

# THE Bulletin

of Selected Independent Funeral Homes

May-June 2020 • Volume 103, Number 3



## Weathering the Storm of a Pandemic

Demonstrating Leadership During Time of Crisis

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## Innovative Funeral Home and Cemetery Management

Selected's FirstGen Program Supports New Owners

Coping with Financial Downturn via the Management Comparative Program

Understanding Your Cost of Goods Sold

Selected Prepares for Move to New Offices



# THE Bulletin

May-June 2020 • Vol.103, No.3



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## Lessons for Today and Tomorrow

Recently, a well-known fourth-generation funeral home owner died suddenly in the town next to mine. The full-page obituary shared how he worked tirelessly to improve and grow the family business, recognizing and adapting to the changes in consumer preferences and adding locations in his quest to serve the needs of the surrounding communities. I was struck by the openness in which his business plan was shared, including the sacrifices he made to his personal retirement accounts to finish an important relocation, which featured one of the largest chapel spaces of any funeral home in the country. His national and community involvement also was showcased, and, most importantly, his love for his family, including some fun stories, were shared.

It's a great story about a man whose life passion was to serve. His oldest son will now carry on as the fifth-generation owner. The following lessons were shared by his sons, noting what they will take forward from their dad's life—some good reminders for us all:

1. Be generous.
2. Show up for people.
3. Plan for tomorrow but enjoy today.
4. Live boldly.

As we all navigate the new world we find ourselves in as a result of the COVID-19 pandemic, these reminders will serve us well. Especially in these trying times, staying connected, sharing ideas and resources, and facilitating communication is what Selected is all about. On the following pages, you will read of the association's efforts to help members during this crisis as well as ideas from members about facing the challenge.

This also is our special combo operations edition of *The Bulletin* which highlights innovations and learnings from our members. I invite you to visit the Funeral Home + Cemetery Management web page on Selected's website, [selectedfuneralhomes.org/combo-owners](https://selectedfuneralhomes.org/combo-owners), to see who is featured in the monthly cemetery spotlight and use the roster to find a combo member with whom to connect. Looking ahead to the Annual Meeting in Montréal, this year's Funeral Home + Cemetery Management offerings will include an idea exchange, educational session titled *Cemetery Share: Strategies, Next Practices, and Solutions*, and a tour of the Mount Royal Cemetery. Our thanks and gratitude to Nicki Price Adams and Preferred Partner The Roosevelt Investment Group, Inc. for their support of these events.

Please reach out to me at [denisez@selectedfuneralhomes.org](mailto:denisez@selectedfuneralhomes.org), if you have a story to share about Funeral Home + Cemetery Management or have suggestions on how we can continue to serve and support this unique group of members. ▲



BY DENISE ZOEPHEL,  
ASSISTANT EXECUTIVE  
DIRECTOR



“THESE DAYS ARE UNPRECEDENTED, BUT I AM CONFIDENT THAT WITH THE SUPPORT OF OUR MEMBERS AND OUR ASSOCIATION, WE WILL GET THROUGH THESE DIFFICULT TIMES.” — ARTHUR ERICKSON

PHOTO COURTESY REUTERS



PHOTO COURTESY NOOZHAWK, SANTA BARBARA, CA

## Selected Helps Its Members Face the COVID-19 Storm

Just like our member funeral homes, Selected is in triage mode trying to maintain full operations while protecting staff and serving the people who depend upon us. We are working diligently to prioritize and protect members when resources are scarce and demand is at an all-time high. Although the Selected staff has been practicing recommended self-distancing by working remotely, we continue to serve the membership during this difficult time.

“We are completely focused on keeping every level of communication open with and between our members,” said Rob Paterkiewicz, Executive Director and CEO, “and we are sharing resources to keep vital information flowing. This includes announcements from several of our Preferred Partners who are offering complimentary access to certain tools and services.”

“The immediate needs of the membership are what concern us most,” said Gina Florzak, Marketing and Communications Manager for Selected. “Together with our Preferred Partners and other trusted sources, we quickly mobilized a plan to provide the latest news and resources to help members withstand this pandemic.”

### ADDRESSING THE PPE SHORTAGE

What quickly became evident through Selected’s online discussion forum, [forums.selectedfuneralhomes.org](https://forums.selectedfuneralhomes.org), was that personal protective equipment (PPE) was the most immediate concern. To help with this urgent need, Selected immediately created the Member Sharing Center webpages, [selectedtrust.org/sharing-center](https://selectedtrust.org/sharing-center), in partnership with the Educational Trust, to connect members who require assistance with those who can provide it.

The Sharing Center listings continue to populate, but when it became apparent that members still were not having success acquiring protective masks,

### A MESSAGE FROM SELECTED PRESIDENT ERICKSON

During the past weeks as this pandemic has unfolded before our eyes, I am extremely impressed with our peers in funeral service and especially the leadership demonstrated by Selected members and the Headquarters Staff. Through daily email updates, *The Link*, a very active discussion forum, and the COVID-19 resource page, Selected is the best source for knowledge and information in our profession during this crisis.

Because this situation is constantly changing, it is vitally important that we all stay connected. Members helping members is what Selected is all about. My staff has benefited enormously from the information and great tips provided by other members. Using our combined resources to garner much needed protective equipment is gratefully appreciated. If ever there was a time to make use of your Selected membership, it is now!

Living and working so near one of the epicenters of the virus, my staff and I are seeing the difficulties our colleagues in New York and New Jersey are facing. In Connecticut, COVID-19 deaths are increasing, and we are bracing for many more in the days to come. Loved ones are dying alone, families are grieving from afar.

These days are certainly unprecedented, but I am confident that, with the support of our members and our association, we will get through these difficult times.

—**Arthur Erickson**  
Selected President 2019-20

## Finding Innovative Solutions to the Service Challenge

One of the first things that concerned me as our current health crisis escalated was people saying they were going to just have a burial and put off funeral services until a later time. It reminded me of hearing Dr. Alan Wolfelt talk about direct cremation families struggling with the grieving process because they had no service. Many times, these people have difficulty moving on even years after the loss of a loved one, he said, because they lost the opportunity to publicly tell their loved one's story and feel the support of friends and family.

I know from experience that if we don't have a service shortly after the death, the family likely will not want to go back and revisit the pain, because they don't understand the value of the funeral service. We know this COVID-19 crisis is not going away soon. So I'm very concerned when I hear healthcare professionals and even funeral professionals recommending postponing services, because the fact is, a lot of people will never have those services.

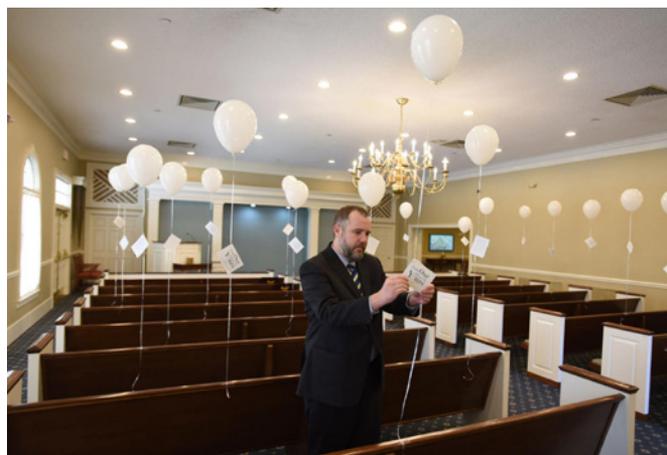
I've told my staff to remind families of the value of being supported by the community and that we need to find ways to provide that for them. We're webcasting our services so that more people can feel like they are attending. But how can we have services that are memorable and help the families feel supported amid social distancing and restrictions on group size? That's where our membership in Selected has been very helpful. I've been watching what our Selected colleagues are doing, many of whom have experienced the impact sooner than we have. One of the things I saw on the discussion forum, [forums.selectedfuneralhomes.org](https://forums.selectedfuneralhomes.org), is how fellow members are implementing a program called *Hugs from Home* that provides handwritten messages of condolence attached to balloons. These temporarily take the place of real hugs. I think it's a terrific idea, and we jumped on it.

It just requires some creativity and willingness to think beyond the restrictions. We want to respect the new rules and keep people safe, but we also must ensure that their emotional needs are not overlooked.

It requires thinking in non-traditional terms. For example, florists in our area are running out of flowers. So why not have them create silk arrangements that can be rented for funerals? There can be interesting opportunities when we face challenges head-on. Together, we might come up with a better service model than we ever would have if we hadn't been faced with this crisis. ▲



BY **JIM LAMAR**,  
PRESIDENT OF  
GREENLAWN FUNERAL  
HOMES & CEMETERIES,  
BAKERSFIELD, CA.



GLENN FUNERAL HOME AND CREMATORY,  
OWENSBORO, KY, IS ONE OF THE MANY  
FUNERAL HOMES UTILIZING *HUGS FROM  
HOME*. PICTURED: GLENN TAYLOR JR.

SELECTED HELPS ITS MEMBERS, FROM PAGE 5

the association quickly created an action plan. Within 48 hours, Selected brought together more than 200 member firms to participate in a mass order for 42,000 KN95 masks delivered in late April.

“The staff came together in a tremendous way to meet a dire member need,” Rob Paterkiewicz added. “I am proud of the level of support we have been able to provide the membership during this crisis.”

## COMPREHENSIVE RESOURCE PAGE

Selected created a new COVID-19 Member Resources webpage, [selectedfuneralhomes.org/COVID-19-member-resources](https://selectedfuneralhomes.org/COVID-19-member-resources), that consolidates the most up-to-date news and articles to help members navigate through a variety of topics such as technology solutions, protecting staff, PPE, CARES Act information, communication and media tips, inspirational news, plus much more.

And each weekday, members receive a COVID-19 Resources & Updates email with the latest information culled by Selected. The most recent emails are available at [selectedtrust.org/sharing-center](https://selectedtrust.org/sharing-center), and a complete archive is located at [selectedtrust.org/newsletter-archive](https://selectedtrust.org/newsletter-archive).

## VIRTUAL AND EXTENDED SERVICES

“While important group educational opportunities have been postponed or canceled to protect members’ safety, the association is assisting its Selected Study Groups in hosting their Spring meetings virtually,” said Denise Zoepfel, Assistant Executive Director. “We also have extended the services of program consultants David Nixon and Janice Redmond to support our Selected Study Groups participants as needed.”

In addition, Selected Leadership Academy members have been supported by Academy Dean Marguerite Ham via conference calls and personal coaching sessions.

Selected thanks its members for the courage, ingenuity, and leadership they are demonstrating as they continue to provide meaningful services to grieving families. And Selected promises to continue providing quality services to all members, especially when they are needed the most. ▲

# SELECTED MEMBER COVID-19 PANDEMIC SUPPORT RESOURCES

**R** COVID-19 MEMBER RESOURCES  
[selectedfuneralhomes.org/COVID-19-member-resources](https://selectedfuneralhomes.org/COVID-19-member-resources)

## COVID-19 Member Resources



Selected is committed to helping our members through these challenging times. This resource page continues to grow as we collect materials from organizations and members share samples of materials they are using in their communities.

Don't forget to post your questions on [The Forum](#) and to share supply needs and surpluses, tips and ideas in the [Member Sharing Center](#).

### Categories of Information on this Page:

- Personal Protective Equipment (PPE) Updates
- Small Business Relief & COVID-19 Impact
- Public Health, Prevention and Safety
- Public Health & Safety Marketing Tools
- Risk Management
- Communications/Media
- Inspiration, Wellness & Self-Care During Crisis
- Resources to Share with Families
- Recorded Webinars

**S** MEMBER SHARING CENTER  
[selectedtrust.org/sharing-center](https://selectedtrust.org/sharing-center)

The screenshot shows the 'SELECTED MEMBER SHARING CENTER' interface. At the top, there are navigation links: 'Message Entry', 'Current Needs', 'Current Availability', and 'Newsletter Archive'. Below this is a form titled 'Posting Request for Selected Member Sharing Center' with fields for Name, Firm, City, State or Province, Phone, and Email. There is also a 'Current Need or Availability' text area and a 'Question or Comment' text area. A 'SEND' button is at the bottom of the form. To the right of the form is an 'UPDATES & INFORMATION' section with a list of links for COVID-19 Member Resources Web Pages, including 'Selected News & Updates for April 10', 'Selected News & Updates for April 9', 'Selected News & Updates for April 8', and 'Selected News & Updates for April 7'. Below this is a 'Personal Protective Equipment (PPE) Updates' section with a list of bullet points: 'Association for Professionals in Infection Control and Epidemiology (APIC) has created PPEs that outline key points on how to use PPE in non-surgical settings. We encourage you to download and print these free flyers and share them with your staff.', 'All N95s in existing stock and those being manufactured now are sent to the Federal Emergency Management Agency (FEMA)', 'FEMA allocates supplies to each state's Emergency Operations Center (EOC) based on need.', and 'Each EOC manages requests from entities within its respective state including death care professionals.' At the bottom right, there is a note: 'To place a request for N95s, you'll need to contact your state's EOC. Click here to access the EOC for your state.'

**F** THE FORUM AT SELECTED  
[forums.selectedfuneralhomes.org](https://forums.selectedfuneralhomes.org)

**E** NEWS & UPDATES EMAILS ARCHIVE  
[selectedtrust.org/newsletter-archive](https://selectedtrust.org/newsletter-archive)

**P** SELECTED PREFERRED PARTNERS  
[selectedfuneralhomes.org/partners](https://selectedfuneralhomes.org/partners)

**T** SUPPORT TOOLS AND RESOURCES  
[selectedfuneralhomes.org/tools](https://selectedfuneralhomes.org/tools)

# COVID-19 Didn't Create Problems; It Revealed Them

## An Important Opportunity for the Funeral Profession

In one way or another, we all are dealing with the fallout of the COVID-19 pandemic. As I've talked with funeral professionals around the country, it's been interesting to hear the variety of reactions. Some have suffered brutal hits to their business. Some have described business as usual.

However, everything we've learned over the past several weeks has a common thread: COVID-19 exposed cracks in our foundation. Much like winning the lottery doesn't create character but reveals it; COVID-19 didn't create new problems for the profession. It revealed the problems that already existed.

### WE'LL ALWAYS HAVE THE BODY

One of the common refrains from funeral directors facing disruption is *at least we'll always have the body*. This is eerily similar to the taxi industry clinging to



BY JONATHAN DAVID LEWIS,  
PRESIDENT, MCKEE WALLWORK + CO.,  
A SELECTED PREFERRED PARTNER

the medallion limited licensing system. *We'll always have the medallion* was a comforting thought to taxi owners struggling with dissatisfied passengers and the rise of Uber. But it proved empty in the end.

As funeral professionals struggle with quarantine around the country, we still have the body—just the body. And it clearly isn't enough.

### FAMILIES DON'T WANT DIGITAL

This profession's status quo is to invest heavily in physical buildings—which can easily represent millions of dollars in construction, maintenance, and upkeep—and rely on free or low-cost solutions for its websites and overall digital presence. In fact, it is common to invest zero dollars on making sure we're findable and differentiated online.

The problem with this way of thinking was exposed in dramatic fashion when suddenly, amidst quarantine, our digital presence was all we had. Of course, this isn't normal, and our physical buildings will continue to be a reflection of our quality and stability. But even after coronavirus, the balance between the importance of physical and digital is not 1,000,000 to 0. People are judging funeral homes and making major decisions based on what they see online, and if we're not investing in our digital presence, we're set up to fail.

CONCLUDES ON NEXT PAGE

No one knows what the next change will be, but there's guaranteed to be one. The winners will not only be equipped to succeed in whatever the new environment may be, they'll have the necessary mindset to adapt to the next one.



SOCIAL DISTANCING AND GROUP SIZE RESTRICTIONS ARE IMPACTING FUNERAL SERVICES.

## IT'S ABOUT TRADITION

My firm works with funeral homes around the country, but we also consult with businesses in dozens of other industries. For both good and ill, funeral service is one of the only professions where strict adherence to *the way we've always done it* is still considered an asset.

When COVID-19 hit, one of my clients in the construction industry pivoted within five days and began manufacturing mobile testing centers for local hospitals. Local restaurants quickly retooled to provide catering services for essential businesses. Bars started selling takeout food and growlers overnight.

Some funeral homes heroically reorganized their offerings and products for a gathering-less society, but many were caught flat-footed and floundered for weeks. This might be indicative of a culture that has relied heavily on history and tradition, and has

generally forgotten how rapidly adapting to change can be a way of doing business.

These are just three examples that demonstrate how this moment represents an important opportunity for the leaders in the funeral profession. No one knows what the next change will be, but there's guaranteed to be one. The winners will not only be equipped to succeed in whatever the new environment may be, they'll have the necessary mindset to adapt to the next one. ▲

# Top Leadership Challenges During The Pandemic

EXCERPTS FROM AN ARTICLE AT *FORBES.COM* BY NIHAR CHHAYA

When the government began to issue stay-at-home orders and companies mandated virtual work, everyone had to shift their priorities. As an executive coach, I have an inside view of the real-time challenges that leaders face. They were working hard to minimize disruptions and preserve business continuity. But as leaders look to broader, longer-term concerns, here are three of the most common challenges I've heard from them. [Visit [forbes.com/sites/niharchhaya/2020/03/23/here-are-the-top-five-leadership-challenges-during-the-coronavirus-pandemic/#4e1944bd5984](https://forbes.com/sites/niharchhaya/2020/03/23/here-are-the-top-five-leadership-challenges-during-the-coronavirus-pandemic/#4e1944bd5984) for the full article.]

## 1. HOW TO BALANCE BEING AN INSPIRATIONAL LEADER WHILE CONTINUING TO PUSH FOR PERFORMANCE.

Striking the balance between getting things done and operating “business as usual” when a crisis creates anything but normalcy may be the most challenging job of a leader. I've reminded my clients of lessons learned during 9/11 and the 2008 financial downturn, which was to recognize that your people need you to understand their anxieties and gently help them rebuild confidence before you expect them to perform to their best ability. As one famous leader is known for saying, you must “define reality, provide hope.”

## 2. HOW TO RESPOND TO COUNTLESS QUESTIONS WHEN NO CLEAR ANSWERS EXIST.

My clients are corporate leaders, but they are humans, too. They feel a sense of overwhelming uncertainty at this time but have to project calm and assuredness to those they lead. And while many companies have policies and communication plans they follow during crises, a lot of leaders are taking it day-by-day. You will undoubtedly say one thing that will change the next day, and others may criticize you for it. But don't take it personally and don't worry about being right all the time. Instead, aim for honest, consistent, and adaptive communication.

## 3. HOW TO KEEP MY TEAM ENGAGED WHILE WORKING REMOTELY.

I have suggested to my clients that they must deal with the reality of working apart by setting up some basic rules of engagement and then empower and trust others to meet the shared expectations for performance. Get to know the factors behind each team members' level of productivity and align your coaching accordingly. But don't assume that just because you get more or less done in a remote environment, they will do the same. Keeping employees engaged, whether in person or virtually, is not a perfect science. But you will undoubtedly fail in inspiring and motivating them if you see them as mere resources to complete deliverables.

The coronavirus pandemic does not appear to be ending soon, so we will undoubtedly have to endure more change in weeks to come. But beyond addressing issues of safety and business continuity, corporate leaders can benefit from reflecting on these broader challenges. Doing so now will help them ensure sustained motivation for their teams and themselves into the future. ▲

## Unprecedented Crisis: A Time for Sound Decision Making

### WHAT ARE YOU AND YOUR TEAM DOING IN TERMS OF BUSINESS OPERATIONS?

“We began having business continuity meetings in early March when it was apparent a trend was developing. We gathered all of our senior leadership together and made the decision that all non-public-facing personnel—such as support services, accounting, human resources, etc.—would start working from home if their jobs allowed it. With a bit of expenditure on equipment, we got most of them up and running remotely. Since the size of the funerals we are now performing has been greatly reduced, roles such as funeral associates, assistants for large gatherings, and drivers are not being scheduled. Most of these people are on an on-call basis and not permanent employees. We have done everything possible to avoid large layoffs and have temporarily reduced all staff to 32.5 hours per week.

“Then there are other functions that are critical to our long-term business, such as our preplanning department, that require some creativity to continue functioning. These are 100%-commission employees, so we are trying to shift as many of the preneed arrangements as possible to phone calls. Group gatherings and preplanning events have been postponed for the time being.

“The biggest change we have made is to not conduct funerals outside of our own facilities. By order of the Governor of the State of New Mexico, gatherings of more than five individuals are prohibited, which effectively eliminates the opportunity for funeral or cemetery services. Services are live-streamed and can view from home. We also are requesting that families combine memorial and committal services. If they want a larger graveside or niche-side service, we will facilitate that for them when there is less of a health risk involved and the restrictions have been lifted.



**CHRISTOPHER KELLER** IS EXECUTIVE DIRECTOR OF SUNSET MEMORIAL PARK, WITH THE FRENCH FAMILY OF COMPANIES IN ALBUQUERQUE, NM. IN EARLY APRIL, HE SPOKE TO *THE BULLETIN* ABOUT HIS FIRM'S RESPONSE TO THE PANDEMIC.

“It’s pretty strange having the doors of our funeral homes and cemetery locked with signs saying we’re still here to help but by appointment only. If arrangements can’t be done over the phone, we will meet in-person at our facilities, but we’re limiting those meetings to two family members.

“Technology is providing some opportunities, though. Our website includes virtual tours of our cemetery, so we still have the ability to direct people to a specific location, give them a panoramic view, and sell property. And if they still want to come to the cemetery, we can do that. They just need to be in their own car. The cemetery is wide open. People can still visit their loved ones. The only thing that’s restricted are graveside services and meeting with our counselors in a large group.

“Our main fear was getting negative publicity, but we’ve had reports of families who are happy we are taking a leadership role in limiting gatherings. I’m guardedly optimistic that the changes we’ve made with trepidation are going to work out. We’ll see.”

CHRIS KELLER'S INTERVIEW CONTINUES ON *THE BULLETIN'S* WEBSITE AT [SELECTED-BULLETIN.ORG/KELLER](http://SELECTED-BULLETIN.ORG/KELLER).

# FUNERAL HOME AND CEMETERY MANAGEMENT

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"THE INCREASE IN THE NUMBER OF FAMILIES WHO DON'T UNDERSTAND THE VALUE OF PERMANENT PLACEMENT IN A MEMORIAL PARK...IS EVERYONE'S PROBLEM. WE TRY TO CREATE AND PRESENT A PARK INVENTORY THAT IS COMPELLING FOR FAMILIES."  
—JIM LA MAR

# Rebranding Greenlawn Funeral Homes & Cemeteries as a Friend of the Family

## TELL US ABOUT YOUR FUNERAL HOMES AND CEMETERIES.

“We have two combinations. The first burial in our older one was in 1931. I know that’s nothing compared to back East, but for California, it’s pretty old. We have a newer combo which opened in the late 70’s, and we also have another funeral home in the small mountain community of Tehachapi. It averages about 200 cases a year, whereas our two combos handle about 1,200 cases a year. We have a web-based cremation business, a monument company, and we own three crematories. We have a solid preneed sales force, and we’re blessed that we are a family-owned company. I’m not a member of that family, but they have given me enormous freedom to run their business.”

## HOW DO YOU SHOW THE VALUE OF WHAT YOU OFFER?

“About six years ago, we wanted to rebrand our company. Instead of just saying ‘family-owned and operated since 1931,’ we wanted to communicate in a few words what distinguishes us from others. A lot of firms in our area focus on price as the differentiator, but we needed it to do more than that. During brainstorming sessions with our Los Angeles marketing firm, LA Ads, I mentioned a graveside service I attended for an acquaintance of mine. One of our cemetery people came up to me and said the crew did a really good job sweeping the grounds and taking care of everything because they knew the deceased is a friend of mine. I said we should treat everyone like they’re a friend of mine.

“The marketing firm felt that how we treat people would be a perfect way to differentiate Greenlawn from the competition. So we started a campaign with the slogan, *You’ll be treated like a friend of the family* or simply *Friend of the Family*. We didn’t approach this casually, because when you genuinely treat someone that way, it’s very noticeable. When you see a friend, what do you do? You greet them warmly, you make them feel comfortable, and you



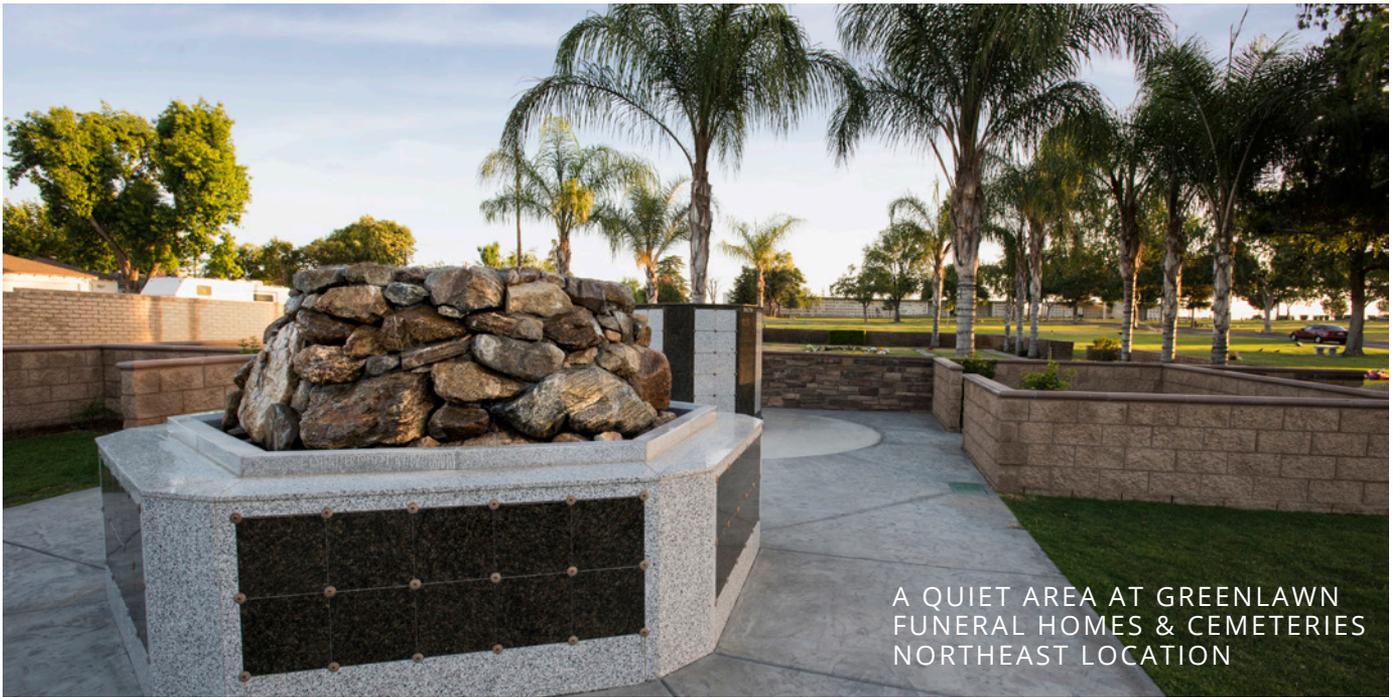
**JIM LAMAR**, PRESIDENT OF GREENLAWN FUNERAL HOMES & CEMETERIES, BAKERSFIELD, CA, TALKS ABOUT HOW HIS COMPANY FOUND A WAY TO DIFFERENTIATE ITSELF.

show them that you care. And you do it every time. So we decided if we were going to say this is who we are, then, at every contact point—whether it’s the first call, an arrangement conference, or someone just coming in to pay a bill—we need to make sure they all feel the difference.

“This is not just about prospects and client families. We also treat fellow employees as friends, so it’s a much broader ideal, and I think it has really made us stand out. I appreciate the fact that we are privately owned. That helps us be nimble in our decision-making process. I don’t have to reach out to a corporate hierarchy and ask if this is acceptable. We often let our hearts guide us when we make decisions about what is best for customers.

“People have really responded to this approach, and they remember our tagline. Now, admittedly, we don’t always get it right, and we’ll get an occasional complaint. I’ve had a few customers say they didn’t feel like they were treated as a friend of the family. I apologize and seek to understand the nature of their complaint, so I can see it is corrected. It is interesting that our tagline has raised expectations within the community, and people identify us by it. A very smart business owner once told me to always run into a problem. If you know someone’s upset, call them right away. Get in front of the situation and deal with it face-to-face.

CONCLUDES ON PAGE 14



JIM LA MAR, FROM PAGE 13

“Our operations are now tied to this tagline. We’ve put together a bonus structure for our funeral directors and management based on, among other things, the reviews they get. It’s important, that we measure how well we were doing and reward successes based on our tagline—which has become a kind of mission statement.

“This also ties directly into the crisis we are experiencing right now. We all worry about the health and safety of our personal families. Well, if we treat people like family, then we should be worried about everyone in the community, especially those that come to our services and our facilities.”

### **WHAT, NORMALLY, IS YOUR GREATEST OPERATIONAL CHALLENGE?**

“With rising cremation rates, particularly with us running combos, I say if we’re not moving a backhoe, we’re not making any money. The increase in the number of families who don’t understand the value of permanent placement in a memorial park—who don’t understand the value of a gathering and a service—is everyone’s problem. What we try to do is create and present a park inventory that is compelling for families. We’ve included services in all of our packaging, because we want everyone—whether they choose cremation or not—to have a service.

“The West has a higher cremation rate than the East or Midwest, and we fear this pandemic may push our 60 percent up to 70 or 80. And each time it gets bumped up—as we saw during the housing and banking crisis when people were unemployed and fearful of what might come next—the cremation rate never comes all the way back down—only five percent or so. It became the new norm, and families embraced it.”

### **AS A NEW MEMBER OF SELECTED, WHAT ARE YOUR EXPECTATIONS OF MEMBER BENEFITS?**

“I think to get the most benefit, we must avail ourselves of as much of what Selected offers as possible. Just as soon as things settle down, we plan to get our people rotating through the programs and courses, because I know they’re spot-on and have a history of success.

“We’ve already met and made some good friends in Selected—people I wouldn’t have encountered otherwise. What strikes me most about the members of Selected is their genuine willingness to share and to raise the overall level of our profession.” ▲

## Gilbert Memorial Park Exceeds All Expectations

In 2018 and 2019, *The Bulletin* reported on the ambitious effort to create a brand new funeral home and cemetery by Bunker Funeral Homes in Gilbert, AZ. Since its grand opening in November 2019, Bryce Bunker, President of the firm, describes the community response to Gilbert Memorial Park, [gilbertmemorialpark.com](http://gilbertmemorialpark.com), as, “better than we could have ever hoped for. It exceeded all expectations, not just in terms of the number of families we’ve been blessed to serve but also in the ways we hoped the unique touches of the funeral home and the cemetery would help people rethink the way we honor life. People are appreciating and using those features, and creating the kinds of unique quality services that we hoped they would.”



**BRYCE BUNKER**  
IS PRESIDENT OF  
BUNKER FUNERAL  
HOMES, MESA, AZ

In this follow-up article, we examine these unique touches and how they create a thoughtful experience that reflects an innovative design approach at all levels.

### DESIGNING THE EXPERIENCE

***Incorporating the Senses.*** Bryce’s vision for the experience of Gilbert Memorial Park incorporated sensory, emotional, and interdisciplinary approaches. In the TED Talk, *Designing for the Five Senses*, industrial designer Jinsop Lee promotes the importance of designing for the senses to create meaningful spaces. He explains that experiences engaging all the senses produce the best memories.

Bryce followed a similar design philosophy when describing his vision of incorporating the senses into the experience of the space. “We thought a lot about how we wanted it to sound, and I think I sampled about 50 different scents in choosing what we wanted people to smell when they walk into the building.”

CONTINUES ON PAGE 16



GILBERT MEMORIAL PARK

Upon entering, visitors are greeted with the gentle sound of water, the scent of white tea and thyme, and sweeping views of the gardens through sliding doors and light-filled open spaces. For refreshment, ice water with sliced citrus fruits and berries is provided in the lobby. “It’s not just the building; it’s how we greet people. The thing I’m most proud of is how our staff has rallied around that vision. The collection of the different elements makes the experience so special.”

**Feeling-Driven Features.** In addition to designing for the senses, Bryce also took special consideration in the emotional experience of the space. “The way we started talking about the design process was not about walls, rooms, and square footage. We first started with a creative brainstorming session and built a word cloud of how we value different feelings that we wanted people to have when they came to our facilities.” Based on those feelings, he and his team discussed how they could design experiences that provided healing, hope, and a source of strength for their families. “Throughout everything that we designed, we asked how that specific design tied back to the experience and the feelings we were trying to create. The experience drove the design.”

One of his favorite features are the chalk walls where families and friends write colorful, creative messages at the end of each service. As these unique details came together, the most rewarding part of this process for Bryce has been seeing how families have been impacted and changed through the moving experiences of honoring their loved ones.

**Collaborating Across Fields.**

In assembling his team, Bryce intentionally hired people who had different belief systems and perspectives outside of the industry. “We wanted to create



“WE HAVE TO BE BOLD TO DIFFERENTIATE OURSELVES AND APPROACH THE MARKET IN WAYS WE’VE NEVER DONE BEFORE. WE NEED TO FIND THAT BALANCE OF BEING BOLD AND CLASSY WHILE SHOWING RESPECT AND REVERENCE FOR WHAT WE DO.”  
—BRYCE BUNKER

something that all of us, despite our differences, could come together and feel inspired, peaceful, and hopeful—the same feelings that drive the experience.” Bryce and his team toured a number of funeral homes that he respects, and connected with creative, innovative thought leaders in the industry. He also wanted to balance input from people outside of the industry, and tear down many of the stereotypical models and expectations for funeral homes. In doing so, he offers an innovative, creative solution to what he wanted to see in his field.

“We have to be bold to differentiate ourselves and approach the market in ways we’ve never done before. We need to find that balance of being bold and classy while showing respect and reverence for what we do.” Bryce advocates for taking risks and being willing to do things differently. To achieve this, he also pushed for a fresh marketing strategy and more inviting, colorful branding.

CONTINUE READING THIS ARTICLE  
ON THE BULLETIN’S WEBSITE  
AT [SELECTED-BULLETIN.ORG/BUNKER](http://SELECTED-BULLETIN.ORG/BUNKER).

## Cemetery Master Plan is Key to Effective Growth

### HOW DID YOU GO ABOUT UPDATING YOUR CEMETERY'S MASTER PLAN?

“From a design and customer preference standpoint, we needed to rethink the last formally filed Development Plan—which was filed with the city in 1987—and take it a different direction. We wanted to do it in a way that blended seamlessly with what had been done during the cemetery’s first 90 years. Although the cemetery has been developed well, the past had almost no bearing on the future, because cultural and customer preferences have changed beyond anyone’s imagination.

“The process varies depending upon locality and state, but in Bernalillo County, New Mexico, every time we want to build anything that involves a concrete footer, we have to obtain a permit. And since everything we have added in the cemetery for the last 20 years or so is not on our original Master Plan, we have had to have it stamped with an administrative amendment each time. We were at the point where we had 19 administrative amendments on our plan, and we were told we needed to submit an entirely new Master Development Plan showing every existing structure and what we plan to do moving forward. We’ve been doing some innovative things that are getting national attention, but none of it was on our original master plan. Updating the master plan has been an intensive but rewarding exercise.

“I frequently speak at conferences and in study groups regarding cemetery design, and I advocate being very proactive with this process. Many of us wait until a regulatory body forces us to update our plan because doing so is costly and time-consuming. But the fact is that the cemetery master plan should guide everything we do from a development standpoint moving forward and force every new feature or section to try to be relevant to future customers.

“From now on, we intend to examine the plan every five years to make sure it is still guiding us in the right direction. Then when it comes time



**CHRISTOPHER KELLER** IS EXECUTIVE DIRECTOR OF SUNSET MEMORIAL PARK, WITH THE FRENCH FAMILY OF COMPANIES IN ALBUQUERQUE, NM, WHICH INCLUDES FIVE FUNERAL HOME LOCATIONS, A CREMATION SOCIETY, AND THE CEMETERY.

for a complete update—every 20 years or so—the process will not be so overwhelming. As our designs change and evolve, the overall look will remain seamless. We’ve discovered that this approach also reveals opportunities for additional inventory that were sitting right under our noses but were never examined through the lens of an updated master plan. We found corners of the property that could be repurposed and old roads that could be taken out. These became beautiful, well-designed, integrated areas woven throughout the park that look like they were intended to be there all along—not disjointed, standalone features set out in the middle of a field.”

### WE CAN'T SEE 20 YEARS INTO THE FUTURE, BUT DOES A FIVE-YEAR EXAMINATION PROVIDE INCREMENTAL STEPS?

“Absolutely. The build cycle of most features is about three years. You plan it during the first year, you finalize design documents the second, and then you build it the third. Re-evaluating the master plan every five years, for us, is about the right frequency to maintain consistency.

“You’re correct, we can’t see 20 years into the future—maybe not even ten. But if we build our master plan with that in mind—whether it’s for

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#### CEMETERY MASTER PLAN, FROM PAGE 17

a brand new cemetery, the undeveloped areas of an existing property, or common areas in parts of the park that can be repurposed—there's a lot of opportunity for developing revenue-generating features in the future. Done correctly, the master plan is a roadmap for building in stages or phases. And those phases should be designed to allow for flex and deviation over time yet still look planned.

“For example, here at Sunset Memorial Park, we do a lot of traditional Roman Catholic burials. So one might be tempted to simply put in another four acres of graves—enough to last us for the next 20 years. Once we start doing burials in that new area, the land is locked into that use. What if ten years from now, we're at 90% cremation, and no one is doing traditional burials? The 4,000-plus graves we developed back in 2020 will now actually last us for 50 years, and we've destroyed an alternative revenue stream.

“Instead, we build in phases, and the master plan outlines what the whole thing is ‘probably’ going to look like. It's flexible by design and purposely gets fuzzy about ten years out, but we're pretty well locked into what we will be doing for the next five years. We might tweak parts of the design, maybe emphasize more of this and less of that in the short term, but by and large, we know what we are building.

“Then, about ten years out on the build cycle, the plan gets fuzzy and grayed out. There's a ghost outline of what we think it's going to look like. We will be revisiting this in five years and then five years after that. Each time, the gray lines begin to darken

and become more firm, because we now know what direction is appropriate for the next phase.

“As we design our new—what we call “micro”—cemetery in Rio Rancho, it fits right into that same pattern. From the very beginning, the master plan for that cemetery is forward-thinking, cremation-based, and very local. By local I mean it resonates with people from this area because its design cues are Southwestern. There are many beautiful cemeteries across the country, they all tend to look the same—big trees and structures that look like Grecian temples. That doesn't fit in Albuquerque, so we decided that all of our designs should feel local. As a result, when people walk and look around, it's relevant to them, and they feel at home—it resonates.”

#### WHAT IS A MICRO CEMETERY?

“Traditionally, cemeteries have a lot of acreage for burials. The standard formula is for every acre, you get about 1,100 graves. And that ground is permanently designated for burial whether it has a perpetual care fund or not. As I mentioned earlier, it's never going to be used for anything else.

“Most government agencies have established standards for new cemetery size. At least 20 acres is a common requirement. However, we are developing a 2.1-acre cemetery in Rio Rancho, because regulations in Sandoval County require that a cemetery must have at least two acres. That, by any definition, is a very small cemetery. I don't know if ‘micro cemetery’ is an actual term, but it's how

CONTINUES ON NEXT PAGE

our design firm refers to it, so we have adopted the terminology, because it evokes an image of what we are trying to do. It's not a cemetery in the classic sense. We bought the property immediately adjacent to our mortuary in Rio Rancho, and it's going to be 100% cremation. It's vertical, which means that on two-plus acres, we get a very high density of usage. It will equate to 20 acres if not more in a traditional cemetery.

We currently are in the conceptual design phase. Next year, we'll complete our construction documents and permitting. Then either in late 2021 or probably early 2022, we start moving earth and building the features. And even though this is a very small cemetery, we are using the master plan strategy of building in phases. The first phase will probably be a niche pavilion and committal area.

"Two acres sounds small until you go out and look at it. It's all weeds and wild mesa right now and will require a lot of landscaping. We will incorporate certain design features right from the beginning that will facilitate future phases, like a walking path

meandering along the perimeter with benches and places to stop. This immediately allows the property to become a resource for the community as the neighbors stroll and walk their dogs. In the future, we won't have to change the design of the walkway, we'll be filling in around it. This provides lots of flexibility moving forward."

### WHAT HAVE YOU LEARNED DURING THIS PROCESS?

"I think one of the biggest things we are learning is how to successfully adapt to changing cultural and customer preferences. This is a watershed time for the funeral and cemetery professions. Traditional revenue streams have been decimated as we try to help people understand that cremation is just body prep, and not final disposition.

CONTINUE READING THIS ARTICLE ON THE BULLETIN'S WEBSITE AT [SELECTED-BULLETIN.ORG/MASTERPLAN](http://SELECTED-BULLETIN.ORG/MASTERPLAN).

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## Selected's FirstGen Program Provides Networking Opportunities to First-Generation Funeral Home Owners

In an effort to support first-generation owners, Selected has created the FirstGen program designed to specifically address their needs and provide a network of members experiencing similar situations as they grow their businesses. While all funeral homes face unique challenges depending upon their geographic location and market demographics, multi-generational firms encountered many decades or even centuries ago what FirstGen owners are up against today.

Selected recognizes this and is committed to providing these members with opportunities to connect, share, and learn from each other in supportive ways. The program currently has 35 member firm participants. They met for the first time at the 2019 Annual Meeting in Nashville, TN.

“We are pleased to offer this new program which caters to first-generation owners much like our Funeral Home + Cemetery Management and

NextGen programs support other segments of our membership,” said Assistant Executive Director Denise Zoephel. “We received great feedback from the Nashville meeting with ideas for how to nurture this group.”

In addition to exclusive, yearly networking and idea exchange sessions at Selected Annual Meetings, the program recently launched a dedicated page on Selected's website at [selectedfuneralhomes.org/firstgen](https://selectedfuneralhomes.org/firstgen). This features a roster of participating members to facilitate connections and relationships year-round. There also is a quarterly Member Spotlight section showcasing the unique stories and experiences of first-generation owners. Sean Thompson of Thompson Funeral Chapel, Goodyear, AZ, is the first to be featured. [An interview with Sean begins on next page.]

To learn more, contact Denise Zoephel at 800-323-4219 or [denisez@selectedfuneralhomes.org](mailto:denisez@selectedfuneralhomes.org). ▲



FIRSTGEN PARTICIPANTS MEET AT THE 2019 ANNUAL MEETING.

## Thompson Funeral Home Runs Two Distinct Businesses

### HOW DID YOU COME TO OWN YOUR FUNERAL HOME?

“The firm was founded in 1957 as Cannon Funeral Home. Cynthia and I had the opportunity to purchase it in 2005. I previously managed an SCI firm, but we both had a vision for our own funeral home. Although the firm was well-established, we made significant upgrades to the facility and grounds, and we built a new staff team. The process had its challenges, but we didn’t appreciate the advantages of taking over an existing firm until we created an entirely new one ten years later.

“In 2015, we opened Simply Cremation & Funeral Arrangements in Surprise, AZ, in the northwestern part of Phoenix. We developed the concept and built it from scratch. That was an intensive experience, and we learned a lot. I think the hardest thing to do, for new as well as established firms, is creating and maintaining a reputation in the community for the type of service you want to provide. People tend to create their own ideas of what a funeral home is, or they may think that all funeral homes are the same. So a good deal of our time is spent cultivating and maintaining a reputation for quality service at our original location and for simplicity at our newest.”

“The two firms are distinct from one another and far enough apart that they don’t directly compete. They each have their own identity and place in their communities. It’s akin to Chevrolet and Cadillac. They each have their own reputation, history, and target markets, but they share the parentage of General Motors.”

### WHAT HAVE YOU LEARNED DURING THIS PROCESS THAT HAS BEEN HELPFUL?

“I think the greatest lesson I have learned is that you can’t be all things to all people. Paying a lower price and still getting the very best quality is impossible in any industry, yet some funeral homes still try to offer that. However, regardless of price, we do try to serve everyone to the best of our ability. We never know who is going to call on us or what their exact wishes will be, but their expectations are based on the seeds we’ve planted, the reputation we’ve created, and the relationships we’ve cultivated in the community. The realization that we can’t expect to be all things to all people led us to create our second facility.”

### WHAT CHALLENGES HAVE YOU FACED CREATING A SECOND FIRM FOR A DIFFERENT MARKET?

“First, we had to make sure we really understood our markets and our potential customers. We also decided to have different staffs at each location. We don’t expect our people to go back and forth, because each company is a different concept. It’s not easy to juggle and maintain awareness of what each market expects.



**SEAN THOMPSON** AND HIS WIFE, CYNTHIA, ARE CO-OWNERS OF THOMPSON FUNERAL CHAPEL, GOODYEAR, AZ. HE RECENTLY SPOKE TO *THE BULLETIN* ABOUT THE COUPLE’S EXPERIENCES AS FIRST-GENERATION OWNERS.

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“Other than that, we have many of the same challenges as everyone else: rising costs and people not understanding the value of funerals. The one thing we don’t worry about, though, is the cremation rate. Our funeral home is at 82%, and our cremation business 98%, and we’ve never really known anything different. The rate was already 80% when we purchased the firm in 2005.

“In terms of people not understanding the value of funeral services, I don’t feel that’s the public’s fault. Funerals are not something that people spend much time researching until they have a need. Educating them is the job of our profession. None of us want to see it reduced to a body disposal industry.

“We spend time in staff meetings discussing and making sure there is an element of service in everything we do—ensuring the whole experience is what people have come to expect from us. We’re not selling a product; we are creating and providing an experience that the average person only has a few times in their life. So our goal is to make the process as comfortable and understandable as possible, and the service truly memorable.”



## WHAT ARE YOUR EXPECTATIONS OF SELECTED'S FIRSTGEN PROGRAM? WHAT'S IN IT FOR YOU?

“First generation owners have unique challenges that older, multi-generation firms have not faced in recent years. Just as Selected serves the needs of combination owners with the Funeral Home + Cemetery Management program and younger funeral directors with the NextGen program, it is appropriate and quite frankly visionary that they recognize the unique needs we FirstGen’ers have.

“The FirstGen group met for the first time at last year’s Annual Meeting in Nashville, and it was a very productive session. We discovered that we all had similar concerns and were asking many of the same questions. My wife and I are now 15 years into our journey. Some participants have been at it longer and some not as long, but we all seemed to be of like minds and found it helpful to share our challenges and bounce ideas off the group. As the FirstGen program continues to develop, I think it’s going to be very helpful to a lot of members.” ▲

## Selected Looks Forward to Future Gatherings

Selected’s top priority is the health and safety of its members. Therefore, with the COVID-19 taking its toll on group gatherings of all kinds, Selected made the necessary decision to cancel the Spring Management Summit, the European Conference, as well as several Group Roundtable Meetings.

“While disappointed for these spring meetings, we already are looking ahead to the future when members can once again come together,” said Amy Hunt, Director of Meetings and Education. “We know the best part of Selected is the sharing and camaraderie among members. It has been inspiring to witness members using The Forum and other technology to continue to help each other during this difficult time.”

Selected remains dedicated to finding ways to help members navigate these unprecedented times. Until we can meet in-person again, we invite you to revisit our meeting archives for materials from past Summits as well as NextGen Seminars and Annual Meetings. Many of the Annual Meeting sessions include informative audio recordings.



Check [selectedfuneralhomes.org/events-calendar](https://selectedfuneralhomes.org/events-calendar) for webinars and other opportunities as they become available. We also encourage you to continue to use The Forum, [forums.selectedfuneralhomes.org](https://forums.selectedfuneralhomes.org), as a valuable resource for sharing ideas, asking questions, and doing what Selected members always have done best—supporting each other and finding solutions to challenges. ▲

Due to the current pandemic crisis, meeting information is changing regularly. Please visit [selectedfuneralhomes.org/events-calendar](https://selectedfuneralhomes.org/events-calendar) for the most up-to-date information.

- 6/5 **EDUCATIONAL TRUST JOB FAIR, WHEELING, IL**
- 6/9 **GROUP 3 ROUNDTABLE FOREST CITY, NC**
- 6/24 **EDUCATIONAL TRUST JOB FAIR, NORWOOD, MA**
- 7/1-7/31 **SELECTED TRANSFER SERVICES (STS) NETWORK RECRUITING MONTH**
- 9/29 **SELECTED STUDY GROUPS RECEPTION, MONTRÉAL, QC**
- 9/30 **SELECTED STUDY GROUPS DAY, MONTRÉAL, QC**
- 9/30-10/3 **2020 ANNUAL MEETING MONTRÉAL, QC**
- 11/6 **FAMILY FOLLOW-UP SURVEY PROGRAM 2021 ENROLLMENT BEGINS**

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9/22-25 **2021 ANNUAL MEETING SAN ANTONIO, TX SEPTEMBER 22-25, 2021**

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9/21-24 **2022 ANNUAL MEETING WASHINGTON, D.C.**



## Weathering the Financial Storm

With predictions of a global recession in 2020, funeral home operators are turning their minds to the bottom line. Policies aimed at preventing the spread of COVID-19 are altering funerals and limiting the services families can select.

Where do you go from here? Start by knowing where you started. Selected's most recent Management Comparative Program compiled fiscal and case volume data from 117 member firms. Here you will learn what the data revealed.

### CREMATION RATES RISE AGAIN

From the 2018 fiscal year, 117 firms provided submissions for the 2019 program. The median case volume was 329. Cremations comprised 46.2% of cases, up from 44.4% the year prior. How will an accelerated shift from burial cases to cremations impact your sales? If rates advance at their 2% per year clip, how will your revenue be impacted? If COVID-19 accelerates the shift toward cremation and away from memorials beyond 2%, what then?

### "JUST CREMATE ME"

For the first time, the program tracked dispositions by level of service to provide insight into precisely where case volume is going amid the shift away from burial. The medians revealed that for families choosing burial, full service was far and away the most common with 83% of families having full services. Another 13% chose partial services, commonly called "graveside" services. Direct burials were a mere 3.5% of burial volume.

Cremation, however, shows the exact opposite. Among families choosing cremation, direct cremation was chosen most often at 49%. Cremations with some services but without visitation made up 36% of all cremations. Cases with "full service" where the family held a visitation along with cremation accounted for only 14% of cremations. How can you teach cremation families the scope and value of all your services?

### SHOW ME THE MONEY

While the onward march of cremation rates gives pause to many, median revenue per case actually climbed in fiscal 2018 to \$6,375, up from \$5,809 the year prior. While each firm faces its own fiscal reality, the move suggests that members may be heeding the message to mind their case mix and monitor pricing strategies.

### DISPOSITION SNAPSHOT

CASE TYPE	2018 MEDIAN
Burial with Full Service	116
Burial with Partial Service	18
Direct Burial	5
Total Burials	139
Cremation with Visitation	22
Cremation without Visitation	55
Direct Cremation	75
Total Cremations	152
*All Other At-Need Cases	38

\*Youth cases, trade services, public assistance, and similar.

## CREMATIONS UP 1.8%



### FINANCIAL SNAPSHOT

FIGURE	2018 MEDIAN
Revenue Per Case	\$6,375
Caskets Sold	147
Urns Sold	88
Employee Hours Per Case	70
Days in Accounts Receivable	31
Advertising/Marketing Exp.	\$43,559

### PRENEED SNAPSHOT

FIGURE	2018 MEDIAN
% of Services Pre-Funded	24%
Preneed Shortfall Per Case	\$467
Preneed Marketing Expense	\$4,126
New Preneed Contracts Sold	85
Total New Preneed Sales	\$547,255

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# Understanding Your Cost of Goods Sold

At the Selected Study Groups meeting in Nashville, TN, last September, Janice Redmond, CPA, and I fielded several questions from the group including three regarding the proper measurement of Cost of Goods Sold (COGS), also referred to as Cost of Sales. They inspired additional research into this important topic.

In my work with independent funeral home owners for more than 41 years, I've striven to keep COGS related to merchandise only. Some accountants include officer salaries, trade embalming, supplies, and even some labor expenses in COGS. But I remove those from our clients' financials and place them appropriately on other expense lines. To me, COGS means merchandise such as caskets, cremation containers, outer burial containers, urns, jewelry, etc.

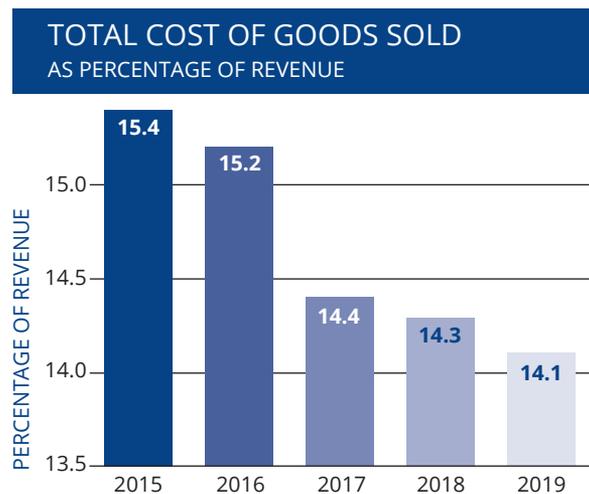
At the meeting, Janice and I stated that the proper level of COGS depends on the firm. Some clients spend more than others. At times, this depends on how much they pay for caskets and other merchandise. Some firms record their casket costs pre-discount in COGS, placing the amount of the discounts earned below the Net Operating Profit/Loss line on the Profit and Loss Statement. Other firms record the post-discount casket costs under COGS. This makes it harder to find comparable statistics.

When I first started in funeral service, COGS ran 20-22% of total revenue (without cash advance income). Thirty years ago, the range of COGS reached 18-20% of revenue. In fact, 20% was so prevalent that elder funeral directors knew that they could lop 20% off a funeral service sale, and if they kept their Total Operating Expense (personnel, facilities, auto, etc.) to 70%, their net profit would be 10%. The Selected Study Group questions on how much a funeral home's Cost of Goods Sold should run was undoubtedly due to the changes facing funeral service. Rising cremation calls with fewer casket or outer burial container sales have changed the COGS percentage materially.



BY **DAVID NIXON, CMC**,  
PRESIDENT OF NIXON CONSULTING, INC.  
AND CONSULTANT TO THE  
SELECTED STUDY GROUPS PROGRAM

The chart below shows our client statistics for the past five years. Keep in mind that our stats were adjusted to include the casket discounts earned so that we could see a true picture. This shows COGS reached just 15.4% by 2015 with notable decreases until 2019 when it fell to 14.1%. So, the answer to the question, *What should my cost of goods sold run?*, appears to be a lot less than the 20% in days of old. Is 14% the right number for your funeral business? That depends.



Some firms reduced their COGS to 9% through shrewd negotiations and buying programs. Firms in high cremation markets might reach just 7%. Much hinges on your negotiating skills, your arranger's skills, and your cremation rate. Clearly, more factors influence your COGS today than 30 years ago when everyone bought caskets.

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## REMEMBERING OUR COLLEAGUES

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Visit [selectedfuneralhomes.org/obituaries](http://selectedfuneralhomes.org/obituaries) for more information.

**4/5 - JOAN C. ARNOLD**, Sister of John L. Arnold, President of Arnold Funeral Home, Canton, OH.

**4/4 - RICHARD STEELE II**, Vice-President of Penzien & Steele Funeral Home, Inc., Bay City, MI, and son of Past Board Member, Richard C. Steele, President of the firm.

**4/3 - BARBARA STEELE**, Purchasing Agent at Penzien & Steele Funeral Home, Inc., Bay City, MI, and wife of Past Board Member, Richard C. Steele, President of the firm.

**4/1 - RETTA H. BILLOW**, wife of Charles W. Billow, Billow Funeral Homes, Akron, OH.

**3/27 - CHARLES W. BILLOW**, Past Board Member of NSM and father of Charles M. "Chip" Billow, President & CEO of Billow Funeral Homes, Akron, OH.

**3/4 - ELAINE F. SCHOOL**, mother of Terry School, owner of Selected Preferred Partner The Davis Whitehall Co.

**2/29 - KARL DENK**, father of Karl A. Denk, Bestattungen Karl Albert Denk, Erding, Germany

**2/23 - JOHN M. BUSCH**, former owner and funeral director of Busch Funeral and Crematory Services, Cleveland, OH; Past Secretary-Treasurer of Selected; and father of James Busch, President of the firm and Past Secretary-Treasurer of Selected, and J. Mark, Vice-President of the firm.

**2/18 - RALPH E. WAITE**, owner of Waite & Son Funeral Home, Medina, OH, and grandfather of Andrew and Christopher Waite, funeral directors and owners of the firm.

**2/16 - GILLIAN DARLING**, mother of Lisa Steel and mother-in-law of Iain Steel of Richard Steel & Partners, Ltd., Winchester, England

**2/5 - DELORES ALLNUTT**, Vice-President of former member firm, Allnutt Funeral Service/Macy Chapel, Greeley, CO, and wife of Past President of NSM, Bill Allnutt.

## WELCOME NEW MEMBERS

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**DAVIS-ANDERSON FUNERAL HOMES, LTD.**, Carlinville, IL, [davis-andersonfuneralhome.com](http://davis-andersonfuneralhome.com)

**LAMBERT FUNERAL HOME AND CREMATION SERVICE**, Mocksville, NC, [lambertfuneralhomenc.com](http://lambertfuneralhomenc.com)

**MONEY & KING FUNERAL HOME, INC.**, Vienna, VA, [moneyandking.com](http://moneyandking.com)

## NEWS FROM OUR MEMBERS

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**BUCHANAN GROUP AND FLANNER BUCHANAN**, Indianapolis, IN, has dedicated the organization's disaster recovery servers to a distributed computing project run by the University of Washington which may be integral in quickly developing a vaccine for COVID-19.

**GLENN TAYLOR JR.** of Glenn Funeral Home and Crematory, Owensboro, KY, was featured in an article in *The Owensboro Times* about the community uniting in an effort to make protective masks. Glenn had the idea of using the funeral home's laser cutter to save time cutting fabric.



GLENN TAYLOR JR. RECEIVES FABRIC TO BE CUT FOR PROTECTIVE MASKS.

**GRECO-HERTNICK FUNERAL HOME**, Weirton, WV, has been named Best Funeral Home by the *Weirton Times*.

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## Joe Jackson Jr. Looks at Life Through His Camera

*Editors Note: In this issue, we begin a new feature that takes a look at some of the interesting activities Selected members do for recreation and relaxation in the precious little time they have after working hours.*

Outside of work, Joe Jackson Jr. is an avid photographer. It began as a hobby 25 years ago, and while he started with film, it wasn't until he began shooting with digital cameras that photography became a true passion for him. His advice for those interested in pursuing photography is to practice consistently and learn to enjoy the moment.

### HOW HAS PHOTOGRAPHY ENHANCED YOUR LIFE?

"If you enjoy photography, you look at life differently. You don't take things for granted. You find yourself asking, how would this look in a picture? You never look at the world in the same way, because the simplest things mean something. The picture tells a story if you do it right.

"The catch is, I have zero business taking pictures because I'm virtually blind in one eye, and my other eye is extremely myopic. A lot of the time, I don't get to see the details in the pictures. But for me, photography is an appreciation of sight. Every day, I appreciate that I am able to see. A lot of my photography is guesswork. I give it a shot and hopefully it works out. I try to let the camera be my eyes."

### DO YOU FIND CONNECTIONS BETWEEN PHOTOGRAPHY AND YOUR WORK AS A FUNERAL DIRECTOR?

"Restoration is a fine art. I think I transferred some of that process over into photography. When you're working on a body, you use all the tools available. I relate that to photography and employ a funeral director's can-do mindset. If a picture is overexposed or not framed properly, I know I can fix it in Adobe Photoshop or Lightroom. With restorative art, your work creates a better, final picture for the family. When you spend the necessary time on a body, you can look at the beauty of the results of your work and the satisfaction that you did it correctly."

Joe advocates for the importance of having an outlet or a hobby, especially for those working in the funeral service profession. "Everybody needs to get away. You need a distraction because it's so emotional and stressful. You're dealing with families who are going through grief. You have to get them through it, and you have to learn how to get through it yourself."

Joe finds peace by getting lost in the moment while shooting with his Nikon D-850. When editing at home, he listens to his favorite music. "It's so enjoyable and encompassing; I wouldn't trade it for the world." ▲



**JOE JACKSON JR.**  
IS PRESIDENT OF  
JOE JACKSON FUNERAL  
CHAPELS, LAREDO, TX,  
AND PAST SECRETARY-  
TREASURER OF  
SELECTED.

## Officers for 2020-21 Elected

Selected has announced that Paul C. St. Pierre has been elected President and Eric R. Trimble has been elected Board Chair for the 2020-21 term. This election introduces a restructuring of these positions to aid in the organization's growth and governance in collective and dynamic roles.



PAUL  
ST. PIERRE



ERIC  
TRIMBLE

Paul St. Pierre of Wilson St. Pierre Funeral Service & Crematory, Greenwood, IN, Group 2. Eric Trimble of Trimble Funeral Home & Crematory, Moline IL, Group 4. Together, they bring decades of senior leadership and experience to their positions and are excited to work together with the Board to prepare the association and profession for the changes ahead.

"I think it's more important to realize that in today's world we have to be ready for the changes in our profession," stated St. Pierre when asked about what he sees for the future. "We need to have the skills to adapt as an industry, pivot if necessary and adjust."

"We're seeing things evolve so rapidly in the profession. Selected is uniquely positioned to help our members to better help their communities however they need," said Trimble. "I am excited for the opportunity to help direct Selected and the funeral profession into the future. At this point in my career, to pay it forward to the profession is important to me."

The new officers will be officially installed during the 2020 Annual Meeting, September 30 through October 3, in Montréal, Canada. ▲

## Headquarters to Relocate in June

In order to meet the growing needs of Selected's membership, the Headquarters office will open in June at a new location, One Overlook Point in Lincolnshire, IL, about seven miles northwest of its current location in Deerfield in the northern suburbs of Chicago.

After 18 years in Deerfield, the staff has more than outgrown its current office space. An extensive search located a suitable nearby location, and plans are well underway to complete the move in late May with little to no interruption of communication with and services to members.



"The move to a larger space is an important event in Selected's long history," said Rob Paterkiewicz, Executive Director and CEO. "The expansion of our member programs and services, coupled with the growth we are seeing within the Selected Educational Trust, led us to this new opportunity to lease office space with a larger and fully-customized floor plan to meet our current and future needs.

"The centerpiece of our new office space will be Room 1917, our executive conference room. In 1917 a group of forward-thinking funeral professionals met to discuss their shared passion for serving families and desire to help each other improve their businesses. At the time, no one could have guessed the lasting impact of their efforts."

One hundred and three years later, Room 1917 honors that vision and will feature the latest in audio-visual capabilities as well as ample space to accommodate meetings of the Selected Board of Directors, committees, work groups, and the staff.

CONCLUDES ON NEXT PAGE



## Pedersen Named Executive Director

The Selected Educational Trust has appointed Bea Pedersen as its first Executive Director. She has served the Trust for the past two years as Development Director after serving in leadership roles for more than 20 years in nonprofit organizations.



BEA  
PEDERSEN

“Being able to provide educational opportunities for the independent funeral service profession is a great honor and privilege,” said Pedersen. “The Trust has made great strides, but this is just the beginning of bigger opportunities for the members of this profession.” ▲

## March Job Fairs are a Huge Success

Prior to travel and group size restrictions, the Trust held three Job Fairs, two onsite and one virtual, hosting 17 firms and more than 130 students.



JOB FAIR AT  
PITTSBURGH INSTITUTE  
OF MORTUARY SCIENCE

SELECTED NEWS, FROM PAGE 28

“This July, we anticipate hosting the summer meeting of the Selected Board as well as an open house for the new space,” said Paterkiewicz. “We will officially unveil Room 1917 at that time and recognize the members and partners who have financially assisted in the creation of this important room.” ▲

## New Marketing Manager Announced

Gina Florzak has been named the new Marketing and Communications Manager for Selected. She brings more than 15 years of experience in

A Job Fair was held at the Pittsburgh Institute of Mortuary Science, one of the oldest mortuary science schools in the country. Students from the American Academy McAllister Institute in New York City participated in a Virtual Job Fair—one of the best online events ever conducted for the school. The last stop was Miami Dade College in Miami, FL, where members and students shared a successful gathering.

*The Mortuary Science Student Center* is a database filled with information about students attending schools in Pittsburgh, Miami, New York, Tennessee, Illinois, and Massachusetts. Members of Selected have exclusive access to this information at [jobs.selectedtrust.org](http://jobs.selectedtrust.org). ▲

## Leadership Academy Scholarship Recipient Announced

The Trust has announced that Wes Elmes, Funeral Director and Certified Funeral Celebrant for Haskett Funeral Homes Ltd., Lucan, Ontario, Canada, is the recipient of the 2020 scholarship to the Selected Leadership Academy. This scholarship, valued at more than \$5,000, was generously sponsored by a grant from Homesteaders Life Company.

“Thank you so much for this!” said Elmes. “I feel so honored to be awarded this scholarship!” ▲

business administration with an extensive knowledge of marketing, communications, advertising, and public relations.

“I am honored to work for Selected and have the opportunity to promote member benefits that enhance business practices, encourage personal development, and raise awareness of the profession,” she said. “I am excited to be a part of such a prestigious organization and am looking forward to working with Selected membership and staff.” ▲



GINA  
FLORZAK

## BECKY LOMAKA, MA, CT,

Director of Grief Support and Education at O'Connor Mortuary, Laguna Hills, CA, has been elected to serve a three-year term on the Board of Directors of the Association for Death Education and Counseling. Becky is the first funeral professional to be elected to this board since the mid-70s.



BECKY LOMAKA



**ROBINSON FUNERAL HOME**, Easley, SC, has added a coffee shop in its facility for the benefit of families and guests.

**WISE FUNERAL SERVICE**, Bucyrus, OH, is celebrating 175 years of service. The firm became a member of National Selected Morticians in 1955. It is the oldest business in its county continuously owned by the same family. ▲

Expenses per case, however, also took a jump forward at a median of \$5,516 compared to \$5,040 the previous year. A timely reminder that while you may wring your hands over altering your own prices, your suppliers tend to have no such concerns. All totaled, net income per case climbed to \$803 from \$705.

## PLAN THE WORK, WORK THE PLAN

How would you alter your facilities and inventory if your future business model were to service mostly immediate cremations? While the exact impact of a global crisis and ensuing recession can't be fully predicted, having data at your fingertips arms you with a plan. By knowing what has been happening in the many typical and atypical years leading to today, you can paint a picture of what is likely to happen in the future.

## TOGETHER WE ARE STRONGER

When the dust settles and normal life resumes, how will your revenue and expenses need to look to carry you to a time when the trials of 2020 are a distant memory? The 2020 Management Comparative Program will open in April with detailed reports issued in July. Plan to participate by submitting your case volume and financial information. Your anonymous, confidential data helps all Selected members navigate the road ahead together. And together we are stronger.

Contact Dan Beavers at [danb@selectedfuneralhomes.org](mailto:danb@selectedfuneralhomes.org) or 800-323-4219 with any questions. To read more about the program, visit [selectedfuneralhomes.org/mcp](https://selectedfuneralhomes.org/mcp). ▲

A few years ago, one funeral director told me that with cremation, he did not have to share his revenues with casket or vault companies. That is one way of looking at it.

There is no right answer to this question. Each owner needs to monitor his/her COGS, watch what is going on in the arrangement office, negotiate

tough, and monitor the cremation rate in their market. COGS is just one measurement of a funeral home's success. Expense control and revenue enhancements all flow down to the bottom line. Delighted client families and a reasonable profit represent the true measure of a firm. Cost of Goods Sold is just a part of that picture. ▲

# HERE TO SERVE YOU



*As you seek to continue to offer families the highest level of service during these difficult times, Funeral Directors Life stands by you to support you and serve you every step of the way with webinars, resources, and tools to help you succeed in a rapidly changing marketplace.*

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# THE Bulletin

of Selected Independent Funeral Homes

May-June 2020 • Volume 103, Number 3

INTEROFFICE ROUTING


## Generate Goodwill in Your Community with the Newly Redesigned Individual Estate Record

**NEW DESIGN!**  
Updated Contents

### INDIVIDUAL *Estate Record*

A HELPFUL RESOURCE FOR RECORDING VITAL INFORMATION,  
COMMUNICATING PREFERENCES, AND CELEBRATING YOUR LIFE.



Connecting Leaders. Transforming Care.™

**To My Loved Ones:**  
In this book you will find my wishes and important information for arrangements at the time of my death. These will help spare you some worry, anxiety and confusion as you sort out the necessary details.  
Here you will find vital statistics, memorial guidelines, and other requests that will help you and the funeral director assisting you to plan my services.  
I leave these for you with love, in the hopes that the ease of having this information will bring you some comfort and help you celebrate the time we shared together.

Signature: \_\_\_\_\_ Date: \_\_\_\_\_  
Witness: \_\_\_\_\_ Date: \_\_\_\_\_

**Immediate Notification List**

Name 1: \_\_\_\_\_  
Address: \_\_\_\_\_ Telephone: \_\_\_\_\_  
Name 2: \_\_\_\_\_  
Address: \_\_\_\_\_ Telephone: \_\_\_\_\_  
Name 3: \_\_\_\_\_  
Address: \_\_\_\_\_ Telephone: \_\_\_\_\_

**IMPORTANT CONTACTS**

Funeral Home: \_\_\_\_\_ Telephone: \_\_\_\_\_  
Address: \_\_\_\_\_  
Do you have an Executor/Administrator of your estate?  Yes  No  
Executor/Administrator Name: \_\_\_\_\_  
Telephone: \_\_\_\_\_  
Name: \_\_\_\_\_ Telephone: \_\_\_\_\_  
Address: \_\_\_\_\_ Telephone: \_\_\_\_\_  
Name: \_\_\_\_\_ Telephone: \_\_\_\_\_  
Address: \_\_\_\_\_ Telephone: \_\_\_\_\_

**OTHER PERSONS TO BE NOTIFIED** (in addition to family listed on page 11)

Name 1: \_\_\_\_\_ Relationship: \_\_\_\_\_  
Address: \_\_\_\_\_ Telephone: \_\_\_\_\_  
Name 2: \_\_\_\_\_ Relationship: \_\_\_\_\_  
Address: \_\_\_\_\_ Telephone: \_\_\_\_\_

**Assets and Liabilities**

**ESTIMATED GROSS ASSETS**

Cash	Estimated fair market value to be entered over age 18 (FVCL)
Applicable value of stocks and bonds	\$ _____
Notes receivable	\$ _____
Life insurance	\$ _____
Business interest	\$ _____
Applicable value of retirement accounts	\$ _____
Applicable value of real estate	\$ _____
Trusts	\$ _____
Nonexempt assets (personal and household effects, etc.)	\$ _____
<b>TOTAL GROSS ASSETS</b>	\$ _____

**ESTIMATED LIABILITIES**

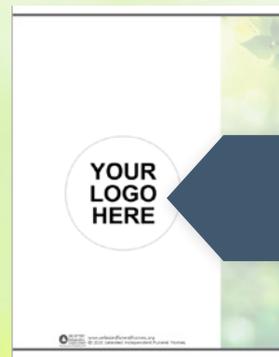
Mortgage	\$ _____
Bank loans	\$ _____
Notes payable	\$ _____
Taxes (including)	\$ _____
Other debts	\$ _____

**BANK ACCOUNTS**

Name of bank 1	Type of account
Address	
Telephone	
Account number(s)	
Name of bank 2	Type of account
Address	
Telephone	
Account number(s)	
Name of bank 3	Type of account
Address	
Telephone	
Account number(s)	

**SAFE DEPOSIT BOX**

Location: \_\_\_\_\_ Location of keys: \_\_\_\_\_



**“Our client families have found the Individual Estate Record to be an invaluable planning tool. We are providing them to price shoppers, veterans organizations, preneed families and as a giveaway at the funeral home. The ability to personalize them with our logo, address and web address sets our firm apart from our competitors.”**

Jeff Vander Plaats  
Vander Plaats Memorial Home LLC, Paramus, NJ



Connecting Leaders. Transforming Care.™

Order online at [selectedfuneralhomes.org/store](http://selectedfuneralhomes.org/store)  
or call 800-323-4219