

This report covers the period from December 19, 2019 – July 7, 2020.

ADMINISTRATIVE

2019-2021 Biennium Budget (July 1, 2019 through June 30, 2021)

Budget Summary through May 2020

Revenue	May 2020	Biennium to Date	% of Budget Received	2019-21 Biennium Total Budget
All sources (including cash reserves & reimbursements)	86,871.85	860,367.35	27%	3,833,953

Expenditures	May 2020	Biennium to Date	% of Budget Spent	2019-21 Biennium Total Budget
Personal Services	62,195.84	570,104.95	40%	1,431,917
Services & Supplies	37,134.94	404,964.04	17%	2,343,995
Total	99,330.78	975,068.99	26%	3,775,912

Note on Coverage and Anticipated Revenue Distribution Cycle. Revenue from licensing fees is billed once a year, for facilities in one year and individuals in the alternate year. This concentrates revenue around the end of the calendar year and is part of why the Board must maintain a higher than average ending balance at the end of each fiscal year and each biennium (typically 8-10 months). The Board also self-insures against unknown expenses such as costs associated with hearings. Please also note that there is a difference between limitation (authorization to spend) and cash on hand. If we anticipate exceeding our limitation total for any expense line items, we must seek that additional limitation authority from the Oregon Legislature via Emergency Board (Ways & Means) proceedings even if we have sufficient ending balance to cover those expenses.

Background on Revenue Sources

The revenue budgeted for the biennium included monies from multiple sources, including ones that pass through the agency. The total for the biennium includes a beginning cash balance of \$1,350,827 (cash reserves carrying over from prior biennium), the total amount collected for death filing fees, which support both the Board programs and the Indigent Disposition Fund, licensing fees, estimates for miscellaneous revenue such as from civil penalties or interest, and a transfer-in reimbursement amount of \$151,377 from the other 833 boards.

The death filing fee is projected to collect approximately \$1,260,000 in total revenue for the 19-21 biennium. The actual amount received will depend upon the number of actual deaths registered and billed within the biennium. The revenue projection is based upon the Office of Vital Statistics and population data from the State Economist's Office, or an anticipated 63,000 deaths within the biennium. In accordance with ORS 692.415, at least \$6 of every \$20 death filing fee is earmarked for the Indigent Disposition Program, which represents a projected total of \$378,000 (before administrative expenses). Administrative expenditures are limited to 5% of the moneys collected (\$18,900), leaving an estimated \$359,100 available for 19-21 biennium indigent claims (enough for approximately 718 claims @ \$500/reimbursement).

Licensing Transactions Executed Pursuant to Delegated Authority

1. Permanently Lapsed Individual Licenses

Funeral Service Practitioner (FSP), Embalmer, Combination & Apprentice/Trainee

(Effective date: January 1, 2020)

a ABELL, BRIAN R: CO-3002
b ADAMSON, GLORIA ANN: FS-0224
c ADAMSON, V VAL: FS-0003
d ALEXANDER, SASHA A: EM-2285
e ALLEN, COLIN R: FS-0635
f ALLEN, KRISTIE LYNN: CO-3964
g BENZLEY, BRET D: CO-3841
h BESSOLO, DAVID ANTHONY: AE-3512
i BODZIN, MAXIMILIAN: CO-3935
j BOWERMAN II, DAVID G: CO-3925
k BOZARTH, JOHN THOMAS: EM-2266
l BRONLEWE, SAMUEL G: CO-3548
m BRUMBAUGH, WESLEY J: EM-2245
n BRUTON, YOLANDA J: FS-0210
o BUCHHEIM, ARTHUR D: EM-2005
p BURKE, DANIELLE M: AE-3440
q BURNS, DANIEL F: CO-3067
r CHILDS, BRADFORD J: CO-3745
s CLARK, JASON R: CO-3587
t COLEMAN, JESSICA: AF-2467
u CORNWELL, ROBERT C: CO-3093
v CROVO, TERENCE DANIEL: AE-3498
w ECKSTEIN, BONNIE L: FS-0429
x FARMER, TIFFANY NICOLE: IP-7445
y FIGUEIRA, BRANDEE M: AF-2406
z GARCIA, ANDR L: AE-3414
aa GILLESPIE, TRACIE KAY: FS-0624
ab GONZALES, WHITNEY L: FS-0652
ac GOODSON, A GENE: CO-3765
ad GRAY, ANTHONY MARK: CO-3773
ae GUEVARA, TAMAY L: AF-2335
af GUEVARA, TAMAY L: AE-3428
ag HAREN, DAWN L: FS-0570
ah HARRINGTON, SPENCER R: AF-2438
ai HARRINGTON, SPENCER R: AE-3505
aj HARWOOD-KARLIK, SARA ELIZABETH: FS-0597
ak HEADRICK, EVA I: FS-0449
al HEADRICK, JAMES C (JC): CO-3647
am HEATON, STEPHEN D: CO-3178
an HEDLUND, RICHARD C: CO-3179
ao Hill, RUSS: CO-3592
ap HUFFSTUTTER, JAMES H: CO-3192
aq HUNTOON, KAREN R: AF-2444

ar HUSTAD JR, JOSEPH OBERT: FS-0579
as JONES, DAISY PHILIPPA MARY: AF-2403
at JONES, DAISY PHILIPPA MARY: AE-3481
au JONES, JESSICA A: AF-2397
av LAWRENCE, JOHN P: CO-3674
aw MACY, STEVEN D: FS-0630
ax MARTINDALE, TERESA L: FS-0290
ay MASON, LA'NETTE MAE: AE-3444
az MASON, LA'NETTE MAE: AF-2354
ba MATHIESEN, ROBERT L: FS-0605
bb MAY, VINCENT C: FS-0493
bc MCMAHON, SCOTT M: CO-3948
bd MORRIS, LINDA B: CO-3689
be MOYER, STACEY M: AF-2408
bf MOYER, STACEY M: AE-3485
bg MUSGROVE, DIANE E: FS-0072
bh NEWKIRK, SCOTT A: CO-3683
bi PARKE, MICHAEL DEAN: EM-2187
bj PARKS, KATHERINE A: FS-0296
bk PARRACK, JEFFREY S: CO-3779
bl PELKER, DAVID G: AE-3501
bm PELKER, DAVID G: AF-2431
bn PETERSON, LARRY A: CO-3306
bo RENAUD, THOMAS H: CO-3969
bp ROSE, ERIC V: AE-3492
bq SCHEIDERMAN, ERICK R: CO-3874
br SCHMIDT, DONNA S: FS-0532
bs SIEVERS, JEANETTE: FS-0550
bt SLOSSER, PAUL D: FS-0554
bu SMITH, K ELIZABETH: FS-0658
bv STANLEY, VIVIAN D: AE-3442
bw TAYLOR, JACQUELYN S: CO-3383
bx TAYLOR, JUDITH: CO-3832
by TORRALBA-GARCIA, LUCIA LIZBETH: AF-2305
bz TORRALBA-GARCIA, LUCIA LIZBETH: AE-3405
ca VAN DEUSEN, RICHARD A: CO-3640
cb WALKER, AMY R: FS-0467
cc WATT, GERALD O: FS-0420
cd WAUD, THOMAS A: FS-0578
ce WHEATLEY, I RICHARD: EM-2119
cf WIENS, VICTOR: CO-3433
cg WILKEY, CORD M: CO-3829
ch WORKMAN, CHAD G: FS-0656
ci WRIGHT, ERIC A: CO-3671
cj WRIGHT, KERRI M: CO-3626

Preneed Salesperson (Effective date: March 1, 2020)

a **ANDRADE, CHRISTOPHER M:** PN-9360
b **BAGLEY, JOCELYN S:** PN-8563
c **BARBER, CURTIS FRANKLIN:** PN-8908
d **BERGEN, PATRICIA ANN:** PN-9358
e **BLACKSTONE, JENNY L:** PN-8814
f **BLESSING, PAIGE E:** PN-9303
g **BOYD, ERMA MARIE:** PN-9332
h **BROWN, SARA LEE:** PN-8629
i **BUCCINA, VICTOR J:** PN-9373
j **BUCHANAN, MARY LOIS:** PN-9424
k **BUTLER, LEANNE L:** PN-9412
l **BYRNE, RYAN D:** PN-9388
m **CANAS, EMILIO R:** PN-9336
n **CARPENTER, VICTORIA:** PN-9428
o **CHAN, ALVIN S:** PN-9188
p **CHAN-CASTILLO, CYNTHIA ARACELY:** PN-9335
q **CHITTENDEN, JEREMY CONRAD:**PN-9427
r **CHRISTIAN, STEPHEN HARPER:** PN-8958
s **CLORE, FRANK A:** PN-9371
t **CONERLY, WILLIAM M:** PN-9432
u **DE VILLE, VICKI LYNNE:** PN-9066
v **DEVAUGHN, ANTHONY RAY:** PN-9375
w **DIPONZIANO, CHERRIE A:** PN-9365
x **DOUGHERTY, MICHAEL STUART:** PN-9306
y **DUNCAN, TAMMY LYNN:** PN-9405
z **EWING, PATRICK W:** PN-9404
aa **FAREY, KATIE M:** PN-9389
ab **FAULKNER, PEGGY A:** PN-9110
ac **FLOWERS, AKIL D:** PN-9346
ad **GIN, TIMOTHY CHUM I:** PN-9396
ae **GOLDBLATT, ANDREW R:** PN-9370
af **GUNTHER, VANESA A:** PN-8933
ag **HADWICK, MARY LOU:** PN-7839
ah **HALLIDAY, RAYNE M:** PN-9367
ai **HAWKINS, MICHAEL DAVID:** PN-9010
aj **HENKEL, PAMELA S:** PN-9186
ak **HERNANDEZ, JEFFERY S:** PN-9302
al **HERRING, BRIAN SCOTT:** PN-9327
am **HESS, DAVID C:** PN-9393
an **HOEFFLER, LOIS JEAN:** PN-9272
ao **HOMER, BRANDON J:** PN-9406
ap **HOUSE, ELISABETH L:** PN-9401
aq **HUNTTING, CHARLES L:** PN-9021
ar **IRWIN, BENJAMIN C:** PN-9356
as **JANTZE, MICHAEL BRIAN:** PN-9334
at **JEFFCOTT, TERESA L:** PN-9183
au **KEARNS, DANIEL M:** PN-9366
av **KEY-BENSON, GAIL D:** PN-8904

aw KIMES, KODY F: PN-9361
ax KING, LAURA S: PN-9369
ay KLINE, MARY ANN: PN-9382
az KOHANEK, BRET R: PN-9046
ba Kwiat, Stephen:PN-9451
bb LANDIS, KEVIN R: PN-9376
bc LITTLE, BARBARA J: PN-9307
bd MARKY, SARAH ANNE: PN-9246
be MARTINSON, AARON C:PN-9418
bf MCCARTHY, SHAREN L: PN-8883
bg MCGANTY, STEPHANIE MARIE: PN-9262
bh MCLEAN, CANDACE K: PN-9417
bi MEJIA, GRACE: PN-9419
bj MILLER, DAVE D: PN-9434
bk MILLS, ROBIN M: PN-9147
bl MURPHY, CHRISTOPHER J: PN-9429
bm NICHOLS, KIRA K: PN-9229
bn NUTTER, DAVE J: PN-9357
bo O'NEAL, KATHY J: PN-9415
bp ONSTOTT, WINIFRED A: PN-9351
bq PERKINS, WILLIAM D: PN-9426
br PETERS, AMBER THERESA STARR: PN-9372
bs PHILBERT, BARRY A: PN-9387
bt POTHS, STEWART W: PN-9421
bu POWSZOK, SARA M: PN-9378
bv PURKEY, DANIEL WESLEY: PN-9242
bw RIDENOUR, DANIEL P: PN-8725
bx ROBINSON, JOY V: PN-9121
by ROGERS, KATHERINE: PN-9450
bz RUNYAN, JILL T: PN-9397
ca Russell, Trent: PN-9445
cb SCHRAMM, JESSICA A: PN-9385
cc SCHWAB, DOUGLAS DEAN: PN-9350
cd SERRES, DANIEL L: PN-8519
ce SHERWIN, SUSAN K: PN-8747
cf SHULMAN, JAYE D: PN-9311
cg SPEARS, ALISHA H: PN-9374
ch SPENCE, SARAH: PN-9437
ci STARK, AMANDA A: PN-9277
cj STONE, GAYLA L: PN-9420
ck STRAUSS, AMY L: PN-9379
cl SUGGS, JIMMY LEE: PN-9352
cm TALLMAN, RODNEY J: PN-9436
cn TAPIA, MIRANDA J: PN-9386
co TENENBAUM, CAROL: PN-9194
cp TROBOUGH, SARAH A: PN-9344
cq TROWBRIDGE, TAWNIA JILL: PN-8620
cr TUDELA, JACKSON E: PN-9408
cs TURNBOW, MICHELLE R: PN-9399
ct VANCE, BRANDON HERSCHEL: PN-9300

cu	VARESE, CHERYL K: PN-9353
cv	VELASQUEZ, ANTHONY STEVEN: PN-9395
cw	WALKER, DEBORAH P G: PN-9343
cx	WALKER, ROBERT M: PN-9060
cy	WANG, MARIE B: PN-9407
cz	WELCH, OLIVIA D: PN-9368
da	WEST, RANDY DIANE: PN-8529
db	WHITE, MARK A: PN-9282
dc	WILLETT, TRACY A: PN-8983
dd	YANEZA, MELISSA MAYOR: PN-9390

2. **Permanently Lapsed Facility Licenses:** None

3. **Individual or Facility Licenses Suspended:** None

4. **Licenses Revoked:** None

AD: Alternative Disposition Facility; **AE:** Apprentice Embalmer; **AF:** Apprentice FSP; **CE:** Cemetery; **CM:** City owned Cemetery; **CO:** Combination Embalmer and FSP; **CR:** Crematory; **CS:** Special Tax District owned Cemetery; **CY:** County owned Cemetery; **DC:** Death Care Consultant; **EM:** Embalmer; **FE:** Funeral Establishment; **FS:** Funeral Service Practitioner; **IP:** Intern Permit; **PN:** Preneed Salesperson; **RR:** Removal Registration.

Operational Summary Statistics: Licensing

Type of License	Sep 29 2019	July 14 2020	Change from Sep - July	Trend
Death Care Consultants	0	0	0	—
EM Apprentices *	50	54	4	▲
FSP Apprentices *	58	64	6	▲
Interns	11	14	3	▲
Embalmer Only *	19	14	5	▼
FSP Only	179	173	6	▼
Combination License: EM *	396	373	23	▼
Combination License: FSP *	396	373	23	▼
Military Combination License: EM	0	0	0	—
Military Combination License: FSP	0	0	0	—
Preneed Salespeople **	191	228	37	▲
Funeral Establishments	193	193	0	—
Immediate Disposition Companies	9	9	0	—
Crematoriums	66	66	0	—
Cemeteries, Operating	294	299	5	▲
Cemeteries, Operating, Municipal	36	36	0	—
Cemeteries, Operating, County	7	7	0	—
Cemeteries, Operating, Special District	127	128	1	▲
Cemeteries, Registered Non-Operating	48	49	1	▲
Removal Registrations	31	31	0	—
Alternative Disposition Facilities	2	2	0	—
Combined Total of all Licenses, Registrations:	2113	2113	0	—

License Examinations

As directed previously by the Board, The International Conference of Funeral Service Examining Boards Inc. will soon be administering the Funeral Service Practitioner law exam. This project is still in process, and Board staff is hoping to transfer exam administration to The Conference during sometime in 2020. Until that time, the exam is being offered to individuals on an as needed basis.

During the pandemic, we have been able to continue administering the FSP law examination.

On March 23rd & April 7th, we were able to offer the examination at Ross Hollywood Chapel – thanks Angela for coordinating it!

On June 23rd, we were able to offer the examination at Mt. Hood Community College's testing center.

DCC Exam Date	DCC Exam Pass Rate			Score Range	
	Passed	Failed		Highest Score	Lowest Score
Jul 11 2019	0	0	0%	68%	68%
Jun 18 2019	0	1	0%	65%	65%
Sep 25 2015	0	1	0%	60%	60%
Sep 15 2014	0	2	0%	67%	57%
Oct 18 2013	0	1	0%	53%	53%
Jan 25 2013	0	1	0%	63%	63%
Jul 23 2012	0	2	0%	54.5%	52%
*Oct 20 2010	1	0	100%	76%	76%

*First Death Care Consultant Exam offered.

FSP Exam Date	FSP Exam Pass Rate			Score Range	
	Passed	Failed		Highest Score	Lowest Score
June 23 2020	8	1	88.8%	96%	70%
April 7 2020	3	0	100%	93.3%	76.6
Mar 23 2020	6	0	100%	96.6%	80%
Dec 30 2019	2	0	100%	90%	80%
Dec 20 2019	2	0	100%	98.3%	95%
Nov 25 2019	5	0	100%	98.3%	76.6%
Aug 21 2019	2	0	100%	98%	86%
Jul 11 2019	3	0	100%	92%	83%

COMPLIANCE

Inspections (Completed in FY 2020)

By the end of 2019, both OMCB inspector positions were filled. In January of 2020, OMCB's compliance department took steps to expeditiously enhance the volume, quality and efficiency of inspections. (This followed an extended period of time when the agency was understaffed and essentially unable to conduct inspections since July 2018.) Beginning in January of 2020, the inspection process and checklists were carefully evaluated and reviewed in coordination with stakeholders, board members and industry associations. Additionally, a number of training inspections were conducted in coordination with licensees, who were able to provide valuable feedback & individual inspector regions have now been established.

The next major development and challenge will be managing inspections through Thentia – our new online licensing management system. This has proven challenging, but will be worth the effort in terms of modernizing our agency and streamlining the licensing/renewal process.

The inspection numbers below reflect the diligent work of our inspectors. Most of these inspections have essentially been conducted in a very brief timeframe – from January 2020 to March 2020 – before being unexpectedly suspended due to the statewide response to the COVID-19 pandemic. Despite this, inspectors have continued to conduct physical inspections of stand-alone cemeteries in the Portland metro area.

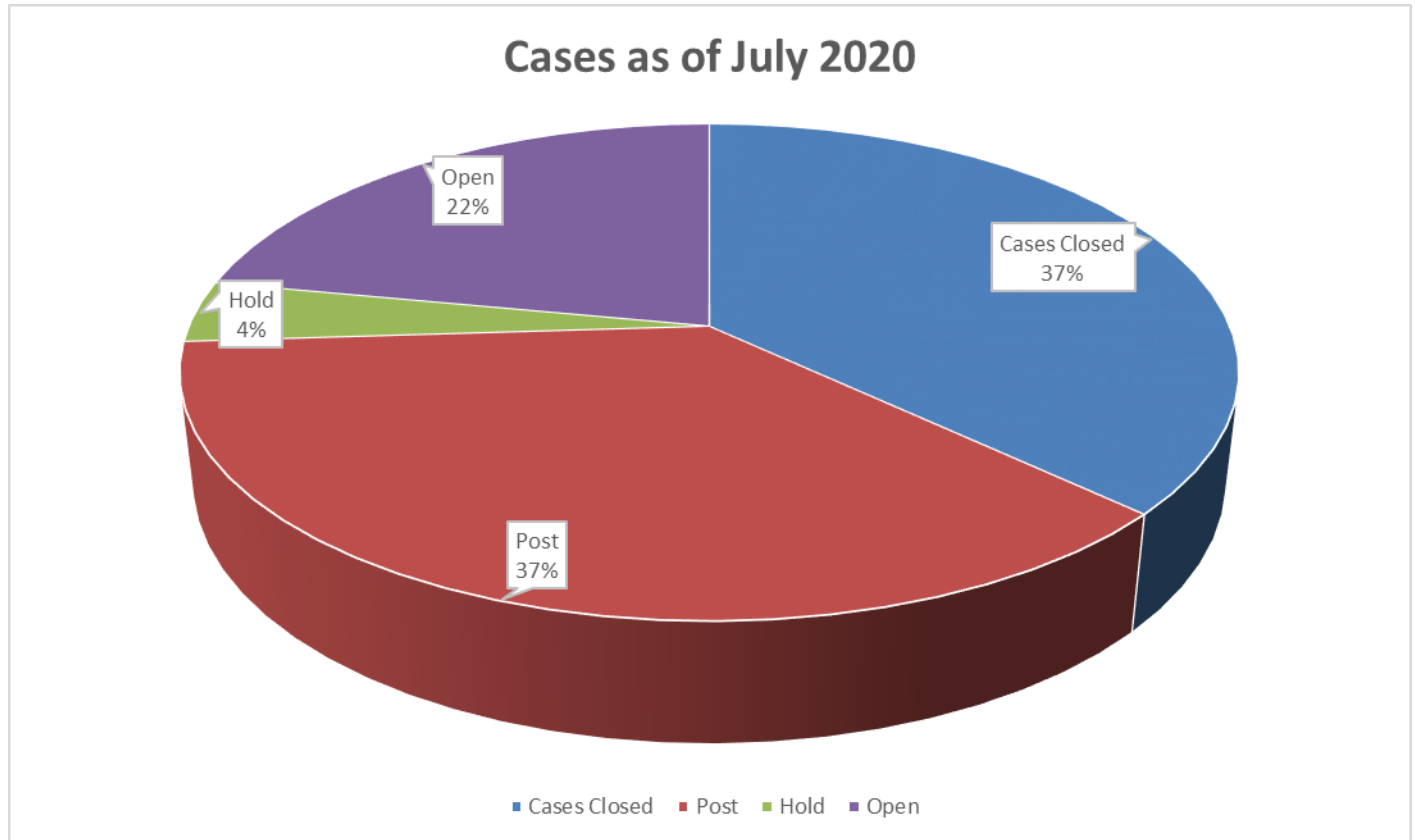
Once restrictions are lifted, we anticipate being able to return to maintaining inspections at an efficient pace to meet our statutory requirement of inspecting, at least once every two years, the premises and records of all licensed facilities.

Facility Type	Complete Inspections*
Funeral Establishment	36
Cemeteries	44
Immediate Disposition Company	0
Alternative Disposition Company	1
Crematory	13
Total Facility Inspections	94

**Note: Complete Inspections means that both the facility inspection and records review have been completed.*

Investigations

The following chart shows the total number of cases by phase, including cases **closed** within the 2020 calendar year. Cases that were opened in prior years but did not close in the prior calendar year for any reason are included until closed.



Total Cases: 148

Case Phases:

“Open” cases are all cases not yet reported to the Board, and are in various stages of review or investigation. This includes Intake, Investigation, Writing Investigative Report, and Presenting to Board.

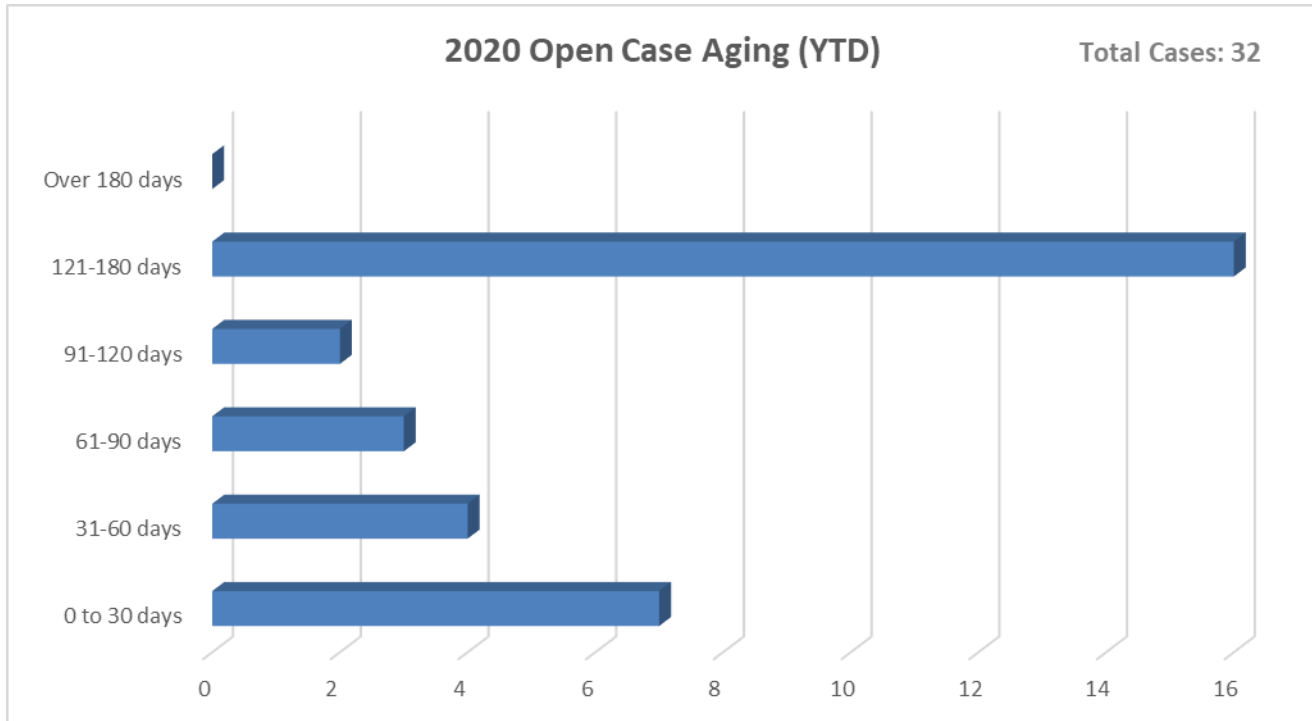
“Hold” cases are ones that have been presented to the Board, but which require some other activity or action by another entity before the Board completes deliberation on a case. This may include cases awaiting determination by another agency, or findings in civil or criminal proceedings. In some cases, it can also mean additional investigation is required for clarification before returning to the Board for deliberation.

“Post” cases are ones that have been presented, but where there is post-meeting activity still required before closure. This includes closing out cases resulting in no action, as well as all activity relating to cases where action is being taken, through the course of all appeals, and related activity. This process can take years before being completed, and before a case can be closed.

“Closed” cases are ones that have been moved completely through the Post phase and have been closed out. This may include closed cases requiring some form of monitoring or follow-up for a period of time, such as in the case of a probationary period, or where there are relevant consent order terms to be monitored.

Case Aging

The following chart identifies the specific aging for all open cases. The chart below shows the totals by age period, **including** the cases before the Board at the current meeting. Note that total case number reflects related cases A, B, C, etc. as separate cases. Whereas we often review them as linked or a single case.



NOTE: Approval of the Executive Director's Report will also authorize up to an additional 60 days for case reporting to the Board under ORS 676.165 to cover any cases where aging will exceed the aging limits based on the date of the next available scheduled meeting. All aging will continue to accrue and any case reports exceeding aging limits will be reported both here as well as on legislative key performance measures.

Indigent Disposition Program (IDP) Fund

The Indigent Disposition Fund is funded by a portion of the death record filing fee. The death record filing fee is \$20 per death record filed, billed to funeral homes monthly. This fee is only based on the initial filing of a death and is not assessed on certified copies of a record of death (formerly called death certificates). \$6 from each \$20 fee goes to support the fund and its administration. Because of this, the amount available in the Indigent Disposition Fund directly correlates to the death rate.

In January of 2016, management of both death record filing fees and the IDF program transferred from the Public Health Division to OMCB via legislative action. Additionally, changes to ORS 97.170 took effect, adding additional requirements to the process that a funeral establishment must complete prior to burying or cremating an indigent person or applying for reimbursement for that disposition.

During the four years prior to OMCB taking over management of the IDF program, the fund paid indigent claims for 0.9% to 1.3% of deaths in the state, depending on the year. Although the maximum reimbursement rate was set at \$650, the fund was rarely able to pay the maximum amount. Over the five years prior to the transfer of the fund's management, the average amount paid was \$492, with monthly averages varying widely – while the fund was able to reimburse nearly the maximum during some months, reimbursements averaged only \$262 during others.

When OMCB took over management, the law changed to provide funeral homes with a more predictable, fixed rate – the initial amount was \$461. The reimbursement rate was set in mid-2015 as a calculation of the maximum amount that the fund could provide given a 100% payment rate by funeral establishments for death record filing fees and the anticipated death rate for 2015 and 2016.

In July of 2018, the Board voted to increase the reimbursement rate from \$461 to \$500, based upon death rate projections and IDF solvency.

During the April 9, 2019 meeting, the Board voted to keep the reimbursement amount at \$500.

Please refer to the IDP Fund 2019 Year in Review for updated information.