

Santa Margarita Cemetery District

Draft Policies & Procedures



Date: August 11, 2026

Santa Margarita Cemetery District

Draft Policies & Procedures

Adopted: [Date]

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1. Purpose and Authority

This Policies and Procedures establishes administrative, operational, and governance standards for the **Santa Margarita Cemetery District** ("District").

The District operates pursuant to applicable provisions of the laws of the State of California, including but not limited to:

- California Health & Safety Code
- California Public Records Act
- Ralph M. Brown Act
- Government Code provisions applicable to special districts

This document is intended to:

- Promote consistent operations
- Ensure transparency and accountability
- Protect public assets
- Provide clear guidance to employees, trustees, contractors, and the public

The policies and procedures found in this document have been reviewed and approved by the District Board of Trustees. The Board has discretion in implementing and applying these Policies and Procedures on a case by case basis. The Board may, in light of the record, waive or interpret Policies and Procedures as long as the decision is consistent with State Law and regulations.

2. Mission Statement

The mission of the District is to provide compassionate, professional service and continuity to families during difficult times.

Core values of the District include:

- Respect
- Integrity
- Compassion
- Service
- Stewardship
- Transparency

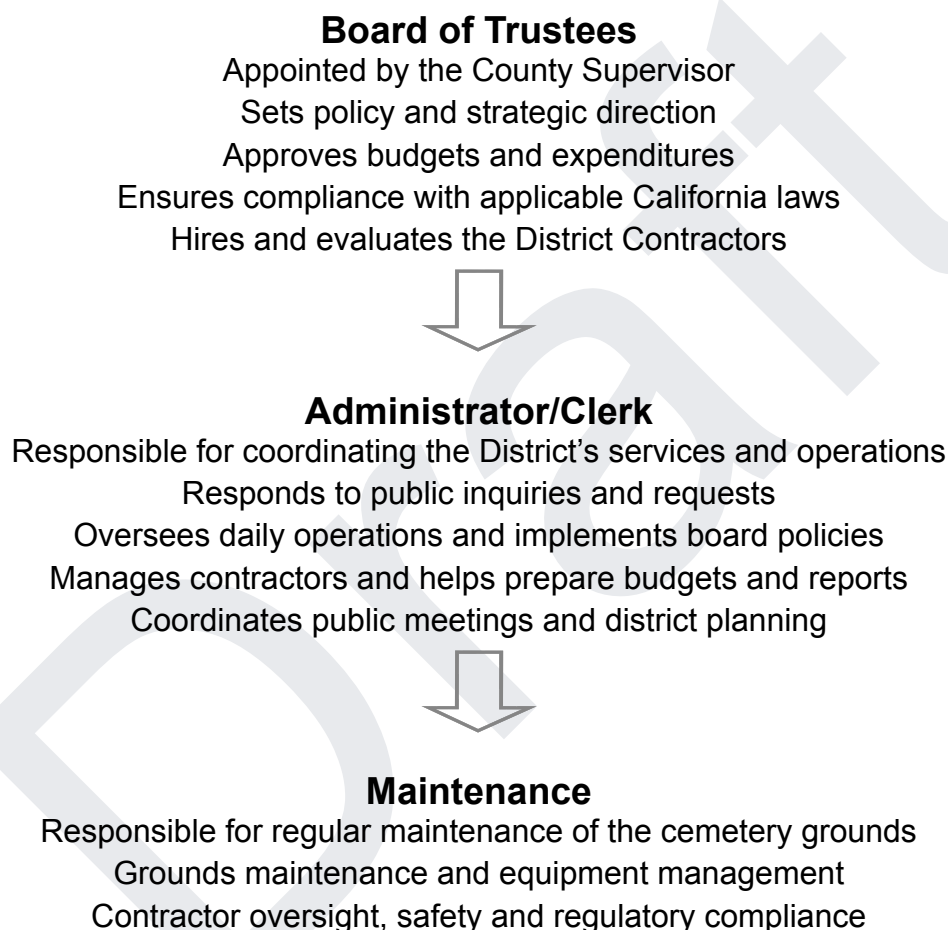
3. Governance and Board Operations

3.1 Board Authority

The Cemetery District Board of Trustees establishes policy, approves budgets, oversees finances, and provides strategic direction. The Board is established and

operates subject to a number of state laws as mentioned above. Individual Trustees may not direct staff or contractors independently unless specifically authorized by Board action. The following organizational chart shows the structure of the District. The Administrator-Clerk and Maintenance duties are to be completed by a contractor.

Santa Margarita Cemetery District Organizational Chart



3.2 Board Meetings

The District's meetings are conducted the first Tuesday of the month at 11:00 a.m. at the Santa Margarita Senior Center. The District shall comply with the California Ralph M. Brown Act regarding open meetings. Regular meetings shall include:

- Agenda shall be posted on the website 72 hours before the meeting
- The Agenda shall also be posted on the downtown kiosk
- Public comment opportunities shall be provided for at each meeting
- Summary meeting minutes shall be recorded by the District Administrator

- Meeting minutes shall be considered by the Board

3.3 Conflict of Interest

Board members and employees shall comply with all applicable conflict-of-interest laws and annual disclosure requirements. No employee or trustee shall use District resources for personal benefit. Any conflicts shall be disclosed as required.

3.4 Board Conduct

Trustees shall:

- Treat staff and the public respectfully
- Avoid interference with operations
- Maintain confidentiality where required
- Support adopted Board decisions

4. Public Transparency

The District is committed to providing transparent services and public accountability.

4.1 Public Information

Public information shall be maintained and disclosed in accordance with the applicable California Laws. A public information request may be submitted to the District via an email to SMCD@sm-cd.org or a phone message at (805) 438-3502. The District has a part-time contractor and may take at least 48-72 hours to return your inquiry. Thank you for your patience.

4.2 Confidential Information

The District shall protect confidential records including:

- Personnel records
- Burial records containing protected information
- Legal communications

4.3 Equal Service

The District shall provide services without discrimination based on:

- Race
- Religion
- Gender
- National origin
- Disability
- Veteran status
- Other protected classifications

5. Professional Services

5.1 Contracting/Hiring Practices

The District is an equal opportunity agency that can contract with individuals and companies for the operational, administrative, and maintenance services to be provided to the public.

Hiring a contractor shall be based on:

- Qualifications
- Experience
- Merit
- Operational needs

5.2 Contractors Conduct

Contractors or employees are expected to:

- Maintain professionalism
- Report to work when needed
- Treat the public respectfully
- Follow safety procedures
- Protect and maintain District property
- Update the Board with regard to activities completed

Prohibited conduct includes:

- Theft
- Harassment
- Substance abuse on duty
- Workplace violence
- Misuse of equipment

5.3 Work Hours

Contractors may establish their own work schedule as long as the public is professionally and effectively served, the Cemetery is well maintained, and the work completed within budget. Hours worked shall be tracked and invoices submitted each month for payment.

5.4 Training

The District may provide contractors with training as needed for:

- Safety procedures
- Equipment operation
- Administrative Procedures
- Public services interaction
- Cemetery operations
- Harassment prevention

5.5 Discipline

Contractors may be terminated at the discretion of the Board of Trustees consistent with the applicable laws of California. Serious misconduct may result in immediate termination.

6. Financial Policies

6.1 Budgeting

The District shall adopt an annual operating budget at its May meeting. A Draft Budget shall be submitted at the April meeting for consideration and comment. The Administrator shall work with the County Auditor to project future revenues.

Budget categories should include but are not limited to:

- Professional Services
- Maintenance
- Equipment
- Utilities
- Capital improvements
- Services and Supplies
- Miscellaneous

6.2 Internal Controls

The District cannot spend any funds without submitting a Board approved draw warrant to the County. Draw warrants are publicly considered by the Board at their monthly meetings. On occasion a draw warrant is needed prior to the Board meeting. In this instance the warrant will be submitted at the next Board meeting. The District shall maintain financial controls including:

- Monthly financial reporting through the submittal of Draw Warrants
- Monthly Board approval of expenditures
- Audits or financial review shall be completed as required by law

6.3 Deposits

All payments received or purchases made, shall be:

- Logged and tracked
- Deposited promptly
- Supported by receipts

6.4 Investments

District funds shall be invested in accordance with California law. The County holds and disburses the District's funds in appropriate trust accounts.

7. Cemetery Operations

7.1 Grounds Maintenance

The District shall maintain cemetery grounds in a dignified and safe condition. Tasks to be completed Include:

- Mowing
- Irrigation
- Tree maintenance
- Weed and Varmint abatement
- Minor Road upkeep

- Trash removal

The Grounds Maintenance tasks shall complete the task as described in the attached scope of work (Attachment A).

7.2 Hours of Operation

Public visiting hours shall be established by the Board. Visiting hours are currently 8:00 a.m. to Sunset.

Employees may limit access during:

- Hazardous conditions
- Maintenance operations
- Emergencies

7.3 Decorations

The District recognizes that decorations and structures are an expression of care and remembrance for families and friends. However, decorations may be restricted to ensure maintenance efficiency and public safety. The District reserves the right to remove:

- Dead and Artificial flowers
- Hazardous items
- Glass containers
- Alcoholic containers

If possible, the District will notify the family or loved one prior to removing the decoration or structure.

8. Interment Procedures

8.1 Scheduling and Information

Residents living within the District's service area may use the cemetery for interment services. Residents from outside the service area must pay an additional \$400 non-resident fee to be interred in the cemetery. All burials shall be scheduled by contacting the District through its website or leaving a message on the District phone (805) 438-3502, or email SMCD@Sm-cd.org. A District representative will contact you within 48-72 hours.

8.2 Grave Preparation-Cremated Remains

Cremated remains may be interred in a plot in the Cemetery.

- Cremains will only be interred in a plot
- No Scattering on-site
- Cremains shall be in a vault or a sealed urn for interment
- Graves will be opened and closed by District personnel

8.3 Grave Preparation-Full Burial

Graves shall be prepared in accordance with applicable State safety and operational standards. Please allow for this time in your planning for a burial.

- Full burial will only be interred in a plot
- A concrete liner or vault is required
- Graves will be opened and closed by a District contractor

8.4 Headstones and Markers

All inscriptions, words, symbols, images, emblems, and designs placed on headstones or markers shall be respectful and appropriate for the cemetery. The Cemetery reserves the right to prohibit or require removal of any inscription, image, symbol, or design that is obscene, vulgar, profane, threatening, discriminatory, hateful, or otherwise inappropriate for public display. Any of the above listed graphics that could reasonably be considered offensive or disruptive to the peaceful and respectful character of the cemetery are prohibited. All headstone and grave markers must get Board approval and *must* be installed by a Cemetery contractor.

8.5 Coping

No coping, curbing, fencing, or raised border may be installed around a burial plot without written approval from the Cemetery Board/Manager. Approved coping must remain entirely within the boundaries of the assigned burial space, be constructed of an approved material, and installed by a cemetery contractor or other qualified person. Cemetery reserves the right to establish reasonable requirements regarding dimensions, materials, placement, and construction to ensure safe and efficient maintenance of the cemetery grounds. The plot owner is responsible for maintaining approved coping in good condition. Any unauthorized, damaged, unsafe, or improperly maintained coping may be removed by the Cemetery following appropriate notice.

8.6 Disinterment

Disinterment requests must comply with state law and obtain appropriate authorization.

9. Records Management

The District recognizes that public records are valuable assets essential to conducting District business, preserving historical information, ensuring transparency, and complying with California law. The purpose of this policy is to:

- Establish standards for the creation, maintenance, retention, storage, and destruction of District records.
- Ensure compliance with California Public Records Act (Government Code §7920 et seq.).
- Protect permanent historical records.
- Promote efficient management of District information.
- Reduce unnecessary storage costs.
- Ensure records are available for public inspection when required by law.

9.1 Permanent Records

District records shall be created, maintained, retained, protected, and destroyed in accordance with this policy and the District's Records Retention Schedule. No employee, director, contractor, or volunteer may destroy District records except as authorized by this policy. The District shall maintain permanent records including:

- Interment records and plot ownership records
- Maps
- Board minutes
- Financial reports

9.2 Digital Records

These records shall be made available on the District website as allowed and appropriate.

9.3 Record Retention

Records shall be retained in accordance with applicable retention schedules and legal requirements.

10. Public Conduct and Cemetery Rules

The cemetery is a place of respect and reflection. The following are prohibited:

- Vandalism
- Alcohol or illegal drugs
- Firearms except as permitted by law
- Excessive noise
- Unauthorized vehicles
- Disturbing plots, graves or services

Pets must remain leashed. The District may remove individuals violating cemetery rules.

11. Safety and Risk Management

11.1 Workplace Safety

The District shall maintain a safe workplace and comply with any requirements. Contractors are responsible for compliance with all applicable State laws.

11.2 Equipment Safety

Only trained personnel may operate District equipment. Equipment inspections shall occur regularly.

11.3 Incident Reporting

All accidents, injuries, or property damage shall be reported immediately. Incident reports shall be documented and retained.

12. Facilities and Equipment

12.1 Equipment Inventory

The District shall maintain an inventory of District owned equipment. The equipment shall be locked in the sheds located on the District property and is for District use only.

12.2 Security

The District shall take reasonable steps to secure:

- Sheds and Structures
- Records
- Equipment
- Grave sites

13. Public Requests

13.1 Complaints

Complaints shall be handled respectfully and documented when necessary.

13.2 Response Time

The District shall attempt to respond to inquiries within a reasonable timeframe. Within 72 hours of the initial contact of the District, a District representative will contact the individual.

13.3 Claims Against the District

Claims shall be processed in accordance with applicable law.

14. Emergency Procedures

The District shall maintain emergency procedures for:

- Severe weather
- Wildfire
- Earthquake
- Utility outages
- Equipment accidents
- Hazardous material spills

Emergency contact information shall be maintained and updated regularly.

15. Information and Communications

15.1 Email Use

District email systems are intended for official business.

15.2 Website

The District website should be regularly maintained and provide:

- Meeting agendas and Minutes
- Contact information
- Burial information
- Financial Information
- Policies and Bylaws

16. Policy for Plot Sales

16.1 Purpose

The purpose of this policy is to establish fair, consistent, and legally compliant procedures for the sale of burial rights within the Santa Margarita Cemetery District ("District"). The District is committed to providing equitable access to burial spaces while protecting the long-term interests of the public cemetery.

16.2 Definitions

Interment Right

The contractual right to use a designated burial space for human remains. Ownership of the land remains with the District.

Purchaser

The individual or entity purchasing the interment right.

Resident

A person whose primary residence is located within the legal boundaries of the Santa Margarita Cemetery District.

Non-resident

A person whose primary residence is outside District boundaries.

16.3 Eligibility

The District shall sell interment rights to:

- Residents of the District
- Former residents when approved by the Board
- Immediate family members of persons already interred in the cemetery
- Others as approved by District policy and availability of space

The Board of Trustees reserves the right to establish priorities during periods of limited burial space.

16.4 Residency Verification

Residency shall be verified before resident pricing is applied. Acceptable documentation includes:

- California Driver License
- California Identification Card
- Property tax bill
- Utility bill
- Other documentation acceptable to the District

Failure to provide documentation shall result in non-resident pricing.

16.5 Fees

The Board of Trustees shall establish all fees. Separate pricing may be established for:

- Resident plot sales
- Non-resident plot sales
- Cremation plots
- Opening and closing services
- Marker installation
- Endowment funds
- Administrative fees

Current fees are maintained in the District's Fee Schedule available on the website.

16.6 Selection of Burial Spaces

Burial spaces shall be selected from available inventory. The District may:

- Limit selection within active sections
- Reserve areas for future development
- Reassign equivalent spaces when necessary due to operational needs

No specific view, landscaping, or future conditions are guaranteed.

16.7 Purchase Procedure

Prior to completing a sale:

1. Purchaser completes District Purchase Form.
2. Purchaser provides identification.
3. Residency is verified.
4. Payment is received.
5. Sale is recorded in permanent cemetery records.

No burial rights are conveyed until payment is received in full.

16.8 Payment

Payment shall be made by:

- Cash
- Check
- Cashier's Check

16.9 Transfer of Burial Rights

Transfers shall comply with California law. The District may require:

- Written request
- Proof of ownership
- Notarized signatures
- Payment of applicable transfer fees

Transfers become effective only after District approval and recordation.

16.10 Repurchase by District

The District may repurchase unused interment rights in accordance with applicable law and Board policy. Repurchase price shall not exceed the original purchase price unless otherwise authorized by Board policy.

16.11 Refunds

Refund requests shall be submitted in writing. Refunds may be approved only when:

- No interment has occurred.
- No marker has been installed.
- Ownership is clear.

Administrative fees may be deducted. The Board may deny refund requests when doing so would adversely affect cemetery operations.

16.12 Reservation of Future Plots

The District may limit advance purchases to ensure future burial capacity for District residents. The Board may establish:

- Maximum number of plots per purchaser
- Age requirements
- Residency requirements
- Family reservation policies

16.13 Right of Refusal

The District reserves the right to refuse any sale that:

- Violates California law
- Violates District regulations
- Would create legal disputes regarding ownership
- Exceeds available inventory
- Is inconsistent with Board policy

16.14 Records

The District shall maintain permanent records of:

- Purchaser name
- Contact information
- Plot location
- Purchase date
- Purchase price
- Transfers
- Interments

Records shall be maintained in accordance with District Records Retention Policy and applicable California law.

17. Policy Review and Amendments

This document shall be reviewed periodically by the Board of Trustees. Policies may be amended by Board action. Contractors shall acknowledge receipt of updated policies.

Adoption Statement

Approved by the Board of Trustees of the **[District Name] Cemetery District** on this ____ day of _____, **2026**.

Board Chair: _____

District Manager: _____

Clerk/Secretary: _____

Attachment A - Scope of Work - Maintenance

Scope of Work

Cemetery Maintenance Contractor

1. Purpose

The Contractor shall provide labor, equipment, tools, supervision, transportation, and incidental materials necessary to maintain the Santa Margarita Cemetery in a safe, respectful, attractive, and operational condition consistent with accepted cemetery industry standards.

The Contractor shall perform work in accordance with District policies, applicable California laws, Cal/OSHA regulations, and directives issued by the District Manager or Board of Trustees.

2. General Responsibilities

The Contractor shall:

- Maintain cemetery grounds in a neat and respectful condition.
- Exercise professionalism and sensitivity when interacting with families and visitors.
- Protect all monuments, headstones, markers, landscaping, irrigation systems, utilities, and District property.
- Report unsafe conditions immediately.
- Perform work without unnecessary disruption to funeral services.
- Maintain confidentiality regarding burial records and family information.

3. Grounds Maintenance

The Contractor shall provide routine maintenance including:

- String trimming around monuments, fences, signs, trees, and structures.
- Edging sidewalks, curbs, and landscaped areas.
- Removal of debris from markers, plots and roadways.

Frequency:

- Weekly during growing season.
- As needed during dormant periods.

Weed Control

- Mechanical removal of weeds.
- Herbicide application where approved by the District.
- Weed control around monuments and fencing.
- Weed removal from roadways and parking areas.

Contractor shall comply with all pesticide licensing requirements if herbicides are applied.

Tree Maintenance

Contractor shall:

- Remove fallen limbs.
- Prune low-hanging branches.
- Remove dead vegetation.
- Notify District of hazardous trees requiring arborist services.

Tree removal exceeding six-inch trunk diameter requires prior District approval.

Shrubs and Landscaping

- Trim shrubs.
- Remove dead plants.
- Replace mulch when authorized.
- Maintain landscape appearance.

4. Irrigation System

Contractor shall:

- Inspect irrigation weekly.
- Repair minor leaks.
- Replace sprinkler heads.
- Adjust timers seasonally.
- Report major repairs immediately.

Major repairs shall require District authorization.

5. Burial Services

When requested, Contractor shall assist with burial services.

6. Roadways and Walkways

Provide regular maintenance services Including:

- Sweeping
- Debris removal
- Minor pothole repair
- Hazard identification

9. Sheds and Structures

The contractor shall maintain the following areas;

- Maintenance sheds
- Storage buildings
- Cleaning
- Minor repairs
- Graffiti removal
- Pressure washing

10. Memorial Decorations

Contractor shall:

- Remove decorations in accordance with District Rules.
- Dispose of faded flowers.
- Retain prohibited items during required holding periods.
- Notify District of unusual circumstances.

11. Safety Requirements

Contractor shall comply with:

- Cal/OSHA regulations
- Injury and Illness Prevention Program (IIPP)
- Hazard Communication requirements
- Personal Protective Equipment requirements

12. Emergency Response

Contractor shall respond to:

- Storm damage

- Fallen trees
- Irrigation failures
- Vandalism
- Public safety hazards

Emergency response shall occur within the timeframe specified in the contract (recommended: four hours for urgent hazards).

13. Reporting

Contractor shall submit monthly written reports including:

- Work completed
- Irrigation repairs
- Safety issues
- Equipment concerns
- Recommendations

15. Hours of Work

Routine work shall be completed Monday through Sunday at any time. Funeral services and emergency work shall be performed as scheduled and needed by the District.

Attachment B - Scope of Work Administrator/Clerk

Scope of Work

Contract Administrator

1. Purpose

The Contract Administrator shall provide executive, administrative, financial, and operational management services for the Santa Margarita Cemetery District under the direction of the Board of Trustees. The Contractor shall administer the day-to-day operations of the District, implement Board policies, ensure compliance with applicable laws, and coordinate cemetery services.

The Contract Administrator is an independent contractor and is not an employee of the District.

2. General Administration

The Contract Administrator shall:

- Serve as the primary administrative representative of the District.
- Implement policies adopted by the Board.
- Advise the Board on operational, financial, and regulatory matters.
- Coordinate with legal counsel, auditors, consultants, and contractors.
- Respond to public inquiries and requests.
- Maintain regular office hours and be reasonably available by telephone and email.

3. Board Support

The Contract Administrator shall:

- Prepare Board meeting agendas in compliance with the Brown Act.
- Assemble and distribute Board packets.
- Attend all regular and special Board meetings.
- Record and prepare meeting minutes.
- Maintain Board resolutions, ordinances, and policy manuals.
- Track Board actions and follow up on assigned tasks.

4. Cemetery Operations

Coordinate and oversee:

- Plot sales.
- Interment scheduling.
- Grave location verification.
- Contractor scheduling.
- Headstone and Marker installation.
- Customer service.
- Cemetery records.
- Cemetery mapping.
- Burial permits.
- Daily cemetery operations.

5. Contractor Management

Administer contracts for:

- Grounds maintenance.
- Burial services.
- Landscaping.
- Irrigation repairs.
- Tree services.
- Pest control.
- Janitorial services.
- Engineering or consulting services.

Responsibilities include:

- Reviewing invoices.
- Monitoring contract compliance.
- Inspecting completed work.
- Recommending contract renewals.
- Preparing bid specifications when necessary.

6. Financial Administration

The Contract Administrator shall:

- Prepare annual operating budgets.
- Monitor expenditures.
- Review monthly financial reports.

- Approve invoices within delegated authority.
- Coordinate accounts payable and receivable.
- Monitor investment accounts.
- Coordinate annual audit preparation.
- Maintain financial records.
- Prepare budget amendments when necessary.

7. Public Records and Records Management

The Contract Administrator shall:

- Maintain official District records.
- Administer Public Records Act requests.
- Implement the District's Records Retention Policy.
- Maintain digital and physical files.
- Protect confidential information.
- Coordinate destruction of records in accordance with approved retention schedules.

8. Regulatory Compliance

Ensure District compliance with applicable:

- California Health and Safety Code.
- Government Code.
- Public Records Act.
- Brown Act.
- Fair Political Practices Commission (FPPC) requirements.
- Form 700 filing requirements.
- State Controller reporting.
- County reporting requirements.
- OSHA and Cal/OSHA administrative requirements.
- District policies.

9. Public Relations

Serve as the District's administrative contact for:

- Families.
- Funeral homes.
- Monument companies.
- Veterans organizations.

- County agencies.
- Local government.
- Community organizations.
- Media inquiries as directed by the Board.

10. Cemetery Records

Maintain accurate records of:

- Burials.
- Plot ownership.
- Transfers.
- Cremation records.
- Cemetery maps.
- Burial permits.
- Historical cemetery records.

11. Budget and Strategic Planning

Assist the Board by preparing:

- Annual budget.
- Capital improvement plans.
- Equipment replacement schedules.
- Fee studies.
- Long-range operational planning.
- Reserve analyses.

12. Grant Administration

When applicable:

- Identify grant opportunities.
- Prepare grant applications.
- Monitor grant compliance.
- Prepare grant reports.

13. Procurement

Coordinate procurement of:

- Equipment.
- Supplies.
- Professional services.
- Public works projects.
- Maintenance contracts.

Ensure compliance with District purchasing policies.