

GREENWOOD CEMETERY ADVISORY BOARD AGENDA
FRIDAY, APRIL 5, 2024
MUNICIPAL BUILDING, 151 MARTIN, ROOM 205
8:30 A.M.

The Greenwood Cemetery Advisory Board provides the recommendations to the City Commission:

1. Modifications: As to modifications of the rules and regulations governing Greenwood Cemetery.
2. Capital Improvements: As to what capital improvements should be made to the cemetery.
3. Future Demands: As to how to respond to future demands for cemetery services.

The Greenwood Cemetery Advisory Board shall hold at least one public meeting in each quarter.

I. CALL TO ORDER

Chairperson, Linda Buchanan

II. ROLL CALL

City Clerk, Alexandria Bingham

III. INTRODUCTION OF GUESTS

IV. APPROVAL OF THE MINUTES

- A. Approval of meeting minutes of January 19, 2024.

V. UNFINISHED BUSINESS

VI. NEW BUSINESS

- A. Strategic Plan Revised
- B. Organizing Future Business
- a. May 3, 2024
 - i. Update on restoration policy and a brief review of the Cemetery Rules and Regulations
 - ii. Discussion about Monuments, Gravemarkers, and Foundations in the Rules and Regulations
 - b. June 7, 2024
 - c. July 5, 2024 – Cancel
 - d. August 2, 2024 – Cancel
 - e. September 6, 2024
 - f. Other Items for Consideration

VII. REPORTS

- A. Update from Museum Director Leslie Pielack (when applicable)
- B. Update from Clerk's Office
- C. Financial Reports
- D. Cemetery Sales & Activity
- E. City Manager's Reports ([January](#), [February](#), [March](#))

VIII. OPEN TO THE PUBLIC FOR MATTERS NOT ON THE AGENDA

IX. BOARD COMMENTS

X. ADJOURN

Next Meeting: May 3, 2024

Should you wish to participate in this meeting, you are invited to attend the meeting in person or virtually through ZOOM:

<https://zoom.us/j/98983856041> Meeting ID: 989 8385 6041

You may also present your written statement to the City Clerk,

151 Martin Street, P.O. Box 3001, Birmingham, Michigan 48012-3001 prior to the meeting.

NOTICE: Individuals requiring accommodations, such as mobility, visual, hearing, interpreter or other assistance, for effective participation in this meeting should contact the City Clerk's Office at (248) 530-1880 (voice), or (248) 644-5115 (TDD) at least one day in advance to request mobility, visual, hearing or other assistance.

Las personas que requieren alojamiento, tales como servicios de interpretación, la participación efectiva en esta reunión deben ponerse en contacto con la Oficina del Secretario Municipal al (248) 530-1880 por lo menos el día antes de la reunión pública. (Title VI of the Civil Rights Act of 1964).

April 5, 2024

Greenwood Cemetery Advisory Board Minutes
January 19, 2024
Municipal Building, 151 Martin
8:30 a.m.

I. Call To Order

Linda Buchanan, Chair, called the meeting to order at 8:30 a.m.

II. Roll Call

Present: Chair Linda Buchanan; Paul Connell, Jacqueline Patt, Linda Peterson, Laura Schreiner, Margaret Suter

Absent: Joseph Vercellone

Staff: City Clerk Bingham; Museum Director Pielack

III. Introduction of Guests

Cheri Arcome, Creative Collaborations spoke to the Board and answered informational questions.

IV. Approval of the Minutes

A. Review of the Minutes of October 6, 2023

MOTION: by Connell, seconded by Patt:
To approve the minutes of October 6, 2023.

VOTE: Yeas, 6
Nays, 0

V. Unfinished Business

VI. New Business

A. Pewabic Pottery Update

The Board received the update.

B. Budgeting Discussion - Resolution to support a budget request for Cemetery Preservation Work

CC Bingham presented the item and answered informational questions from the Board.

MOTION: by Suter, seconded by Connell:
To adopt a resolution to support the budget expenditure request of \$15,000 per fiscal year for the cemetery maintenance fund starting July 1, 2024 for cemetery preservation efforts.

VOTE: Yeas, 6
Nays, 0

C. Organizing Future Business

- a. February 2, 2024 – Cancel
- b. March 1, 2024 – Cancel
- c. April 1, 2024
 - i. Update on restoration policy and a brief review of the Cemetery Rules and Regulations
 - ii. Strategic Plan Revised
- d. Other Items for Consideration

VII. Reports

- A. Update from Museum Director Leslie Pielack (when applicable)
- B. Update from Clerk's Office
- C. Financial Reports
- D. Cemetery Sales & Activity
- E. City Manager's Report

VIII. Open To The Public For Matters Not On The Agenda

IX. Board Comments

After discussion among the Board, CC Bingham, and Ms. Arcome, there was Board consensus to have a further discussion about Monuments, Gravemarkers, and Foundations in the Rules and Regulations at the April 2024 meeting.

Mr. Connell thanked Ms. Arcome for her work with the Cemetery.

X. Adjourn

The meeting was adjourned at 9:48 a.m.

Alexandria Bingham, City Clerk



Laura Eichenhorn, City Transcriptionist



MEMORANDUM

Clerk's Office

DATE: April 2, 2024

TO: Greenwood Cemetery Advisory Board

FROM: Alexandria Bingham, City Clerk

SUBJECT: Greenwood Cemetery Board Strategic Plan Process

INTRODUCTION:

The Greenwood Cemetery Advisory Board (GCAB) has requested to discuss and create a strategic plan. A strategic plan will emerge through discussions on the Greenwood Cemetery and will identify the cumulative vision of the board. The strategic plan is not a budgetary or policy document, however, it should be a reference that guides the board when making decisions and recommendations going forward.

The GCAB visited this issue in December of 2022, April 2023, and October 2023.

The GCAB directed the City Clerk to present a revised strategic plan based on feedback from the most recent October 2023 meeting.

At the culmination of this process, a report will be created outlining the steps taken during the process, the outcomes of these discussions, and ultimately a strategic plan with a mission, values, and strategic goals as derived from the process.

BACKGROUND:

Public sector and government organizations use a variety of plans:

Strategic Plan – a disciplined effort to produce fundamental decisions and actions that shape and guide what an organization is, what it does, and why it does it. (Bryson, 1995)

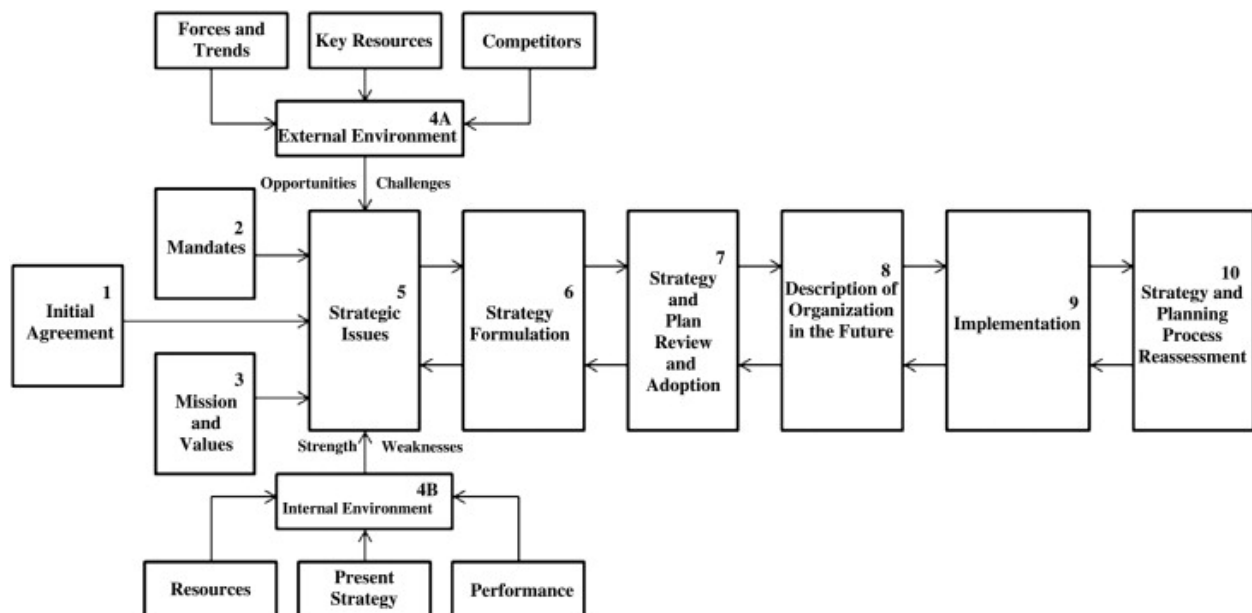
Master Plan – a document and policy guide designed to help communities create a vision of what they want to look like in the future. Master Plans help guide communities in their decisions on land use development and preservation. (American Planning Association, Michigan Chapter)

Long Range Plan – Long-range planning, and consequently the name “long-range plan”, arose in the 1950s and 1960s, when the economic development in various countries gave rise to the first

five-year and four-year plans (Maqueda Lafuente, 1996, p. 11). This planning was considered an extension of the regular one-year financial planning, in the form of budgets and operating plans. It hardly took into consideration any social or political factors, and assumed a relative stability of the markets. (Pacios, 2004)

Strategic Planning Process:

- (1) environmental analysis (macro, micro and corporate or internal environment), SWOT analysis, planning assumptions, and developing scenarios;
- (2) mission;
- (3) values;
- (4) vision;
- (5) priorities (critical success factors, key result areas, information services priorities);
- (6) goals;
- (7) strategies; and
- (8) formal plans



FISCAL IMPACT:

A strategic plan is aspirational document to guide the actions and decision making of the board. A strategic plan is not a budgeting document, therefore there is no fiscal impact at this time.

SUSTAINABILITY:

Due to the City Commission's development of a strategic plan in 2022 that includes a goal in regards to sustainability all departments and boards are encouraged to incorporate sustainable initiatives in their projects going forward.

PUBLIC COMMUNICATIONS:

All GCAB meetings fall under the Open Meetings Act and are open to public comment, and all GCAB agendas, packets and minutes are available online for public viewing.

ATTACHMENTS:

1. Combined DRAFT SWOTC
2. Combined DRAFT Vision Tour
3. Combined DRAFT Mission and Values
4. 2022 City of Birmingham City Commission Goals
5. 2023 City Commission Principles of Conduct
6. 2023 Greenwood Cemetery Annual Report
7. Greenwood Cemetery Board Ordinance

SUGGESTED ACTION:

Provide direction to the City Clerk on finalizing and adopt a strategic plan.

Strengths-Weaknesses-Opportunities-Challenges (SWOC) Analysis

Strengths

- Beauty, charm and value to the community; integrated with Birmingham's sense of place
- Unique history, character and historic designations
- High level of interest from multiple community stakeholders
- Responsive service from City and Cemetery Manager
- Digital information
- Age/historicity - A valued community and state treasure
- 8 acres is manageable to maintain
- City owned
- Access to city resources e.g. DPS
- Pride of ownership
- Historical (1825) – Bham's story
- The bucolic/serene atmosphere (inc. landscaping – trees, shrubbery)
- Location – peaceful Bham neighborhood
- Population of Birmingham residents over age of 65
- Prestige of Birmingham and those interred at Greenwood
- Peaceful cemetery grounds
- Concern of Historic Museum & Friends
- Financial support by City with a strong tax base
- Support by City Administration and City Governance
- Records available & maintained by City
- Reserve fund monitored by City
- Advocacy & stewardship of GCAB
- Perpetual Care Endowment Fund
- Partnership with Museum
- Historic
- Beautiful
- Unique
- Well Maintained
- Desirable
- Significant
- Historical tours
- Knowledgeable and accommodating contractors
- Historical Designation, State Recognition, National Underground Railroad Network to Freedom destination from the National Park Service
- Second and third rights are able to accommodate most
- Funeral home relations

Weaknesses

- Limited availability of sites
- Lack of plan, program, and/or funding for preserving historic markers
- Age/historicity - maintenance of older markers, trees, more "exclusive", more demand
- 8 acres, fewer plots = less revenue
- City owned – subject to politics, more bureaucracy
- Location – hemmed in, no place to expand
- Could lose charm & desirability if overbuilt
- Greenwood Cemetery unknown in cemetery market
- Lack of space for full-body burials
- No columbarium
- No marketing
- No presence of person on site
- High cost of plot and burial
- Declining number of grave sales
- Cemetery reaching end of revenue life
- Some monuments and markers are in poor condition
- Landscaping

Opportunities

- Capitalize on the historic value of site
- Develop opportunities for stakeholders to raise additional funds, e.g., a "friends" group or annual fundraiser not dependent on grave sales
- Grants could be sought after to provide the revenue to fund preservation or improve the cemetery
- Increase revenue by increasing plot price, fund-raising, legacy raising, columbarium
- Thru endowment fund and city commitment
- Create an obligation to keep care of Greenwood into immediate future + beyond
- Find unsold space
- Market cremation space
- Reclaim plots where no contact in 100 years – generates income
- Create and market audio tours with maps
- Releasing graves would generate income
- More enforcement of rules & regulations
- Increasing Perpetual Endowment Fund to prolong life of Greenwood
- Increase fees
- Additional burial rites
- Use in tours for educational programs
- Cremation rate is on the rise

Challenges (or Threats)

- Deterioration of important historic markers without planned intervention
- Integrating digital content with visitors on site
- Balancing access to grave purchases with limited spaces
- Building sufficient revenue to maintain cemetery even when it is full
- Protecting and preserving historical markers and historical knowledge related to cemetery – maintenance
- Keeping up tree canopy + landscaping
- Avoid too large stone/granite contemporary styled memorials which make the cemetery look crowded + non-historic
- Explore the asset or liability aspect of building new structures (like a columbarium) – would expenditure lead to profits or financial burden which becomes a detriment (deficient) to the cemetery
- Cost of municipal services
- Popularity of cremation interment
- Limited demand for green burials & increase of cremations
- Perpetual care fund
- Limiting decorations
- Ability to enforce rules and regulations



Greenwood Cemetery Advisory Board Shared Five-Year Vision Tour

Aspirational Thinking:

What will the Historic Greenwood Cemetery look like in the next five years?

In the next five years, the Historic Greenwood Cemetery will continue to be beautifully maintained and well cared for. Visitors will encounter a serene landscape with preserved gravestones, monuments, and historical structures that tell the captivating stories of those interred here. Preserving the existing tree canopy is essential to maintaining the aesthetic beauty of our environment for future generations to enjoy. Educational programs and guided tours will offer immersive experiences, sharing the cemetery's rich history, cultural significance, and natural beauty with the community. Greenwood Cemetery will stand as a symbol of sustainability, with eco-friendly landscaping and energy-efficient amenities. Engaging community events will breathe life into the grounds, fostering a sense of belonging and remembrance. It will be a place where history thrives, where memories are honored, and where the spirit of preservation, education, and community truly flourishes.

What kind of accomplishments and projects will GCAB have made progress on in the next 5 years?

The accomplishments of the Historic Greenwood Cemetery Advisory Board over the next five years could include:

1. **Restoration and Preservation:** Undertaking significant restoration projects to repair and conserve gravestones, monuments, and historical structures within the cemetery, ensuring the physical integrity of the site.
2. **Increased Community Engagement & Educational Initiatives:** Expanding efforts to increase awareness of the cemetery as a city treasure and involve more community members in cemetery tours, educational programs, and volunteer initiatives. This includes expanding online resources and communications to educate the public about the historical, cultural, and natural significance of the cemetery.
3. **Enhanced Accessibility and Wayfinding:** Improving the accessibility of Greenwood Cemetery by implementing signage, and facilities that accommodate visitors of all abilities, making it more welcoming to a diverse range of individuals.
4. **Sustainability Measures:** Implementing sustainable practices within the cemetery, such as environmentally friendly landscaping, and water conservation to reduce its environmental footprint.
5. **Financial Stewardship:** Ensuring the financial stability of the cemetery by implementing effective strategies, seeking grants, and exploring revenue-generating partnerships.
6. **Collaborative Partnerships:** Maintain and expand on existing partnerships with local schools, historical societies, and other organizations to foster collaborative initiatives that benefit both the cemetery and the community.
7. **Maintenance and Security:** Continuing regular maintenance and consider security measures as needed to ensure the safety and tranquility of the cemetery, including regular landscaping and regular review and updates to the Greenwood Cemetery Operational Procedures, Conditions, and Regulations.

These accomplishments would not only contribute to the ongoing preservation of Greenwood Cemetery but also promote its role as a valuable community asset, a place for reflection and learning, and a testament to the rich history of the area.



Greenwood Cemetery Advisory Board DRAFTING – Mission & Values

A mission statement is a concise explanation of the organization's reason for existence. It describes the organization's purpose and its overall intention. The mission statement supports the vision and serves to communicate purpose and direction to employees, customers, vendors and other stakeholders.

DRAFT – Mission

The mission of the Greenwood Cemetery Advisory Board is to preserve, protect, and celebrate the rich historical, cultural, and natural heritage of the Historic Greenwood Cemetery. In respect to the ordinance establishing the parameters of the board, the board is committed to providing recommendations on modifying the rules and regulations as needed, recommending capital improvements to the Historic Greenwood Cemetery as needed, and examining future demands and making recommendations as to how to accommodate those demands. The board is dedicated to honoring the memories of those interred here, fostering an engaged and connected community, and ensuring the long-term sustainability and accessibility, while providing efficient and effective services that meet the current demands.

Organizational values are a set of core beliefs held by an organization. They act as guiding principles that provide an organization with purpose and direction and set the tone for its interactions with its customers, employees and other stakeholders.

DRAFT – Values

1. **Preservation:** We value the preservation of Greenwood Cemetery's historical, architectural, and natural assets. We are committed to safeguarding its rich heritage, ensuring that future generations can appreciate its significance.
2. **Service:** Ensuring that exceptional service is available to plot owners and grieving families in Greenwood Cemetery is paramount as it not only honors the memory of their loved ones but also offers comfort, support, and a sense of dignity during their time of loss, fostering trust and lasting connections within the community.
3. **Sustainability:** We are committed to ensuring the long-term sustainability of Greenwood Cemetery. This includes responsible environmental practices, financial stewardship, and strategic planning to guarantee its continued role as a cherished community resource.
4. **Community Engagement:** We believe in actively involving the community in our efforts. We strive to engage with residents, local organizations, and stakeholders to promote a sense of ownership and shared responsibility for the cemetery's well-being.



CITY COMMISSION GOALS

ENGAGED AND CONNECTED COMMUNITY → Birmingham is a community that is connected to one another and engaged in the decision making process

- Bridge the divide that Woodward Avenue creates in the City and transform the Woodward environment
- Offer City services and amenities that enrich the lives of residents of all ages
- Encourage robust resident engagement with their government and community
- Increase connectivity between the Rouge River trail system, downtown, and the neighborhoods

ENVIRONMENTAL SUSTAINABILITY → The City of Birmingham positions itself for a changing future by instituting policies and practices that protect the natural environment and reduce extreme weather impacts on the community

- Create a sustainability board to review projects, investigate funding opportunities, and offer public education opportunities
- Maintain and upgrade infrastructure to prepare for future climate conditions
- Modernize City facilities for energy efficiency and sustainability

EFFICIENT AND EFFECTIVE SERVICES → Birmingham will address the needs of the community in a timely and respectful manner

- Incorporate new technologies to improve service delivery for residents including digitization of public records and museum materials
- Build and retain an effective and professional staff who serve the community
- Create community risk reduction policies and programs that emphasize citywide increased safety and security



CITY COMMISSION PRINCIPLES OF CONDUCT

As elected leaders of this community, the City Commission is entrusted to collaborate, and work as a team committed to the residents of the City of Birmingham. In order to be effective, City Commissioners commit to come to meetings with an open mind, think strategically about City issues, and conduct themselves in a respectful and professional manner at all times to maintain a culture of candor, trust and respect.

1. Collaboration:

We shall recognize the importance of working toward consensus as an elected body in order to make the best possible decisions for the good of the entire community.

2. Respectful Communication:

We shall treat all persons equally and with respect by listening openly to their ideas and responding with courtesy to those with whom we disagree. We shall promote healthy discourse and avoid spreading false information or making personal attacks and accusatory statements.

3. Integrity:

We shall act with honesty and transparency, realizing that we are accountable to the public for our decisions. We shall not allow our personal biases and self-interest to interfere with making decisions based on the best interests of Birmingham and its residents.

4. Professionalism:

We shall approach each City Commission meeting with an open mind and be prepared to engage with one another and the public about items on the agenda.

5. Ethical Conduct:

We shall adhere to our Oath of Office, Code of Ethics, and Rules of Procedure and maintain the highest ethical standards in our interactions, decision-making and use of public resources.

GREENWOOD CEMETERY ADVISORY BOARD



2022/2023 ANNUAL REPORT

September 2023

Linda Buchanan, Chair

Linda Peterson, Vice Chair

Pam DeWeese, outgoing member July 2023

Laura Schreiner

George Stern, outgoing member July 2023

Margaret Suter

Joseph Vercellone

Jacqueline Patt, incoming member July 2023

Paul Connell, incoming member July 2023

INTRODUCTION

The Greenwood Cemetery Advisory Board (GCAB) was established by the Birmingham City Commission on October 13, 2014. One of its duties is to submit a report to the Commission on an annual basis of the general activities, operation and condition of the cemetery for the preceding 12-month period. The GCAB Annual Report includes a summary and update of the cemetery's status, related finances and the GCAB's planned activities for the next fiscal year.

In alignment with the city's fiscal year, the current GCAB report covers the period from July 1, 2022 through June 30, 2023.

GENERAL ACTIVITIES

Meetings

The GCAB is required to meet at least quarterly. During the report period, the board met this requirement by conducting meeting on the dates listed below:

July 1, 2022
September 2, 2022
November 2, 2022
December 2, 2022
February 3, 2023
April 14, 2023

2022/2023 Accomplishments

- Produced the 2021-2022 Annual Report
- Approved the policy for approving and installing markers for persons of historical significance
- Studied <https://www.findagrave.com/> to give feedback to the museum on how this online collaborative forum tool could benefit the City and those interested in information about persons buried in Greenwood Cemetery
- Approved revisions to the Greenwood Cemetery Operational Procedures, Conditions and Regulations
- Approved the application by the Friends of the Birmingham Museum, a non-deed holder, for a marker installation for George and Eliza Taylor, persons of historical significance to Birmingham.
- Initial discussions on a Cemetery Service Provider RFP
- Initial discussion on Strategic Planning
- Q&A with Cheri Arcome, Creative Collaborations – to better understand the demand and services being provided in the cemetery
- Discussed the planning of the next grave release

OPERATION

Sales and Financial Information

On December 1, 2019, Creative Collaborations, LLC became transitional provider for cemetery services, with the exception of grounds maintenance, which is provided by the City's Department of Public Services. On May 1, 2020, Creative Collaborations entered into a one-year renewable contract with the City to provide cemetery services on an ongoing basis. Grounds maintenance continues to be provided by DPS with ongoing communication and collaboration between Creative Collaborations, DPS, and the City Clerk's office.

On January 14, 2019, the City Commission approved a payment plan policy for cemetery plots that requires full payment within 24 months. During the 2022-2023 fiscal year, no new payment plans have been initiated. The Clerk's Office and Treasurer's Office monitors active payment plans. Plots under a payment plan are considered sold for purposes of availability unless the plot becomes available again in the event of a purchaser default.

Beginning December 1, 2019, Creative Collaborations, LLC, remits 100% of revenue to the City, which then makes payments to the contractor for services performed.

FY 22-23 Grand Totals	
Sales in B	5
Sales in C	10
Sales in Other	1
Resident Purchases	4
Non-Resident Purchases	12
Payment Plans Initiated	0
Total Graves Sold	16
Transfer of Ownership Filed	7
Additional Burial Rights Purchased	6

Grave Releases

- 4/26/21 The City Commission approved the recommended release of Section B, Rows 17-C, 16-C, 15-C & 14-A for a total of 38 Graves, 9 of which are obstructed)
- 12/23/21 The City Commission approved the release of one grave in section B, row 2-A for an at-need situation for a family with adjacent space.
- 8/15/22 The City Commission approved the release of one grave in section B, row 12-A, for an at-need situation for a family with adjacent space.
- 7/24/23 The City Commission approved the release of 88 available graves suitable for burial in the flush rows in Section B, and to direct Greenwood Cemetery Advisory Board to evaluate the fee schedule again for plot costs after 20% of these plots have been sold which would equate to 18 spaces.

Notes on Obstructed Graves

- 1/29/21 Creative Collaborations noted that graves 1 & 2 in Section C rows 18-A & 19-A are not able to be used due to obstructions.
- 3/25/21 DPS noted that graves in row 19-A 1,2,13,14,16 are obstructed by trees.
- 4/23/21 DPS noted Row 17-C: Graves 9 and 11 are affected by a 16" Red Maple located at the east edge of both graves. Row 15-C: Grave 5 is obstructed by a monument on the east edge. Grave 10 has a 16" Cedar (eastern arborvitae) obstructing it. Grave 17 has a marker on the east edge that is encroaching onto the grave site. Row 14-A: Graves 15 and 16 have a large shrub located over both sites. Graves 17 and 19 are obstructed by a large monument located east of them.
- 5/31/23 A field survey was completed for the following lots: A-1, 2-D, 3-A, 4-A, 5-C, 6-C, 7-D, 8-C, 9-D, 10-A, 11-A, 12-A and 13-A.
Of the 312 graves surveyed 189 of them are sold. There are 8 graves unsuitable for burial due to historic memorials. At this time there are 43 graves unsuitable for burial due to trees and tree roots. These graves would become suitable when the trees are removed should the city wish to make them available for sale. There are a total of 72 graves suitable for burial.

Price Increases

- 4/12/22 The City Commission approved the grave price increase for plots that can accommodate one full burial from \$3,000 to \$4,000 per plot. All graves sold in the 2021-22 FY were at the rate of \$4,000 per grave.
- 7/24/23 The City Commission approved the grave price increase for plots that can accommodate one full burial from \$4,000 to \$6,000 per plot. All new sales after 7/24/23 will be subject to the new rates as indicated in the fee schedule.

Grave Sales Detail, July 2022 - June 2023

Greenwood Cemetery Sales and Availability				
	Sec B	Sec C	Resident	Non-Resident
July 2022	1	1	1	1
August 2022	0	0	0	0
September 2022	1	3	1	3
October 2022	0	0	0	0
November 2022	0	3	0	3
December 2022	0	1	0	1
January 2023	1	1	1	1
February 2023	2	0	0	2
March 2023	0	0	0	0
April 2023	0	1	1	0
May 2023	0	0	0	0
June 2023	0	0	0	0
Total Sold	5	10	4	11
Available Under Current Authorization (20% of remaining inventory)	18			
Total Available	88			

Notes: Plots in Sections B and C sold under a payment plan are included in the number of sales made for the quarter in which the payment plan was initiated. The remittance to the Perpetual Care Fund of payment for the plots is recorded in total in the quarter in which the final payment is made.

One grave was sold outside of section B and C in the July 2022 – June 2023 fiscal year.

Burials and Inurnments, July 2022 - June 2023

Burials and inurnment activity during the period can be used to understand utilization of graves and assist in planning for future sales.

Cremation vs. Burial: According to National Funeral Directors Association 2022 Cremation and Burial Report, the 2022 cremation rate is projected to be 59.3% and the burial rate is projected to be 35.7%, the remaining 5% may be due to alternative methods such as green burials and scatter gardens, which are not available in Greenwood Cemetery. The City of Birmingham's 2022-2023 cremation rate is below the national average at 56% and the full burial rate is above the national average at 44%.

	Sec B		Sec C		Other		Total by Month	
	Full	Crem	Full	Crem	Full	Crem	Full	Crem
July 2022	1	0	1	0	1	1	3	1
August 2022	0	1	1	0	0	1	1	2
September 2022	1	0	1	1	1	2	3	3
October 2022	0	0	0	2	0	4	0	6
November 2022	1	0	0	0	0	0	1	0
December 2022	0	2	0	0	1	0	1	2
January 2023	1	1	0	1	0	0	1	2
February 2023	1	0	0	0	0	0	1	0
March 2023	0	0	0	1	1	0	1	1
April 2023	0	0	0	1	0	1	0	2
May 2023	0	0	2	0	0	0	2	0
June 2023	0	0	0	0	1	0	1	0
Totals	5	4	5	6	5	9	15	19

Perpetual Care Fund

Revenues from grave sales are used to increase the Perpetual Care Fund for Greenwood Cemetery, with investment earnings remaining with the PCF. Currently all cemetery care and maintenance is funded through the general fund. Eventually the goal is for the perpetual care fund to be able to take over the financial burden of cemetery maintenance through interest accrued.

Detail for July 2022 through June 2023:

2022 Q Ending September 30

Proceeds from cemetery plot sales and service fees	\$ 12,000.00
Investment income	<u>6,338.95</u>
Revenue for Perpetual Care Fund	\$ 18,338.95

2022 Q Ending December 31

Proceeds from cemetery plot sales and service fees	\$ 22,750.00
Investment income	<u>8,190.66</u>
Revenue for Perpetual Care Fund	\$ 30,940.66

2023 Q Ending March 31

Proceeds from cemetery plot sales and service fees	\$ 24,850.00
Investment income	<u>7,085.17</u>
Revenue for Perpetual Care Fund	\$ 31,935.17

2023 Q Ending June 30

Proceeds from cemetery plot sales and service fees	\$ 10,300.00
Investment income	7,737.59
Unrealized Gain	<u>76,711.80</u>
Revenue for Perpetual Care Fund	\$ 94,749.39

Notes

1. We have created a new department within the General Fund to better track cemetery expenses. This will allow the City to get a better estimate of costs that the perpetual care fund will need to cover in the future.
2. The fund has recaptured almost half of the market loss it sustained last fiscal year.
3. The focus of the perpetual care fund is long-term growth. To achieve this goal, the fund is invested in equity investments near the maximum allowed by state law with no more than 40% of the amount invested in equities in any one asset class (large cap, mid cap, small cap) as per our investment policy.
4. The fund is generating approximately enough funds to cover basic lawn maintenance and tree service based on current charges, but not enough for snow removal or other improvements to the cemetery.

CITY OF BIRMINGHAM
PERPETUAL CARE FUNDS
INVESTMENT REPORT
6/30/2023

	PRINCIPAL	INCOME	TOTAL
BEGINNING BALANCE 6/30/2021	\$ 906,316.54	\$ 101,336.06	\$ 1,007,652.60
SALE OF GRAVES	41,250.00	-	41,250.00
CAPITAL GAINS (LOSSES)	-	-	-
INTEREST/DIVIDENDS	-	29,352.37	29,352.37
CHANGE IN MARKET VALUE	<u>76,711.80</u>	<u>-</u>	<u>76,711.80</u>
ENDING BALANCE 6/30/2022	<u>\$ 1,024,278.34</u>	<u>\$ 130,688.43</u>	<u>\$ 1,154,966.77</u>
<u>INVESTMENTS</u>			
BOND MUTUAL FUNDS	\$ 501,064.73	43.4%	
EQUITY MUTUAL FUNDS	<u>653,902.04</u>	56.6%	
TOTAL	<u>\$ 1,154,966.77</u>		

CITY OF BIRMINGHAM
PERPETUAL CARE FUNDS
ANNUAL INVESTMENT REPORT
6/30/2023

	PRINCIPAL (NONSPENDABLE)	INCOME (SPENDABLE)	TOTAL
BEGINNING BALANCE 6/30/2022			
Pooled Funds	\$ -	\$ -	\$ -
Bond Mutual Funds	399,705.11	68,946.80	468,651.91
Equity Mutual Funds	<u>506,611.43</u>	<u>32,389.26</u>	<u>539,000.69</u>
	\$ 906,316.54	\$ 101,336.06	\$ 1,007,652.60
SALE OF PLOTS			
Bond Mutual Funds	16,000.00	-	
Equity Mutual Funds	<u>25,250.00</u>	<u>-</u>	
	\$ 41,250.00	\$ -	\$ 41,250.00
CAPITAL GAINS (LOSSES)			
Pooled Fund	\$ -		
Bond Mutual Funds	-		
Equity Mutual Funds	<u>-</u>		
	\$ -		\$ -
INTEREST/DIVIDENDS			
Pooled Fund		\$ -	
Bond Mutual Funds		19,578.47	
Equity Mutual Funds		<u>9,773.90</u>	
		\$ 29,352.37	\$ 29,352.37
CHANGE IN MARKET VALUE			
Pooled Fund	\$ -		
Bond Mutual Funds	(3,165.65)		
Equity Mutual Funds	<u>79,877.45</u>		
	\$ 76,711.80		\$ 76,711.80
ENDING BALANCE 6/30/2023	<u>\$ 1,024,278.34</u>	<u>\$ 130,688.43</u>	<u>\$ 1,154,966.77</u>
<u>INVESTMENTS</u>			
BOND MUTUAL FUNDS	412,539.46	88,525.27	501,064.73
EQUITY MUTUAL FUNDS	<u>611,738.88</u>	<u>42,163.16</u>	<u>653,902.04</u>
TOTAL	<u>\$ 1,024,278.34</u>	<u>\$ 130,688.43</u>	<u>\$ 1,154,966.77</u>

CONDITION

During the 2022-2023 fiscal year, the City's Department of Public Services has overseen cemetery landscape maintenance, which has included:

- Oversight of lawn mowing contractor including weekly cuts and spring and fall cleanup
- Oversight of forestry contractor for tree maintenance as directed by DPS
- Maintenance of the tree inventory program
- Lawn fertilization twice a year
- Burial topsoil and seeding: spring and fall
- As-needed general clean up: grave blankets, old flowers, fallen branches
- Trash removal: 2 to 3 times per week
- Maintenance of water system: start up, winterizing, and repair as needed
- Repair of turf as needed
- Snow removal
- Building/fencing/road maintenance as needed

PLAN FOR 2023/2024

The Greenwood Cemetery Advisory Board has prioritized the following action items for 2023-2024:

CRITICAL GOALS

Short Term

- ***Developing and Updating Policy***

- The GCAB is interested in streamlining policy documents to ensure that all policy is held in one document, the Greenwood Cemetery Operational Procedures, Conditions, and Regulations. This includes incorporating new policy regarding restoration efforts on monuments and incorporating the policy on installing monuments for persons of historic significance.

- ***Review the Cemetery Management Agreement***

- Creative Collaborations, LLC. has been the contracted cemetery service provider since December 1, 2019. The contract has been renewed in one-year increments on May 18, 2020, April 26, 2021, and May 9, 2022.
- The GCAB wishes to review the contract to ensure that all Greenwood Cemetery needs are being met. The GCAB is interested in issuing a new RFP to reassess the current market of providers for cemetery services to make sure that the City of Birmingham is able to retain the best cemetery service provider available.
- This includes reviewing the cost of clerical services, as well as cost of labor for installing markers, performing burials, and inurnments.

Long Term

- ***Confirm the baseline amount of known available plots in the cemetery***

- Record reconciliation is an ongoing process within the Clerk's Office, the GCAB receives reports provided by the Clerk's Office which monitor sales, interments, and inurnments across the entire cemetery. Sections B and C are the most active sections of the cemetery with both sales and burial-related transactions. Sections other than B and C are active in regards to transfers of ownership, interments, and inurnments as well as an occasional private sale. Private sales in the sections other than B and C take place as these plots were all purchased prior to the implementation of the 2014 Lot Resale Policy.
- Confirming the baseline amount of known available plots in the cemetery aligns with the planned monument/marker inventory survey and the GIS mapping initiative, aiming to reaffirm the ownership and utilization status of all cemetery spaces.

- ***Monitor the continued growth of the perpetual care fund***

- The GCAB monitors the growth of the perpetual care fund and may propose strategies for increasing the funds growth in order for the fund to reach a point where the interest accrued can cover most or all of the general maintenance requirements of the cemetery.

- ***Monitor the demand for cemetery services***

- The GCAB members review cemetery data in regards to sales, interments and inurnments and consider trends in order to suggest ways Greenwood Cemetery may need to adapt in order to meet future demands.

- ***Continue historic preservation efforts***

- The GCAB works collaboratively with the Museum Board and Friends of the Birmingham Museum (a.k.a. the Birmingham Historical society) the GCAB develops

projects such as the monument/marker inventory survey, and the Friends of the Birmingham Museum conducts bi-annual tours in the cemetery to continue to educate and engage citizens while preserving history in the cemetery.

DESIRED GOALS

Short Term

- ***Develop a Strategic Plan for the Greenwood Cemetery Advisory Board***
 - The GCAB will benefit from going through the strategic planning process to evaluate strengths, weaknesses, opportunities, and threats/challenges the cemetery faces. In going through the process, the board will come up with a vision of what the cemetery should look like in the future, consider stakeholder perspectives, expectations, and needs as well as reconfirm the mission, vision, and values. Strategic planning will empower the board to function more efficiently. The City Clerk will continue to work as the staff liaison to the board and ensure that the board has a clear understanding of their expectations such as being in “growth” or “maintenance” mode.
- ***Inventory of signs in Greenwood Cemetery***
 - In order to update and streamline communication and wayfinding within the cemetery, the GCAB wishes to inventory and evaluate all signage in the cemetery to determine if updated signage should be budgeted for.

Long Term

- ***Monument/marker inventory survey***
 - The GCAB began working on planning for the process and survey for a monument/marker inventory with the guidance of Museum Director Pielack and City Clerk Bingham at the June 4, 2021 GCAB meeting. The GCAB wishes to conduct this survey with volunteers and the support of city staff in order to cross-reference general information and collect baseline condition data and photos that could potentially be linked with the GIS data project. Monuments or markers that may need maintenance may also be identified through this survey.
- ***GIS Mapping – Launching a digital map for public reference***
 - City Staff in the Planning Department with GIS expertise created a GIS map of the cemetery. Data points from DPS on tree locations within the cemetery were added as a layer to the map in the spring of 2021. This goal ties in with the monument/marker inventory survey and confirming the baseline information of known available plots in the cemetery. Ongoing efforts are being made as time allows, the Clerk’s office provides progress updates to the GCAB as needed.
- ***Determine Capital Outlay Projects***
 - The GCAB may discuss and study the potential benefits of a capital outlay project. The GCAB will provide a recommendation and report to the City Commission if a capital outlay project is identified.
- ***Explore Above Ground Columbarium Opportunities***
 - With the limited space in the cemetery and shifting demand towards cremation and inurnments, the GCAB wishes to explore the costs, benefits, and opportunities for installing a columbarium.
- ***Review and update Greenwood Cemetery Operational Procedures, Conditions and Regulations***
 - The GCAB spent a considerable amount of time in the 2021-2022 FY reviewing and updating the rules and regulations. To keep the rules and regulations current going forward they will conduct an annual read through to maintain the document.

SUMMARY AND RECOMMENDATIONS

Grave sale activity primarily occurs in sections B and C and is closely monitored by the City Clerk's office.

	Section C	Section B	Total
Obstructed – Temporary (trees/roots)	5	50	55
Obstructed – Permanently (monument)	26	12	38
Owned	39	262	301
Available	2	86	88

The GCAB, Clerks Office, DPS, Museum, and contracted cemetery service provider continue to work collaboratively to preserve the historic charm and ambiance of Greenwood Cemetery while ensuring the highest standards of maintenance and service are being provided. The GCAB will continue to monitor data as provided by the City Clerk, work on their goals as laid out in this document, and make recommendations for future grave releases and/or improvements for the preservation and operation of the Historic Greenwood Cemetery.

The cemetery is in a state of slow growth and preservation.

For the 2023-2024 FY, the GCAB is encouraged to continue working on the goals as identified in this report at their regular monthly meetings. Recommendations made by the Greenwood Cemetery Advisory Board will be presented to the City Manager's Office for further direction and implementation.

ARTICLE II. - GREENWOOD CEMETERY

Sec. 34-26. - Supervision.

The care, maintenance and operation of Greenwood Cemetery in the city shall be under the supervision and control of the city manager.

(Code 1963, § 3.41)

Sec. 34-27. - Sale of lots.

The sale of the lots in Greenwood Cemetery, and the issuance of burial and other permits pertaining to the use of lots in the cemetery shall be under the control and supervision of the city clerk. Upon payment of an administrative fee in the amount set forth in the schedule of fees, charges, bonds and insurance, such clerk shall record all sales and transfers of lots in the cemetery. The clerk shall keep an accurate record of all interments in the cemetery.

(Code 1963, § 3.42; Ord. No. 1507, § 3.42, 11-25-91; Ord. No. 2010, 2-8-10)

Sec. 34-28. - Rules and regulations.

The city manager may adopt such rules and regulations for the control of Greenwood Cemetery, for the conduct of persons therein, and governing the charges for lots, burial spaces and services, as he may deem necessary. Such regulations shall, when approved by resolution of the city commission, have the full force and effect of law, and shall be binding upon all persons in and about the cemetery. All such regulations shall be available to the public at the office of the city clerk, and elsewhere as the manager may direct.

(Code 1963, § 3.43)

Sec. 34-29. - Perpetual care fund.

- (a) *Establishment of fund; name.* The city hereby establishes, subject to the control of the city commission, a fund separate and apart from all other funds, property or securities belonging to the city, or belonging to any other entity, for the perpetual care and maintenance of Greenwood Cemetery property owned by the city, together with its buildings and appurtenances, any extension or enlargements thereof, and any mausoleum or burial crypts thereon. All deposits hereafter deposited with the city pursuant to this section and earnings thereon (such deposits and earnings being hereinafter referred to collectively as "Care Funds"), shall be administered in

accordance with Act 215 of 1937 (MCL § 128.1 et seq.) and the terms of this section. The perpetual care fund hereby established shall be known as the Greenwood Cemetery Perpetual Care Fund.

(b) *Deposits.*

(1) *General.* The city shall set aside and deposit within the perpetual care fund, within the time period required by law, the amount of funds required by the Act. The city agrees to accept care funds paid in accordance with this section and to maintain such amounts and records as are necessary to carry out its obligations.

(2) *Multiple care funds.* The city may establish more than one care fund as specified by the city commission, provided that the procedures and requirements for establishing a care fund, under this section are complied with separately for each separate care fund. Each separate care fund shall be handled by the city in like manner as if each such care fund were governed by its own separate and distinct agreement with terms identical to those contained herein.

(3) *Rejection of donation.* The city reserves the right to reject any donation.

(c) *Investments.* The city is hereby expressly authorized and empowered to manage the care fund in accordance with Act 20 of 1943 (MCL § 129.91), as amended and within the parameters of the city's investment policy as adopted by the city commission and conforming to all statutes governing the investment of public funds.

(d) *Distribution of income.* The ordinance of the care fund shall be held intact by the city pursuant to the terms herein, and any interest and dividends (i.e. income, generated from the principal of the care fund) shall be paid for the care and maintenance of the cemetery. For purposes of this section, net capital gains shall be treated as principal. To the extent that income so generated is not immediately paid, such income shall be retained and shall be characterized as undistributed income.

(e) *Records.* The city shall maintain such records for each care fund and will evidence the amounts received for deposit, the amounts disbursed and withdrawn, the total amount of care funds held and the location, description, and character of the investments of the care fund.

(f) *Reports.*

(1) *Annual.* The city shall provide an annual (fiscal year, July 1 through June 30) accounting as of June 30 of each year.

(2) *Other.* The city will furnish such additional reports or information related to the care fund as may be required by ordinance and as may be required by the city or the state.

(Ord. No. 2145, 10-13-14)

Sec. 34-30. - Establishment of the Greenwood Cemetery advisory board.

- (a) *Composition.* There is hereby established the Greenwood Cemetery advisory board for the city which shall consist of seven members who shall serve without compensation. Members must be chosen from among the citizens of Birmingham and, insofar as possible, represent diverse interests, such as persons with family members interred in Greenwood Cemetery; owners of burial sites within Greenwood Cemetery intending to be interred in Greenwood Cemetery; persons familiar with and interested in the history of Birmingham; persons with familiarity and experience in landscape architecture, horticulture, law or cemetery or funeral professionals. The city manager or his/her designee shall serve as ex officio, non-voting members of the board.
- (b) *Terms of members.* Each member shall be appointed for a term of three years ending on the first Monday of July of the third year after appointment, or upon the appointment of his successor, whichever is later, except that in the first instance three of the members shall be appointed for a one-year term and two shall be appointed for two-year terms. Vacancies occurring other than through the expiration of term shall be filled for the unexpired term by the city commission.
- (c) *Removal of members.* Members of the Greenwood Cemetery advisory board shall hold office at the pleasure of the city commission and can be removed at any time with or without cause.
- (d) *Organization.* The Greenwood Cemetery Advisory Board shall elect a chairperson and vice-chairperson from its membership annually at its first meeting after the first Monday of July.
- (e) *Meetings.* The Greenwood Cemetery Advisory Board shall hold at least one regular public meeting in each quarter on such date and at such time and place as may be established by resolution of the Greenwood Cemetery advisory board. The Greenwood Cemetery advisory board shall keep a written or printed record of its proceedings which shall be a public record and property of the city.
- (f) *Expenditures and assistance.* The Greenwood Cemetery advisory board may call upon the city manager for such services and data from the various departments as it may require. The Greenwood Cemetery advisory board may recommend to the city commission the securing of such professional and consulting services as it may require, however, the Greenwood Cemetery advisory board shall not have any authority to authorize or otherwise obligate the city to incur expenses and/or approve contracts. Requests for expenditures shall be routed through the ex-officio member(s) of the board to the city commission for consideration.
- (g) *Powers and duties.* In general, it shall be the duty of the Greenwood Cemetery advisory board to provide recommendations to the city commission:
- (1) *Modifications.* As to modifications of the rules and regulations governing Greenwood Cemetery;
 - (2) *Capital improvements.* As to what capital improvements should be made to the cemetery;
 - (3) *Future demands.* As to how to respond to future demands for cemetery services; and

(4) *Day to day administration.* The day to day administration of the cemetery shall be under the direction and control of the city, through the city manager or his/her designee.

(h) *Reports.* The Greenwood Cemetery advisory board shall make and submit to the city commission annually a report of the general activities, operation, and condition of the Greenwood Cemetery for the preceding 12 months. The Greenwood Cemetery advisory board shall, from time to time, as occasion requires, either in the annual report, or at any time deemed necessary by the Greenwood Cemetery advisory board, advise the city commission in writing on all matters necessary and proper for and pertaining to the proper operation of Greenwood Cemetery and any of its activities or properties.

(i) *Protection of property.* No person shall take, use, or occupy the Greenwood Cemetery except in accordance with such rules and regulations governing such as may from time to time be authorized by the city commission.

(Ord. No. 2146, 10-13-14)

January 2024 Updates

Clerk's Office Update

The City Clerk's office is focused on preparation for the May 19, 2024 Celebrate Birmingham Hometown Parade and Party in Shain Park and the State Primary Election on August 6, 2024.

A new subscription category has been added for notifications regarding Greenwood Cemetery. (Pictured right) Members of the public are encouraged to sign up for these notifications for information on spring and fall cleanup and other cemetery related notifications as needed.

Due to revised quotes being received from Carter's Cemetery Preservation \$17,500 is being requested in the cemetery maintenance budget proposal for cleaning stones and preservation work. The City Commission will hold the 2024-2025 Budget Hearing on April 27, 2024.

DPS Updates

DPS has performed routine spring clean-up in mid-March.

DPS coordinated the repair of the Greenwood Cemetery Historical sign which had a broken leg. (Pictured below)



Sign up to stay in touch!

Thank you for your interest in being in Constant Contact with the City of Birmingham. By signing up for this service, the City will send you messages about a variety of topics that interest you, in addition to important updates regarding your home or neighborhood. Sign up for one or all of these electronic notification groups by completing the information below, and click "Sign Up."

* Email Address

First Name

Last Name

* Address

Select a state/province ▼

Zip Code

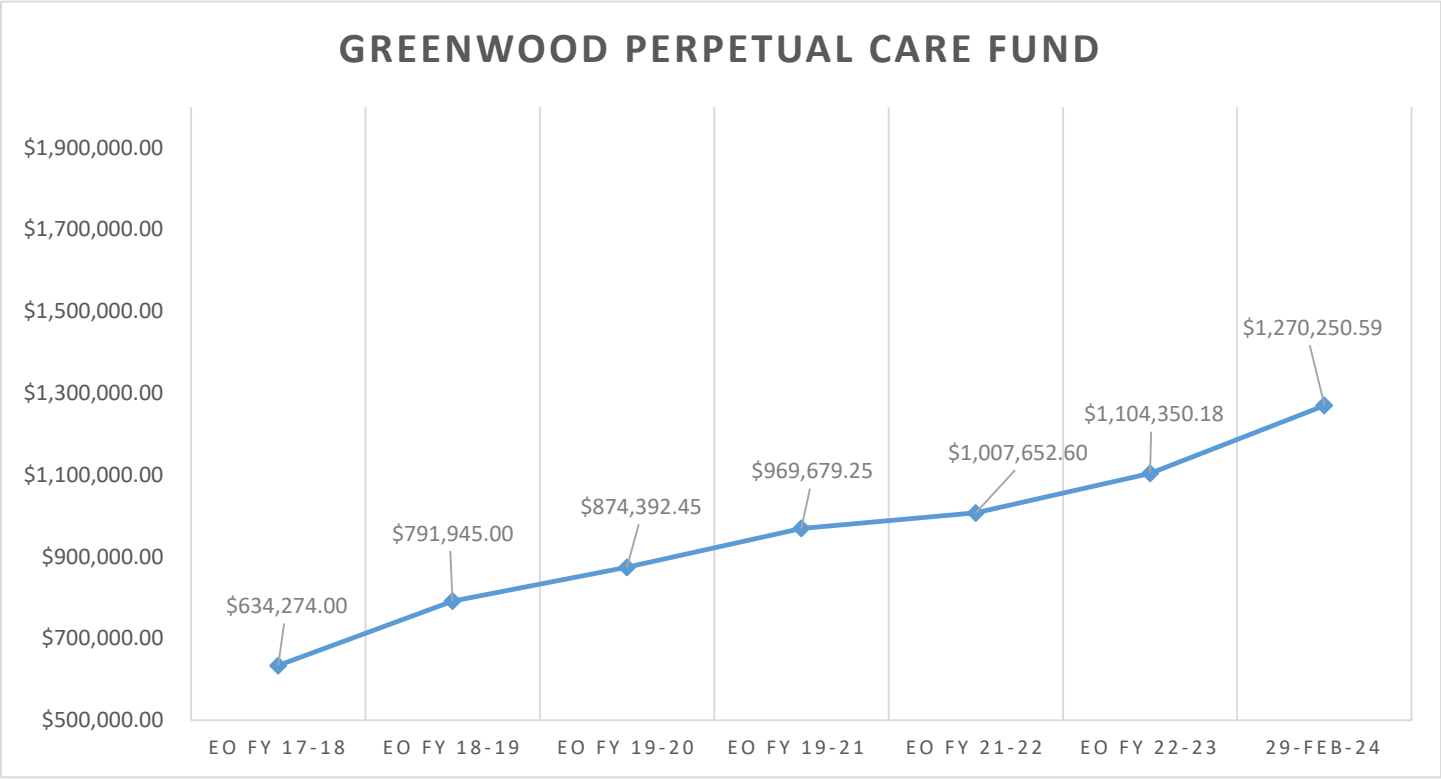
Email Lists

- ☐ City Newsletter & Alerts
- ☐ Edgewood Road Project
- ☐ Events and Activities in Birmingham
- ☐ Golf Course Specials & Updates
- ☒ Greenwood Cemetery Notifications
- ☐ Ice Arena Events & Information
- ☐ Parks & Recreation Projects
- ☐ Redding Road Project
- ☐ Road Construction & Closures
- ☐ South Eton Resurfacing Project

Security Check

☐ I'm not a robot 

Perpetual Care Fund Update



Cemetery Sales

Greenwood Cemetery Sales and Availability				
	Sec B	Sec C	Resident	Non-Resident
July 2023	0	1	0	1
August 2023	0	0	0	0
September 2023	2	0	1	1
October 2023	1	0	0	1
November 2023	4	0	2	2
December 2023	0	0	0	0
January 2024	0	0	0	0
February 2024	0	0	0	0
March 2024	0	0	0	0
April 2024				
May 2024				
June 2024				
Total Sold	7	1	3	5

Cemetery Burials

	Sec B		Sec C		Other		Total by Month	
	Full	Crem	Full	Crem	Full	Crem	Full	Crem
July 2023	1	0	1	1	0	0	2	1
August 2023	0	0	0	0	0	2	0	2
September 2023	1	0	0	0	0	0	1	0
October 2023	0	0	0	0	1	0	1	0
November 2023	1	0	1	1	0	0	2	1
December 2023	1	0	0	0	2	1	3	1
January 2024	1	1	0	0	0	1	1	2
February 2024	1	0	0	0	0	0	1	0
March 2024								
April 2024								
May 2024								
June 2024								
Totals	6	1	2	2	3	4	11	7

FY 23-24 Grand Totals (so far)	
Sales in B	7
Sales in C	1
Sales in Other	0
Resident Purchases	3
Non-Resident Purchases	6
Payment Plans Initiated	0
Total Graves Sold	8
Transfer of Ownership Filed	5
Additional Burial Rights Purchased	2

Section (total plots)	7/2015 - 6/2018	7/2018 - 6/2019	7/2019 - 6/2020	7/2020 - 6/2021	7/2021 - 6/2022	7/2022 - 6/2023	7/2023 - 6/2024	TOTAL Number of Graves Sold To Date	Number of Graves Remaining (obstructed)
B (408)	203	11	32	10	3	5	7	271	77 (60)
C (72)	3	5	10	9	3	9	1	40	1 (31)
TOTAL	206	16	42	19	6	14	8	296	78 (91)