

**Administrative**

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

*Budget Summary through February 2019*

Revenues	February 2019	Biennium to Date	% of Budget Received	2017-19 Biennium Total Budget
All sources, including cash reserves & reimbursements	92,598	1,774,918	58%	3,076,287

Expenditures	February 2019	Biennium to Date	% of Budget Spent	2017-19 Biennium Total Budget
Personal Services	44,769	990,915	71%	1,399,475
Services & Supplies	32,294	612,514	77%	792,274
<b>Total</b>	<b>77,063</b>	<b>1,603,429</b>	<b>73%</b>	<b>2,191,749</b>
Ending Balance				884,538

**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 \$951,900 (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 amount of \$130,924 from the other 833 boards, covering 5/6ths of the cost of the shared accounting function, which is budgeted in the OMCB budget.

The death filing fee is projected to collect approximately \$1,376,107 in total revenue for the 17-19 biennium. The actual amount received will depend on the number of actual deaths registered and billed within the biennium. The revenue projection is based on Oregon death data provided by the Office of Vital Statistics and population data from the State Economist's Office, or an anticipated 68,805 deaths within the biennium. Six dollars of each \$20 death filing fee is earmarked for the Indigent Disposition Program, which represents a projected total of \$412,832, before administrative expenses. Expenses are legislatively limited to 5% of the total, leaving an estimated \$392,190 available for indigent claims this biennium.

## Staffing

The Education & Compliance Program Manager's job announcement was posted on Thursday, March 28, 2019 and will close on Monday, April 15, 2019. The Inspector position description has been submitted to DAS HR for review and posting.

## Licensing Transactions Executed Pursuant to Delegated Authority

- 1 **Permanently Lapsed Facility Licenses**, with effective date of January 1 2019:
  - a North Douglas Betterment dba **Applegate Pioneer Cemetery**, CE-0985.
  - b Teskey Inc dba **Aspen Burial & Cremation**, FE-8835.
  - c Chadwick Lodge No 68 AF & AM Coquille City Coos County dba **Chadwick Lodge No 68 AF & AM Coquille City Coos County Cemetery**, CE-0770.
  - d **Cove Cemetery Maintenance District**, CS-0148.
  - e Grants Pass Masonic Lodge # 84 AF & AM Inc dba **Grants Pass Masonic Pioneer Cemetery**, CE-0878.
  - f Monument Cemetery Maintenance District dba **Hamilton Cemetery**, CS-0416.
  - g **Historic Columbian Cemetery**, CE-0898.
  - h **Island City Cemetery Maintenance District**, CS-0313.
  - i Sumcor Company dba **Juniper Ridge Funeral Home**, FE-8859.
  - j **Laurel Cemetery Association**, CE-0796.
  - k **Melrose Cemetery Association**, CE-0879.
  - l Monument Cemetery Maintenance District dba **Monument Cemetery**, CS-0159.
  - m Prairie Cemetery Maintenance District dba **Prairie Cemetery**, CS-0149.
  - n St Luke Catholic Church Woodburn Oregon dba **St Luke's Cemetery**, CE-0889.
  - o City of Salem dba **Salem Pioneer Cemetery**, CM-0464
  - p St Luke's Parish Grants Pass Oregon dba **St Luke's Parish Grants Pass Oregon Cemetery**, CE-0674.
  - q **Shields Cemetery Association**, CE-0388.
  - r Wasco Cemetery Association dba **Sunrise Cemetery**, CE-0314.
  - s Weston Cemetery Maintenance District dba **Weston Cemetery**, CS-0176.
  
- 2 **Unqualified Applicants: None.**
  
- 3 **Individual Licenses Inactivated**, with effective date:
  - a **Brostrom**, Hannah Elizabeth: AE under Ry R Erickson, March 11 2019.
  - b **Brostrom**, Hannah Elizabeth: AF under G Craig Collins, March 11 2019.
  - c **Drake**, Kelsie A: AE and AF under Joseph E Sharps, February 8 2019.
  - d **Galstad**, Julie K: AE and AF under Jordan L Westhoff, January 24 2019.
  - e **Gonzales**, Whitney L: AE under Christine Jackson July 1 2018.
  - f **Mills**, Dane E: AE and AF under Rebecca L Tjaarda, December 31 2018.
  - g **Patstone III**, David H - AF under Deborah L Wolf January 25 2019.
  - h **Seltzer**, Judy L: PN-9072, January 3 2019.
  - i **Smith**, K Elizabeth: AE under Pamela Suzanne Brawn, May 1 2019 (maximum).
  - j **Valentine**, Emily Lynne: AE under Maximilian T Bodzin, March 12 2019.
  - k **Warren**, Stephanie C: AF under Drew D Lundgreen, December 31 2018.

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

**5 None.**

**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	Sep 27 2018	Apr 3 2019	Change from Sep - Apr	Trend
Death Care Consultants	0	0	0	—
EM Apprentices *	58	58	0	—
FSP Apprentices *	68	66	(2)	▼
Interns	8	8	0	—
Embalmer Only *	19	19	0	—
FSP Only *	170	174	4	▲
Combination License: EM *	379	386	7	▲
Combination License: FSP *	379	386	7	▲
Military Combination License: EM	0	0	0	—
Military Combination License: FSP	0	0	0	—
Preneed Salespeople **	149	179	30	▲
Funeral Establishments	193	193	0	—
Immediate Disposition Companies	7	8	1	▲
Crematoriums	65	65	0	—
Cemeteries, Operating	304	291	(13)	▼
Cemeteries, Operating, Municipal	37	36	(1)	▼
Cemeteries, Operating, County	7	7	0	—
Cemeteries, Operating, Special District	133	127	(6)	▼
Cemeteries, Registered Non-Operating	48	48	0	—
Removal Registrations	30	31	1	▲
Alternative Disposition Facilities	2	2	0	—
Combined Total of all Licenses, Registrations:	2056	2084	28	▲*

**\*Note:** All facility and apprenticeship licenses expired January 1 2019, but have 90 days to cure this lapse. As of April 3 2019, not all renewals have been returned as of this date.

### Licensing Exam Update

As directed previously by the Board, The International Conference of Funeral Service Examining Boards Inc will soon 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 transition to the Conference during the 2019 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. 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.

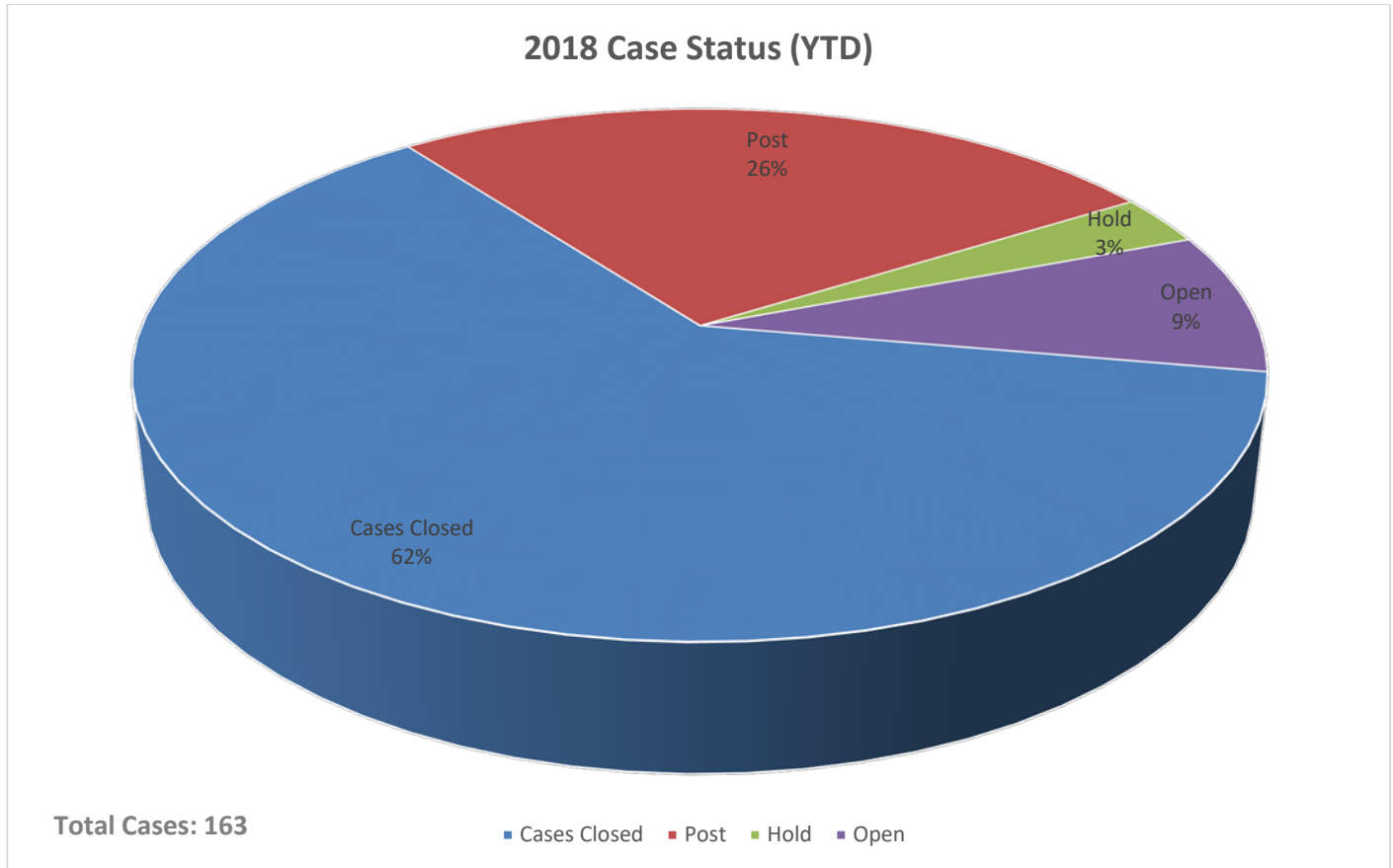
DCC Exam Date	DCC Pass Rate			Score Range	
	Passed	Failed		Highest Score	Lowest Score
Sep 25 2015	0	1	0%	60.0%	60.0%
Sep 15 2014	0	2	0%	67.0%	57.0%
Oct 18 2013	0	1	0%	53.0%	53.0%
Jan 25 2013	0	1	0%	63.0%	63.0%
Jul 23 2012	0	2	0%	54.5%	52.0%
*Oct 20 2010	1	0	100%	76.0%	76.0%

\*First Death Care Consultant Exam offered.

FSP Exam Date	FSP Pass Rate			Score Range	
	Passed	Failed		Highest Score	Lowest Score
Mar 27 2019	1	0	100.0%	95.0%	95.0%
Feb 1 2019	1	0	100.0%	<b>98.0%</b>	95.0%
Dec 5 2018	1	0	100.0%	85.0%	85.0%
Sep 25 2018	2	0	100.0%	92.0%	90.0%
Aug 3 2018	14	1	93.0%	95.0%	73.0%
May 17 2018	1	0	100.0%	75.0%	75.0%
Mar 23 2018	8	3	73.0%	95.0%	<b>63.0%</b>
Feb 14 2018	1	0	100%	88.0%	88.0%
Dec 18 2017	2	0	100%	93.0%	83.0%
Dec 8 2017	1	0	100%	75.0%	75.0%

## Investigations

The following chart shows the total number of cases by phase, including cases **closed** within the 2018 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.



### 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.

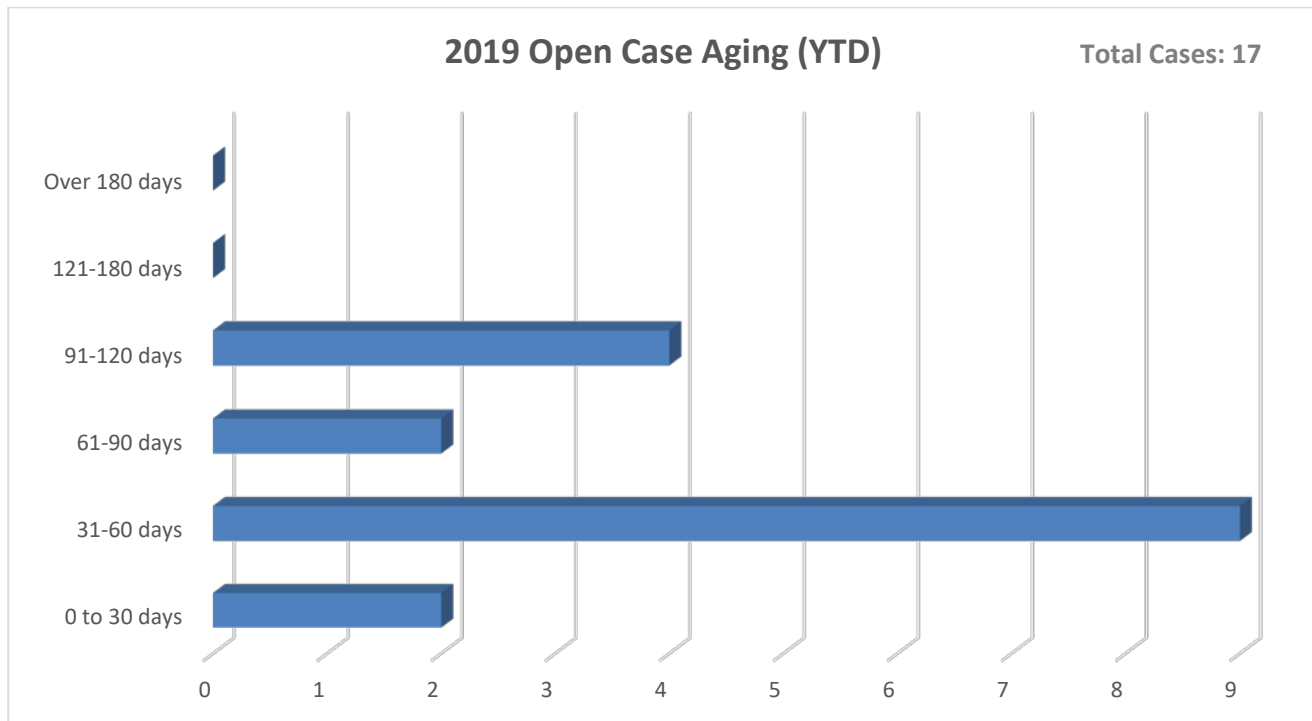
**“Hold”** cases are ones that have been presented to the Board, but which require some other activity or action by another entity before the Board completes deliberation on a case. This may include cases awaiting determination by another agency, or findings in civil or criminal proceedings. In some 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:** 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 in FY 2018)

Inspections were limited for a number of reasons in FY 2018. The review of the end-to-end inspection process and forms is currently being performed – they were last reviewed and updated in 2014.

Facility Type	Onsite	Records
Funeral Establishment	22	10
Cemeteries	97	24
Immediate Disposition Co	2	2
Alternative Disposition Co	2	1
Crematory	10	2
<b>Total Facility Inspections</b>	<b>133</b>	<b>39</b>

## Indigent Disposition Fund (IDF) Program

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 the Indigent Disposition Program and Fund. 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 Indigent Disposition 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 the transfer of the fund's management, the fund paid indigent claims on between 0.9% to 1.3% of deaths in the state, depending on the year. The maximum reimbursement rate was set at \$650, but the fund was rarely able to pay the maximum rate. Over the five years prior to the transfer of the fund's management, the average amount paid was \$492, with monthly averages varying widely—some months the fund was able to reimburse nearly the maximum and others months reimbursements averaged only \$262.

When OMCB took over the program, the law changed to provide funeral homes with a more predictable, fixed rate. Currently, that rate is \$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.

During the July 10, 2018 meeting, the Board voted to increase the reimbursement amount from \$461 to \$500.

Below is a summarization of the IDF Program (Calendar Years 2016 through 2018):

Indigent Claims Received	CY 2016	CY 2017	CY 2018
<b>Total Number of Claims Received</b>	443	376	421
<b>Number of Claims paid</b>	409	330	399
<b>Approved, Processing</b>	N/A	N/A	N/A
<b>Currently Open Claims</b> (Waiting on additional information, researching, etc.)	N/A	N/A	N/A
<b>Withdrawn/Denied</b>	36	43	21

Indigent Claims Reimbursed	CY 2016	CY 2017	CY 2018
<b>Average Amount Reimbursed per <i>Qualifying</i> Claim*</b>	\$446	\$454	\$474
<b>Total Amount Reimbursed</b>	\$182,656	\$149,874	\$189,214
<b>Average Number of <i>Total</i> Claims received per Month</b>	36.9	31.9	35.1
<b>Average Number of <i>Qualifying</i> Claims received per Month</b>	33.9	28.1	33.3

\*Claims are reimbursed at the actual amount claimed up to the maximum of \$500.