



Five-year Strategic Plan

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Introduction

A Strategic Plan is a top level planning document for an organization to set clear direction over all operational aspects of its mission. It serves as a framework for decision making over a five-year period. It is a disciplined effort to produce fundamental decisions that shape what a District plans to accomplish by selecting a rational and balanced course of action. The District's Mission, Core Values, Vision and the overall structure of this Strategic Plan were developed by the Board in workshop settings. Within the framework of that structure and the business environment, strategies and goals were developed to sustain and improve the District over the next five years. At its highest level, this Strategic Plan seeks to strengthen and build upon opportunities while addressing areas of concern all aimed toward forecasting an optimized future condition.

This plan also identifies actions, activities, and planning efforts that are currently underway which are needed for continued success in operations and management of the District, and provides for periodic reviews and updates.

Strategic Planning Definitions

Mission Statement: A declaration of the District's purpose which succinctly describes why the District exists. All activities of the District should be in support of the Mission Statement. The District's Mission statement also reflects the values to which the District Board is dedicated. The Board of Directors adopts the Mission Statement. The Mission Statement is reviewed annually but is intended to be constant over the long term.

Vision Statement: A statement that articulates where the District wants to be over the life of the Strategic Plan. It outlines at the highest level the key changes that must be achieved by the Strategic Plan. The Vision creates and drives strategy and tactics identified elsewhere in the Strategic Plan. The Board of Directors adopts the Vision Statement. The Vision Statement will be reviewed annually and will typically change more frequently than the Mission Statement to reflect the direction the Board wants to take the District over the five-year time horizon of the Strategic Plan.

Core Values: These are values, framed in question form, to which the Board of Directors are fiercely dedicated. They are anchored in community values and are used by the Directors as decision filters for the myriad of decisions in the future.

Strategic Elements: The broad and primary areas of District operations, planning, and management that are addressed and supported by the Strategic Plan goals. These essentially serve as the outline and organization of the Strategic Plan. The Board of Directors adopts the Strategic Elements. The Strategic Elements are reviewed annually but are intended, absent major new issues to be faced, to be relatively constant over the life of the five-year Strategic Plan.

Objective/Strategy statement: A concise statement associated with each Strategic Element that describes what the Objective for that Element is and how it will be achieved.

Strategic Goals: The goal statement is supported by a narrative that more fully explains the nature of the goal and the issues that the goal intends to address. The Strategic Goals are prepared by District staff and accepted by the Board. The Strategic Goals may change from year-to-year when the annual assessment is made of the progress on each Strategic Element. The Strategic goals define the line between policy (Board responsibility) and implementation (Staff responsibility) and as such are a collaborative effort of both the Board and Staff.

Strategic Plan Development

In FYE 2013 the District retained the services of BHI Management Consulting (BHI) to facilitate and coordinate the development of the District's five-year Strategic Plan. BHI first gathered input from the community through a series of interviews conducted in Taft. These interviews were with representatives from the City of Taft, the school District, Chamber of Commerce, other governmental agencies and funeral homes in the community. District Board members were interviewed individually, staff and employees were also polled for their impressions of the future of the District. All of these inputs were used to inform the Board during deliberations in a planning workshop. The following topics and more were discussed at these input gathering meetings:

- Mission;
- Vision;
- Core Values;
- Strengths;
- Weaknesses;
- Opportunities; and
- Threats.

The Board supported this process as a way to allow all to participate in the foundation of the Strategic Plan. The Board workshop was conducted in March of 2014. At this workshop the Board reviewed all input and considered the strengths, weaknesses, opportunities and threats to the District. The Board also developed its first Mission statement and created a Vision statement for the District. The Board provided guidance on Core Values that were developed more fully thereafter. The Board endorsed six strategic elements around and within which to organize implementation actions that will support the Mission and assure success of the Vision.

After the Board planning workshop, key members of District staff, worked with BHI to develop the Strategic Element objective and strategy statements and Strategic Goals that support each element. The resultant implementation plan was presented to the Board in another workshop that allowed for the Board and staff to determine if the proposed implementation plan is clear and meets the direction of the Board. Using this process, this Strategic Plan was proposed, iterated and assembled in a way that provides assurance of success and full buy-in for the Board's Vision and Strategy for the District over the next five years.

Strategic Plan Maintenance

A key part of the Strategic Planning process is to conduct an annual review to update the Plan. These reviews allow for regular maintenance of the Plan so it reflects the actual progress and conditional needs of the District. The reviews will be documented and followed up with either a Plan supplement or an updated Plan. A five-year planning horizon will be maintained with each review effort developing a new fifth year of actions, projects and initiatives.

Mission Statement, Vision Statement, Core Values

Mission Statement

The Westside Cemetery provides dignified internment services in a beautiful, tranquil and lasting environment that will honor and celebrate life.

Vision

In five years (2019) the Westside Cemetery District will:

- *possess a complete set of policies and procedures including how we communicate with our constituents.*
- *have completed master site development plan including:*
 - * *Central committal area*
 - * *Cremation internment options*
 - * *Outside Niche banks*
 - * *More*
- *be fully transparent to the public.*
- *have determined the optimal use of natural resources including recycled water, solar power and others as appropriate.*
- *be properly staffed and have a plan for succession.*
- *have implemented best practices for our investments.*

Core Values

We are fiercely dedicated to the following core values and, as the Board of Directors, will use them as decision filters.

Being representative to our Public

Fiscal efficiency with the public's funds

Safe Facilities

Integrity in all we do

Full transparency in all of our practices

Our employees and their well being

Strategic Elements -

Strategic Elements represent the vital areas of the District's operation and management. They assure that the implementation of work to be performed in support of the Mission and Vision are comprehensive in nature and properly cover the District in all areas. Strategic elements are derived from the foundational Mission and Vision statements of the District. They are linked to action and results through the Strategic Goals written in each area and the Strategic Work Plan. Within the five-year period covered by this Strategic Plan, these Elements assure that all aspects of District operations are well supported; moving forward in a way that reflects Board priorities and creates balanced implementation. The Strategic Work Plan which contains the supportive actions and initiatives organized and prioritized by year within the planning period, is presented along with each Strategic Goal and is also consolidated in tabular form in Table 1 - Strategic Plan "At-a-Glance" (pg. 17). Business Plans and Employee Goals are not a part of the Strategic Plan; these are developed on a one to two year timeframe with tasks, and are handled within the management structure of the District.

The Strategic Elements are:

- 1.0 Facilities/Land Assets
- 2.0 District Finances
- 3.0 Partners and Public Affairs
- 4.0 Administrative Management/Personnel
- 5.0 Technology/Equipment

1.0 FACILITIES AND LAND ASSETS

Our objective is to provide cost effective, modern facilities and land assets for the public needs for burial rights now and in the future. We will do this by continual planning for the needs of our community and reflecting those needs with efficient state of the art cemetery facilities.

Summary of 5-Year Strategic Goals

- 1.1 Master Plan
- 1.2 Wider range of cremation interment options
- 1.3 Security improvements

1.1 Master Plan

Currently the District is seeking ways to continually expand the District property and facilities creating better ways to serve the constituents of our community at minimal cost. The District is committed to this by looking into several different types of cremation interments' as-in scattering gardens, ossuary, and different types of niche bank options. To develop and offer two outside committal service centers, with cremation interment options; one near the mausoleum and one located at the north/east corner of the existing cemetery. The historical significance of certain District facilities will also be captured in the Plan.

1.2 Wider Range of cremation options

In recent past and what looks to be a coming trend a larger percent of decedents families are opting for cremation of their loved ones. The District will seek more options for them to consider when making arrangements. This can be achieved through different types of niche banks located in several strategic areas of the cemetery possibly creating a committal area to also be used for full body interments; low cost options as in scattering gardens, ossuary, memorial walkways and the like.

1.3 Security improvements

The District is currently in the process of planing a automatic gate for the west entrance of the cemetery. The other points of entry into the cemetery will also be better secured, and also better security lights, including some with cameras.

2.0 DISTRICT FINANCES

Our objective is to ensure the short and long-term fiscal health of the District. We will forecast and plan revenues, reserves, debt and expenditures. We will efficiently use our financial resources to fund current and future expenses.

Summary of 5-Year Strategic Goals

- 2.1 Project funding
- 2.2 Investment and reserve policy maintenance
- 2.3 Annual Audit

2.1 Project funding

The District currently has a capital project account. The goal for this account is to continue to build and expand it to allow for funding of future expansion and projects. This fund will be put to use for projects described in the Master Plan in element 1 above.

2.2 Investment and reserve policy maintenance

The consideration and maintenance of policies regarding District investments and reserves serve to assure that they remain optimized throughout economic swings and District financial conditions. The District will routinely review and update these policies to assure they protect and optimize District assets.

2.3 Annual Audit

A third party annual audit of District finances, records, methods, policies and controls provides assurance to both the Board and the public that the agency remains in good fiscal conditions, controls their money well, and be open and accountable to members of the public. The District will continue annual audits by employing an outside auditing firm and maintain proper policies for the rotation of firms to allow for broader oversight over time.

3.0 PARTNERS AND PUBLIC AFFAIRS

Our objective is to work with our local partners to leverage opportunities for the District. We will do this by working closely with our partners and public to make best use of public funds on projects such as those dealing with natural resources and conservation.

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Summary of 5-Year Strategic Goals

3.1 Reduce potable water usage

3.2 Possible use of solar energy

3.1 Reduce potable water usage

The District has, within its Mission and Vision, to make sustainable place for celebrating life and in doing so provide for optimal use of natural resources. Our water is primary among those resources. We can reduce the use of potable water for irrigation purpose by maintaining the current water system to the highest level of efficiency, planning watering times, and making changes to unnecessary turf locations. This environmentally friendly project will take several steps.

3.2 Possible use of solar energy

In further service to our Mission and Vision, the District plans to assess the viability of utilizing solar power. The spectrum of opportunities could range from producing only the power we use at the District site (Net zero (0) to producing power on a larger basis for use and sale to other local public agencies. This project could be made possible by purchasing the property across Cedar Street on the south side of the cemetery and installing solar panels.

4.0 ADMINISTRATIVE MANAGEMENT/PERSONNEL

Our objective is to create, maintain and implement policies and procedures and human resources to ensure sound and efficient management of the District. We will periodically review, refine, and implement policies, procedures and staffing to ensure that the General Manager has the resources and tools necessary for successful operation of the District.

Summary of 5-Year Strategic Goals

- 4.1 Policies and Procedures update
- 4.2 Assuring Transparency
- 4.3 Staffing/succession planning
- 4.4 Board Development
 - Orientation
 - Board training
- 4.5 Annually Update Strategic Plan

4.1 Policies and Procedures update

Policies and procedures guide the District in proper management and operations of this public agency. As such, we will review and update all of the Districts policies and procedures to assure that they reflect today's needs, modern methods and best practices. This will be done with the help of a qualified consultant, the Board and Staff involvement.

4.2 Assuring Transparency

It is a Vision of the District Board of Trustees to maintain the public trust by being fully transparent to the public. The District will update our website to allow for greater functionality, like a Board member access portal and more on-line document availability to the public. We will strive to appropriately digitally maintain all public records, make all public records available when requested, and keep an open door policy to all. Additionally, the Board will be open to those who can add to this discussion with beneficial ideas and viewpoints. We will also achieve the CSDA District Transparency certificate.

4.3 Staffing/succession planning

It is important that the District has a clear plan looking toward future staffing. Everyday, our staff is what makes our cemetery work and work well. The District will maintain a clear chain of command in place, assure that key district personnel are cross trained and able to step-up and fill in for a missing employee when the need arises. The District will also consider long-term succession as staff analyses demand.

4.4 Board development-Orientation-Board training

It is a best practice of Boards to address their own development to adopt best practices in their public role. As such, the Board will adopt clear training and orientation methods each year and consider an annualized calendar for Board development and individual Board members. A New Board Member Orientation program will be developed to assist new Trustees Members in coming up to speed as they take office. The Board will create a Trustee handbook that will clearly define their roll and scope of authority. Attendance at beneficial industry related conferences will be encouraged with the goal of each member attending at least one appropriate conference each year. Overall, within this plan, we will work to prepare for achieving the CSDA District of Distinction Award

4.5 Annually update the Strategic Plan

Once completed and adopted, this strategic plan constitutes the roadmap for the District into the future. Board consideration, discussion and updating of this plan each year is a must to keep it relevant, useful and real. The District will have a yearly workshop in February with full Board and Staff, preferably a full day to discuss all issues and aspects of the cemetery, where we are at that time and where we want to be in the future 1-to-5 years, and update the plan accordingly.

5.0 TECHNOLOGY/EQUIPMENT

Our objective is to utilize and drive the best cemetery technologies for our community. We will constantly seek and test methods to be on the cutting edge of efficient digital methods and safe/effective maintenance equipment.

Summary of 5-Year Strategic Goals

5.1 Digital Technologies

5.2 Safe/Efficient Equipment

5.1 Digital Technologies

The use of technologies to improve service to our customers will remain important to this District and its public. To continue to update and maintain the best cutting edge equipment and software available, we will annually, within budget development cycle, consider cemetery relevant technologies for application. This will also include our website upgrades outlined above.

5.2 Safe/Efficient Equipment, Grounds and Facilities

Worker and customer safety is paramount to the District. We will continually assess our grounds, facilities and equipment to assure that it maintains all required safety measures. We will also assess best methods and practices to assure efficiency in all we do.

Table 1 –The Strategic Plan “At a Glance”

Strategic Objective	Strategic Elements	Completion (Fiscal year)
1.0 Facilities/Land Assets		
	1.1 Master Plan	Ongoing
	1.2 Wider range of cremation interment options	2016-2018
done	1.3 Boundary Definitions	2014-2015
not a priority	1.4 Building New Office Facility	2018-2019
2.0 District Finances		
	2.1 Project Funding	Ongoing
	2.2 Investment and Reserve Policy Maintenance	Ongoing
	2.3 Annual Audit	Ongoing
3.0 Partners and Public Affairs		
ongoing	3.1 Reduce Potable Water Usage	2015-2016
In progress	3.2 Potential Solar Energy Use	2015-2016
4.0 Administrative Management/ Personnel		
	4.1 Policies and Procedures Update	2014-2015
	4.2 Assuring Transparency	2015-2017
	4.3 Staffing/Succession planning	2014-2015
	4.4 Board development – Orientation – Board Training	2014-2015
	4.5 Annually Update Strategic Plan	Annually
5.0 Technology/ Equipment		
	5.1 Digital Technologies	FY2015-18
	5.2 Safe/Efficient Equipment, Grounds and Facilities	Ongoing