



MCB

OREGON MORTUARY & CEMETERY BOARD
Regulating Death Care Facilities & Practitioners in Oregon.

EXECUTIVE DIRECTOR'S REPORT for July 10 2018

This report covers the period from April 3, 2018 through July 2, 2018.

Administrative

2017 - 2019 Biennium Budget (July 01 2017 through June 30 2019)

Budget Summary thru February 2018

Revenues	February 2018	Biennium to Date	% of Budget Received	Flat Line Budget Pace	2017-19 Biennium Total Budget
All sources, including cash reserves & reimbursements	30,599.92	689,105.75	22%	33%	3,076,287

Expenditures	February 2018	Biennium to Date	% of Budget Spent	Flat Line Budget Pace	2017-19 Biennium Total Budget
Personal Services	42,641.45	426,940.67	31%	33%	1,359,926
Supplies & Services	41,762.17	256,996.65	32%	33%	792,274
Total	84,403.62	683,937.32	32%	33%	2,152,200
Ending Balance					~ 10 months 924,087

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.

Licensing Transactions Executed Pursuant to Delegated Authority

- 1 Permanently Lapsed Individual Licenses, with effective date:**
 - a Abraham, Bart W:** PN-9249, March 1 2018.*
 - b Ajifu, Abbie K:** PN-9207, March 1 2018.*
 - c Alexander, Dale L:** PN-9296, March 1 2018.*
 - d Andl, Rudolf:** PN-9196, March 1 2018.*
 - e Anthous, Joshua Thomas:** PN-9312, March 1 2018.*
 - f Bishop, Cori K:** PN-8648, March 1 2018.*
 - g Bobzien, Richard Steven:** PN-9256, March 1 2018.*
 - h Browne, Angelina A:** PN-9316, March 1 2018.*
 - i Brunelle, L Wayne:** PN-9226, March 1 2018.*
 - j Cain, Cameron David:** PN-9234, March 1 2018.*
 - k Campbell, Christine A:** PN-9341, March 1 2018.*
 - l Chao, Pahin L:** PN-9292, March 1 2018.*
 - m Clemans, Tina:** PN-9349, March 1 2018.*
 - n Coates, Amber Dawn:** PN-9293, March 1 2018.*
 - o Cox, Genie L:** PN-8895, March 1 2018.*
 - p Diogenes, Spyros Don:** PN-9330, March 1 2018.*
 - q Dougherty, Heather A:** PN-9210, March 1 2018.*
 - r Downey III, Theodore John:** PN-9323, March 1 2018.*

s Erhardt, Jean D: PN-9093, March 1 2018.*
t Edington, Anna E: PN-9264, March 1 2018.*
u Estoque, Eric: PN-9274, March 1 2018.*
v Flores, L Layla: PN-9203, March 1 2018.*
w Foster, John Patrick: PN-8902, March 1 2018.*
x Fox, Ashley Lynn: PN-9271, March 1 2018.*
y Fritz, Portia E: PN-9261, March 1 2018.*
a Garrett, Karen Marie: PN-9245, March 1 2018.*
aa Garrod, Robert L: PN-9260, March 1 2018.*
ab Goldblatt, Andrew R: PN-9269, March 1 2018.*
ac Goodwill, Judith Diane: PN-9175, March 1 2018.*
ad Goulet, Christy C: PN-9105, March 1 2018.*
ae Gray, Amy R: PN-9305, March 1 2018.*
af Hiday, Brad K: PN-9304, March 1 2018.*
ag Hill, Patrick M: PN-9328, March 1 2018.*
ah Hoffman, Krista M: PN-9298, March 1 2018.*
ai Hoffman, Michael J: PN-92965, March 1 2018.*
aj Houle, Randal C: PN-9263, March 1 2018.*
ak Hunter, Jeffrey David: PN-7025, March 1 2018.*
al Isaacs, Trina Lynn: PN-9195, March 1 2018.*
am Jenson, Donna J: PN-9295, March 1 2018.*
an Johnson, Dean Norman: PN-9321, March 1 2018.*
ao Johnson, Sheri L: PN-9321, March 1 2018.*
ap Jones, Guinevere Z: PN-9286, March 1 2018.*
aq Keller, Kimberlee C: PN-9329, March 1 2018.*
ar Lauridia, Angelina T: PN-9354, March 1 2018.*
as Lawson, Cary A: PN-9297, March 1 2018.*
at Layson, Karen S: PN-9268, March 1 2018.*
au Lee, Laurey R: PN-7486, March 1 2018.*
av Lewis, Andrea J: PN-9257, March 1 2018.*
aw Lile, Angela Dawn: PN-9276, March 1 2018.*
ax Luce Sr, Jon F: PN-9083, March 1 2018.*
ay Marrs, Randall J: PN-9250, March 1 2018.*
az McHatton Jr, Robert J: PN-9255, March 1 2018.*
ba McNeil, Jacob William: PN-9280, March 1 2018.*
bb Metcalfe, K David: PN-9258, March 1 2018.*
bc Meyer, Ted J: PN-9065, March 1 2018.*
bd Middleton, Megan N: PN-9294, March 1 2018.*
be Miller, Noelle E: PN-9314, March 1 2018.*
bf Moreno, Tim O: PN-9231, March 1 2018.*
bg Navaroli, Judy C: PN-9275, March 1 2018.*
bh Nelson, Diane Marilyn: PN-7547, March 1 2018.*
bi Nguyen, John Van: PN-9157, March 1 2018.*
bj Olsen, Norman K: PN-9339, March 1 2018.*
bk Olson, Crystel R: PN-9333, March 1 2018.*
bl Oman, Gary E: PN-9308, March 1 2018.*
bm Osborn, Venie D: PN-9247, March 1 2018.*
bn Palmore, Robin D: PN-9322, March 1 2018.*
bo Panida, Scott E: PN-9289, March 1 2018.*
bp Parker, Terry A: PN-9337, March 1 2018.*
bq Perkins, Amanda K: PN-9317, March 1 2018.*

- br** Post, Gloria J: PN-8943, March 1 2018.*
- bs** Prince, Dennis Troy: PN-9100, March 1 2018.*
- bt** Raybourn, Scott M: PN-9301, March 1 2018.*
- bu** Ramirez, Raymond: PN-9254, March 1 2018.*
- bv** Rector, Sasha Marie: PN-9132, March 1 2018.*
- bw** Reid, David A: PN-9320, March 1 2018.*
- bx** Rice, Patrick Warren: PN-8936, March 1 2018.*
- by** Robinson, Bonnie S: PN-9209, March 1 2018.*
- bz** Sin, Quoc Lap: PN-9227, March 1 2018.*
- ca** Sitton, Robby Shawn: PN-9345, March 1 2018.*
- cb** Smith, Lisa D: PN-9279, March 1 2018.*
- cc** Sobbizadeh, Soriah Asomahn: PN-9270, March 1 2018.*
- cd** Sobieszczyk, Cheryl S: PN-9291, March 1 2018.*
- ce** Sorensen, Bonnie L: PN-9331, March 1 2018.*
- cf** Stallworth, Brandon S: PN-9319, March 1 2018.*
- cg** Stetson III, Richard C: PN-9285, March 1 2018.*
- ch** Streilein-Boerste, Megan C: PN-9313, March 1 2018.*
- ci** Swails, Gaedwyn M K: PN-9267, March 1 2018.*
- cj** Swartz, Levi Christopher: PN-9290, March 1 2018.*
- ck** Vesper, David J: PN-9252, March 1 2018.*
- cl** Yonekura, Kathleen N: PN-9340, March 1 2018.*

* Not renewing for 2018 / 2020.

2 Unqualified Applicants: None.

3 Individual Licenses Inactivated, with effective date:

- a** Waud, Patrick William: FS-0631, April 6 2018 (deceased).
- b** Carrillo, Michelle Lorraine: AF under Joy L Slack, April 1 2018.

4 Individual or Facility Licenses Suspended:

- a** Heckman, Greg A: CO-3653, June 25 2018 (2018-1024).

5 Facility License(s) Inactivated, with effective date:

- a** Service Corporation International dba Stewart Enterprises Inc dba S E Acquisition of Oregon Inc dba Chapel of the Valley Funeral Home Inc dba
Abbey Funeral, FE-8785
550 Business Park Drive
Medford OR 97504

Closed May 1 2018. Permanent records will be located at Rogue Valley Funeral Alternatives | 558 Business Park Drive | Medford OR 97504.

6 Licenses Revoked, effective date: 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	Change				Change			
	Dec 5 2017	Jul 2 2018	from Dec - Jul	Trend	Apr 4 2018	Jul 2 2018	from Apr - Jul	Trend
Death Care Consultants	0	0	0	—	0	0	0	—
EM Apprentices *	51	52	1	▲	48	52	4	▲
FSP Apprentices *	58	62	4	▲	58	62	4	▲
Interns	9	7	(7)	▼	19	7	(12)	▼
Embalmer Only *	21	17	(4)	▼	17	17	0	—
FSP Only *	182	166	(16)	▼	165	166	1	▲
Combination License: EM *	397	375	(22)	▼	369	375	6	▲
Combination License: FSP *	397	375	(22)	▼	369	375	6	▲
Military Combination License: EM	0	0	0	—	0	0	0	—
Military Combination License: FSP	0	0	0	—	0	0	0	—
Preneed Salespeople **	211	139	(72)	▼	121	139	18	▲
Funeral Establishments	195	192	(3)	▼	193	192	(1)	▼
Immediate Disposition Companies	8	7	(1)	▼	7	7	0	—
Crematoriums	65	65	0	—	65	65	0	—
Cemeteries, Operating	303	304	1	▲	303	304	1	▲
Cemeteries, Operating, Municipal	36	37	1	▲	37	37	0	—
Cemeteries, Operating, County	7	7	0	—	7	7	0	—
Cemeteries, Operating, Special District	133	133	0	—	133	133	0	—
Cemeteries, Registered Non-Operating	48	48	0	—	48	48	0	—
Removal Registrations	29	29	0	—	29	29	0	—
Alternative Disposition Facilities	1	2	1	▲	2	2	0	—
Combined Total of all Licenses, Registrations:	2151	2017	(134)	▼	1990	2017	27	▲

* All apprenticeship certificates, embalmer and funeral service practitioner licensees permanently lapsed January 1 2018.

** All preneed salespeople registrations permanently lapsed May 28 2018, unless renewed.

Licensing Exam Update

As directed previously by the Board, The International Conference of Funeral Service Examining Boards Inc. will be administering the Board's Funeral Service Practitioner and Embalmer examinations via a computer-based exam. This project is still in process, and Board staff is targeting turnover to the Conference by the end of the calendar year. Until that time, the exam is being offered to parties inquiring to take the test, on an as needed basis by the Board staff. This is why August, for example, had three different exams. While this creates potentially more work on an interim basis, it is necessary to make sure all exam applicants can sit for the exam when desired.

DCC Exam Date	DCC Pass Rate			Score Range		FSP Exam Date	FSP Pass Rate			Score Range	
	Passed	Failed		Highest Score	Lowest Score		Passed	Failed		Highest Score	Lowest Score
May 17 2018	0	0	0%	0.0%	0.0%	May 17 2018	1	0	100.0%	75.0%	75.0%
Mar 23 2018	0	0	0%	0.0%	0.0%	Mar 23 2018	8	3	73.0%	95.0%	63.0%
Feb 14 2018	0	0	0%	0.0%	0.0%	Feb 14 2018	1	0	100%	88.0%	88.0%
Dec 18 2017	0	0	0%	0.0%	0.0%	Dec 18 2017	2	0	100%	93.0%	83.0%
Dec 8 2017	0	0	0%	0.0%	0.0%	Dec 8 2017	1	0	100%	75.0%	75.0%
Aug 31 2017	0	0	0%	0.0%	0.0%	Aug 31 2017	1	0	100%	92.0%	92.0%
Aug 14 2017	0	0	0%	0.0%	0.0%	Aug 14 2017	1	0	100%	82.0%	82.0%
Aug 9 2017	0	0	0%	0.0%	0.0%	Aug 9 2017	1	0	100%	87.0%	87.0%
Jun 16 2017	0	0	0%	0.0%	0.0%	Jun 16 2017	16	0	100%	90.0%	75.0%
Feb 6 2017	0	0	0%	0.0%	0.0%	Feb 6 2017	6	0	100%	98.0%	78.0%
Jan 16 2017	0	0	0%	0.0%	0.0%	Jan 16 2017	2	0	100%	76.5%	75.5%
Nov 21 2016	0	0	0%	0.0%	0.0%	Nov 21 2016	5	10	33%	87.0%	60.5%
Jul 22 2016	0	0	0%	0.0%	0.0%	Jul 22 2016	7	8	47%	85.5%	64.5%
Apr 22 2016	0	0	0%	0.0%	0.0%	Apr 22 2016	5	9	36%	85.0%	59.5%
Jan 22 2016	0	0	0%	0.0%	0.0%	Jan 22 2016	6	9	40%	87.0%	58.0%
Sep 25 2015	0	1	0%	0.0%	60.0%	Sep 25 2015	6	3	67%	82.5%	54.5%
Jul 22 2015	0	0	0%	0.0%	0.0%	Jul 22 2015	10	2	83%	86.5%	57.5%
May 28 2015	0	0	0%	0.0%	0.0%	May 28 2015	1	0	100%	82.5%	82.5%
Apr 24 2015	0	0	0%	0.0%	0.0%	Apr 24 2015	5	2	71%	85.5%	66.0%
Jan 29 2015	0	0	0%	0.0%	0.0%	Jan 29 2015	7	5	58%	86.5%	62.0%

Investigations

The following pie shows the total number of cases by phase, including cases *closed* within calendar year 2018. Cases opened in prior years but that did not close in the prior calendar year for any reason carry forward on this report until closed. **NOTE: UPDATED PIE CHART TO BE PROVIDED AT THE MEETING**

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 a 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. These are broken out as "Closed w/Follow up".

Case Aging

The following charts identify the specific aging for all open cases. The first chart shows the totals by age period, *including* the cases before the Board at the current meeting. The second chart removes those cases being presented at the June meeting to show only the remaining cases. **NOTE: still finalizing report, will provide Board with updated report at the meeting.**

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.

Inspections-Completed Since Last Board Meeting

Regular inspections resumed in March, 2018. The review of the end-to-end inspection process and forms, last reviewed and updated in 2014, is nearing completion. A report will be provided at the July meeting.

Facility Type	Onsite	Records
Funeral Establishment	22	4
Cemeteries	72	17
Immediate Disposition Co	2	0
Alternative Disposition Co	1	1
Crematory	10	2
Total Facility Inspections	107	24

Board Member Training Requirement Discrimination and Harassment- Deadline 12/31

Letter from Katy Coba, Chief Operating Officer and DAS Director

Colleagues:

As you know, all state agencies, boards, and commissions are expected to provide a work environment free from discrimination and harassment. We have policies in place that prohibit discrimination and harassment in the workplace, encourage individuals to report such conduct, and outline investigatory procedures and consequences for violations.

At the Governor's direction, DAS (in consultation with the Enterprise Leadership Team) has taken additional steps to ensure our workplaces are free from harassment and discrimination. I want to provide you with a summary of these steps, which will require some action on your part.

Updates on Discrimination and Harassment Policies, Training

Policies

There are two statewide policies that primarily cover appropriate workplace behavior: [DAS Policy 50.010.03](#) (Maintaining a Professional Workplace) and [DAS Policy 50.010.01](#) (Discrimination and Harassment Free Workplace), the latter of which has recently been revised with input from agencies. Changes made include:

- • Adding "volunteer" to the definitions
- • Adding training requirements for all employees and volunteers
- • Providing options for employees to report concerns outside of their agency
- • Eliminating the one-year reporting timeframe

CHRO published the [policy](#) online today and distributed it to agency HR Directors. My office will be sending the policy out across the Executive Branch shortly, directing questions to agency HR managers or CHRO. Please ensure your commission/board members and volunteers who don't have state email addresses receive the policy as well.

Training

Per the revisions to the statewide policy on Discrimination and Harassment Free Workplace, all employees, board and commission members, temporary employees, and volunteers are required to complete harassment and discrimination training upon their initial hire or appointment, as well as annually thereafter.

The DAS Chief Human Resources Office (CHRO) has developed a new training on discrimination and harassment for the Executive Branch. Agencies can either direct their employees, members and volunteers to complete the statewide iLearn training, or they can choose to develop agency-specific training, as long as it includes all the topics covered in the statewide version. Agencies choosing to develop their own training must certify it covers the 10 topics included in the statewide version (see attached training outline for the 10 topics) and track employee completions.

Whatever option you choose, all employees, board and commission members, and volunteers must be trained upon initial hire or appointment, and annually thereafter. CHRO will report annually in January. Please ensure all employees complete the required training as soon as possible, but no later than December 31.