

# Historic Cemetery Long Range Planning Workbook



*Arriving at one goal is the starting point to another. ~John Dewey*

Oregon Historic Cemeteries Program  
Oregon Parks and Recreation Department



## Introduction

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Oregon's historic cemeteries are wonderful cultural, historical and natural resources. The Oregon Commission on Historic Cemeteries' goal is to preserve those resources. Long range planning is a vital component to this effort.

Whether you are caring for a private family cemetery or hosting living history tours at a tourist destination, long range planning is for you. A good plan is the basis for a healthy organization that can set goals and attain them. A plan will allow you to understand your assets, encourage community support, take advantage of surprise opportunities and feel confident in the longevity of your organization.

The intent of this workbook is to provide a Do-It-Yourself tool to create a medium to long range plan for your historic cemetery. It includes components for maintaining the historic integrity, building a strong organization and operating as a cemetery.

The workbook can remain the only product of the planning process or you can create a nice fancy document.

The plan should be used regularly, updated every five years and redone every 10 years.

This plan will provide priorities, but it will also incorporate dream projects and long range plans so you will be able to seize opportunities as they arise.

Everyone related to your organization should be invited to participate on some level – Board members, members, partner organizations, customers, visitors, descendants of the interred, etc. It is best to have them involved in planning because they will certainly be involved in the implementation. They can participate in the meetings, brainstorming, review, research, etc.

Be sure to keep all the brainstorm ideas from this process for future use.

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## Mission/Purpose

Every organization should know why it exists. If you already have a mission statement or purpose (or both) insert it here. This should be the basis of all of your choices. In fact, you will refer to it regularly throughout this process.

### *What is a mission statement?*

A mission statement is a clearly written, easy-to-remember sentence, short list of bullet points, or paragraph illustrating an organization's goals and purpose. It has one common function: to guide you in making critical decisions that effect the direction of your organization. A mission statement identifies your organization to the public.



A mission statement is:

- "What we are here to do"
- A clear and compelling reason for being that serves to unify an organization's efforts
- Crisp, clear, engaging, verging on unreasonable.

Friends of Jacksonville Cemetery:  
*To restore, preserve, document, and safeguard our cemetery and its history for future generations.*

Examples –

- Disney: *To make people happy.*
- 3M: *To solve unsolved problems innovatively.*
- Mary Kay Cosmetics: *To give unlimited opportunity to women.*
- Nike: *To experience the emotion of competition, winning and crushing competitors.*
- Chicago History Museum: *The Chicago History Museum cares for, showcases, and interprets millions of authentic pieces of Chicago and U.S. history. Our ability to illuminate the past is a reminder of what really happened once upon a time, sheds light on the present, and compellingly informs the future. We invite you to engage with our stories and make history yourself.*
- Royal BC Museum: *Through research and education, we strive to broaden understanding about our province and inspire curiosity and wonder.*

A mission statement should include one or all of the following:

- *Statement of Purpose* – An overarching, inspirational purpose.  
Example – “To encourage future generations to remember the actions and experiences of those people who were here before them.”
- *Statement of Strategy* – An explanation of the way your organization functions.  
Example – “To be vital to the community through participation and outreach.”
- *Statement of Value* – A description of the philosophical approach with which the organization undertakes its work.  
Example – “To be driven by respect and stewardship.”
- *Statement of Behavioral Standards* – How the organization participants relate to the public and constituents.  
Example – “To act in a manner that honors the memory of those buried in *(insert name)* cemetery.”
- *Statement of Character* – Similar to behavior and value, but tied to organizational culture.  
Example – “To build a cohesive group of caring stewards for the protection of *(insert name)* cemetery.”

Putting it together:

- Weed out ideas that do not describe your organization’s core services (for instance, fundraising and publicity probably do not belong in your mission statement, though they may be critical to your organization’s survival).
- Integrate like concepts (for instance, “finding creative solutions”, “being innovative”, “thinking outside the box” are all similar values that could be described with one phrase)
- Keep it short!

Action: Create a mission statement and use it!

Mission Statement:

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## Strategies

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Strategies are the broad, wide reaching actions to achieve your mission.

Examples:

- Assure that the cemetery exists and retains its historic character in perpetuity.
- Maintain the awareness of the community about the existence and value of the cemetery.
- Maintain a vital and active board and membership.
- Teach the community and visitors about the history of the cemetery.
- Provide burial space in perpetuity.
- Etc.



*However beautiful the strategy, you should occasionally look at the results.*

~ Sir Winston Churchill

Action: Brainstorm all the strategies of the organization. Select three to five. Prioritize them or not. Remember the strategies can change whenever this document is reviewed and updated. Keep a record of the other suggested strategies.

Strategies:

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# Goals

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Goals are measurable outcomes related to the strategies selected to achieve your mission. The goals in this plan should be based on a five year timeline. As you create an annual work plan, base your annual goals on these.

Examples:

- Assure that the cemetery exists and retains its historic character in perpetuity.
  - Goal – Survey the cemetery property
  - Goal – submit a letter of dedication into the county land record
  - Goal – Trim all heritage trees in the cemetery
- Maintain the awareness of the community about the existence and value of the cemetery.
  - Goal – Have a presence at one community event per year
- Maintain a vital and active board and membership.
  - Goal – Hold an annual meeting every year
  - Goal – Send two newsletters per year
- Teach the community and visitors about the history of the cemetery.
  - Goal – Send two newsletters per year
  - Goal – create a cemetery webpage
- Provide burial space in perpetuity.
  - Goal – Survey the cemetery property
  - Goal – Submit a letter of dedication into the county land record



*Shoot for the moon. Even if you miss,  
you'll land among the stars.*

~ Les Brown

Action: Brainstorm all the goals for each of the strategies selected in the previous activity. Select three to five for each. Prioritize them or not. Remember the goals can change when this document is reviewed and updated. Keep a record of the other suggested strategies. This will give reason to celebrate when the plan is reviewed and updated.

Strategy:

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Goals:

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Strategy:

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Strategy:

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Goals:

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# Resources

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Understanding what assets you have in your organization is important. Consider all of your assets when you set priorities for goals and actions. Know what you have in hand to understand what you need to gather to accomplish projects (volunteers, grants funds, etc.)

## Examples

- Graphic artist on the board
- A strong youth volunteer corps
- A trust fund
- A sexton
- Water on site
- A relationship with the local historical society

*Life is constantly providing us with new funds, new resources, even when we are reduced to immobility. In life's ledger there is no such thing as frozen assets.*

~ Henry Miller



Action: Brainstorm and record all assets – skills, funds, partnerships, volunteers, supporters, etc.

Resources:

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## History

Write a short summary of the history of the cemetery – no more than two pages. How the cemetery was created, significant events or people related to the cemetery, any organizations associated with the cemetery, the site history, etc.



*History cannot give us a program for the future, but it can give us a fuller understanding of ourselves, and of our common humanity, so that we can better face the future.*

~ Robert Penn Warren

Action: Insert your cemetery and organization history here. Read it before you begin the planning process so that it will inform your decisions.

## Site (survey, documentation)

Understanding the scope of the property is useful to understand your responsibility, to protect burials, to offer burial space and to have good relationships with your neighbors. The survey includes the borders, the blocks and plots and the purposes for which the various parts of the property are intended. This is to be a first priority.

- A formal survey of the property – lots, blocks, unused space
- County record
- Dedication of the property as a cemetery
- Unknown burials
- County property tax status
- Access roads, easements, and rights-of-way



*Land really is the best art.*  
~ Andy Warhol

### Action:

- Research and record the information that you have access to for your property.
- Compile the information or references to the information in one place.
- Create a list of information that must be obtained.

### Information to collect:

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## Grounds & Landscape

This section pertains to the features (curbing, plot fences, pathways, etc.), landscape, facilities within the cemetery.

- Condition report – create a condition report on all landscape, features and structures in the facility. This includes markers, curbing, buildings, shed, fences, security, path and roadways, etc.
- Projects list – from the condition report create a list of projects that may address some of the discovered issues. Include cost estimate.

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- Maintenance report – from the condition report create a list maintenance issues and duties.

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*Did you ever think how a bit of land shows the character of the owner?*

~ Laura Ingalls Wilder



Action:

- Review your mission.
- Review your strategies and goals.
- From the Project list and the Maintenance report set 3-5 priorities – Set priorities based on your goals and resources – safety, historic character, prevent vandalism, create more burial sites, etc.

Priorities:

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## Organization

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Create a plan for your organization – function, participation, financial, etc.



*The income tax has made more liars out of the American people than golf has.*

~Will Rogers

### *Incorporation/ tax status*

There are many options for federal tax status and state incorporation status. Know your status and be sure you have all of the documentation of it. Review the status for both – based on your organization’s goals, what is appropriate and tax and corporation status for your cemetery?

Federal Tax status (most common for historic cemeteries)

*501(c)(13)* – This is a tax status for cemeteries. It allows charitable contributions that can be a charitable write off. Plot and burial sales are taxable. Easier status to achieve. Limited opportunity for grant funding.

*501(c)(3)* – This is a tax status for educational or organizations functioning for the public good. It allows charitable contributions that can be a charitable write off. More difficult status to achieve. More access to grant funds.

State Corporation status

*Incorporated with the state of Oregon* – Allows more protection for individual members of an organization. The organization is the responsible party. Annual recording fee for nonprofit corporations for cemeteries listed with the Oregon Commission on Historic Cemeteries.

*Unincorporated with the state of Oregon* – No annual recording of the organization. Individuals are responsible for the actions of the group.

Actions:

- Find paperwork for tax and corporation status and compile it together.
- If the organization is not tax-exempt or incorporated, have a discussion about whether or not to change that.

Note decision & required Action:

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## *By-Laws/Articles of Incorporation/Structure*

Your organization must have a structure or by-laws under which everyone acts. By-laws include the legal function of the organization, defines how decisions are made and by whom, how funds are expended and by whom, the definition of membership, etc. Articles of Incorporation are filed with the state and include the purpose of the organization and a summary of the structure.

*You can only govern men by serving them.*  
~ Victor Cousin



Do you have by-laws and/or articles of incorporation?

If yes – It is time to review your by-laws.

- Questions to explore – Do your by-laws serve your mission?
- Do your by-laws allow you to accomplish work efficiently?
- Do you have a hard time have quorum at meetings?
- Can you consistently address your annual meeting, membership and decision making requirements?

If no – Make the creation of by-laws a high priority.

- Seek examples from similar cemeteries.
- Seek legal advice.
- Seek advice from the Nonprofit Association of Oregon

Actions:

- Find paperwork regarding by-laws and articles of incorporation and compile it together.
- Review the by-laws or create them if you don't have any.
- This is a high priority.
- Answer the above questions to decide whether changes are necessary.

Priorities:

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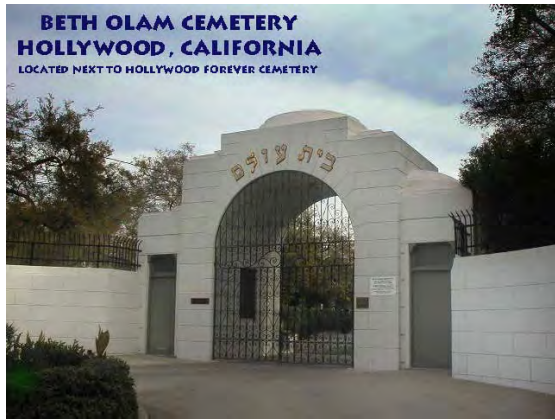
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## *Funding/Fundraising*

Your organization must have funds to fulfill its mission. Consider your budget needs and create a plan to raise funds.



*No one has ever become poor by giving.*  
~ Anne Frank

### **Actions:**

*Create a proposed operating budget* – An operating budget is to manage the day to day operation of the cemetery and may include licensing fees, grounds maintenance, staff, membership mailings, burial fees, etc.

Attach the budget

*List projects that need funding* – These are outside of regular operations, such as a fence replacement, marker repair, survey, special event, etc.

Attach the list of projects

*Funding* – Ideally funding will come from various sources. Operating funds are most vital and should particularly have several sources of income. Membership dues, burial fees, donations, endowment or trust funds, special events or fundraisers, in-kind donations, volunteer time. Fund sources for projects may include all of these and grants.

- What are your funding sources?

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- Are they adequate for the mission of the cemetery? Yes/no
- What are your strongest sources? Weakest?

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- Prioritize areas to increase fundraising.

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## *Volunteer Management*

A volunteer management program is vital to your organization no matter the size. A system of recruitment, retention, development and appreciation will keep your organization strong and functioning long after you are gone.

- Do you have a way to track volunteers? Yes/no
  - Do you have job descriptions for volunteers and staff? Yes/no
  - Do you contact the volunteers regularly? Yes/no
  - Do you offer new tasks regularly? Yes/no
  - Do you purposefully seek new volunteers? Yes/no
  - Are interested in having a more diverse volunteer base? Yes/no  
If yes, what specific population you would like to involve?
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- Have you had new a volunteer in the last year? Yes/no
  - Do you regularly recognize the work of your volunteers? Yes/no
  - Do you offer access to training and/or certification? Yes/no
- List which of the above need improvement:
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Prioritize the most important 3-5 to work on:

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## *Leadership*

Most people don't just show up and say, "Hey, I want to chair the board and run all of the fundraising tasks." You need to develop and encourage people into taking leadership. Most people will move into leadership roles if they are encouraged, trained, trusted and appreciated. Some never will.

- Has the board membership changed in the last four years? Yes/no
- Have volunteers been trained in various aspects of the organizations functions? Yes/no
- Do you have members and volunteers who do everything? Yes/no
- Do you have clear expectations, orientation and a development plan for board members? Yes/no
- Do you talk with volunteers about their interests regularly? Yes/no

List one issue to address to increase leadership potential:

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## Cooperation, Collaboration & Partnership

One of the best ways to have a strong organization is to be a part of the greater community by collaborating and partnering with other organizations. This is hard work, but when done well the benefits are immense.

- Cooperation: Being aware of each other's efforts, avoid scheduling conflicts, promote each others' events, etc.
- Collaboration: Working together toward one goal, may be short or long term. Commitment to communication and mutual benefit.
- Partnership: Ongoing relationship that may grow and develop over time. Commitment to communicate beyond one events. Supporting other programs of each others' organizations.

*Coming together is a beginning. Keeping together is progress. Working together is success.*

~ Henry Ford



Actions:

- Are there organizations that have a similar mission? Yes/no

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- Are there organizations with a similar history? Yes/no

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- Are there organizations that serve/reach and audience you are targeting? Yes/no

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- Do you have the time and capacity to commit to cooperation, collaboration or partnership? Yes/no
- Based on the answers to the questions do you want to find a partner? Yes/no? Why?

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With which organizations?

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At which level (cooperation, collaboration, partnership)

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*Organization Summary*

The health of your organization is vital to the health of the cemetery. Use this page to compile the priorities from each portion of the organization section.

Action:

- Review your mission.
- Review your strategies and goals.
- Review your resources.
- Prioritize actions by balancing the mission, strategies, goals and resources.
- List your priorities by category:

Incorporation/tax status

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By Laws/Articles of Incorporation/Structure

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Funding/Fundraising

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Volunteer Management

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Leadership

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Collaboration & Partnership

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## Operations

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If you are operating as a cemetery with burials of human remains, you must have good sales contracts, policies, practices, record keeping and be licensed with the Oregon Mortuary and Cemetery Board.



*Any fool can make a rule, and any fool will mind it.*

~ Henry David Thoreau

*\*Seek help from the Cemetery Association of Oregon and the Oregon Mortuary and Cemetery Board.*

### *Rules*

Rules are valuable for patrons, visitors and the public. It is important to have rules agreed upon by the board and posted at the cemeteries.

Rules to consider – grave goods, memorial events, marker rubbings, etc.

Action: Create and attach rules.

### *New Burials*

The organization should have rules and processes for the sale of plots, the opening and closing of graves, paperwork for the burial, etc.

Action: Create and attach processes for new burials.

### *Fees & Services*

The organization should be clear about the services they offer and the fees that are associated with those services. The cemetery must also decide how income is handled, based on tax and corporation status and whether or not it is a perpetual care cemetery.

Action: Create and attach fee and services structure.

### *Contracts*

The organization must have clear sales contracts for the right of burial that includes the location, rules and other appropriate details.

Action: Create and attach the right of burial contract.

## Records

Records are extremely important for the long term health of the organization. The records must be preserved, accessible to all board members and as complete as possible. The record types you should maintain include: organizational, burial and business.



*It is not deeds or acts that last: it is the written record of those deeds and acts.*  
 ~ Elbert Hubbard

*Issues to address include:*

- What information should be recorded
  - Organizational records
  - Burial records
  - Property records
  - Business records
- Long term storage
- Electronic vs. Concrete

Action:

- Find all records.
- Put them together and store them in a safe place, accessible to the board.
- Consider an additional space for copies of the most critical records.
- Consider converting to electronic files
- Set priorities if further action is warranted.

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## Outreach/Education

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Many historic cemeteries aren't aware that they should be promoting the cemetery. For a long-lasting, healthy organization the local community must know about the cemetery and the organization. Depending on the organization's goals, you may want to go beyond the local market.



*Education is what survives when what has been learned has been forgotten.*

~ B. F. Skinner

Action:

- Consider your mission.
- Consider your goals.

### *Audience*

It is important to understand your audience. Who do you serve? Who do you want to have involved? List & mark two priority audiences.

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### *Themes*

Any marketing, education and outreach can be easier when you use themes to share the information. What is the information you want to convey? How does this relate to your theme or purpose? What action do you want people to take? List and mark two priority themes.

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### *Methods*

The method you use for education and outreach is important to consider. You will want to consider your target audience? Will you need to think about the type and volume of information you want to share? What are resources you have at hand? How much time and consistent effort can you put into this? List and mark two priority methods.

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## Priority Setting

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Now for the really hard part...YOU CAN'T DO EVERYTHING. Select a few specific actions to take over the next five years to reach your goals.

Begin by collecting the priorities selected from each category addressed in this workbook

### **Fill out the priorities from each category.**

Basic Priorities (mission, goals, resources, history, site info)

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Grounds, features, landscape, facilities

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Organization

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Operations

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Records

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Outreach/Education

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**Write your mission statement here.**

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**Write your goals here.**

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**Based on your mission, goals and resources from the above priorities write your ten priorities.**

They can be from any category and they don't have to cover all categories. The basic priorities from above must appear on this list. Chose activities that help you meet your goals.

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## Next Steps

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Now it is time to put your plan into action.

### **Keep your lists and brainstorm.**

They will help you in your next planning process, they will remind you why you decided what you did and they will enable you to take advantage of surprise opportunities.

### **Pat yourselves on the back.**

### **Follow the plan, but be flexible.**

### **Based on the long range plan, create an annual work plan.**

### **Review and share your mission and goals regularly.**

### **Review the long range plan quarterly.**

### **Update the long range plan every five years.**

*No pessimist ever discovered the secret of the stars, or sailed to an uncharted land, or opened a new doorway for the human spirit.*

~ Helen Keller



## Resources

Oregon Commission on Historic Cemeteries

503-986-0671

[Heritage.Programs@state.or.us](mailto:Heritage.Programs@state.or.us)

[www.oregonheritage.org](http://www.oregonheritage.org)

Oregon Mortuary and Cemetery Board

971-673-1500

[Mortuary.board@state.or.us](mailto:Mortuary.board@state.or.us)

[www.oregon.gov/MortCem](http://www.oregon.gov/MortCem)

Cemetery Association of Oregon

503-651-1724

[Info@cemeteryassociationoforegon.com](mailto:Info@cemeteryassociationoforegon.com)

[www.cemeteryassociationoforegon.com](http://www.cemeteryassociationoforegon.com)