Ransom and Ocean View Mortuary);
- Local churches and service organizations, such as the Knights of Columbus;
- Local senior service providers and retirement residences, such as the Astoria Senior Center;

- Vancouver Granite Works, Astoria (sponsor of Talking Tombstones);
- The American Legion;
- Clatsop County Museum and Historical Society (coordinator of Talking Tombstones);
- Clatsop County Community College Historic Preservation Program;
- Astoria-Warrenton Chamber of Commerce (for cemetery tourism opportunities);
- Cannon Beach History Center & Museum;
- Local cultural organizations, and
- Cemetery Association of Oregon.

RECOMMENDED MARKETING STRATEGY

Cemetery staff should begin with easy-to-achieve initiatives, building over time as staff and resources permit. To begin, Ocean View Cemetery's marketing strategy could include:

- **Creating a Cemetery Marketing Budget;**
 - Allocation of time and resources
- **Introducing Consistent City Branding;**
 - Highlighting the unique aspects of the City and Clatsop County and how this is reflected at Ocean View Cemetery
- **Enhancing the Cemetery Website + Social Media Presence;**
 - Adding photographs of the cemetery, its natural and built features, and key qualities;
 - Adding directions to the cemetery, an FAQ section, pre-planning information, and a contact form;
- **In future, consider social media accounts for Ocean View Cemetery to be managed by City-staff, with links to the City website and community partners.**
- **Creating Cemetery Print Materials;**
 - Create a full-color, professionally designed brochure with a site map and photographs, to showcase the interment options available and to convey the features and reasons for choosing Ocean View Cemetery;
 - Distribute the new material to families who reach out by phone or in person. Convert to PDF format to be downloaded from the new website, and
 - Consider professional layouts for all print materials.

- **Invite Potential Community Partners to use Ocean View Cemetery as a resource, and**

- Encourage the distribution of print materials and general communication about Ocean View Cemetery's resources, services and offerings through potential community partners' web pages, media channels and physical distribution sites.

- **Coordinate Public Events + Site Tours.**

- Establish new heritage, cultural, or holiday-themed events or tours hosted by City staff, and
- Reach out to potential community partners, and encourage them to lead and advertise City-approved events and tours at Ocean View Cemetery.

The recommended strategies and actions presented in this chapter can be implemented quickly and should not require a large financial investment.

All other marketing initiatives primarily require the investment and dedication of time by City staff and community volunteers. They provide a path through community engagement and cultivating positive associations with Ocean View Cemetery, which tends to lead to the cemetery being "front of mind" for City and County residents when considering a final place of rest.

8. Financial Plan

This chapter of the report examines the financial sustainability of Ocean View Cemetery and assesses the City's capacity to continue funding its services to the community and support the long term care and maintenance of its cemetery site.

A comprehensive financial plan typically includes a study of the following key performance indicators, that reflect the short term and long term sustainability of a cemetery system: the **Operating Break-even point**; which is the point at which a cemetery can fund itself. It identifies whether a cemetery is able to cover its operating costs with its annual sales and services, independent of non-operating revenue subsidies.

Perpetual Care Break-even point: which is the point at which a Perpetual Care Fund (PCF) is generating enough income to pay for its projected, future site care and maintenance. This chapter reviews the City's current financial practices and compares them to legislative requirements, as well as, current and best practices for cemeteries in the region, State and across the United States.

FINANCIAL PLAN - KEY FINDINGS

The following is a summary of the key findings from this financial analysis:

- Ocean View Cemetery financial management system does not meet best practices. The City would benefit from tracking its data by interment form, residency and time of sale;
- The Cemetery reported an average annual gross profit of \$47,800 over the years 2014 to 2018; however, this figure does not reflect some costs absorbed in the General Fund for support and overhead activities;
- Ocean View Cemetery' financial performance is expected to continue along the same trajectory due to strong population growth and the increased deaths due to the demise of the Baby Boom generation.
- Ocean View Cemetery's projected revenue growth under status quo conditions will offset cost increases from inflation and will generate a profit, which can be used for future development;
- Ocean View Cemetery has historically reported an average \$34,000 per year on site care costs, over the past five years. Maintenance accounts for 90% of the reported cemetery expenses, and
- The Perpetual Care Fund (PCF) practices exceeds best practices for annual contributions, but its principal and investment income management could be enhanced, and
- Ocean View Cemetery's PCF is 50% funded and is pooled with other City investment funds. Under the status quo, it will require ongoing tax subsidies to fully support the future site maintenance costs at the minimum level of care necessary in 50 years.

The methodology, detailed analyses, key components and recommendations for this financial plan, are outlined in sections to follow.



HISTORIC FINANCIAL PERFORMANCE, 2014 TO 2018

FINANCIAL MANAGEMENT

Detailed financial ledgers for cemetery revenue and expense accounts were provided by the City for analysis. The City does not presently prepare independent, annual income statements for Ocean View Cemetery for the purpose of monitoring the cemetery's financial performance.

An operator's effectiveness in the measurement and assessment of their cemetery's financial performance often correlates to the number of tracking codes, revenue, and expense accounts in the cemetery's financial management system.

The City is not able to readily extract the valuable, detailed information from its cemetery's financial records, without a significant time investment from its Parks and Finance Departments. The City has an opportunity to enhance its future budgetary estimates and financial projections, by taking measures to enhance the detail and transparency of its cemetery's financial performance data. This can be done by tracking the precise source, timing and function of the revenue and expense transactions.

REVENUE

Best practices for a cemetery system's financial management includes setting up revenue accounts for each **type of interment** offered (e.g. casket plot, cremation plot, columbaria niche, mausoleum crypt, etc.) Sophisticated systems also use multiple accounts or tracking codes to identify **at-need/pre-need** (time of sale – before or after death) and **resident/non-resident** revenue.

Cemetery revenue accounts report the value of sales, opening/closing, liner and miscellaneous revenue. City accounts do not presently report the value of revenue by interment form, residency or time of sale.

EXPENSES

Expense data provided by the City of Astoria for costs allocated to the cemetery for this plan was not complete. Over the past five years, cemetery operating costs have not been not been fully accounted for, nor were they posted consistently to the City's cemetery expense accounts. Prior to 2015, not all staff time for cemetery administration and site care was fully allocated to the cemetery.

City staff estimate that a minimum of \$15,000 to \$ 20,000 in annual administration time over the past five years has not been allocated to Ocean View Cemetery's expense accounts. In addition, cemetery cost coding, activity tracking and operating methodology has evolved over the years and

with changes to City staff. Major site repairs and upgrades have been done on an ad hoc basis, and the resources used to service the cemetery site have varied significantly from year to year. For instance, in 2014 and 2015 the City used juvenile work crews from the local criminal justice system for partial site maintenance; since then, all site care has been provided by City staff and contractors hired to provide occasional burial services.

Typically, the greater the variance in cemetery operations from year to year, the greater the annual operating cost due to the loss of system efficiencies and institutional knowledge.

Over the past five years, the City cemetery expense accounts have included payments for City staff labor, utilities, irrigation, tools and equipment, monument repair, pest management, chapel upgrades, furnace maintenance, safety supplies, landscaping expenses, operational oversight and administrative overhead.

HISTORIC OPERATING FINANCIAL PERFORMANCE

The following graph summarizes the historic operating financial performance of Ocean View Cemetery, from 2014 to 2018. Note that Operating Expenses shown below excludes the cost of cemetery administration, as provided by the Finance Department.

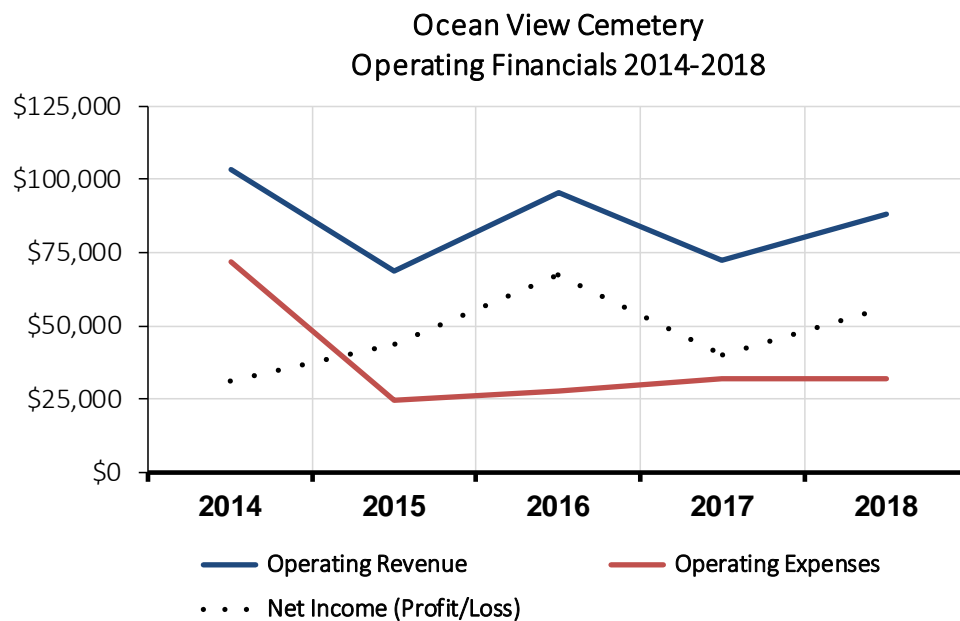


Figure 36: Ocean View Cemetery Operating Financial Performance, 2014 to 2018, Source: Data from City of Astoria's Cemetery Account Ledgers, Graphs from LEES+Associates.

The following graphs summarize the distribution of revenue and expenses from Ocean View Cemetery's operations, as reported by the City for the period of 2014 to 2018. Again, Finance Department costs for cemetery administration are not included in the the creation of these charts.

Ocean View Cemetery Revenue, 2014 - 2018

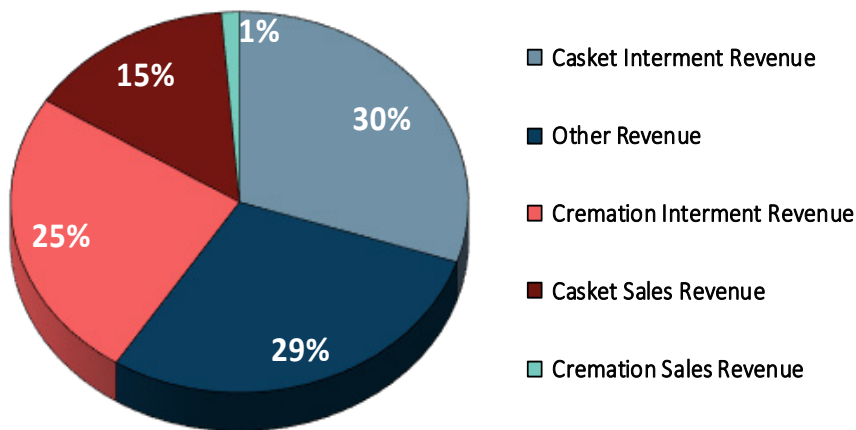


Figure 37: Distribution of Ocean View Cemetery Revenue from 2014 to 2018, Source: LEES+Associates.

Ocean View Cemetery Expenses, 2014 - 2018

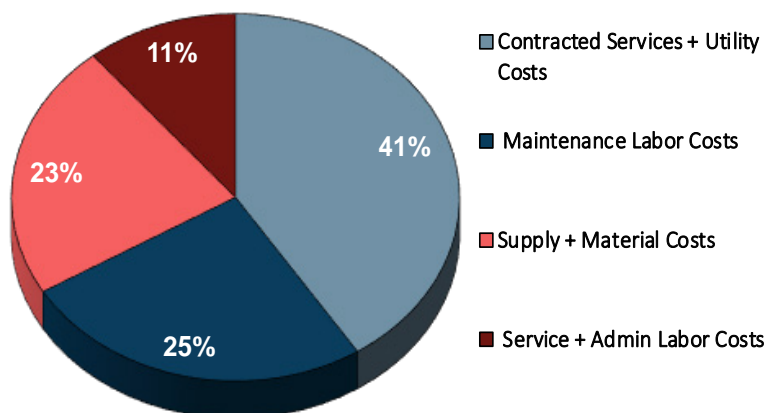


Figure 38: Distribution of Ocean View Cemetery Expenses from 2014 to 2018, Source: LEES+Associates.

Key Findings – Historical Operating Financials

Over the past five years (2014 to 2018), Ocean View Cemetery reported averaging:

- **\$85,500** revenue, **\$37,700** expenses and **\$47,800** net income per calendar year, this includes;
 - \$38,300 revenue from casket plot sales and services (45%);
 - \$22,400 revenue from cremation sales and services (26%);
 - \$24,800 revenue from other cemetery sales and services (29%), and
 - \$34,000 in maintenance costs per year, 90% of total expenses reported.
- **1%** average increase in operating revenue, and
- **10%** annual decrease in operating expenses per year.

City financial records show that Ocean View Cemetery has consistently provided revenues that helped offset operating costs of the Parks Maintenance Division. Review of the available financial records and feedback from City staff shows that the cemetery's financial performance appears to be more robust than it actually is due to not all of the City's costs for operating the cemetery being allocated to Ocean View Cemetery's expense accounts.

Most municipalities in North America run their cemeteries at an operating loss and support their operations with tax dollars. Based on what has been reported by the City, Ocean View Cemetery's performance exceeds most municipal cemeteries, as the City has not needed to subsidize its cemetery operations, past its support through the General Fund, to sustain the activities currently carried out there.

PERPETUAL CARE FUND: SUSTAINABILITY, LEGISLATION, CURRENT & BEST PRACTICES

SUSTAINABILITY

An important factor in the future sustainability of a cemetery system is the adequacy of its Perpetual Care Fund (PCF). A cemetery operator's obligation for site care and maintenance begins at the time a cemetery is established, extends through the period during which they are active and generating revenue, and continues in perpetuity, after the site is full and no longer generating revenue.

North American cemeteries usually contribute a portion of sales revenue to the principal of a Trust Fund, which is then expected to fund the perpetual care of the cemetery into the future.

The PCF principal is expected to generate investment income (e.g. interest, dividends, etc.) which is either retained in the fund to **compound growth** on the investment income or **withdrawn annually** to pay for present day site care and maintenance costs.

Planning for a fully funded PCF, involves comparing the investment income and maintenance costs projected at the time the cemetery site is expected to become inactive. The future investment income generated by the PCF will need to be equal to, or greater than the projected maintenance cost. When the investment income needed is established, it is possible to identify the PCF end balance and appropriate revenue contributions necessary over the period of the cemetery's active life span, to reach that end balance.

LEGISLATION + REGULATIONS

North American legislation related to a cemetery Perpetual Care Fund, also known as a Care and Maintenance Fund, Endowment Fund and Irreducible Fund, is intended to help offset the effect of inflation and provide the required monies to care for what is expected to be a site that is more expensive site to maintain in the future, based on higher costs. Fortunately, once cemeteries are full and dependent on PCF interest, the level of care required by law is far less, a minimum of 50% of an active site.

Cemeteries are unique facilities and service providers, constrained in their governance by local ordinances and Codes, as well as State or Provincial Laws and Ordinances. These regulations state that cemetery owners must provide "care and maintenance" of their properties, and that they must do so in perpetuity.

North American cemetery legislation and municipal policies typically mandates that a PCF be managed very conservatively. Access to the principal of a PCF is usually restricted and its investment income can only be spent on cemetery care and maintenance.

OREGON LAW

ORS 226.450 provides that all cities owning and controlling land or plots used for cemetery purposes may expend, for the purposes of beautifying, caring for and keeping all such lands and premises, public funds as have been included for that purpose in their annual budget.

Oregon Law has specific regulations regarding "**Endowment Cemeteries**," which are a class of cemeteries defined by how it manages its PCF. Cemeteries generally have some type of PCF for the general maintenance of the cemetery; however, just having a maintenance fund where the interest earned is used to maintain a cemetery, doesn't automatically qualify a site as an "endowment care cemetery" For a cemetery in Oregon to become an "endowment care cemetery," it must subject itself

to the provisions of **ORS 97.810 to 97.865**, the statutes of which pertain to this particular category of cemetery. Every authority that operates a cemetery can place its cemetery under endowed care, and establish, maintain and operate an endowment care fund. The provisions of this subsection do not apply to a city-owned cemetery, unless the city has elected to subject itself to these laws, **ORS 97.810- 97.865**.

Once a cemetery is formally designated an endowment care cemetery, it must deposit revenue into the endowment care fund in accordance with the minimum requirements established in **ORS 97.810 (2)(a)(b)(c) & (d)**. While the statutory minimum is based upon and received from the gross sales price of graves, crypts and niches, nothing in the statute prohibits an endowment care cemetery from depositing more than the minimum, or from basing deposits on something beyond graves, crypts and niches. Endowment care cemeteries must also file reports and pay fees to the Director of the Department of Consumer and Business Services as required by **ORS 97.810 (4) & (7)**.

OREGON LAW APPLICABLE TO OCEAN VIEW CEMETERY

There are no records that indicate that the City of Astoria has ever elected for Ocean View Cemetery to be an “endowment care cemetery.” While the City is not obligated to follow the regulations for an endowment care cemetery, ORS 97.810 to 97.865 does outline the State’s recommended PCF practices. These laws summarize how the State would prefer Ocean View Cemetery to govern and maintain its current Irreducible Fund dedicated to the purpose of its long term care and maintenance.

There are three key outliers between the State’s rules and guidelines for PCF management and the City of Astoria’s historic PCF practices and policies.

CITY PCF PRACTICES

The City’s practices with respect to Ocean View Cemetery’s Perpetual Care is summarized in Article X of the City’s Parks, Cemetery Rules and Regulations document.

PCF PRINCIPAL

ORS 97.830 states that the principal of invested endowed care funds shall never be voluntarily reduced, but shall be maintained separate and distinct by the trustee or custodian from all other funds except that it shall be proper to commingle endowment care funds with special care funds. The City of Astoria’s cemetery PCF is currently maintained in the Oregon State Local Government Investment Pool (LGIP), which is Oregon State’s managed depository pool for government agencies. The LGIP provides the best interest the City can obtain under the investing criteria established by the State for Government agencies, with terms that are entirely legal for municipal cemeteries.

The State of Oregon requires an approved investment plan for municipalities to invest along with an oversight committee or fund management firm to manage the approved plan.

The City of Astoria does not have a State approved investment plan. An established investment Board as required by an approved investment plan nor internal resources to manage a plan, board or investment portfolio as there are no staff resources budgeted for the fiduciary accounts. As such the City retains most of its cash with the LGIP.

The City has chosen to maintain its funds with the State pool in order to maximize the interest they can receive, and to ensure that they are in compliance with Oregon Revised Statutes regarding investments for public agencies rather than receiving less at local depositories, and ensure they are qualified depositories through the State Public Funds Collateralization Program.

North American cemetery best practices typically supports municipalities setting up and managing a distinct, independent trust fund, separate from other department funds, that is conservatively invested. There are professional firms that specializes in the needs of administration and conservative investment requirements of an American cemetery PCF. Examples of these firms include:

- The Essential Planning Group- American Funeral & Cemetery Trust Services, <https://www.afcts.com/>
- HB Actuarial Services, Inc. – PerpetualCareAdequacy;
<http://www.perpetualcareadequacy.com/>
- Funeral Services, Inc. (FSI)- <https://www.fsitrust.com/>, and
- Live Oak Bank- <https://www.liveoakbank.com/>

PCF INVESTMENT INCOME

ORS 97.810 states the income earned on a PCF shall be used solely for the general care and maintenance of the cemetery property entitled to endowment care, as stipulated in the resolution, bylaw and other action or instrument by which the fund was established, and in such manner as the cemetery authority may, from time to time, determine to be in the best interests of such endowed property.

Currently, the majority of the City's interest earned on Ocean View Cemetery's funds is directly attributed to the Parks Maintenance Department through monthly allocations – rather than processing this revenue through the cemetery's accounts or retaining it within the PCF for compound growth.

These monthly transfers are assumed to offset the cemetery's care costs, however, the City has not historically undertaken a comparative analysis of the allocated investment income to the Parks expenditures, as they relate to the cemetery. It is therefore difficult to directly attribute the historic use of the PCF's investment income directly to Ocean View Cemetery's site care and maintenance costs.

North American cemetery best practices entails retaining the PCF's investment income within the site's trust fund and for operators to not withdraw any of its annual returns. This allows the interest to compound with the principal over the active life of the cemetery. This strategy is usually necessary for municipalities to accelerate PCF growth towards a balance that will be self-sustainable in perpetuity.

PCF REVENUE CONTRIBUTIONS

ORS 97.810 states that an endowment care cemetery shall deposit with the trustee of its endowment care fund the following amounts received from the sale of plots, niches, crypts or private mausolea:

- (a) At least **15 percent** of the gross sales price with a minimum of \$5 for each grave sold without a grave liner installed at the time of sale or, when the gross sales price is paid in installments, at least 15 percent of each installment until at least 15 percent of the gross sales price has been deposited, with a minimum of \$5 for each grave sold without a grave liner installed at the time of sale.
- (b) At least **nine percent** of the gross sales price for each grave sold with a grave liner installed at the time of sale or, when the gross sales price is paid in installments, at least nine percent of each installment until at least nine percent of the gross sales price has been deposited.
- (c) At least **five percent** of the gross sales price for each niche or, when the gross sales price is paid in installments, at least five percent of each installment until at least five percent of the gross sales price has been deposited.
- (d) At least **five percent** of the gross sales price for each crypt or, when the gross sales price is paid in installments, at least five percent of each installment until at least five percent of the gross sales price has been deposited.
- (e) At least **five percent** of the gross sales price for each private mausoleum or, when the gross sales price is paid in installments, at least five percent of each installment until at least five percent of the gross sales price has been deposited.

The City significantly exceeds the State’s recommended contribution practices. According to the City’s Cemetery Rules and Regulations document:

“Section 10.08. Amount of Deposit for Ground Plots. From the purchase price of any lot or plot, there shall be set aside for the perpetual care fund not less than forty (40) percent of the cost of each lot or plot.” It is therefore Ocean View Cemetery’s formal policy to contribute a minimum **40%** of all its inventory sales to its PCF. In practice, according to City financial reports, annual contributions have historically averaged closer to **45%** of annual sales from 2014 to 2018.

HISTORIC PCF PERFORMANCE

The following graph summarizes the historic performance of Ocean View Cemetery’s PCF over the past five years, from 2014 to 2018. In this graph, the PCF end balance aligns to the left vertical axis, while the year’s investment income and maintenance costs align to the right vertical axis.

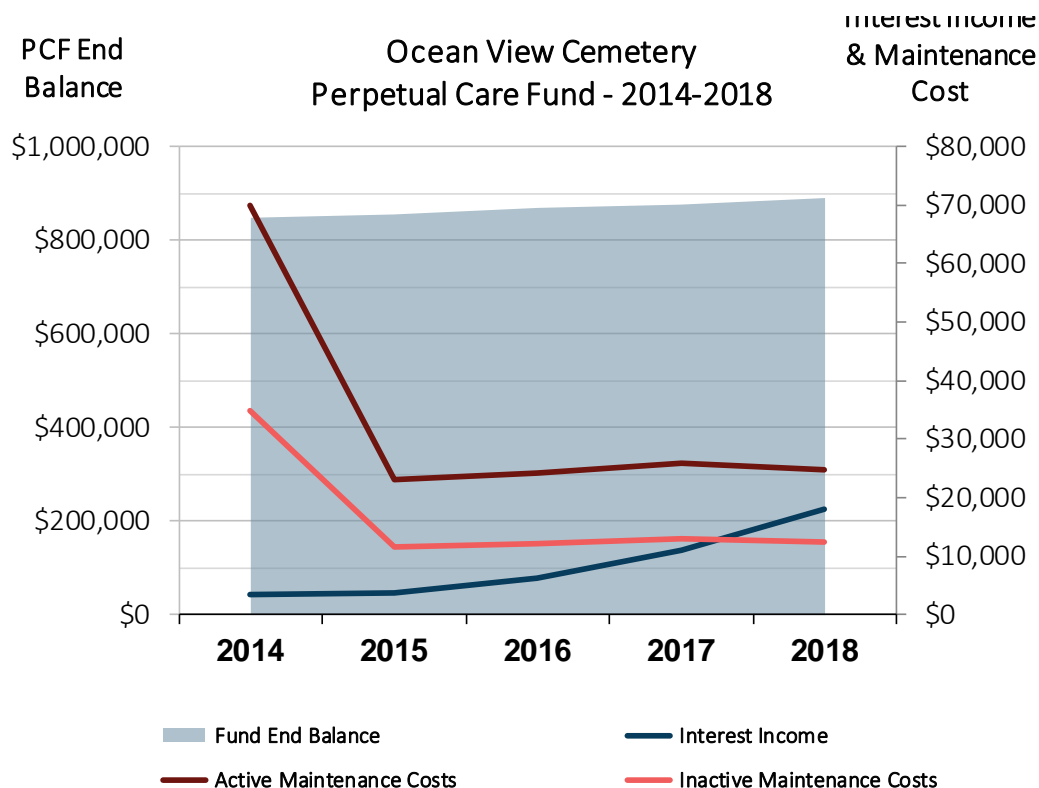


Figure 39: Ocean View Cemetery PCF Performance Measurements, 2014 to 2018, Source: City of Astoria Financial Records.

KEY FINDINGS – HISTORIC PCF PERFORMANCE

As of December 31, 2018, Ocean View Cemetery’s PCF balance was **\$889,000**.

According to City staff, the State investment pool is currently paying approximately **2.25%**. However, the historical average interest income over the past five years reported by the City and posted to the Parks department was a lower return of **1%**, averaging **\$11,000** per year.

The reason for this lower historic return is that prior to 2015, the City had some of its cemetery care funds invested at banks with a much lower interest rate. If the PCF presently generated **2.25%**, the cemetery would have an annual income of approximately **\$20,000** per year.

This average investment income is below the average active site care and maintenance costs (**\$33,600** per year) reported by City staff to Ocean View Cemetery expense accounts over the past five years.

Maintenance work usually decreases when cemeteries become inactive due to less use and reduced expectations. Consequently, care costs of inactive sites typically decrease by at least 50% of the active site’s costs. Therefore, if Ocean View Cemetery became inactive, maintenance costs would potentially become as low **\$16,800 per year**. If the City is able to maintain this more recent higher rate of return, then Ocean View Cemetery’s PCF would be fully funded to cover its minimum, basic level site care needs.

This reported cost for Ocean View Cemetery’s site care and maintenance is currently believed to currently be under-reported by City staff; however, even if it weren’t, the City’s PCF would not be sufficient to generate the needed investment income to cover even this minimal site care cost.

The minimal investment income that has historically been generated over the past five years, has been fully withdrawn to offset Ocean View Cemetery’s current site care and maintenance costs spent by the Parks Department.

FINANCIAL SCENARIOS

To identify the best strategy for the Ocean View Cemetery’s future operations, two scenarios are presented in this section: “**Scenario 1: Status Quo**” and “**Scenario 2: Alternate Model**.”

The “**Status Quo**” assumes a scenario where there are no changes to Ocean View Cemetery’s operations. In this scenario, operating practices from the past five years are assumed to continue and financial performance is only driven by currently scheduled price increases and the anticipated changes in the size, death rate, disposition and interment trends in the community.

The **“Alternate Model”** represents the most optimal scenario resulting from the adoption of this plan’s recommendations. In this scenario, changes to operations are proposed and assumed to be implemented, as well as being driven by external changes to demographics and community preferences.

Graphs in this section illustrate the key aspects of each financial scenario. These graphs show the projected revenues, expenses, profits or losses and PCF changes over the next 50 years.

On the revenue side of the equation, projections relate to the number of families who choose to be interred in Ocean View Cemetery and anticipated adjustments in pricing. Operating income forecasts in this plan do not include revenue from new offerings adopted by the City in the future. On the expense side of the equation, costs are primarily related to inflation and the anticipated value of any prearranged contract agreements that exist. Forecasts do not include extraordinary costs that may be required for acquiring land, equipment, engineering, development and new infrastructure.

PCF graphs in this section refer to:

- **“Active Maintenance Cost”** - The cost of maintaining Ocean View Cemetery as an active sites, and
- **“Inactive Maintenance Cost”** - The cost of maintaining Ocean View Cemetery as an inactive site.

FINANCIAL SCENARIO ASSUMPTIONS

The following assumptions apply to both financial scenarios in this chapter:

- Demographic and disposition trends will be a primary driver of future revenue;
- The proportion of the community served will not change significantly in the next 50 years, unless the City invests in new engagement, sales and marketing initiatives;
- Annual cost increases will be equivalent to the historic rate of inflation of 2% per year;
- Annual investment income will be equivalent to the conservative historic average rate of 1.2% per year;
- The City will continue to contribute 40% of sales revenue to the PCF, and Annual investment income will be equivalent to the conservative historic average rate of 1.2% per year;
- The City will develop additional cemetery land as needed and continue serving its residents for the next 50 years.

Forecasts in this chapter do not presently include any extraordinary capital costs for future planning, design and development of cemetery infrastructure or new interment capacity.

These are conservative forecasts, as it assumes no changes to the services offered and the same proportion of County residents will continue to be served by the City over the next 50 years. It also does not account for any new revenue streams that are introduced to the cemetery. If the City expands its offerings, revenue will likely increase even further as it would elevate the attractiveness of the site to the County's residents and non-residents from outside the immediate service areas.

SCENARIO 1: STATUS QUO

This scenario assumes the City's offerings and funding sources for its cemetery operations will remain the same as the past five years. In this scenario, prices will increase by 10% per year up till 2022 (as is currently planned by the City), there are no further rate increases from 2023 forward, and expenses will increase by the anticipated, annual rate of inflation.

Under status quo conditions, the City is also assumed to not fully reinvest the investment income it receives annually, continuing the current practice of posting investment income directly to the Parks Operation Fund, to offset some of the cemetery expenses in the Park Operation Fund.

OPERATING INCOME PROJECTIONS

The following graph summarizes the projected position of the Ocean View Cemetery's operating financials by calendar year, over the next 50 years, under the Status Quo scenario.

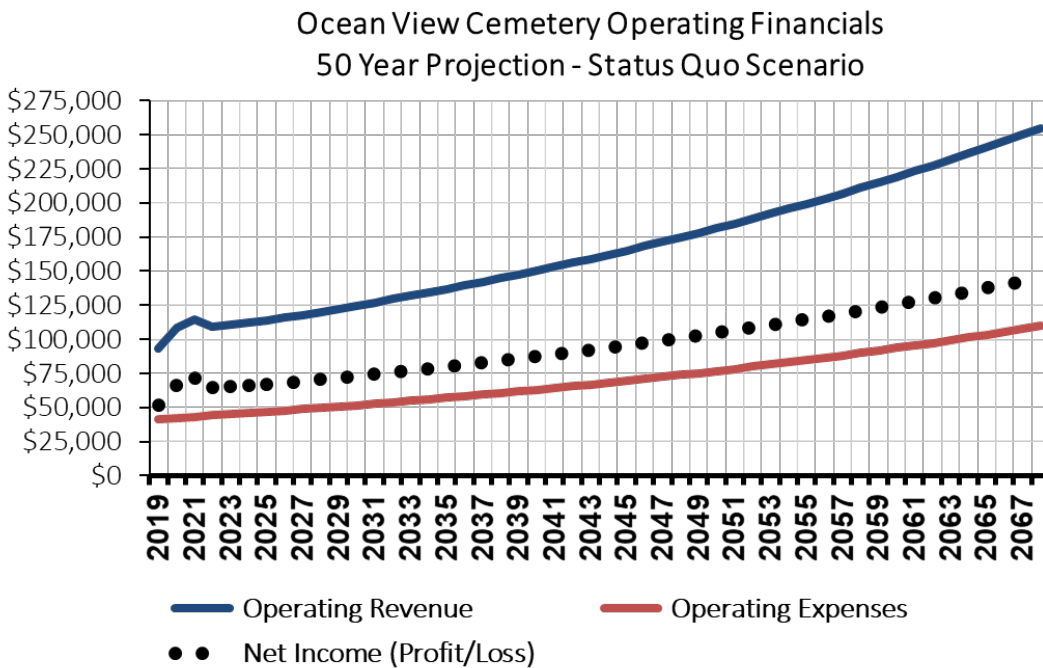


Figure 40: Ocean View Cemetery- 50 Year Operating Financials Forecast, Status Quo, Source: LEES+Associates.

KEY FINDINGS: STATUS QUO SCENARIO – OPERATING INCOME OUTCOMES

Strong community growth and the upcoming passing of the Baby Boom Generation is projected to boost sales and further enhance Ocean View Cemetery’s short term financial sustainability.

Under status quo conditions, Ocean View Cemetery is expected to continue to exceed its operating break-even point for the foreseeable future, assuming that the underreported costs historically unaccounted for, but to be recognized in future years, are not significant and do not exceed the historically-reported profit margin.

The City therefore is not able to justify the current planned price increases of 10% per year, on the basis that Ocean View Cemetery not presently covering its current operating costs with its operating revenue – generated by the current level of pricing and demand for City cemetery land.

PERPETUAL CARE FUND PROJECTIONS

The following graph summarizes the projected position of Ocean View Cemetery's PCF over the next 50 years, under the Status Quo scenario.

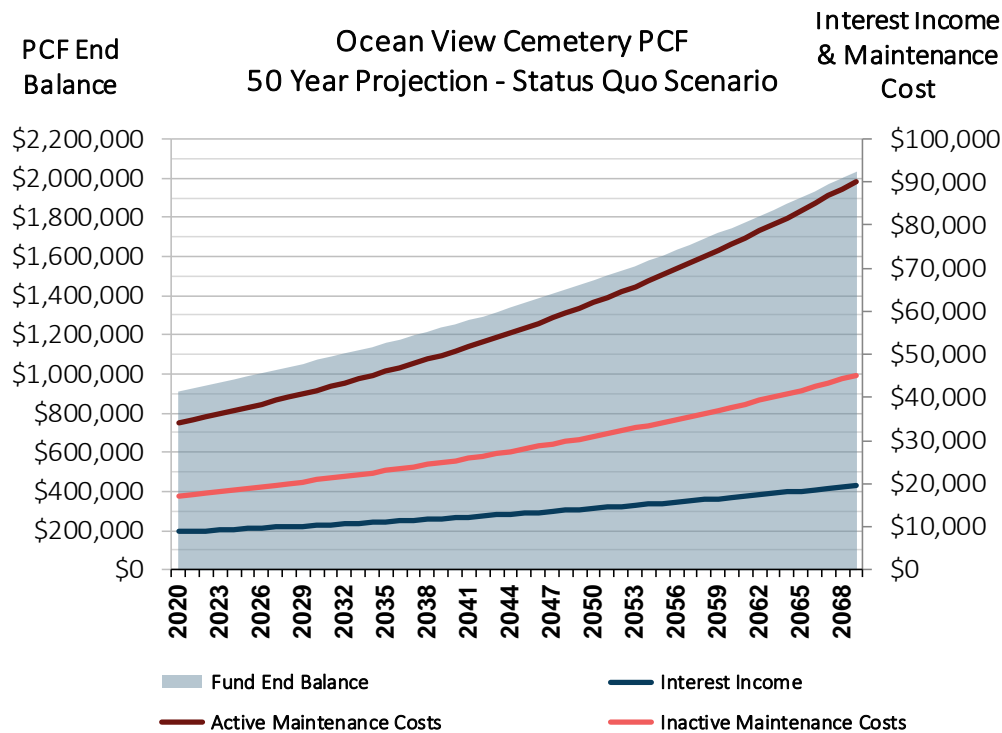


Figure 41: Ocean View Cemetery- 50 Year Town Cemeteries PCF Forecast, Status Quo, Source: LEES+Associates

KEY FINDINGS: STATUS QUO SCENARIO – PERPETUAL CARE OUTCOMES

Under status quo conditions, the PCF will reach a balance of **\$2,000,000** and generate an approximate investment income of **\$20,000** per year in 50 years. Based on historic trends, the projected active maintenance costs will increase to **\$90,000** over the next 50 years, amplified over this time by inflation.

When a cemetery becomes inactive, it is expected that the care costs may decrease as low as 50% of its active costs. Therefore, care costs could be as low as **\$45,000** if the site became inactive in 2069.

This forecast does not anticipate the PCF will become fully funded in the next 50 years. There will be a minimum \$25,000 gap between investment income and inactive site care costs by 2069. In this scenario, the City would need to subsidize the long term care of Ocean View Cemetery.

This is a long term “snapshot” of the Perpetual Care break-even status. Ocean View Cemetery is not expected to become inactive within 50 years. It is expected that the ongoing expansion of Ocean View Cemetery lands and their capacity will continue to serve the community for well over another 100 years; however, 50 years is considered to be the maximum period of projection for a PCF analysis with a reasonable degree of precision. Projecting further into the future is significantly less certain.

PERPETUAL CARE FUND GROWTH STRATEGIES

Ocean View Cemetery’s interment capacity is substantial, and the site is not expected to become inactive for centuries. Consequently, unlike other municipalities with more limited land constraints, the time when the City would become fully dependent on the PCF is quite far in the future.

The primary benefit of moving Ocean View Cemetery’s PCF to fully-funded status more quickly is that this would give the City access to an enhanced annual investment income that could:

Fund in perpetuity, 100% of cemetery maintenance costs at the minimum level of care required;

- Enable the City to fund enhanced cemetery maintenance, over the basic level of care, and
- Decrease the future need for the City to increase cemetery prices for County residents, to offset increasing site care costs due to inflation.

There are four common strategies available to the City to accelerate PCF growth. These include:

- **Increasing prices** for casket plot, cremation plot and columbaria niche sales;
 - Increasing prices would increase the cemetery total revenue, inherently increasing the PCF portion for each sale. This strategy risks rates rising above the regional average, and
 - This is the optimal strategy for a cemetery that is not breaking even or generating an annual profit from its operations.
- **Increasing the percentage** of each sale contributed;
 - Increasing the portion of each sale contributed to the PCF annually, and
 - This is the optimal strategy for a cemetery that is breaking even and generating an annual income from its operations, as it will decrease short term, operating profits.
- **Compounding investment income**, and
 - This entails making no withdrawals from the PCF to offset current care and maintenance costs. This will accelerate growth by increasing the fund balance generating income, and
 - This is the optimal strategy for a cemetery that is breaking even and generating an annual income from its operations, as it will decrease short term, operating profits.

- **Increase the principal** in the PCF.
 - Excess land could potentially be sold and the funds used to make a one-time contribution to the PCF, increasing its principal earning base and future potential income to cover site care, and
 - This is the optimal strategy for a cemetery with excess land, and have more than adequate interment capacity to meet its projected community needs.

SCENARIO 2: ALTERNATE MODEL

Scenario 2 is an alternate model that would guide the Ocean View Cemetery towards North American best practices and enhance its long term financial sustainability.

The best practice strategies most suitable to enhance Ocean View Cemetery's future operations include:

1. Increasing the value of cemetery sales (and related fund contributions) by:
 - a. **Increasing the number of revenue streams** by adding new options such as scattering services, columbaria niches, green burial, new memorial options, new added value services, etc., and
 - b. **Introducing non-resident premiums**, increasing returns on sales, from individuals outside of Clatsop County, while prioritizing City and County residents.
2. Maintain cemetery prices in the region's average fair market value range, by reducing future increases to **5% per year** for the next 10 years, from 2020 to 2029. **Appendix E** outlines what Ocean View Cemetery rates would look like by 2022 at this rate of increase;
3. Increasing cemetery rates by a minimum of **3% per year** from 2030 forward to offset the effect of inflation on operating costs and generate funding for development costs, and
4. **Retaining 100% of investment income** earned within the cemetery's PCF. Under this alternate model, the City is assumed to stop withdrawing investment income to offset current site care costs.

The first strategy is challenging to precisely quantify until it is implemented and the community response is assessed. Therefore, it is not included in this alternate model.

The second, third and fourth strategies, however, can be quantified with a reliable degree of accuracy. These have been integrated into Scenario 2, the Alternate Model for Ocean View Cemetery.

OPERATING INCOME PROJECTIONS

The following graph summarizes the financial position of Ocean View Cemetery over the next 50 years, under the Alternate Model scenario.

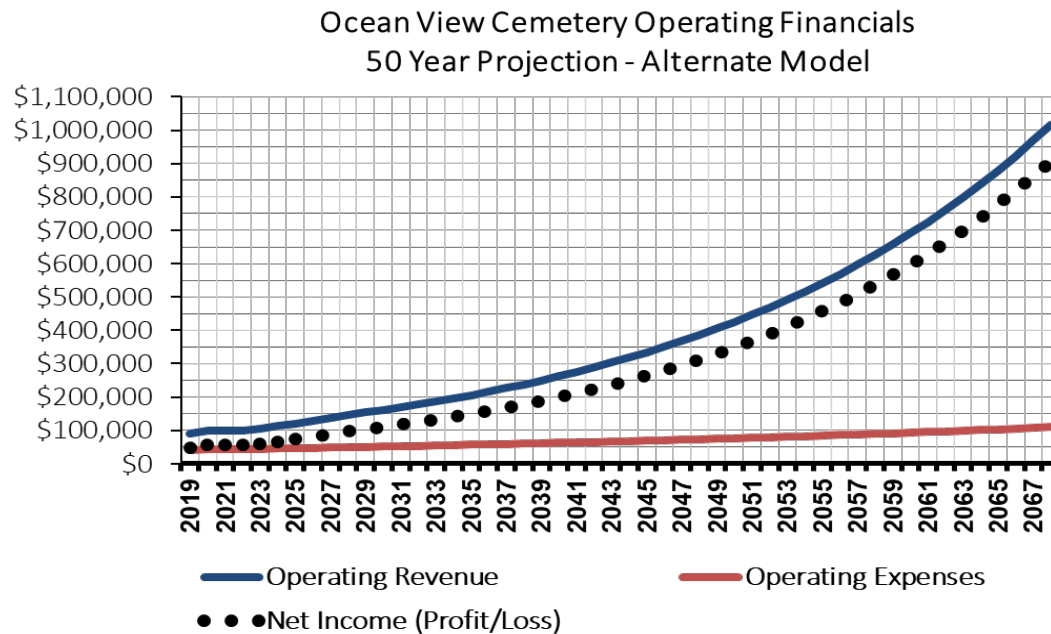


Figure 42: Figure 30: Ocean View Cemetery- 50 Year Operating Financials Forecast, Alternate Model, Source: LEES+Associates.

KEY FINDINGS: ALTERNATE MODEL – OPERATING INCOME OUTCOMES

Under the Alternate Model, Ocean View Cemetery is expected to continue to exceed its operating break-even point for the foreseeable future, even with the lowered price increases proposed for this scenario from 2020 to 2022.

The City can justifying its growing operating income to County residents, by using it to enhance the future level of service, site maintenance, and quality of site infrastructure and facilities at Ocean Cemetery. The optimal financial strategy for a cemetery with strong operating income and an adequately funded PCF, is to transfer its profits into a dedicated **Development Trust Fund**.

This new trust fund would be dedicated to support capital infrastructure projects and extraordinary cemetery costs. This includes the development of new inventory, enhancing facilities, funding monument restoration and heritage conservation initiatives, and developing new burial areas.

Perpetual Care Fund Projections

The following graph summarizes the projected position of Ocean View Cemetery's PCF over the next 50 years, under the Alternate Model scenario.

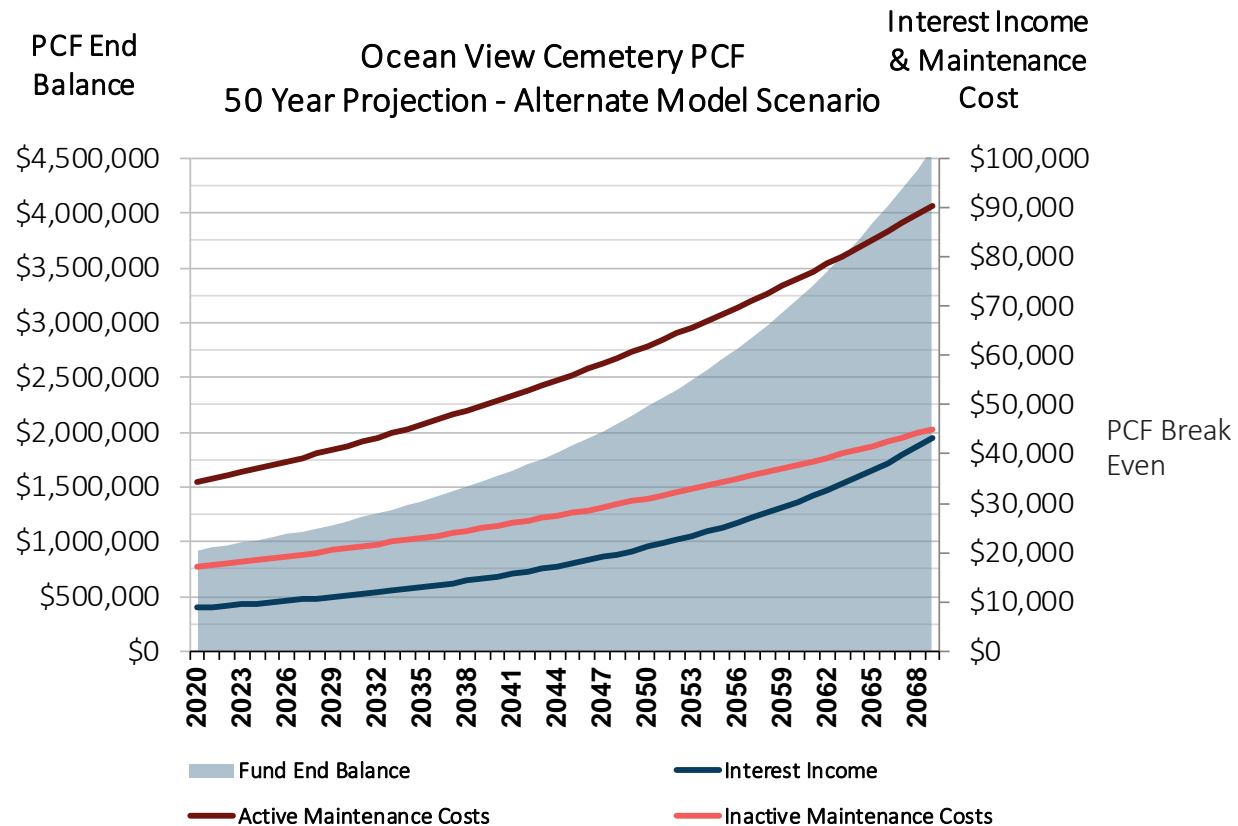


Figure 31: Ocean View Cemetery - 50 Year Town Cemeteries PCF Forecast, Alternate Model, Source: LEES+Associates.

Key Findings: Alternate Scenario – Perpetual Care Outcomes

In this scenario, the City can currently expect the PCF to be fully funded in **50 years**, by 2069.

Under Alternate Model, the PCF will reach **\$4.6 million** in 50 years and generate investment income of approximately **\$45,000** per year in 2069. This matches the projected inactive maintenance cost of **\$45,000** in 50 years, assuming the City reduces site maintenance to the minimum, basic levels of care.

If the City wishes to bring the PCF to fully funded status more quickly, it could increase the proportion of sales it contributes to **50%** and still carry an operating profit.

Alternately, the City could make a one-time contribution to the PCF principal. A contribution of **\$830,000** is required to bring the PCF up to fully funded status within **25 years**, half the time currently projected.

To help fund this contribution, the City could potentially sell some of the undeveloped cemetery land to the north. The 4.4 acre area identified as the North Edge of Undeveloped Area (lot 600) could have some future value, and any revenue arising from its sale or use could be added to the PDF Fund to increase its principal. It is important to note, however, that the value of this area of the cemetery remains undetermined. Based the presence of wetlands, its development potential is likely to be limited.

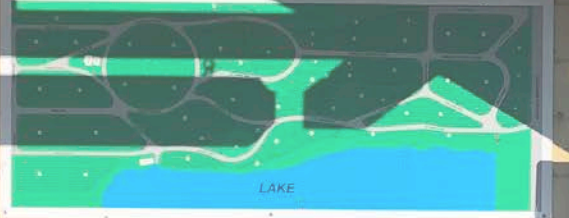
FINANCIAL PLAN - RECOMMENDATIONS

The following recommendations are expected to improve future cash flows and long term care and maintenance funding. To achieve financially sustainable cemetery operations, the City should:

- **Implement an Alternate Model that introduces strategic price increases, non-resident premiums and new revenue streams. The alternate model proposed in this chapter includes:**
 - Introduce non-resident premiums in 2020;
 - Increasing cemetery prices by 5% per year for the next 10 years, 2020 to 2029, and
 - Increasing prices annually by a minimum of 3% per year from 2030 forward.
- Develop a State-approved investment plan for the cemetery's PCF and separate this investment portfolio from other City funds. At the minimum, the City needs to be able to independently manage, track and report in detail the PCF's annual performance;
- Retain all PCF investment income earned in the fund to accelerate its growth;
- Consider making a one-time contribution from Ocean View Cemetery land sales to the PCF, or increasing annual contributions to 50% of burial plot and columbaria niche sales;
- Transfer future profits into a new independent "Development Fund." This capital fund should be set up as a trust and be restricted for cemetery development and extraordinary costs;
- Develop new City cemetery accounts, system codes, financial management policies and reporting protocols, that will enhance the City's ability to easily track and report:
 - PCF start and end balances, annual contributions, investment income, and withdrawals;
 - Cemetery revenue by interment type, site, residency and time of sale;
 - All staff labor costs for the cemetery,
 - Maintenance costs for the cemetery (with allocations from labor costs for site care) and
 - All expenses related to the cemetery's operations allocated to City cemetery accounts.
- Revisit this plan in five years to review and evaluate the County's resident response to the new offerings, price increases and changes in operations.

OCEAN VIEW CEMETERY

Ocean View Cemetery



MAPS
&
INFO



9. Cemetery Rules and Regulations

The overarching legal framework governing the operation of mortuaries, funeral homes and cemeteries (active and inactive) in the State of Oregon is Chapter 97 of the Oregon Code: Rights and Duties Relating to Cemeteries, Human Bodies and Anatomical Gifts. Last updated in 2017, this legislation is summarized in a publication by the State of Oregon Mortuary and Cemetery Board, [Guidelines for Oregon Cemeteries, February 17, 2015: Complying with Oregon Laws & Rules](#). Since 1985, the Oregon Mortuary and Cemetery Board has held the power to approve, license and monitor businesses in what is now known as the death care or bereavement sector, of which cemeteries are a key component.

For any cemetery to legally operate in Oregon, it must be licensed. Once licensed, the administrator has the right and power to make and enforce rules and regulations, and to amend or revise these over time, providing the current version is clearly presented and made available to the public.

The City of Astoria's current Cemetery Rules and Regulations for Ocean View Cemetery are a 2011 update of the 1995 edition. As required, these Rules and Regulations are available from the Cemetery Administrator at City Hall, or on-line, from the Cemetery section of the Astoria Parks web page.

Overall, the current Cemetery Rules and Regulations fulfill the Oregon Code requirements; however, this document is dated, lacks the structure and cohesiveness of a sound legal document, and falls short of current standards for regulations, which are essentially also the foundation document for the cemetery. A full update of the Rules and Regulations is beyond the scope of this Master Plan; however, this chapter offers recommendations for new Cemetery Rules and Regulations to help the City improve the administration and management of the cemetery, thereby benefiting area residents, families and cemetery visitors.

A new set of Cemetery Rules and Regulations should be prepared by a qualified professional with an understanding of prevailing legislation, the needs and wishes of the City of Astoria, and its vision for Ocean View now and into the future. In light of the changes now underway in the realm of death and dying, along with the completion of this Cemetery Master Plan, this is an excellent point for the City to initiate the rewrite of its Cemetery Rules and Regulations. As evident in Chapter 97 of the Oregon Code, municipal cemeteries enjoy specific rights that enable Ocean View Cemetery to aspire to and achieve standards and levels of sustainability that out of the reach of most private cemeteries.

RECOMMENDATIONS:

An updated document should be written to **be as permanent as possible**. It should:

1. Clearly state what families, visitors and the City should reasonably expect of each other regarding interments, site care and maintenance, and amenities.

A short **statement at the beginning of the document about the cemetery's overall intent or vision** would establish an overall perspective that cannot be conveyed by just regulations. This is in keeping with the Board's statement that Cemetery Rules and Regulations may include language for "...the protection and safeguarding of the premises and the principles, plans and ideals on which the cemetery was organized."

2. Clearly state the legal rights and responsibilities of families and the City when they enter into a contract to pay for the interment of human remains.

New Cemetery Rules and Regulations should be written in clear, concise language. Ideally, the document should be made available to anyone interested in making a cemetery-related purchase so they will understand exactly what they are and are not entitled to receive. For example, the current Rules and Regulations cites the terms "owner," "ownership," and certificate of ownership" many times with only one reference to the ownership being of **a right of interment** rather than of an actual plot of land. This has led to ongoing confusion about what families actually buy and own at Ocean View, and what this "ownership" entitles them to.

3. Provide accurate information about Ocean View's interment options and obligations to families and the community.

New Cemetery Rules and Regulations should **clarify the City's position regarding the Abbey Mausoleum**. This is particularly relevant in view of recent enquiries by descendants of individuals interred in crypts within this structure and to resulting legal opinion of the City Attorney.

The current Rules and Regulations includes language references to columbaria and niches though these are not currently available. Assuming new options will be approved for the cemetery (including **columbaria, scattering gardens, ossuaries and green burial**), a section to define and describe each option should be included in new Cemetery Rules and Regulations.

4. Reflect contemporary standards and practices with language now used within the bereavement sector and in State regulations.

New Cemetery Rules and Regulations should state their **compliance with related City and State codes**. This should be reflected in the **updating of the Definitions section** to sync with the terms and definitions used in prevailing legislation and by the Oregon Mortuary and Cemetery Board. An expanded definition of “Perpetual Care,” should clarify that at a municipal cemetery such as Ocean View, Care Funds are intended primarily for overall site maintenance and **not the detailed care of individual monuments**, as these remain the property of the family. This point is not well understood by many families and has led to confusion and complaints about poor care.

New Cemetery Rules and Regulations should be **concise and free of arcane language**, especially for key points. For example, the one place where the “right of interment” is defined is under Plot Ownership, currently described as *“Any person in whose name a burial plot stands as owner of the right of sepulture therein, or who holds from the City a conveyance of the right of sepulture or a certificate of ownership of the right of sepulture in a particular lot, plot or space.”* The reference to “incinerated remains” is likewise no longer appropriate.

Similarly, Article VIII refers to “trespass” and “invasion” of plots by those who walk on graves when in reality, it is often impossible to see grass pathways in flat marker sections, or to get to some graves without crossing others. It also includes a full prohibition of “Pets” when dog walkers with their pet on-leash are now understood by some cemetery owners as ideal cemetery visitors, providing valuable, regular “eyes” on their sites.

5. Present the core information concisely and use consistent, current terminology.

Creating new Cemetery Rules and Regulations provides an opportunity to **refine the terms** for commonly confused items, such as monuments, markers, memorials and headstones, and for the final terminology to be defined and harmonized throughout. Another example is the term “plot” and “lot,” which are defined as different units of space but are often referenced together, which is confusing and puts into question the need for both terms.

The current Rules and Regulations refers to the limit of only “one deceased person interred in a single interment space,” which is inaccurate insofar as four sets of cremated remains are permitted to be placed in one grave, over a full body burial.

Over four pages of the current Rules and Regulations are dedicated to the detailed specification of monuments, markers, grave covers, vaults and concrete footings, most of which is relevant only to monument suppliers/installers. This section **should be simplified, with technical specifications relegated to an appendix**.

6. Remove references to prices.

New Cemetery Rules and Regulations should eliminate including specific pricing, as they make it more difficult to keep the document current. **Dollar values** are best included in the pricing schedule, which can be routinely updated.

7. Establish clear policy related to grave adornments.

The points under **Decoration of Plots and Plots** in the current Rules and Regulations are typically the most contentious regarding site maintenance. They therefore should be written very carefully, with input from Cemetery staff, based on their experience on-site, and with families.

8. Identify the City's right to reclaim unused plots.

Current cemetery legislation is based on the concept of perpetuity. New Cemetery Rules and Regulations should reflect the **importance of managing the finite land base of the cemetery**. This includes making provision for the reclamation of graves that were purchased in the past but are unlikely to be claimed for use by the original owner or heirs. These should be subject to reclamation by the City for resale through a procedure specified within the new Rules and Regulations.

9. Review Memorial Regulations and allowable interments per plot.

Current Rules and Regulations impose **limitations on the number of interments per grave**, as well as on the **sizes, materials, style and character of monuments**, likely based on a time when Ocean View Cemetery primarily interred one casket per full-sized grave.

The trend towards cremation and families interring up to four sets of cremated remains above one casket in a single grave presents challenges for memorializing each individual. This also brings into question the trend for families to purchase a single casket grave to secure a larger space for four sets of cremated remains relative to the space they could secure and the price they would pay to acquire two double cremation plots.

New Cemetery Rules and Regulations should specify what is permitted to be interred in and placed upon each plot according to its designation with reference to the rationale so the policy is fair and clear to all parties and achieves the goals of the City of Astoria. Once new Cemetery Rules and Regulations are approved, they should be provided at the point of sale to every customer. They should be posted in at least two locations at Ocean View. New regulations should also be enforced, or they will not achieve the desired effect on the site and its operation.

10. Strategic Development and Implementation Plan

This chapter presents the process used to create a physical master plan for Ocean View Cemetery. It compiles the results of the analysis conducted in previous sections with proposed site improvements in a table of **Recommendations for Operational and Capital Improvements**.

This table includes recommendations for Operational Improvements in four areas:

- Governance, Administration, and Site Operations and Maintenance
- Cemetery Products and Services
- A new Financial Plan for Ocean View Cemetery, and
- A Cemetery Marketing Plan

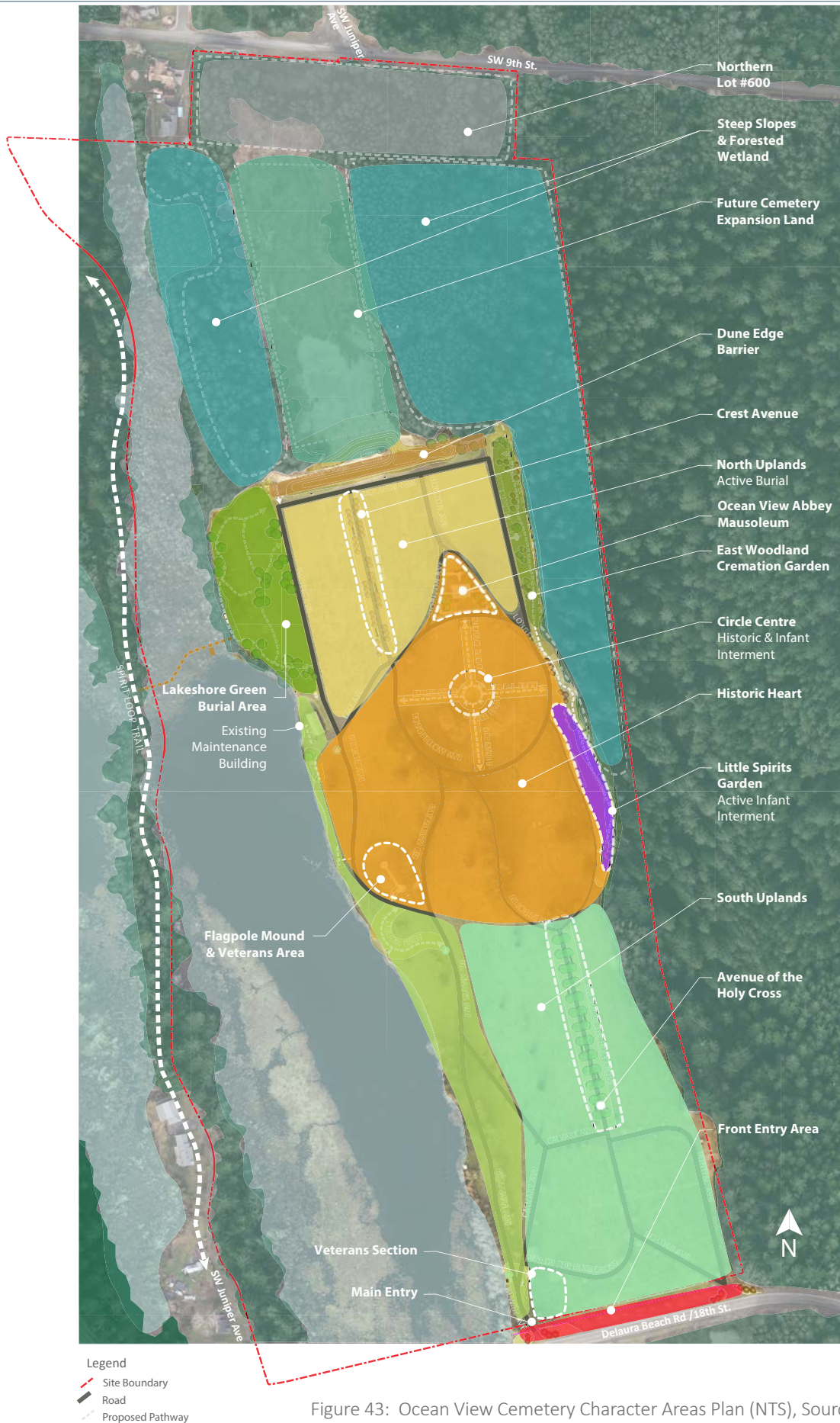
This table also includes recommendations for twenty proposed site improvements, these were identified through site visits, stakeholder input, and the analysis of the information gathered through the course of the study. Proposed site improvements are framed within the context of “character zones,” or areas that were deemed physically identifiable zones within the existing cemetery property.

The final site plan for Ocean View Cemetery is the **Illustrative Ocean View Cemetery Master Plan Concept**. The projects identified on this Master Plan Concept range from discrete, site-specific improvements, to large and small cemetery-wide initiatives that will facilitate and support current and proposed uses.

The proposed physical site improvements were ranked according to the preferences as expressed by survey participants. This ranking was sorted according to the Estimated Return on Investment (ROI) of each proposed improvement. The outcome is presented in a **Matrix of Proposed Site Improvements by ROI (Appendix F)**.

Project areas were conceptually designed to the point where their construction value could be quantified. Estimates prepared to the level of budget level prices. Three phases of improvements are proposed and within each phase, projects are prioritized as A, B or C. Budget level costing, Phasing and Priorities are presented by area for each of the twenty proposed improvements in a table, **Proposed Capital Improvements and Cost Estimates (Appendix G)**.

The final section of this report, **Funding and Financing Options**, outlines potential sources of funding and other support potentially available to help the City of Astoria to implement the recommendations in this Master Plan Report.



OCEAN VIEW CEMETERY MASTER PLAN CONCEPT

The site evaluation described in Chapter 3 identified the diverse physical qualities present at Ocean View Cemetery. This diversity is revealed as one travels from the approach to the site, through the entry area along the south edge of the site and up the slope, through the original, old burial area to the open north side of the developed area, and finally to the rugged, undeveloped area. Cemetery Lake along the west edge of the sites and the spruce wetlands along the east edge further enrich this diversity.

Based on site visits and project background information, the consultant team identified the 15 distinct zones shown on the Ocean View Cemetery Character Areas Schematic in Figure 18. These areas were named according to their physical qualities and context within the cemetery, as well as their potential roles within the overall plan.

The Character Areas provided the framework for potential improvements, which were identified through site visits, discussions with City staff, engagement with internal and external stakeholders, and evaluation of opportunities and constraints by the consultant team.

An early objective was to identify potential improvement areas around the entire cemetery site. The idea was that no area should be overlooked, and that the public should have a chance to state their preferences regarding capital investment projects and sites.

Public preferences for projects were carefully considered but these were tempered by the goal of this project to foster sustainable development. This meant that projects were weighted according to how likely they were to enhance the site's financial performance, as well as its sustainable development, which includes environmental and social factors.

The most capital-intensive projects identified are those that can enhance the overall site (such as creating a more favorable "front door" to the cemetery) or can enhance the more active sales areas (such as where there is new interment capacity already available). Investing in improvements in areas where most families are looking to purchase a right of interment makes good economic sense.

The plan on the following page represents the Illustrative Ocean View Cemetery Master Plan Concept. The subsequent three pages are enlargements to show project details and features that are not as visible at the larger scale.

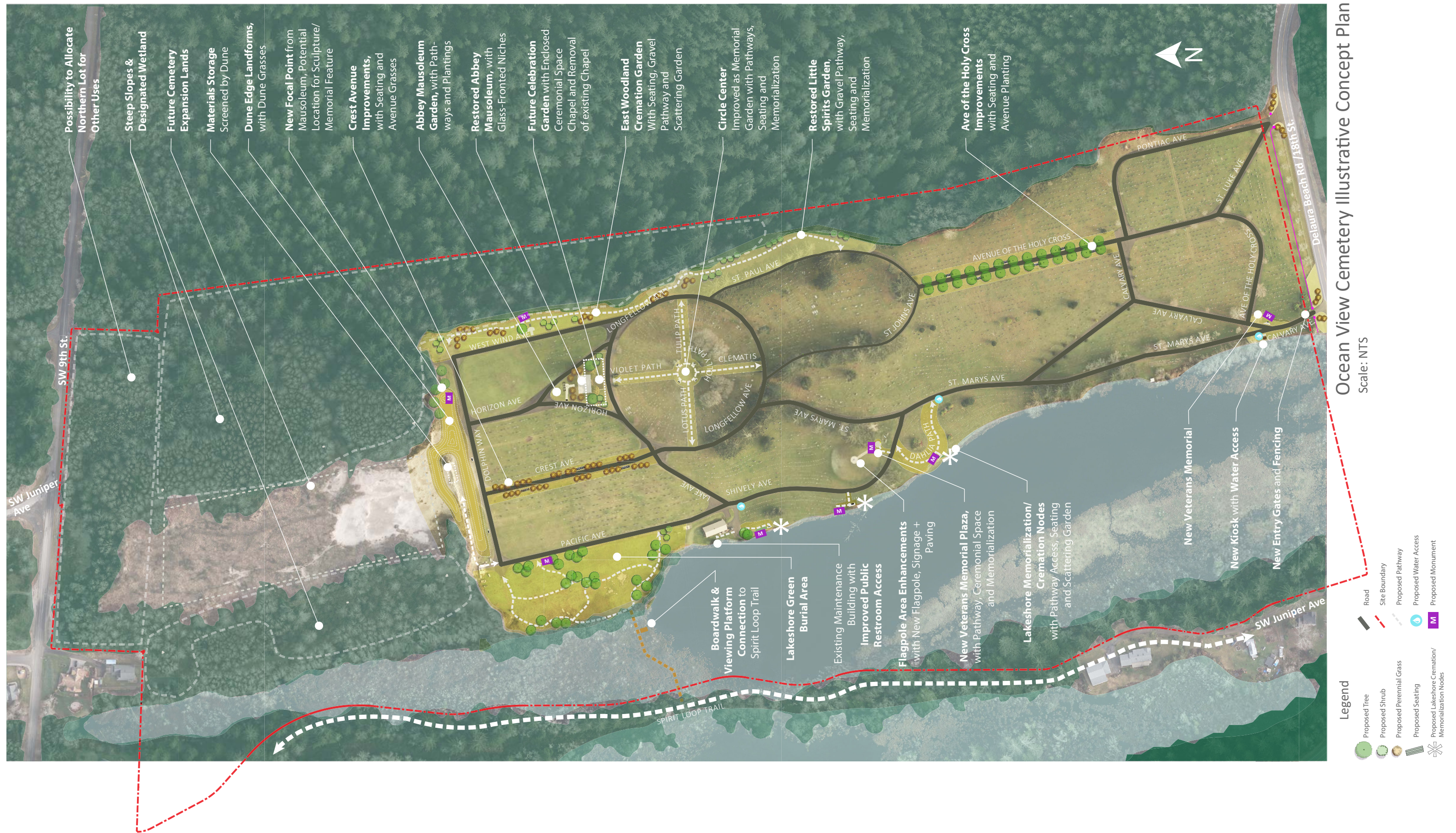


Figure 44: Ocean View Cemetery Illustrative Concept Plan (NTS), Source: LEES+Associates.

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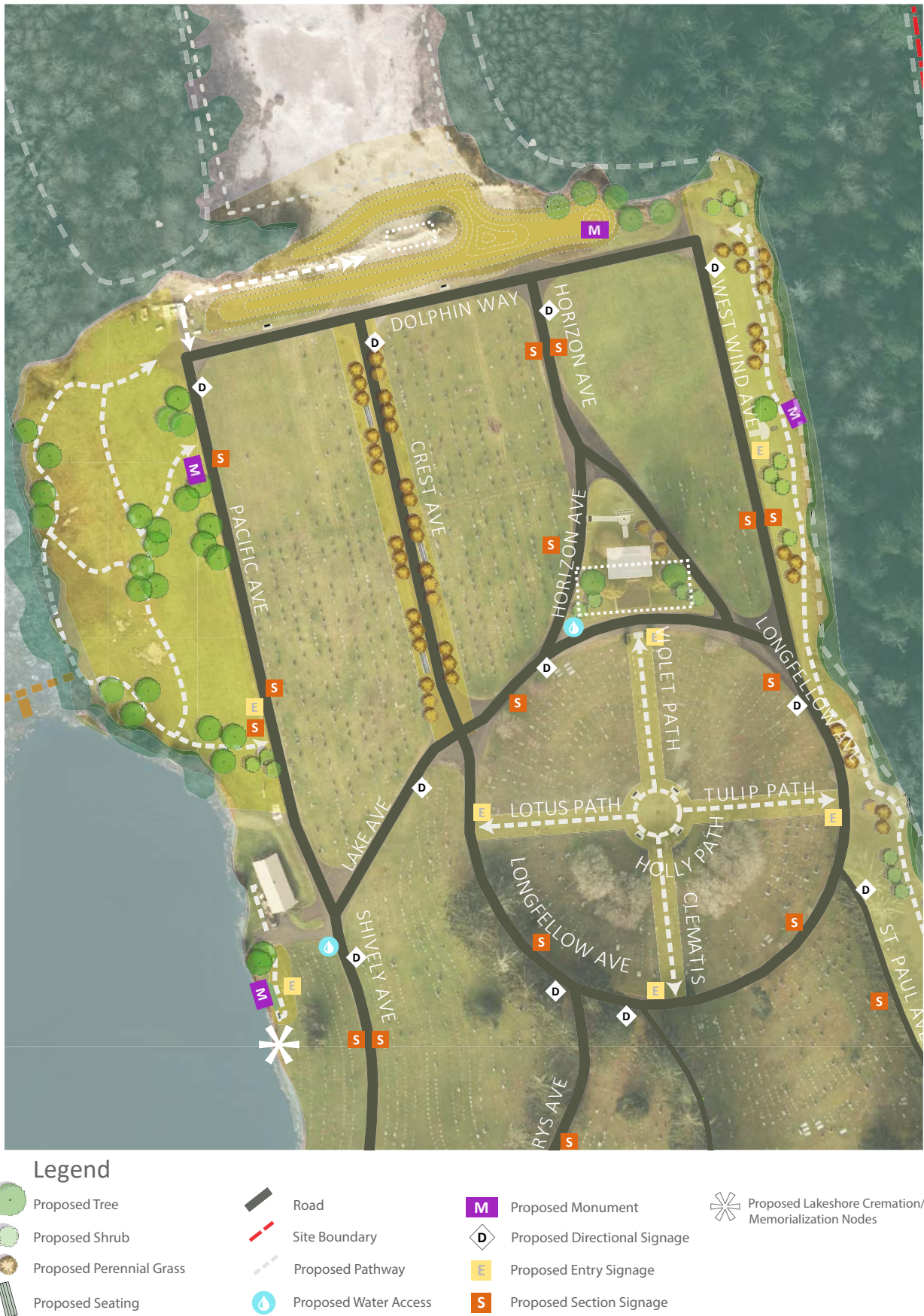


Figure 45: Ocean View Cemetery Illustrative Improvement Concept Plan (North Area, NTS), Source: LEES+Associates

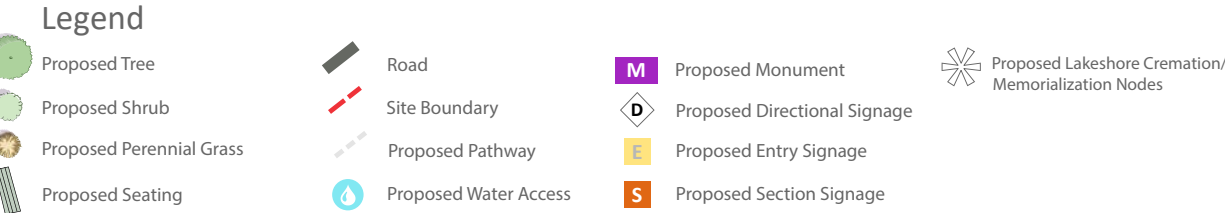


Figure 46: Ocean View Cemetery Illustrative Improvement Concept Plan (Center Area, NTS), Source: LEES+Associates

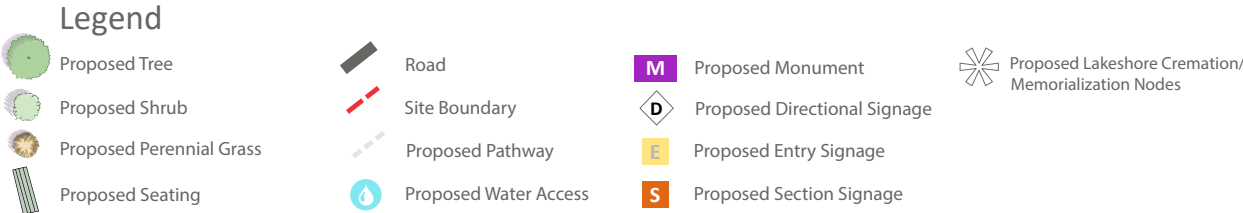
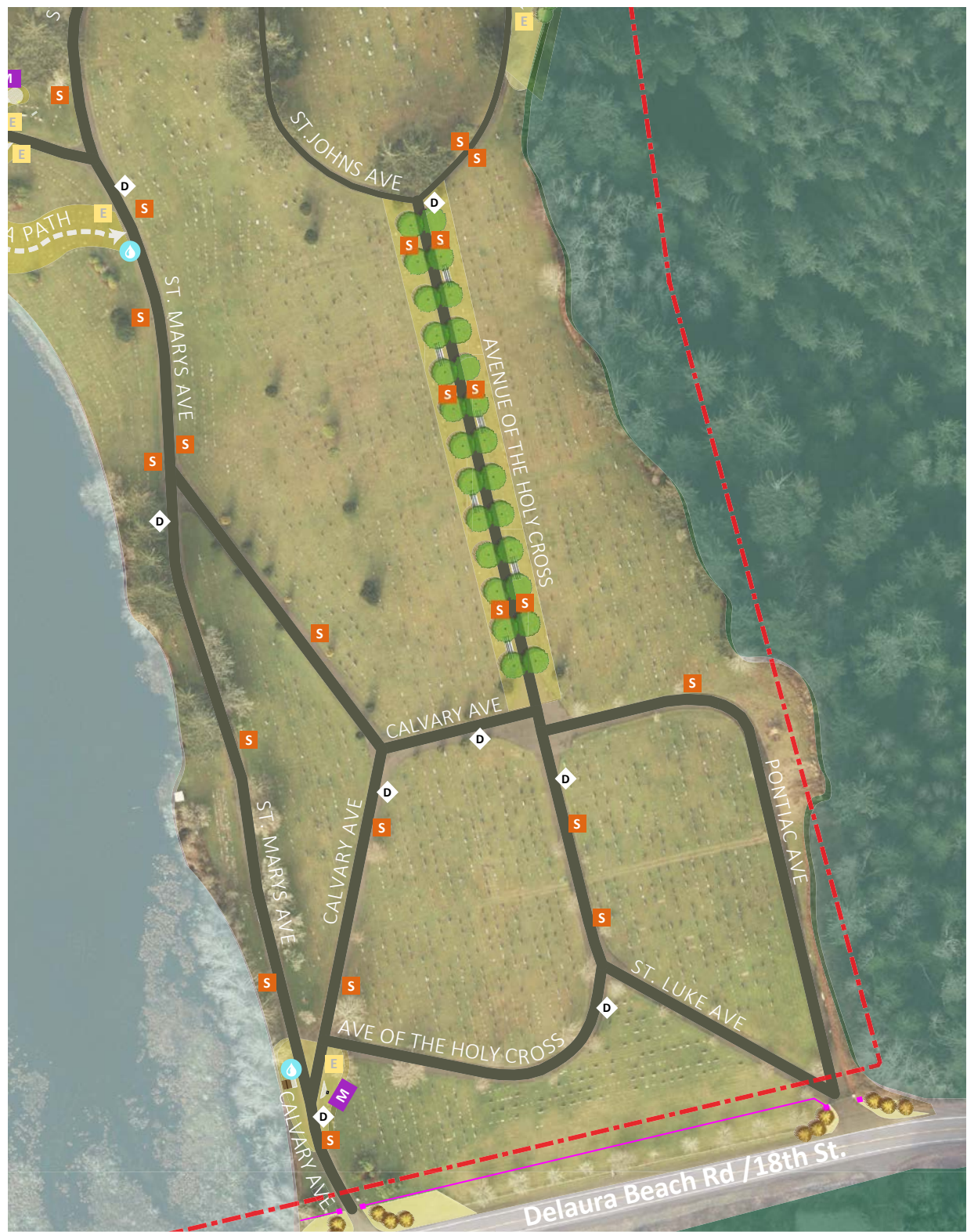


Figure 47: Ocean View Cemetery Illustrative Improvement Concept Plan (South Area, NTS), Source: LEES+Associates

RECOMMENDATIONS

A summary **Table of Recommendations for Operational and Capital Improvements** is provided on the following page.

The first section of this Table are the key recommendations for **Operational Improvements**, which include:

- Cemetery Governance and Administration, and Cemetery Site Operations and Maintenance
- Cemetery Products and Services
- Financial Plan for Ocean View Cemetery
- Cemetery Marketing Strategy

The second section of the Table is a list of **Capital Improvements**, with a short description of each of the twenty projects and project sites identified, along with the rationale for recommending these projects.

It is worth noting that these projects are arranged in the order presented in Figure 49, **Proposed Capital Improvements** (page 130).

This Table also provides the estimated capital cost of each project area, including 20% contingency.

Further background on the project sites is provided in **Appendix H, Improvement Areas Photos**.

Ocean View Cemetery: Recommendations for Operational and Capital Improvements

Operational Improvements		Rationale
Governance, Administration and Site Operations and Maintenance Invest in digital cemetery management software Increase maintenance staff levels; establish one full time, seasonal position at the cemetery Eliminate outsourcing of Saturday interments to independent contractor Initiate a full update of the Ocean View Cemetery Rules and Regulations Join Oregon Cemetery Assoc'n - attend annual conferences, access training programs Consider creating a volunteer Cemetery Board of Trustees		<ul style="list-style-type: none">• Improve data management for increased efficiency, accuracy, and noncorruptability• Establish the staff levels needed to maintain improved levels of care• Reduce admin costs; optimize use and efficiency of in-house staff and equipment• Update/streamline the cemetery's legal, operational and administrative framework• Improve the organization's overall understanding of cemetery mgt. and operations• Tap into local expertise to assist with implementation of the OVC Master Plan
Cemetery Products and Services Expand the range of interment and memorialization options offered at Ocean View Cemetery Focus on creating new cremation interment options; locations around the site TBD Establish a new green burial area Investigate feasibility; prepare a business case for interior niches in the Mausoleum Investigate the feasibility of creating an outdoor celebration area with cremation interment options		<ul style="list-style-type: none">• Respond to the changing needs and wishes of Astoria and Clatsop County residents• Improve Ocean View's offerings in response to locally high cremation rate• Respond to the changing needs and wishes of Astoria and Clatsop County residents• Use restored mausoleum to offer new interment option; use revenue to help fund restor'n• Evaluate replacing the existing chapel with a context-appropriate, outdoor events space
Financial Plan Implement the "Alternative Financial Operating Model" – Limit price increases to 5%/year from 2020 - 2029; subsequently 3% per year (cost of living) – Introduce non-resident premiums; research appropriate structure and approach – Adjust PCF management to improve performance – Create a Development Fund – Revise cemetery systems and procedures to improve financial tracking and reporting – Monitor and revisit outcomes every five years; adjust as needed		<ul style="list-style-type: none">• Confirm current profitability to set appropriate staffing levels and development targets• Establish Clatsop County's contribution to supporting Ocean View as a shared facility• Optimize the growth of cemetery's Perpetual Care Fund• Consider the revenue potential of undeveloped, surplus lands• Improve the cemetery's financial management systems to meet current best practices• Facilitate financial management to improve the cemetery's financial performance
Cemetery Marketing Establish a marketing budget Enhance the cemetery's website Use social media to inform and engage with the community regarding the cemetery Create print materials; make available at the cemetery, funeral homes, and other public facilities Work with community partners to support current tours and events Expand programming: create new tours and establish new events at the site Work to establish Ocean View's reputation as a county-wide facility		<ul style="list-style-type: none">• Allocate annual funding to promote the site, its options and services• Work to address the low awareness of Ocean View Cemetery throughout Clatsop County• Invest in website improvements due to increasing use of websites by potential customers• Recognize the need to reach older members of the community with print materials• Capitalize on the area's heritage resources to forge partnerships and launch site initiatives• Leverage the introduction of new service options through social media• Invest in website improvements due to increasing use of websites by potential customers
Capital Improvements		Rationale
1. New Water Supply Abandon and replace existing waterline (assume 4-inch dia pipe) Install water points (hose bib or quick couplers)		<ul style="list-style-type: none">• Restore water access for public and maintenance/operations use• Enable improved establishment and care of softscape, incl'd trees.• Upgrade temporary measures now used for annual events
2. New Cemetery Kiosk Replace existing kiosk with upgraded design (weather proof with map and lockable panels) Concrete unit paving Design, coordination, and contract admin		<ul style="list-style-type: none">• Upgrade entry kiosk to improve visitor navigation and orientation• Improve visitor perception of site• Facilitate Admin's efforts re plot sales and locating existing graves• Improve communications (posting of site rules and reg's, news, events etc.)
3. Wayfinding Signage (Proposed Throughout) Driveway and wayfinding signage Design, coordination, contract admin		<ul style="list-style-type: none">• Upgrade site signage to improve visitor navigation and orientation• Facilitate Admin/Operations by helping visitors to locate existing and potential gravesites
4. Waste Management Garbage receptacles and signage Planning Strategy for site furnishings, signage and waste management		<ul style="list-style-type: none">• Enable and facilitate improved site maintenance• Encourage public participation in appropriate waste disposal• Visually communicate significance of site to greater community
5. Section Markers (Proposed Throughout) Custom design stone section markers; ~24" ht. above finish grade, c/w concrete foundation		<ul style="list-style-type: none">• Support improved site navigation and orientation• Facilitate Admin/Operations assisting visitors to locate existing and potential gravesites
6. New Entry Gates and Fencing New entry gates with automatic closer Stone clad entry gate columns Stone clad entry wing walls Entry sign with lighting New 6' ht. decorative metal fencing along south PL Planting from fence to edge of gravel shoulder Design and contract admin		<ul style="list-style-type: none">• Improve cemetery image and appeal• Invite visitors into the site• Communicate unique character and quality of cemetery from street edge• Make highly visible improvements to indicate cemetery-wide initiatives and improvements
7. Lakeshore Cremation and Memorialization Nodes Benches Pavers around benches (3 areas) Planting for scattering (3 areas, including subgrade prep & growing medium) 5' wide gravel walkways; 6" depth with metal edging Design, coordination, contract admin and permitting		<ul style="list-style-type: none">• Increase cremation interment options with viewpoint seating• Increase memorialization options• Take advantage of areas unsuited for casket lots to develop scenic cremation interment
8. East Woodland Cremation Garden Planting River rock feature; 3"-12" dia. locally sourced, 12" depth Benches Develop interment and landscape plan for future implementation Design and contract admin		<ul style="list-style-type: none">• Increase cremation interment options• Increase memorialization options• Reinforce heritage landscape design + layout• Carefully integrate cemetery improvements with existing surroundings• Respond to public interest in restoring buried headstones• Respond to public interest in 'destination features' attracting visitors to site
9. Improved Public Restroom Access New access to existing maintenance building restroom from outside; new door, and Paver walkway from driveway to restroom Architectural and servicing study, design, permitting and contract admin		<ul style="list-style-type: none">• Respond to public request for restrooms on site• Repair waterline for existing on-site restroom facilities for staff• Replace public restrooms in chapel with new facilities (vital for future events/rentals)
10. Lakeshore Green Burial Area Develop a concept plan (grave layout and circulation plan) and landscape management strategy Prepare phased plan for native and naturalized plantings in strategic locations Develop an understanding of green burial practices and procedures Establish an operational and marketing strategy; plan for launch of new service		<ul style="list-style-type: none">• Increase interment options available at Ocean View Cemetery• Increase memorialization options• Carefully integrate cemetery improvements with natural surroundings• Respond to public interest in environmentally conscientious end-of-life choices• Respond to public interest in environmental management + habitat improvement• Respond to public interest in destination features to attract visitors to site

Figure 48: Recommendations, Pg 1 of 2 Source: LEES+Associates

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Ocean View Cemetery: Recommendations for Operational and Capital Improvements

Capital Improvements		Rationale
11. Veterans Memorial Improvements	Signage	<ul style="list-style-type: none">• Maintain the memorial mound as a key landmark feature in the cemetery• Repair aged memorial infrastructure• Respond to public interest in the Veterans Memorial and in historical information• Provide information on Astoria's Civil War Veterans• Establish connection with history of Astoria & Hillside Cemetery/Pioneer Cemetery Park
	Planting	
12. Center Circle Memorial Garden	Benches and new flagpole	<ul style="list-style-type: none">• Increase cremation interment options• Increase memorialization options• Reinforce heritage landscape design and layout• Carefully Integrate new cemetery options with existing surroundings• Respond to public interest in environmental management and habitat improvement• Respond to public interest in destination features to attract visitors to site• Respond to public interest in destination features to attract visitors to site
	Concrete paver plaza ~600sf	
13. Restored "Little Spirits Garden" Infant Interment Area	Memorialization (plaque wall, monument signs, etc.)	<ul style="list-style-type: none">• Improve site maintenance and care• Increase cremation interment options• Increase memorialization options• Reinforce heritage landscape design and layout• Respond to public interest in restoring buried headstones• Respond to public interest in destination features to attract visitors to site
	Design and contract admin	
14. Crest Avenue Improvements	6' wide paver path N/S from edge of driveway circle	<ul style="list-style-type: none">• Improve cemetery image and appeal, notably in the active sales area of the site• Improve perception of active sales area with deer/elk resistant horticultural feature• Reinforce heritage landscape design and layout and dune landscape context• Respond to public interest in destination features to attract visitors to site
	6' wide gravel path E/W from edge of driveway circle (with edger)	
15. Dune Buffer	Planting area (including prep and growing medium)	<ul style="list-style-type: none">• Improve perception of site maintenance• Reinforce heritage landscape design and layout• Increase memorialization options• Integrate cemetery with existing surroundings• Respond to public interest in improved waste management
	Benches/Columbaria	
16. Mausoleum Restoration with Interior Niches	Design, and contract admin	<ul style="list-style-type: none">• Increase cremation interment options• Reinforce heritage landscape plan• Carefully integrate cemetery improvements with existing surroundings• Respond to public interest in the Ocean View Abbey building and its condition• Respond to public interest in destination features to attract visitors to site• Prepare a site plan for a "mausoleum and celebration precinct"
	Design, and contract admin	
17. Future Celebration Garden (at Existing Chapel Site)	Design, and contract admin	<ul style="list-style-type: none">• Respond to the aging building and infrastructure• Respond to public interest in destination features to attract visitors• Increase cremation interment options• Reinforce heritage site design• Integrate new cemetery features into existing context• Prepare a site plan for a "mausoleum and celebration precinct"
	Design, and contract admin	
18. Avenue of the Holy Cross Improvements	Tree planting	<ul style="list-style-type: none">• Reinforce design intent of the historic cemetery concept plan• Realize the concept of an axial avenue with a planted allée• Potential opportunities for memorialization• Initiate tree succession planting• Establish landmark feature to support site navigation/facilitate on-site orientation
	Benches	
19. Lake Maintenance Program	Concrete unit pavers with 6" wide flush curb	<ul style="list-style-type: none">• Respond to public interest in wetland management for flood control• Respond to public interest in environ./habitat improvements (fishing + wildlife viewing)• Respond to public interest in destination features to attract visitors to site
	Concrete flush curbs along edge of driveway (8" wide)	
20. Boardwalk and Viewing Platform (Connection to Spirit Loop Trail)	Design, coordination, contract admin	<ul style="list-style-type: none">• Respond to public interest in establishing connection to water• Provide connection to Spirit Trail and greater Warrenton path network• Respond to public interest in destination features to attract visitors to site
	Design, coordination, contract admin	

Figure 49: Recommendations, Pg 2 of 2 Source: LEES+Associates

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PROPOSED CAPITAL PROJECTS

The table on the following page summarizes the capital projects identified for the entire site. It also indicates proposed phasing by Priority:

Priority One: to be implemented in years 1 – 5

Priority Two: to be implemented in years 5 – 10

Priority Three: to be implemented in years 10+.

This prioritization is subject to revision due to other priorities and commitments by the City of Astoria. The proposed time frames are approximate and depend on the availability of funds other resources, and the City of Astoria’s capital budget cycles.

Proposed phasing is based on two factors:

1. The estimated return on investment (“ROI”) offered by each project is based on how likely it is that the funds spent on the project will increase cemetery revenue. This measure is indicative rather than precise and is therefore divided into only three broad categories, High, Medium and Low.

- “High” ranking is based on the investment yielding **a direct, shorter term return**, such as funding new interment options that can be sold to cemetery customers, or improving an active sales area. Examples include new columbaria, a scattering garden and a new green burial area.
- “Medium” ranking is based on an investment yielding **a less direct and longer term return**, such as funding improvements that benefit the overall quality and reputation of the cemetery. Examples include entry area improvements and bringing in a water line, both of which will not result in specific new revenues but will positively influence the site and its reputation, attracting more sales and enabling higher pricing over time.
- “Low” ranking is based on the investment **not having any direct or indirect return**, though the improvement will still benefit the site and its user in less direct ways, for example, increased social and environmental sustainability. Examples include public facilities such as trails and water quality improvements to Cemetery Lake.

2. The level of public support for each project expressed through the on-line survey was summarized in a matrix. This matrix was organized by the estimated ROI described above, and is provided in **Appendix F**.

The **Table of Proposed Capital Projects** on the following page shows the phasing and priority of each capital project, per the Table, Ocean View Cemetery Recommendations for Operational and Capital Improvements.

A version of this table of Proposed Capital Projects that provides cost estimates for each of the twenty proposed project areas is provided in **Appendix G**.

OCEAN VIEW CEMETERY: PROPOSED CAPITAL PROJECTS

Proposed Improvement	Cemetery Area	Phase	Priority
New Water supply	Various Locations	1	A
Lakeshore Green Burial Area	Lakeshore Green Burial Area	1	A
Lakeshore Cremation and Memorialization Nodes	Lakeshore	1	A
Waste Management	Various Locations	1	A
East Woodland Cremation Garden	East Woodland Edge	1	B
New Entry Gates and Fencing	Front Entry	1	B
New Cemetery Kiosk	Main Entry	1	B
Crest Avenue Improvements	Active Burial Area / Crest Avenue	1	C
Wayfinding Signage (Proposed Throughout)	Various Locations	2	A
Section Markers (Proposed Throughout)	Various Locations	2	B
Improved Public Restroom Access	Various Locations	2	B
Dune Buffer	Dune Edge	2	B
Veterans Memorial Improvements	Historic Heart / Civil War Veterans Memorial	2	B
Mausoleum Restoration with Interior Niches	Historic Heart Area / Ocean View Abbey Mausoleum	2	C
Future Celebration Garden (at Existing Chapel Site)	Historic Heart Area / Chapel Site	3	A
Center Circle Memorial Garden	Historic Heart Area / Center Circle	3	A
Lake Maintenance Program	Various Locations	3	B
Restored "Little Spirits Garden" Infant Interment Area	Historic Heart Area / Infant Interment	3	B
Avenue of the Holy Cross Improvements	South Uplands / Avenue of the Holy Cross	3	C
Boardwalk and Viewing Platform (Connection to Spirit Trail)	Lakeshore Green Burial Area / Trailhead for Spirit Loop Trail	3	C

Figure 50: Proposed Capital Improvements, Source: LEES+Associates

FUNDING AND FINANCING OPTIONS

This section is provided assist with the implementation of the master plan by providing potential funding sources. Each funding source includes a description of the fund, the funding amount, timing, and eligibility. The description includes the purpose of the source and eligible activities.

The funding amount includes the overall program allocation, typical amounts granted to individual projects (if known), and matching requirements, if any. Timing identifies the funding cycle and deadlines. Eligibility includes which entities are eligible to apply, as well as any unusual application requirements beyond the typical application information.

Note that the sources listed in this report are not exhaustive.

STRATEGIES

In order to fund projects identified in the master plan, the City should consider:

- Partnerships—with non-profit organizations (such as the North Coast Land Conservancy), veterans' organizations, and recognized Tribes, because these entities may be eligible to apply for grants for which the City is not an eligible applicant.
- Multiple sources—all grant programs have limited funds and require funding matches.
- Features—the veterans' area, land and water trails, historic resources, and activity programs are eligible for different sources of funding.

FEDERAL SOURCE

Veterans Cemetery Grants Program – Department of Veterans Affairs (VA)

Aid can be granted only to states, federally recognized tribal government, or U.S. territories. The VA cannot provide grants to private organizations, counties, cities or other government agencies. Therefore, the City is ineligible.

Funding for providing grave sites for Veterans in those areas where VA's national cemeteries cannot fully satisfy their burial needs. Grants may be used only for the purpose of establishing, expanding or improving Veterans cemeteries that are owned and operated by a state, federally recognized tribal government, or U.S. territory.

STATE SOURCES — OREGON PARKS AND RECREATION DEPARTMENT (OPRD)

Recreational Trails

<http://www.oregon.gov/oprd/GRANTS/Pages/trails.aspx>

Description and eligible activities

Eligible activities are building new trails, restoring existing trails, signs, constructing trailhead facilities, acquiring land, and acquiring permanent easements. It includes water trails.

Amount and match requirement

Grant amounts vary. A 20 percent match is required; 40 percent if requesting more than \$250,000.

Timing

The grant cycle begins in April, with letters of intent due on April 30 and applications due on June 15.

Eligibility

Federal, state, and local government agencies and Tribes and non-profits are eligible applicants.

Land and Water Conservation Fund

<http://www.oregon.gov/oprd/GRANTS/Pages/lwcf.aspx>

<http://www.nps.gov/lwcf/>

Description and eligible activities

The LWCF Program (established by the LWCF Act of 1965; Public Law 88-578; 16 U.S.C 4601-4 et seq.) through the US Department of Interior National Park Service, provides matching grants to states and local governments for the acquisition and development of public outdoor recreation areas and facilities. The program is intended to create and maintain a nationwide legacy of high quality recreation areas and facilities and to stimulate non-federal investments in the protection and maintenance of recreation resources across the United States. States receive apportionments of LWCF grant funds based on a national formula (state population).

Projects must be consistent with the Statewide Comprehensive Outdoor Recreation Plan (SCORP). The OPRD uses the Open Project Selection Process.

Amount and match requirement

Grant amounts vary. A 50 percent match is required.

Timing

Allocations are based on the state Statewide Comprehensive Outdoor Recreation Plan (SCORP).

Eligibility

State, regional, and local government agencies and districts and Tribes are eligible applicants.

Local Government Grant Program

<https://www.oregon.gov/oprd/GRANTS/Pages/local.aspx>

Description and eligible activities

The OPRD gives \$4 million annually through this program, which is funded by the state lottery. Funding is for public outdoor park and recreation areas that are open and accessible to the public-at-large. Eligible projects involve land acquisition, development, and major rehabilitation projects, and planning and feasibility studies.

Projects must be consistent with the Statewide Comprehensive Outdoor Recreation Plan (SCORP).

[Note: The state also has County Opportunity Grants, but these are only for sites that will provide camping.]

Amount and match requirement

Small grants are for a maximum of \$75,000. Large grants are for a maximum of \$750,000 or \$1 million for land acquisition. A 20 percent match is required for cities and districts with a population less than 5,000.

Timing

Timing is unknown.

Eligibility

Local government agencies and districts are eligible applicants.

Heritage Grant Program

<https://www.oregon.gov/oprd/HCD/FINASST/docs/HeritageGrantInformation.pdf>

Description and eligible activities

The program supports projects for the conservation, development and interpretation of Oregon's cultural heritage. Priority will be given to projects that preserve, develop or interpret threatened heritage resources and/or heritage resources of statewide significance. Historic structures are not prioritized.

Amount and match requirement

The total amount available for the program is \$380,000, with awards ranging from \$3,000 to \$20,000. A 50 percent match is required.

Timing

Biennial: currently in the 2019-2021 grant cycle.

Eligibility

Local governments, Tribes, public universities, and non-profit organizations are eligible applicants.

Historic Cemeteries Grant Program

<https://www.oregon.gov/oprd/HCD/FINASST/docs/HistoricCemeteriesGrantInformation2019.pdf>

Description and eligible activities

The program provides financial assistance in the following general categories: Protection and Security, Restoration and Preservation, Education and Training, Research and Interpretation. Eligible projects may include, but aren't limited to: security fencing or lighting, skilled monument repair or training, conservation of historic elements such as fencing, curbs, markers, etc., documentation and mapping, signage, landscape restoration, planning and interpretation.

Amount and match requirement

Awards range from \$1,000 to \$8,000. No match is required, but is encouraged.

Timing

Two grant cycles in the 2019-2021 biennium.

Eligibility

Local governments, non-profit organizations, other organizations, and individuals are eligible applicants.

Veterans and War Memorials Grant

https://www.oregon.gov/oprd/HCD/FINASST/docs/VWM_Grant_Information2020.pdf

Description and eligible activities

The Veterans' and War Memorials Grant Program was created and established to provide funding assistance to local governments for the construction and restoration of veterans' and war memorials. : The types of eligible projects include construction of a new memorial or restoration of an existing memorial.

Amount and match requirement

The total amount available for the program is between \$150,000 per year. Grants range from \$14,000 to \$80,000. Match required is minimum 10 percent cash and 10 percent in-kind and other.

Timing

The application deadline is February 13, 2020. Notification is on May 1, 2020.

Eligibility

Local governments and Tribes are eligible. Local governments must partner with a veterans' organization. Priority is given to projects included in a long-range plan.

CLG Grant Program*Description and eligible activities*

The CLG program offers matching grants to cities and counties that have been “certified” as historic preservation partners with both the state and the federal governments. These grants can be used for a wide-range of preservation projects, including National Register nominations, historic resource surveys, preservation education, preservation code development, building restoration, and preservation planning.

Amount and match requirement

The total amount available for the program is between \$65,000 and \$200,000 per year.

Timing

The application deadline has not been updated.

Eligibility

Astoria is a CLG. Warrenton and Clatsop County are not.

Preserving Oregon

<https://www.oregon.gov/oprd/HCD/FINASST/docs/PreservingOregonInformation2019.pdf>

Description and eligible activities

Programs funds are to be used for rehabilitation work on properties listed in the National Register of Historic Places or significant work contributing to identifying, preserving and/or interpreting archaeological sites.

Amount and match requirement

The grant maximum is \$20,000. A 1:1 match is required.

Timing

Two grant cycles in the 2019-2021 biennium. The letter of intent deadline is April 2020. The application deadline is May 2020.

Eligibility

The Ocean View Mausoleum at 575 SW 18th Street is listed as “eligibility undetermined,” and is therefore not currently eligible for this grant opportunity. If the resource is listed in the NRHP in the future, the City may consider this grant program.

LOCAL MECHANISMS

In addition to the mechanisms identified below, the City should investigate approaching the land owners and interested parties adjacent to the cemetery.

Oregon cities and counties have the legal authority to devise their own non-property tax and other local revenue structures without specific state enabling legislation.

Impact Fees

Regulated by county and municipal subdivision policies, impact fees require residential, industrial and commercial development project leaders to provide sites, improvements and/or funds to support public amenities such as open space and trails. Impact fees may be allocated to a particular trail from land development projects if the fund is a dedicated set-aside account established to help develop a county- or city-wide system of trail projects.

Revenue Bonds

Revenue bonds are issued or sold by government agencies and repaid by specific user fees or service charges. The bonds are typically secured by stable revenue stream, such as a local street utility fee.

Hotel/Lodging Tax

Astoria imposes a local hotel tax (also known as a transient room tax) of 11 percent.

Campaigns and Donations

The City could raise money directly through fundraising campaigns such as “selling” pieces of the cemetery (“adopt-an-area”), providing each donor with a “deed” for that donor’s segment of the property; or “selling” cemetery amenities, such as benches and trees. The revenue can be used for construction as well as operations and maintenance.

Trust Funds or Endowments

A trust fund or endowment can be established in which funds contributed from government sources, private grants, and gifts are deposited. Funds can be used for acquisition, construction or maintenance. The fund or endowment would be administered by a nonprofit group or local commission.

PRIVATE SOURCES

The Ford Family Foundation—Community Building Spaces Capital Grants

<https://www.tfff.org/what-we-do/vital-rural-communities/community-and-economic-development/rural-capital-projects>

Description and Eligible Activities

Encourage civic participation, community collaboration and other ways of bringing residents together for the well-being of the community. Grants support the development of physical places that are open to the public and have multiple uses.

Amount and Match Requirement

Typical range is \$25,000 to \$250,000. The project must have a minimum of 50 percent of funding committed and grant must not be more than one-third of total funding.

Timing

Applications are reviewed within two to six months.

Eligibility

Government entities, Tribes, and non-profit organizations are eligible.

Geographical focus of project must be predominately (60% or more) for the benefit of residents of rural Oregon. We define rural as communities with populations of 35,000 or less and not adjacent to or part of an urban or metropolitan area.

Oregon Community Foundation—Oregon Historic Trails Fund

<https://oregoncf.org/grants-and-scholarships/grants/oregon-historic-trails-fund/>

Eligibility

The fund is dedicated to projects related to Oregon historic trails as recognized by the state legislature in ORS 358.057. Ocean View Cemetery is about 4 miles from the Lewis and Clark National Park. This is the closest point along the trail to Ocean View Cemetery. If a trail connection between these two sites is identified in the future, it may be possible to formalize a link between these historic sites.

Clif Bar Family Foundation's Small Grants

<http://clifbarfamilyfoundation.org/Grants-Programs/Small-Grants>

Description and Eligible Activities

The grants are to protect Earth's beauty and bounty, create a robust, healthy food system, increase opportunities for outdoor activity, reduce environmental health hazards, and build stronger communities.

Amount and Match Requirement

Funding amounts are not provided.

Timing

Application deadlines are February 1, June 1, and October 1.

Eligibility

Only non-profit organizations are eligible.

Conservation Alliance

<http://www.conservationalliance.com/grants/?yearly=2019>

The Conservation Alliance is a group composed of outdoor industry companies that uses its annual membership dues to provide funds to grassroots environmental organizations.

Description and eligible activities

Projects must be targeted for quantifiable protection of a specific wild land or waterway. The program prioritizes landscape-scale projects that have a clear benefit for habitat and that engages grassroots citizen action in support of the conservation effort. The program does not fund general education, restoration, stewardship, or scientific research projects. All projects must have a clear recreational benefit.

Meyer Memorial Trust

<https://mmt.org/portfolio/environment/annual-opportunity>

Description and eligible activities

Meyer Memorial Trust (MMT) Healthy Environment grants are awarded on an annual basis, with applications due May 15.

The program does not fund outdoor recreation projects and programs, unless they are part of a larger effort that demonstrates measurable environmental impact or systems change and Single-site/small-scale restoration, stewardship and acquisition projects unless they are part of a landscape-scale/systems change strategy.

Wal-Mart Foundation

<https://walmart.org/how-we-give/local-community-grants>

Description and eligible activities

Through its Local Community Grants, Walmart provides grant funds to support a variety of needs. The veterans and military families grant program is by invitation only.

Amount and match requirement

The minimum amount to apply for is \$250, and the maximum is \$5,000.

Timing

The 2019 grant cycle was February 15 to December 31.

Eligibility

Eligible applicants are non-profit organizations; a recognized government entity: state, county, or city agency that are requesting funds exclusively for public purposes; schools and universities; and faith-based organizations.

RESOURCES

Catalog of Federal Domestic Assistance. <https://beta.sam.gov/search?index=cfda>. The database contains detailed program descriptions for federal assistance programs

Grants. Gov. <http://www.grants.gov/>. A source to find and apply for federal grants.

Candid: A fee-based searchable database. <https://fconline.foundationcenter.org/>



11. Conclusion

Ocean View Cemetery is fortunate to have a significant land base and remaining capacity relative to current demand so it does not need to look for new cemetery space or even to expand its current, developed footprint for many years. Ocean View is also blessed with a remarkable natural context and intact heritage features. It is now poised to offer interment options with the potential to generate significant revenue over time. It is clear however, that structural changes are needed to establish the sustainability of the current positive trend, as staffing levels remain low and resources stretched.

Now that maintenance issues have been largely addressed, and there is an achievable plan to build on the financial health of the cemetery operation, the focus should be on creating resilience by improving infrastructure and operating systems to achieve sustainability rather than depending on the energies of dedicated individuals in the organization. This would achieve the objective of fostering the cemetery's sustainable development over the decades to come.



Appendices

APPENDIX A

OCEAN VIEW ABBEY MAUSOLEUM

The Ocean View Abbey Mausoleum sits on the highest point of the cemetery's north end. Along with the civil war veterans' area with its mound and memorial, and the Flavel Family Obelisk, the Abbey Mausoleum is a key visual element and heritage feature at the site. Built in 1915 by the Portland Mausoleum Company, the structure was designed by Ellis F. Lawrence. Lawrence was at that time Oregon's most prominent architect and worked on over 500 projects over his career, including designing most of the original buildings at Oregon State University.

In the early 1900's, crypt interment was widely promoted by funeral homes and entrepreneurs across North America. Mausoleum disposition was billed as offering a more exclusive, less polluting and less "dismal" way for families to "lay away their loved ones."¹ Ocean view Abbey Mausoleum is a "community mausoleum" based on it being designed for sale and occupation by members of the general public rather than just the members of one family. Ocean View Abbey was one of six community mausoleum buildings built in cemeteries around Oregon, with similar, but more elaborate versions built in Eugene, Salem and Portland. The size and architectural merit of each of these buildings is a reflection of the level of the local interest and investment in this premium interment option.

In 2015, a Historic Structure Report on the 100 crypt Ocean View mausoleum was prepared by students at Clatsop Community College. This report provides a good overview of the century old, concrete structure. It notes that the building approved for construction was a simpler version of an original proposal for a stone-clad, 250-crypt building, designed in the Classic Revival style.

The building standing in Ocean View Cemetery today is a modest, flat-roofed 36' x 46' edifice with a smooth concrete exterior. Its main stylistic feature is a cast-stone cornice with an Egyptian-inspired motif. The only other place this stylistic influence appears is on the building's interior door handles. Narrow, leaded glass windows articulate the front and side façades and stained glass clerestory windows in the raised upper roof allow light to come into the building from above. The primary articulation is provided by the building's north-facing portico, featuring two monumental, bronze kalamein (bronze-clad, solid wood) front doors.

The Historic Structure Report states that the current building suffers from many deficiencies, but with respectful restoration, "The Ocean View Abbey will establish itself as a key part of the community by being available not only to the original owners but also to new owners and to some degree to the public."² The Report outlines a program of activities and events that could take place at and

1 p. 9, "Ocean View Abbey Mausoleum: Historic Structure Report", Historic Preservation Program Clatsop Community College, February 24, 2015

2 Ibid, p 31

around the site. It notes that there are still 8 unused crypts, which had been deeded to the City by the Portland Mausoleum Company, and that there is an opportunity to install interior niches within them, and these could then be offered for sale by the City.

The main restoration tasks and some unit costs are listed in the Report along with a list of potential funders. In 2016, the City contributed to an initiative that led to the replacement of the structure's leaded glass windows. The current cost of restoration would require a comprehensive site review by a structural engineer and a qualified heritage architect. A contractor with skills in heritage work should be used for all restoration tasks.

Of the three buildings at Ocean View, the mausoleum is by far the most architecturally significant; however, due to the lack of any information about this structure beyond the name panel over its front door, many visitors are curious but do not know much about the building or its history.

In spite of this, community interest in the mausoleum appears to be high. The public survey component of this study indicated a marked interest in the mausoleum, with almost 30% of respondents stating that they might be interested in mausoleum interment. Most respondents also indicated that they were aware that the mausoleum is privately owned and understand that its maintenance is the responsibility of its owners (those interred within it).

The City of Astoria has recently confirmed that the City has no legal duty to maintain or repair the mausoleum at Ocean View Cemetery. Following research by the City of Astoria's Attorney, a memo about the mausoleum was sent to the City Manager on August 8th 2019. Key points include:

- Under its original contract with the Portland Mausoleum Company (PMC), the City-appointed Cemetery Commission was to provide "care and maintenance" of the mausoleum, using revenues from its use of eight receiving vaults transferred to it by the PMC, with the revenues from use of these vaults to be deposited into an endowment fund that was to be set up by the PMC.
- There is no evidence that an endowment fund was ever set up by the PMC or that any funds were ever deposited into it.
- In 1923, when the City of Astoria adopted the Council-Manager form of government, it assumed the original mausoleum contract as a successor to the Cemetery Commission, which had since been abolished.
- Based on the original terms of the contract, even if an endowment care been set up and maintained, its current value would likely be less than \$10,000. Under the contract, the level of return the care fund would have generated would be far from enough to properly maintain the structure and even further from the current cost to restore it. A 2008 estimate for "repair and maintenance" came in at \$32,000.
- The City has already paid for basic repairs to the building, including a new sheet metal roof in 1951, which was paid for out of the general cemetery fund.

- The City's Parks Operation Fund includes a budget allowance for some maintenance of the mausoleum and the City has supported work by others, such as the repair of the stained glass windows by students and staff of the Clatsop Community College Historic Preservation Program.
- In 2016, the City removed overgrown trees planted next to the structure and cleaned up the area around it.
- The original contract prohibited the City from selling the eight receiving vaults received from the PMC; however it also restricted the sale of crypts to members of the Caucasian race, which contravenes current public policy. As the PMC went out of business in 1927, the City's current contractual obligations are questionable and the City could seek to have part of the deed judicially rewritten. This could enable the City to sell or otherwise use their receiving vaults. Revenue from adaptive reuse could then be placed in an endowment fund to help care for the mausoleum.

The 75' x 100' lot occupied by the mausoleum was sold to the PMC as Section H, Block 29. It has its own deed and is occupied by the mausoleum building only.



Figure 1: Ocean View Abbey Mausoleum in 2015 (left) and in 2019 (right)

Currently, the structure seems relatively stable, though its loss of the original copper downspouts will likely cause structural as well as cosmetic damage over time. There may be other existing structural issues with the building, though improvements made to the building and its site since 2016 have helped to mitigate its deterioration as well as its visual impact on the surrounding cemetery.

The heritage, visual and programmatic value of the Abbey Mausoleum to Ocean View Cemetery are indisputable. The key issue is determining the City's approach to managing this resource.

For many in Astoria, the mausoleum in Ocean View Cemetery has intrinsic value and the City has an obligation to care for the building as a way of providing perpetual care to those interred there, just as it has an obligation to provide perpetual care of the place of interment of those buried in

conventional graves. For others, the mausoleum is a key visual and heritage resource, linking the cemetery to the broader history of the state and the country. Ocean View is a state-designated historic cemetery, based on it containing the remains of people who died before February 14, 1909 (in this case, relocated from Hillside Cemetery) and being listed with the Oregon Commission on Historic Cemeteries.

There are several families living in the City of Astoria and the surrounding area that are directly descended from individuals interred in the mausoleum. Some have expressed an interest in contributing to its care and possibly its restoration through personal contributions, or by helping to leverage funding for improvements from higher levels of government.

As with any historic structure, the value of a physical restoration should be considered in context, which typically extends beyond the purely functional. The City of Astoria has long been successful in capitalizing on its wealth of heritage resources and has cultivated a respect for heritage resources within the community and beyond. The City remains committed to heritage conservation and has invested in establishing a vision for Ocean View Cemetery as a heritage site as well as a “public utility” that serves a public need.

The level of restoration of Ocean View Abbey should begin with the preparation of a mausoleum business case. Depending on the City’s priorities in implementing this Cemetery Master Plan, the mausoleum could be maintained to simply stabilize it, or it could be restored as a heritage feature and potential financial asset. The value of the eight, unoccupied City-owned crypts will depend on the nature and intent of the building’s restoration. Depending on the quality of the offering, the level of market demand and other influences, the price of each interior crypt could range from \$5,000 to over \$20,000.

Perhaps of more interest is the potential to install interior niches in the mausoleum, which are more relevant to Ocean View Cemetery’s market, based on its high cremation rate. Interior niches can also yield an excellent return on investment.

If niches are to be installed in the Abbey Mausoleum, they would be most successful if designed to reflect the building’s architectural and heritage character. High quality, attractive, glass-fronted niches sensitively placed inside the Abbey Mausoleum could be offered as an upgrade to exterior columbaria niches, which are exposed to the elements and do not allow for the display of urns (a desirable quality for some customers).

It is relevant to note that the 1954 chapel building immediately south of the mausoleum sits entirely on cemetery property. This aging, one story structure is visually incompatible with the mausoleum. The chapel was ranked in the 2016 Parks Master Plan as being in fair condition only. Despite the City undertaking cosmetic improvements in 2013, the chapel is challenged by poor heating, leaky

water service and general deterioration. It has little appeal as a venue for memorial services and is rented only 2 – 3 times per year and so it generates little revenue while occupying a significant site in the most active area of the cemetery.

If the chapel building were removed and the mausoleum building were restored, the chapel site could be redeveloped as the location of a new outdoor cremation garden and celebration space. This area could be specifically designed to be visually compatible and programmatically complementary to the restored Abbey Mausoleum. With careful planning, the City may be able to sell its remaining crypts, install interior niches, and also take advantage of the mausoleum as a marketable interior space. Together, the mausoleum and chapel site could add attractive new cemetery services and revenue streams to the operation.

In keeping with the City's desire to foster the sustainability of Ocean View Cemetery, the City should work to enable the mausoleum to contribute to the financial operation of the cemetery, including generating sufficient revenues to maintain this historic structure well into the future.



Figure 2: Ocean View Abbey Mausoleum, 2019, Source: LEES+Associates

APPENDIX B

HILLSIDE CEMETERY/PIONEER CEMETERY PARK

The City of Astoria's original cemetery was the aptly named "Hillside Cemetery," situated on a sloping lot on 14th Street between Niagara and Madison Avenue. Between 1865 and 1897 there were an estimated 700 burials in Hillside Cemetery, though even by 1890, the site was challenged by access issues (especially in wet weather), an increasing lack of space, poor maintenance, and likely the concerns of residents of the surrounding, developing neighborhoods. In 1897, the City opened the new Ocean View Cemetery, located outside the City of Astoria in the neighboring City of Warrenton. That year, the City of Astoria enacted Ordinance 2284-1897, which prohibited any further burials inside City limits.

With the establishment of a new cemetery, the City granted new rights-of-interment at Ocean View to residents who had purchased graves at Hillside. It also encouraged families to relocate the remains and headstones of loved ones in graves at Hillside. While there were some disinterments and relocations of remains and headstones, it seems likely that several hundred of those that had been buried at Hillside are still there today. Most monuments are now gone, with many either laid flat or removed to expedite lawn mowing, especially after the abandoned cemetery was again cleared and the new Pioneer Cemetery Park was established in 1961.



Figure 1: Shively Mausoleum, Pioneer Cemetery Park, Astoria OR, 2019, Source: LEES+Associates



Figure 2: Monument Sign, Pioneer Cemetery Park, Astoria OR, 2019, Source: LEES+Associates

In 1969, Astoria Granite Works donated a monument sign crafted from their trademark red Finnish granite, and a local seafood company donated the carved wooden archway still standing at the site. Besides a few scattered headstones, the main evidence of the site's past is the Shively mausoleum, now a small crumbling structure, gradually being overtaken by weeds in the NE corner of the park.

Over recent years, some residents of Astoria have expressed their preference to be interred in the City of Astoria rather than in the City of Warrenton. Choosing one's place of final disposition is important to many people, and being able to select the site, even when the intent is for scattering, is one of the appealing aspects of cremation.

There are no state regulations in Oregon prohibiting where cremated remains can be kept or scattered, though permission for scattering anywhere should be sought from the owner of the property. Since cremated remains are essentially inert (although they have a high pH and salt content), they do not pose an environmental hazard. The key problem with scattering or any other placement of cremated remains is the challenge of recording the place of disposition, along with the family being at peace with the decision to scatter, and ensuring that a record of where the remains ended up will be available to descendants over time. These considerations are why cemeteries are still generally regarded as the best place to inter cremated remains.

The 1897 prohibition of interring the deceased in Astoria dates back to a time before cremation was common. In the late 19th century, the burial of human remains was often physically difficult. It was often distressing, posed a health hazard and was a financial burden on families. Today, interring cremated remains is simple and easy.

As noted in this Cemetery Master Plan, the City is encouraged to install columbaria niches at Ocean View Cemetery. Depending on the public response, the City could also consider niches, amending its City Code to permit cremated remains to be interred within city limits. This would enable the installation of niches at Pioneer Cemetery Park, to meet the wishes of residents who wish to be interred in their own city.

Currently, Pioneer Cemetery Park is a pleasant but underused urban green space. Its features are aging and its programming is unclear. Careful redesign of this small but key piece of the City could reinvigorate the site with niche walls, a scattering garden, interpretive signage, new plantings and other features that would add structure and visual interest, accommodate the cremated remains of local residents, and generate revenue to help to pay for enhancements.



Figure 3: Pioneer Cemetery Park, Astoria OR, 2019, Source: LEES+Associates

APPENDIX C

OCEAN VIEW CEMETERY STAKEHOLDER COMMENTS

FINANCIAL

- Staffing problems – not enough to manage the site
- All Astoria Parks and OVC maintained by just Jonah plus 3 FT (unionized) staff + 1 PT staff
- 20 minute drive between OVC and Astoria – consumes a lot of time/resources
- Digging grave requires 2 men 8 hours (16 manhours)
- Do not have backhoe but use John Deere with regular tires and hoe/bucket attachment
- About 2 funerals a year with pall bearers (usual staff sometimes asked to serve as pall bearers)
- New irrigation system would be a six figure investment
- Probably not good economic sense to try to provide irrigation
- Staffing matrix to inform staffing levels for the site might be useful
- Chapel is only booked only about 3x/year. No functional water service there; cosmetic update in 2013.
- Some casket burial plots have cremated remains only.
- People do not seem to mention budget when deciding cremation on cremation interment.
- Admin does not receive many comments regarding pricing
- Will finance (“carry a contract”) – two of these this year to allow people to purchase a plot over time.

PHYSICAL

- Formerly received many complaints about the cemetery but fewer complaints now
- Most complaints are from older residents, typically only a few people
- Generally good feedback now though lack of water access an issue
- A lot of elk, rodents at the site
- Ground squirrels and moles are big problem - dangerous to mow over. Problem worse under trees and head
- Dandelions very conspicuous in the spring
- Plastic flowers are an issue with mower; would prefer natural flowers only
- No complaints now that site looks maintained
- String trimming, especially around headstones has improved

- Beautiful, expansive appearance. This type of open space is unique in the Astoria area
- Trees and wetland add character
- Mound needs to be weed-whipped (too steep to mow)
- Ornamentation can be a problem; people get upset even if old tributes are removed
- Have used 50:50 material to establish grass seed but now just leave sand and allow natural re-vegetation
- Some families will bring soil and sod but tends not to persist
- Noticed that people are becoming “greener” - environmentally aware
- Did tree inventory 2 years ago
- Spruce trees received aphid treatment

OPPORTUNITIES

- Restroom would be good (one in maintenance shop but cannot let public use)
- Many visitors ask “where’s the water?”
- Would like to see some kind of irrigation system- spigots
- Water barrels fine but can be an issue due to mosquitoes
- Possible rain collection system as a water source
- Water supply on-site okay. Many leaks so keep most lines turned off
- Locations of water mains through the cemetery need to be confirmed
- Mixed use, walking, dog walking, fishing
- Memorial Day big event every year, need to rent portable restrooms
- “Day of Caring” for visitors- to clean up graves and monuments?
- Respect very important to people at the cemetery
- Need signage to communicate need for dogs to be on-leash and owners to pick up after their pets
- Lack of enforcement of Rules and Regulations
- In-ground flower vases might solve some problems
- A possible structure for services could be a good idea
- Cemetery Admin gets complaints about wayfinding- not enough signage for people to find their way around.
- Block/Section markers would be good for orientation & wayfinding
- Diligent record keeping is very important for efficiency
- On-line cemetery mapping is helpful but GIS format is cumbersome.
- Would like to see a streamlined record keeping process.
- One spreadsheet for all records poses potential risk for losing information if file is lost, corrupted, etc..
- Needs a better database. Cost tracking not complete
- Sometimes need to get photos taken to send to customers to show proposed gravesites

- Rules and Regulations are dated, not user-friendly. Probably drafted in 1950s by or with a monument supplier
- Better software and/or record-keeping should be a key objective
- Dedicated cemetery personnel would be great

OTHER

- The City website is a good source of information
- People are “passionate” about cemeteries
- See many young people in the cemetery, especially in the new sections
- A lot of dog walkers; happy to see, so long as dogs are on-leash (most dogs off-leash)
- Website research now being done by families

APPENDIX D

DETAILED PRICE BENCHMARKING STUDY

2019 Cemetery Rates Comparison																
US Census - Population 2018	39,764		110,158		3,618		6,358		653,115		653,115		653,115			
Location:	Astoria, OR		Gresham, OR		Ranier + Clatskanie, OR		Woodland, WA		Portland, OR		Portland, OR Mt. Calvary & Gethsemani Catholic Cemeteries		Portland, OR			
Site:	Oceanview Cemetery		Forest Lawn Cemetery		Ranier Cemetery District		Cowlitz Cemetery District		Metro Cemeteries				River View Cemetery			
Website:	http://www.astoriaparks.com/parks/ocean_view_cemetery		https://www.burialplanning.com/cemeteries/forest-lawn-cemetery		https://www.rainiercemeterydistrict.com/		http://cowlitzcemetery2.org/		https://www.oregonmetro.gov/historic-cemeteries/cemetery-services-		https://www.ccpdxor.com/cemetery-fees-requirements		https://www.riverviewcemetery.org/			
Source:	Parks & Rec Schedule F3		Price List Emailed		Price List Online		Price List Emailed		Price List Online		Price List Online		Price List Emailed			
Cemetery Offering	Resident	Nonresident	Resident	Nonresident	Resident	Nonresident	Resident	Nonresident	Resident	Nonresident	Resident	Nonresident	Resident	Nonresiden	Average Resident	Average Nonresiden
Right of Interment for Lots and Niches																
Adult Casket Lot - MIN	\$ 1,556.00	\$ 1,556.00	\$ 3,695.00	\$ 3,695.00	\$ 732.00	\$ 846.00	\$ 250.00	\$ 250.00	\$ 1,500.00	\$ 1,500.00	\$ 1,600.00	\$ 1,600.00	\$ 2,295.00	\$ 2,295.00	\$1,679	\$1,698
Adult Casket Lot - MAX	\$ 1,556.00	\$ 1,556.00	\$ 3,995.00	\$ 3,995.00	\$ 732.00	\$ 846.00	\$ 250.00	\$ 250.00	\$ 3,000.00	\$ 3,000.00	\$ 11,000.00	\$ 11,000.00	\$ 6,295.00	\$ 6,295.00	\$4,212	\$4,231
Child / Infant Lot - MIN	\$ 282.00	\$ 282.00	n/a	n/a	\$ 312.00	\$ 426.00	\$ 50.00	\$ 50.00	\$ 250.00	\$ 250.00	\$ 500.00	\$ 500.00	\$ 250.00	\$ 250.00	\$272	\$295
Child / Infant Lot - MAX	\$ 282.00	\$ 282.00	n/a	n/a	\$ 312.00	\$ 426.00	\$ 50.00	\$ 50.00	\$ 625.00	\$ 625.00	\$ 500.00	\$ 500.00	\$ 400.00	\$ 400.00	\$377	\$400
Cremation Lot - MIN	\$ 518.00	\$ 518.00	\$ 1,295.00	\$ 1,295.00	\$ 509.00	\$ 623.00	\$ 250.00	\$ 250.00	\$ 750.00	\$ 750.00	\$ 400.00	\$ 400.00	\$ 595.00	\$ 595.00	\$633	\$652
Cremation Lot - MAX	\$ 518.00	\$ 518.00	\$ 2,650.00	\$ 2,650.00	\$ 509.00	\$ 623.00	\$ 250.00	\$ 250.00	\$ 1,500.00	\$ 1,500.00	\$ 3,900.00	\$ 3,900.00	\$ 3,995.00	\$ 3,995.00	\$2,134	\$2,153
Columbaria Niche - MIN	n/a	n/a	\$ 500.00	\$ 500.00	\$ 656.00	\$ 656.00	\$ 250.00	\$ 250.00	\$ 575.00	\$ 575.00	\$ 300.00	\$ 300.00	\$ 495.00	\$ 495.00	\$463	\$463
Columbaria Niche - MAX	n/a	n/a	\$ 4,195.00	\$ 4,195.00	\$ 656.00	\$ 656.00	\$ 400.00	\$ 400.00	\$ 4,625.00	\$ 4,625.00	\$ 5,800.00	\$ 5,800.00	\$ 6,795.00	\$ 6,795.00	\$3,745	\$3,745
In-ground Family Estate - MIN	n/a	n/a	\$ 3,216.00	\$ 3,216.00	n/a	n/a	n/a	n/a	\$ 11,250.00	\$ 11,250.00	\$ 13,000.00	\$ 13,000.00	\$ 4,590.00	\$ 4,590.00	\$8,014	\$8,014
In-ground Family Estate - MAX	n/a	n/a	\$ 6,495.00	\$ 6,495.00	n/a	n/a	n/a	n/a	\$ 11,250.00	\$ 11,250.00	\$ 45,000.00	\$ 45,000.00	\$ 13,290.00	\$ 13,290.00	\$19,009	\$19,009
Lawn Crypt - MIN	n/a	n/a	\$ 7,695.00	\$ 7,695.00	n/a	n/a	n/a	n/a	\$ 2,500.00	\$ 2,500.00	\$ 5,900.00	\$ 5,900.00	n/a	n/a	\$5,365	\$5,365
Lawn Crypt - MAX	n/a	n/a	\$ 7,695.00	\$ 7,695.00	n/a	n/a	n/a	n/a	\$ 2,500.00	\$ 2,500.00	\$ 16,500.00	\$ 16,500.00	n/a	n/a	\$8,898	\$8,898
Mausoleum Crypt - MIN	n/a	n/a	\$ 4,395.00	\$ 4,395.00	n/a	n/a	n/a	n/a	\$ 1,250.00	\$ 1,250.00	\$ 1,700.00	\$ 1,700.00	\$ 5,495.00	\$ 5,495.00	\$3,210	\$3,210
Mausoleum Crypt - MAX	n/a	n/a	\$12,995.00	\$ 12,995.00	n/a	n/a	n/a	n/a	\$ 2,500.00	\$ 2,500.00	\$ 17,500.00	\$ 17,500.00	\$ 27,995.00	\$ 27,995.00	\$15,248	\$15,248
Green Burial Lot - MIN	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	\$ 2,800.00	\$ 2,800.00	\$ 995.00	\$ 995.00	\$1,898	\$1,898
Green Burial Lot - MAX	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	\$ 2,800.00	\$ 2,800.00	\$ 6,645.00	\$ 6,645.00	\$4,723	\$4,723
Opening / Closing Services																
Adult Burial - Single Depth	\$ 1,556.00	\$ 1,556.00	\$ 1,495.00	\$ 1,495.00	\$ 678.00	\$ 678.00	n/a	n/a	\$ 1,200.00	\$ 1,200.00	\$ 1,075.00	\$ 1,075.00	\$ 1,495.00	\$ 1,495.00	\$1,189	\$1,189
Child/Infant Burial	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	\$ 50.00	\$ 50.00	\$ 695.00	\$ 695.00	\$373	\$373
Cremated Remains Burial	\$ 778.00	\$ 778.00	\$ 795.00	\$ 795.00	\$ 339.00	\$ 339.00	\$ 50.00	\$ 50.00	\$ 500.00	\$ 500.00	\$ 700.00	\$ 700.00	\$ 695.00	\$ 695.00	\$513	\$513
Niche Inurnment	n/a	n/a	\$ 795.00	\$ 795.00	\$ 109.00	\$ 109.00	n/a	n/a	\$ 400.00	\$ 400.00	\$ 650.00	\$ 650.00	\$ 695.00	\$ 695.00	\$530	\$530
Scattering / Ossuary Interment	n/a	n/a	\$ 395.00	\$ 395.00	n/a	n/a	n/a	n/a	\$ 175.00	\$ 175.00	n/a	n/a	\$ 495.00	\$ 495.00	\$355	\$355
Crypt Entombment	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	\$ 775.00	\$ 775.00	\$ 1,495.00	\$ 1,495.00	\$1,135	\$1,135
Additional Fees																
Double Depth Interment Premium	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	\$ 600.00	\$ 600.00	\$ 350.00	\$ 350.00	n/a	n/a	\$475	\$475
Weekend/Holiday Premium - MIN	\$ 226.00	\$ 226.00	\$ 695.00	\$ 695.00	\$ 393.00	\$ 393.00	\$ 50.00	\$ 50.00	\$ 400.00	\$ 400.00	\$ 525.00	\$ 525.00	\$ 340.00	\$ 340.00	\$401	\$401
Weekend/Holiday Premium - MAX	\$ 445.00	\$ 445.00	\$ 1,495.00	\$ 1,495.00	\$ 393.00	\$ 393.00	\$ 50.00	\$ 50.00	\$ 650.00	\$ 650.00	\$ 625.00	\$ 625.00	\$ 775.00	\$ 775.00	\$665	\$665
After Hr Weekday Premium (/hr) -	\$ 90.00	\$ 90.00	\$ 195.00	\$ 195.00	\$ 245.00	\$ 245.00	\$ 50.00	\$ 50.00	\$ 250.00	\$ 250.00	n/a	n/a	\$ 225.00	\$ 225.00	\$193	\$193
After Hr Weekday Premium (/hr) -	\$ 90.00	\$ 90.00	\$ 195.00	\$ 195.00	\$ 245.00	\$ 245.00	\$ 50.00	\$ 50.00	\$ 250.00	\$ 250.00	n/a	n/a	\$ 225.00	\$ 225.00	\$193	\$193
Disinterment (Cremation) - MIN	\$ 226.00	\$ 226.00	\$ 1,595.00	\$ 1,595.00	n/a	n/a	n/a	n/a	n/a	n/a	\$ 700.00	\$ 700.00	\$ 1,390.00	\$ 1,390.00	\$1,228	\$1,228
Disinterment (Casket) - MAX	\$ 733.00	\$ 733.00	\$ 2,995.00	\$ 2,995.00	n/a	n/a	n/a	n/a	n/a	n/a	\$ 1,450.00	\$ 1,450.00	\$ 2,990.00	\$ 2,990.00	\$2,478	\$2,478
Liner / Vaults - MIN	\$ 445.00	\$ 445.00	\$ 295.00	\$ 295.00	\$ 147.00	\$ 147.00	\$ 28.00	\$ 28.00	\$ 700.00	\$ 700.00	\$ 150.00	\$ 150.00	\$ 295.00	\$ 295.00	\$269	\$269
Liner / Vaults - MAX	\$ 1,332.00	\$ 1,332.00	\$ 1,495.00	\$ 1,495.00	\$ 562.00	\$ 562.00	\$ 28.00	\$ 28.00	\$ 1,400.00	\$ 1,400.00	\$ 3,650.00	\$ 3,650.00	\$ 1,795.00	\$ 1,795.00	\$1,488	\$1,488
Monument / Marker Permit - MIN	\$ 90.00	\$ 90.00	\$ 495.00	\$ 495.00	\$ 114.00	\$ 114.00	n/a	n/a	n/a	n/a	n/a	n/a	\$ 100.00	\$ 100.00	\$236	\$236
Monument / Marker Permit - MAX	\$ 271.00	\$ 271.00	\$ 895.00	\$ 895.00	\$ 114.00	\$ 114.00	n/a	n/a	n/a	n/a	n/a	n/a	\$ 795.00	\$ 795.00	\$601	\$601
Administrative Fees - MIN	n/a	n/a	\$ 95.00	\$ 95.00	\$ 43.00	\$ 43.00	n/a	n/a	\$ 100.00	\$ 100.00	\$ 50.00	\$ 50.00	\$ 95.00	\$ 95.00	\$77	\$77
Administrative Fees - MAX	n/a	n/a	\$ 195.00	\$ 195.00	\$ 43.00	\$ 43.00	n/a	n/a	\$ 100.00	\$ 100.00	\$ 450.00	\$ 450.00	\$ 125.00	\$ 125.00	\$183	\$183
Engraving - MIN	n/a	n/a	\$ 395.00	\$ 395.00	\$ 150.00	\$ 150.00	n/a	n/a	\$ 225.00	\$ 225.00	\$ 125.00	\$ 125.00	\$ 295.00	\$ 295.00	\$238	\$238
Engraving - MAX	n/a	n/a	\$ 495.00	\$ 495.00	\$ 208.00	\$ 208.00	n/a	n/a	\$ 300.00	\$ 300.00	\$ 375.00	\$ 375.00	\$ 465.00	\$ 465.00	\$369	\$369

APPENDIX E

FUTURE PRICING: 5% PER YEAR INCREASES

2019 Cemetery Rates Comparison								
Cemetery Offering	Current Rates 2019				Future Rates 2022			
	Oceanview Cemetery		Regional Average		Oceanview Cemetery, 5%/yr		Regional Average - 2%/yr	
	Resident	Non-resident	Resident	Non-resident	Resident	Non-resident	Resident	Non-resident
Right of Interment for Lots and Niches								
Adult Casket Lot - MIN	\$1,556.00	\$1,556.00	\$1,679	\$1,698	\$ 1,801.26	\$ 1,801.26	\$1,781	\$1,802
Adult Casket Lot - MAX	\$1,556.00	\$1,556.00	\$4,212	\$4,231	\$ 1,801.26	\$ 1,801.26	\$4,470	\$4,490
Child / Infant Lot - MIN	\$ 282.00	\$ 282.00	\$272	\$295	\$ 326.45	\$ 326.45	\$289	\$313
Child / Infant Lot - MAX	\$ 282.00	\$ 282.00	\$377	\$400	\$ 326.45	\$ 326.45	\$400	\$425
Cremation Lot - MIN	\$ 518.00	\$ 518.00	\$633	\$652	\$ 599.65	\$ 599.65	\$672	\$692
Cremation Lot - MAX	\$ 518.00	\$ 518.00	\$2,134	\$2,153	\$ 599.65	\$ 599.65	\$2,265	\$2,285
Opening / Closing Services								
Adult Burial - Single Depth	\$1,556.00	\$1,556.00	\$1,189	\$1,189	\$ 1,801.26	\$ 1,801.26	\$1,261	\$1,261
Cremated Remains Burial	\$ 778.00	\$ 778.00	\$513	\$513	\$ 900.63	\$ 900.63	\$545	\$545
Additional Fees								
Weekend Premium - MIN	\$ 226.00	\$ 226.00	\$401	\$401	\$ 261.62	\$ 261.62	\$425	\$425
Weekend Premium - MAX	\$ 445.00	\$ 445.00	\$665	\$665	\$ 515.14	\$ 515.14	\$705	\$705
After Hr Weekday Premium (/hr) - MIN	\$ 90.00	\$ 90.00	\$193	\$193	\$ 104.19	\$ 104.19	\$205	\$205
After Hr Weekday Premium (/hr) - MAX	\$ 90.00	\$ 90.00	\$193	\$193	\$ 104.19	\$ 104.19	\$205	\$205
Disinterment - MIN	\$ 226.00	\$ 226.00	\$1,228	\$1,228	\$ 261.62	\$ 261.62	\$1,304	\$1,304
Disinterment - MAX	\$ 733.00	\$ 733.00	\$2,478	\$2,478	\$ 848.54	\$ 848.54	\$2,630	\$2,630
Liner / Vaults - MIN	\$ 445.00	\$ 445.00	\$269	\$269	\$ 515.14	\$ 515.14	\$286	\$286
Liner / Vaults - MAX	\$1,332.00	\$1,332.00	\$1,488	\$1,488	\$ 1,541.96	\$ 1,541.96	\$1,579	\$1,579
Marker Permit - MIN	\$ 90.00	\$ 90.00	\$236	\$236	\$ 104.19	\$ 104.19	\$251	\$251
Marker Permit - MAX	\$ 271.00	\$ 271.00	\$601	\$601	\$ 313.72	\$ 313.72	\$638	\$638

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APPENDIX F

MATRIX OF PROPOSED SITE IMPROVEMENTS BY ROI

Cemetery Area	Proposed Improvement	Estimated Return on Investment (ROI)	Survey Ranking
Lakeshore Green Burial Area	Lakeshore Green Burial	Very High	<p>2nd and 3rd out of 7 Interment Options (Green Burial, memorial features)</p> <p>2nd out of 3 Interment Priorities (Provision of Green Burial)</p> <p>1st out of 7 Visitor Amenities (Grounds improvements, including shade trees and other plantings)</p> <p>2nd out of 5 Recreation + Access to Nature Priorities (Ecological improvements)</p> <p>3rd out of 7 Visitor Amenities (Improved wayfinding and site info, including signs)</p> <p>1st and 3rd of 5 Priorities for Cemetery Services/Events (Paying respects/visiting graves and informational)</p>
Various Locations	Improved Public Restroom Access	High	<p>2nd out of 7 Visitor Amenities (Restrooms)</p>
Historic Heart Area/Ocean View Abbey Mausoleum	Abbey Mausoleum Restoration with the addition of Interior Niches	High	<p>1st of out of 3 Heritage Priorities (Preservation and restoration of mausoleum)</p> <p>5th of out of 7 Interment Options (Mausoleum)</p> <p>1st out of 3 Interment Priorities (Cremation interment options)</p> <p>1st out of 7 Visitor Amenities (Grounds improvements, including shade trees; other plantings)</p> <p>2nd out of 5 Recreation + Access to Nature Priorities (Ecological improvements)</p>
Active Burial Area / Crest Avenue	Crest Avenue Improvements	High	<p>1st out of 7 Visitor Amenities (Grounds improvements, including shade trees and other plantings)</p> <p>1st and 2nd out of 5 Recreation + Access to Nature (Seating/views for quiet contemplation, ecological improvements)</p>

Ocean View Cemetery: Matrix of Proposed Site Improvements by ROI

Cemetery Area	Proposed Improvement	Estimated Return on Investment (ROI)	Survey Ranking
Historic Heart Area/Chapel Site	Future Celebration Garden (at Existing Chapel Site)	High	<p>1st out of 3 Heritage Priorities (Restoration of mausoleum and surrounding area)</p> <p>1st, 3rd, 4th, and 6th out of 7 Interment Options (Scattering garden, memorial features, columbarium, and family urn)</p> <p>1st out of 3 Interment Priorities (Cremation interment options)</p> <p>1st out of 7 Visitor Amenities (Grounds improvements, including shade trees and other plantings)</p> <p>2nd out of 5 Recreation + Access to Nature Priorities (Ecological improvements)</p>
Dune Edge	Dune Edge Landform	Medium to High	<p>1st out of 3 Heritage Priorities (Restoration of mausoleum and surrounding area)</p> <p>1st out of 7 Visitor Amenities (Grounds improvements including waste management)</p> <p>2nd out of 5 Recreation + Access to Nature (Ecological Improvements)</p> <p>1st out of 7 Visitor Amenities (Grounds improvements, shade trees and other plantings)</p>
Various Locations	New Water supply	Medium	<p>1st out of 7 Visitor Amenities (Grounds improvements including water supply)</p>
Front Entry	New Entry Gates and Fencing	Medium	<p>6th out of 7 Visitor Amenities (Entry improvements)</p>
Main Entry	New Cemetery Kiosk	Medium	<p>3rd out of 7 Visitor Amenities (Improved wayfinding and site info, including maps and kiosk)</p>
Lakeshore	Lakeshore Memorialization and Cremation Nodes	Medium	<p>1st out of 7 Visitor Amenities (Grounds improvements including seating, shade trees and other plantings)</p>
Various Locations	New Wayfinding Signage (Proposed Throughout)	Medium	<p>3rd out of 7 Visitor Amenities (Improved wayfinding and site info, including signs)</p>

Ocean View Cemetery: Matrix of Proposed Site Improvements by ROI

Cemetery Area	Proposed Improvement	Estimated Return on Investment (ROI)	Survey Ranking
Historic Heart Area/Infant Interment	Restored Little Spirits Garden (Infant Interment Area Restoration + Commemoration)	Medium	<p>1st and 3rd out of 7 Interment Options (Scattering garden, memorial features, columbarium)</p> <p>1st out of 3 Interment Priorities (Cremation interment options)</p> <p>1st and 3rd out of 7 Visitor Amenities (Grounds improvements, including shade trees and other plantings, as well as Improved wayfinding and site info, including signs)</p> <p>2nd out of 5 Recreation + Access to Nature Priorities (Ecological improvements)</p> <p>1st and 3rd of 5 Priorities for Cemetery Services/Events (Paying respects/visiting graves and informational)</p>
Historic Heart Area / Circle Center	Center Circle Memorial Garden	Medium	<p>1st , 3rd and 4th out of 7 Interment Options (Scattering garden, memorial features, columbarium)</p> <p>1st out of 3 Interment Priorities (Cremation interment options)</p> <p>1st out of 7 Visitor Amenities (Grounds improvements, including shade trees and other plantings)</p> <p>2nd out of 5 Recreation + Access to Nature Priorities (Ecological improvements)</p>
East Woodland Edge	East Woodland Cremation Garden with Memorialization	Medium	<p>1st , 3rd and 4th of 7 Interment Options (Scattering garden, memorial features, columbarium)</p> <p>1st of 3 Interment Priorities (Cremation interment options)</p> <p>1st of 7 Visitor Amenities (Grounds improvements, including shade trees and other plantings)</p> <p>2nd of 5 Recreation + Access to Nature Priorities (Ecological improvements)</p>

Ocean View Cemetery: Matrix of Proposed Site Improvements by ROI

Cemetery Area	Proposed Improvement	Estimated Return on Investment (ROI)	Survey Ranking
Various Locations	Waste Management	Low	<p>1st out of 7 Visitor Amenities (Grounds improvements including waste management)</p> <p>2nd out of 5 Recreation + Access to Nature Priorities (Ecological improvements)</p>
Various Locations	Section Markers (Proposed Throughout)	Low	<p>3rd out of 7 Visitor Amenities (Improved wayfinding and site info, including signs)</p> <p>1st and 3rd of 5 Priorities for Cemetery Services/Events (Paying respects/visiting graves and informational)</p>
South Uplands / Avenue of the Holy Cross	Avenue of the Holy Cross Improvements	Low	<p>3rd out of 7 Interment/memorial Options (Memorial features)</p> <p>1st out of 7 Visitor Amenities (Grounds improvements including shade trees and other plantings)</p> <p>2nd out of 5 Recreation + Access to Nature Priorities (Ecological improvements)</p>
Lakeshore Green Burial Area / Trailhead for Spirit Trail	Boardwalk and View Platform (Connection to Spirit Trail)	Low	<p>3rd out of 5 Recreation + Access to Nature Priorities (natural and neighborhood pathway connections)</p> <p>Recommended Visitor Amenities (Grounds improvements - including destination areas)</p>
Historic Heart / Civil War Veterans Memorial	New Veterans Memorial Plaza and Flagpole Area Enhancements	Low	<p>3rd out of 7 Visitor Amenities (Improved wayfinding and site info, including signs)</p> <p>1st and 3rd of 5 Priorities for Cemetery Services/Events (Paying respects/visiting graves and informational)</p>
Lakeshore + Entry / Veterans Section	Veterans Information and Signage Improvements	Low	<p>3rd out of 7 Visitor Amenities (Improved wayfinding and site info, including signs)</p> <p>1st and 3rd of 5 Priorities for Cemetery Services/Events (Paying respects/visiting graves and informational)</p>
Various Locations	Lake Maintenance Program	Low	<p>4th out of 5 Recreation + Access to Nature Priorities (Partnerships to manage and protect adjacent natural areas)</p>

APPENDIX G

PROPOSED CAPITAL IMPROVEMENTS AND COST ESTIMATES

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Ocean View Cemetery: Proposed Capital Improvements and Cost Estimates

Proposed Improvement	Cemetery Area	Phase	Priority	Amount (with 20% Contingency)
New Water supply	Various Locations	1	A	\$81,540.00
Lakeshore Green Burial Area	Lakeshore Green Burial Area	1	A	\$186,000.00
Lakeshore Cremation and Memorialization Nodes	Lakeshore	1	A	\$53,730.00
Waste Management	Various Locations	1	A	\$10,500.00
East Woodland Cremation Garden	East Woodland Edge	1	B	\$42,600.00
New Entry Gates and Fencing	Front Entry	1	B	\$165,000.00
New Cemetery Kiosk	Main Entry	1	B	\$16,440.00
Crest Avenue Improvements	Active Burial Area / Crest Avenue	1	C	\$62,640.00
Wayfinding Signage (Proposed Throughout)	Various Locations	2	A	\$7,500.00
Section Markers (Proposed Throughout)	Various Locations	2	B	\$26,650.00
Improved Public Restroom Access	Various Locations	2	B	\$23,760.00
Dune Buffer	Dune Edge	2	B	\$70,800.00
Veterans Memorial Improvements	Historic Heart / Civil War Veterans Memorial	2	B	\$63,000.00
Mausoleum Restoration with Interior Niches	Historic Heart Area / Ocean View Abbey Mausoleum	2	C	\$79,230.00
Future Celebration Garden (at Existing Chapel Site)	Historic Heart Area / Chapel Site	3	A	\$192,000.00
Center Circle Memorial Garden	Historic Heart Area / Center Circle	3	A	\$188,280.00
Lake Maintenance Program	Various Locations	3	B	\$15,000.00
Restored "Little Spirits Garden" Infant Interment Area	Historic Heart Area / Infant Interment	3	B	\$52,980.00
Avenue of the Holy Cross Improvements	South Uplands / Avenue of the Holy Cross	3	C	\$58,480.00
Boardwalk and Viewing Platform (Connection to Spirit Trail)	Lakeshore Green Burial Area / Trailhead for Spirit Loop Trail	3	C	\$495,625.00

APPENDIX H

IMPROVEMENT AREAS PHOTOS

FRONT ENTRY



MAIN ENTRY (KIOSK)



SOUTH UPLANDS



SOUTH UPLANDS / AVENUE OF THE HOLY CROSS



LAKESHORE



OPERATIONS BUILDING (EXISTING RESTROOM)



LAKESHORE GREEN BURIAL AREA



HISTORIC HEART CENTER CIRCLE



HISTORIC HEART INFANT AREA



EAST WOODLAND EDGE



HISTORIC HEART AREA/OCEAN VIEW ABBEY MAUSOLEUM



HISTORIC HEART AREA/CHAPEL SITE



HISTORIC HEART AREA/CIVIL WAR VETERANS



LAKESHORE + ENTRY/ VETERANS SECTION



DUNE AREA



ACTIVE BURIAL AREA/CREST AVENUE



