

# TOWN ASSESSOR'S OFFICE

## 2019 ORGANIZATIONAL CHART

**SOLE ASSESSOR**

**Lisa Goree**

Responsible for valuing and maintaining the Town and Village's real property assessments through field inspections, data collection and sales verification in order to produce a fair and equitable assessment roll. Adheres to state requirements by meeting 100% level of assessment. Implements state, county and local law policy changes that effect real property, including exemptions. Prepares yearly departmental budget. Supervise and manages clerical, technical, appraisal staff and daily activities of the department. Acts as liaison for various town departments, outside municipalities and school districts. Reconciles assessments rolls, assessor reports, produces annual state, county and school district reports. Notify local agencies of changes to real property tax laws and potential impact to tax levy. Provide information to tax payers regarding estimated assessments and taxes. Makes recommendations to the Board of Assessment Review regarding assessments and corrections to the tentative and final rolls. Maintain assessments for state owned lands, Special Franchise, Utility and Agricultural assessments. Processes and judicial review assessments and corrections of error. Reviews all article 7 cases for potential settlements. Attends trainings and real property tax seminars for annual Assessor certification.

**Board of Assessment Review**

**DEPUTY TOWN ASSESSOR**

**Maureen Berglin**

Responsible for coordinating field and office functions to properly evaluate all types of real property for tax assessment purposes. Plans, assigns, reviews and supervises the collection and processing of data relating to real property evaluation. Coordinates the data entry and sales verification process of real property transfers. Conducts data integrity reviews and land analysis through review of sales and market changes. Inspects real property to determine evaluation for tax purposes; fixes assessment on building and land. Maintains continuous check on assessment records for accuracy and validity in order to keep abreast of new construction and other changes affecting property values. Supervises the work of employees. Attends appeals hearings and acts on evaluation complaints; hears and considers oral and written complaints; explains status of assessment program for taxpayers. Acts for and on behalf of the Town Assessor at all times. Does related work as required. Assists with other duties as necessary, under the direction of the Sole Assessor.

**DIVISIONS**

**APPRAISALS SYSTEMS**

**FIELD**

**OFFICE**

**TAX RECEIVER**  
(SHARED SERVICES)

**OFFICE ASSISTANT**  
(Vacant)

Assists with annual Grievance Day process, including the preparation of applications, data entry and BAR decisions. Responsible for data entry of all real property transfers. Data entry of judicial review petitions and decisions. Assists Senior Clerk with various exemptions. Performs data entry of property inventory and data collection. Assists with sales verification process. Submits quarterly sales reports.

**PRINCIPAL ASSESSMENT CLERK**

**Diane Van Slyke**

Responsible for data entry 74B assessment reduction procedures. Assists with data entry of real property transfers and other duties as needed.

**PRINCIPAL ACCOUNT CLERK**

**Patricia Rickard**

Reconciles department's financial records. Prepares purchase orders, vouchers and resolutions. Assists with yearly departmental budget. Maintains changes to mobile home parks, cooperatives and wholly exempt properties. Maintains employee timecards. Processes appropriate forms for Tax Certiorari settlements. Assists with other duties under the direction of the Sole Assessor. Assists with preparation of assessment rolls and associated reports. Oversees data entry of grievance applications. Completes FOIL requests. Assist the public with assessment status info.

**GIS TECHNICIAN III**

**Robert Schulteis**

- Cadastral maintenance
- Govern maintenance and integrity
- WebGIS support
- Deed and Map interpretation
- Scanning and digitizing
- Real Property Mapping/ Subdivisions/Abandonments
- Pictometry
- Easements

**SR. ASSESSMENT ASSISTANT**

**Jerome Gee**

Collects and evaluates data for assessing real property. Maintains data files for comparison of collection methods. Reviews assessment complaints and assists with grievance and informal hearing review process. Supervises data collection of Assessment Aides, including training and implementation of data collection methods. Oversees monthly distribution of Building Permits. Conducts final review of Assessment Aide data collection.

**SENIOR CLERK**

**Christine Higgins**

Processes exemption applications. Maintains the deed transfer/exemption report. Researches ownership and death certificate files.

**OFFICE ASSISTANT**

**Kyna Bloxon-Elleazer (P/T)**

Assists with annual Grievance Day process, including the preparation of applications, data entry and BAR decisions. Responsible for data entry of all real property transfers. Data entry of judicial review petitions and decisions. Assists Senior Clerk with various exemptions. Performs data entry of property inventory and data collection. Assists with sales verification process. Submits quarterly sales reports.

**ASSESSMENT ASSISTANT**

**Tammy Wimpleberg**

Provides data collection and field review inspections. Sketches real property structures and records notes. Updates data collection forms for field use. Sales verification.

**ASSESSMENT AIDE**

**Christopher Flowers**

Performs data collection and field review inspections. Sketches real property structures and records notes. Sales verification. Performs various office duties as needed.

# Department Summary

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*Department: Town Assessor*

**Budget Year:** 2019  
**Division:** Town Assessor  
**Tax District:** Full Town

**Cost Center #:** 1355  
**Manager:** Lisa Goree

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**Goals & Objectives:**

Provide accurate assessments for the 60 plus taxing jurisdictions within the Township with the assistance of information technology and GIS in order to provide greater data integrity, validity, accuracy and most importantly, annual fair and equitable assessment rolls. The Assessor's Office also strives to maintain professional and courteous public relations and an open door policy for all Town constituents.

March 1st - Taxable Status Date: Condition of all property and structures. Exemption application deadline.  
May 1st - Tentative Roll is available. Grievance period begins.  
Third Tuesday in May - Grievance Day.  
July 1st - Certification of Final Roll.

**Legal Authority:**

The legal authority for the department rests within the New York State Real Property Tax Law.

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**NOTES:**

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# Department Summary

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*Department: Board of Assessment Review*

**Budget Year:** 2019  
**Division:** Town Assessor  
**Tax District:** Full Town

**Cost Center #:** 1357  
**Manager:**

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**NOTES:**

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**Departmental Mission & Responsibilities:**

The Board of Assessment Review is charged with determining the validity of assessments that are developed by the Town Assessor's Office each year.

**Workload:**

The Board of Assessment Review typically handles approximately 6,500 petitions that are filed annually on the third Tuesday in May by taxpayers and property owners in the Town of Southampton. The BAR is charged with certifying the corrections to the final roll at their second meeting usually held in late September.

**Goals & Objectives:**

The Board of Assessment Review must review property appraisals and other research and determine an accurate assessment based upon all of the evidence.

The Board of Assessment Review shall be compensated on a per diem basis.

Chair \$1,000 per diem, not to exceed \$7,000 annually  
Members \$ 650 per diem each, not to exceed \$4,500 annually total for members

**Legal Authority:**

The Board of Assessment Review derives its authority from the New York State Real Property Tax Law Section 523.

# Employee Compensation & Benefits Schedule

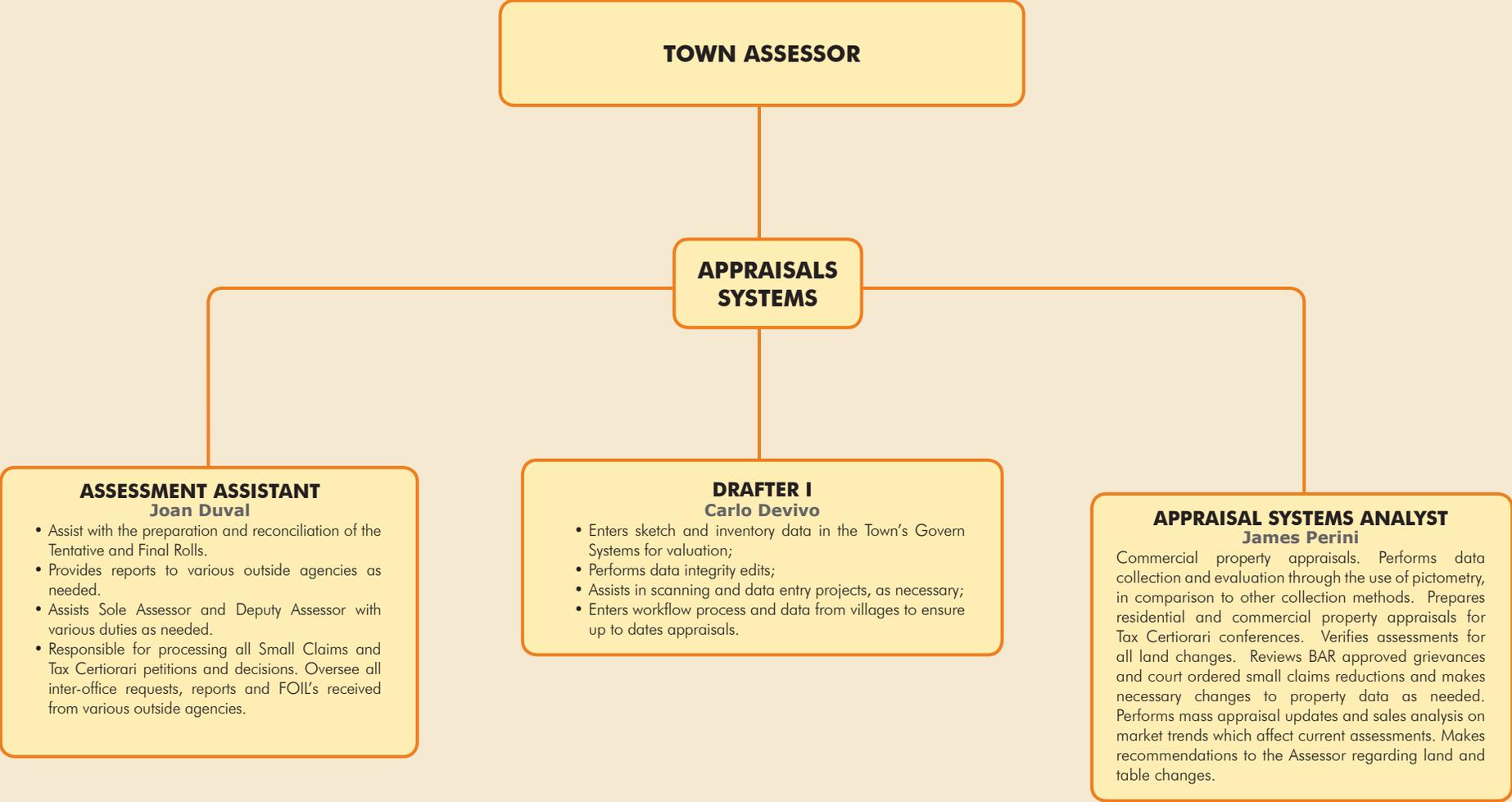
Position	Class/Grade/Step	Base Salary	Longevity	Other Comp	Total Comp	Medical Benefits	Employer FICA	Retirement	Other Benefits	Total Benefits	Total Comp. & Benefits	Yrs Srv 1/1/19	Alloc. %
<b>Town Assessor</b>													
<b>Town Assessor</b>													
<b>Town Assessor - 1355</b>													
Assessor	ADMINISTRATIVE	125,804	5,000	0	130,804	29,184	8,568	17,231	3,870	58,853	189,657	18.2	100.0
Deputy Town Assessor	ADMINSUPPORT	91,800	2,754	0	94,554	29,184	7,423	12,459	2,826	51,892	146,446	13.3	100.0
Board of Assessment Review	APPOINTBOARD	4,590	0	0	4,590	0	361	605	157	1,123	5,713		100.0
Board of Assessment Review	APPOINTBOARD	7,140	0	0	7,140	0	561	942	235	1,738	8,878	10.9	100.0
Board of Assessment Review	APPOINTBOARD	4,590	0	0	4,590	0	361	605	157	1,123	5,713		100.0
Board of Assessment Review	APPOINTBOARD	4,590	0	0	4,590	0	361	605	157	1,123	5,713		100.0
Board of Assessment Review	APPOINTBOARD	4,590	0	0	4,590	0	361	605	157	1,123	5,713	5.0	100.0
Office Assistant - Requested	CSEA40HOUR - 7-1-2010 / CSEA40HOUR - 7-1-2010 - B / Step 1	38,219	0	0	38,219	25,982	3,003	5,040	1,181	35,206	73,425		100.0
Principal Assessment Clerk	CSEA40HOUR - 7-1-2010 / CSEA40HOUR - 7-1-2010 - F / Step 7	30,386	1,215	0	31,601	14,172	2,480	4,163	939	21,755	53,356	7.3	50.0
Assessment Aide	CSEA40HOUR-NEW / CSEA40HOUR-NEW - B / Step 6	45,665	2,740	0	48,404	14,304	3,797	6,373	1,419	25,894	74,298	14.5	100.0
Assessment Aide	CSEA40HOUR-NEW / CSEA40HOUR-NEW - B / Step 6	45,665	2,740	0	48,404	14,304	3,797	6,373	1,419	25,894	74,298	11.9	100.0
Geographic Info Sys Tech III	CSEA40HOUR-NEW / CSEA40HOUR-NEW - I / Step 6	72,829	5,826	0	78,656	28,344	6,168	10,352	2,258	47,121	125,777	16.4	100.0
Principal Account Clerk	CSEA40HOUR-NEW / CSEA40HOUR-NEW - G / Step 2	60,719	3,643	0	64,362	28,344	5,049	8,475	1,881	43,749	108,111	11.9	100.0
Senior Assessment Assistant	CSEA40HOUR-NEW / CSEA40HOUR-NEW - F / Step 6	61,158	3,669	0	64,827	14,304	5,086	8,536	1,895	29,820	94,647	11.3	100.0
Senior Clerk	CSEA40HOUR-NEW / CSEA40HOUR-NEW - D / Step 4	51,866	3,112	0	54,978	28,344	4,206	7,059	204	39,813	94,791	13.5	100.0
Senior Assessment Clerk	PART-TIME	2,550	0	0	2,550	0	200	0	95	295	2,845	32.8	100.0
<b>Total Town Assessor - 1355</b>		<b>652,159</b>	<b>30,700</b>	<b>0</b>	<b>682,859</b>	<b>226,466</b>	<b>51,780</b>	<b>89,424</b>	<b>18,853</b>	<b>386,523</b>	<b>1,069,382</b>		

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# APPRAISAL SYSTEMS

## 2019 ORGANIZATIONAL CHART



# Department Summary

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*Department: Appraisal Systems*

**Budget Year:** 2019  
**Division:** Town Assessor  
**Tax District:** Full Town

**Cost Center #:** 1688  
**Manager:** Lisa Goree

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**NOTES:**

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## **Departmental Mission & Responsibilities:**

The mission and responsibility of the Department of Appraisal Systems is to provide leadership and vision in the use and development of advanced appraisal methodologies and predictive analytic software. The department accomplishes its mission through the coordination of labor and technical resources available in the Assessor's Office, Geographic Information Systems (GIS), and Information Technology.

## **Workload:**

The Appraisal Systems' Division workload involves the study of appraisal data to maintain property inventory, to analyze sales and trending and perform data mining methods using state of the art tools, such as mapping and Pictometry. Appraisal performance standards are monitored and valuation models are developed to maintain accuracy and equity. Appraisal systems coordinates with local and state agencies; provides staff training to increase skill levels; provides data and return on investment analyses; as well as, provides software design setups and implementation.

## **Goals & Objectives:**

1. Implement, monitor, test and report the efficiency, accuracy and reliability of digital imaging technologies to local and state government.
2. Develop return on investment and predictive analytic tools serving the statistical needs of the Supervisor, Comptroller and all other Town departments.
3. Develop a methodology for review of sales data that incorporates sensitivity testing, which will improve valuation of equity throughout the Town.
4. Develop a five year vision interconnecting the Information Technology, General Services, Appraisal Systems and Assessment Offices by blending the use of software, technologies and staff.
5. Review and adjust neighborhood and land values to further insure equitable valuation.

## **Legal Authority:**

The Appraisal Systems cost center is created under the Supervisor's authority as Budget Officer. As part of the 2012 Budget, the Appraisal Systems Division was moved from the Information Technology Department to the Assessor Department.

# Employee Compensation & Benefits Schedule

Position	Class/Grade/Step	Base Salary	Longevity	Other Comp	Total Comp	Medical Benefits	Employer FICA	Retirement	Other Benefits	Total Benefits	Total Comp. & Benefits	Yrs Srv 1/1/19	Alloc. %
<b>Town Assessor</b>													
<b>Town Assessor</b>													
<b>Appraisal Systems - 1688</b>													
Appraisal Systems Analyst	CSEA40HOUR - 7-1-2010 / CSEA40HOUR - 7-1-2010 - H / Step 5	66,604	2,664	0	69,269	28,344	5,437	9,125	2,057	44,963	114,232	6.7	100.0
Assessment Assistant	CSEA40HOUR - 7-1-2010 / CSEA40HOUR - 7-1-2010 - D / Step 2	49,486	0	0	49,486	13,008	3,786	6,354	186	23,333	72,820	1.3	100.0
Drafter I	CSEA40HOUR-NEW / CSEA40HOUR-NEW - B / Step 6	45,665	2,740	0	48,404	14,304	3,797	6,373	1,419	25,894	74,298	13.3	100.0
<b>Total Appraisal Systems - 1688</b>		<b>161,755</b>	<b>5,404</b>	<b>0</b>	<b>167,159</b>	<b>55,656</b>	<b>13,020</b>	<b>21,852</b>	<b>3,662</b>	<b>94,190</b>	<b>261,349</b>		

**NOTES:**

**Town of Southampton**  
**2019 Adopted Budget**  
**Appraisal Systems - 1688**

Account Code	Description	2017 Adopted Budget	2017 Actual	2018 Adopted Budget	2018 Amended Budget	2018 Dec YTD Actual	2019 Requested Budget	2019 Tentative Budget	2019 Preliminary Budget	2019 Adopted Budget	2019 Adopted / 2018 Amended Difference	2019 Adopted / 2018 Amended % of Change	2020 Requested Budget	2020 Tentative Budget	2020 Preliminary Budget	2020 Adopted Budget
<b>Real Property Taxes:</b>																
1001	Property Taxes	243,936	238,336	266,144	266,144	266,144	261,349	261,349	261,349	261,349	(4,795)	(1.80%)	267,580	267,580	267,580	267,580
	<b>Total Real Property Taxes</b>	<b>243,936</b>	<b>238,336</b>	<b>266,144</b>	<b>266,144</b>	<b>266,144</b>	<b>261,349</b>	<b>261,349</b>	<b>261,349</b>	<b>261,349</b>	<b>(4,795)</b>	<b>(1.80%)</b>	<b>267,580</b>	<b>267,580</b>	<b>267,580</b>	<b>267,580</b>
<b>Other Revenue:</b>																
2701	Miscellaneous Tax Receipts	0	0	0	0	19	0	0	0	0	0	0.00%	0	0	0	0
	<b>Total Other Revenue</b>	<b>0</b>	<b>0</b>	<b>0</b>	<b>0</b>	<b>19</b>	<b>0</b>	<b>0</b>	<b>0</b>	<b>0</b>	<b>0</b>	<b>0.00%</b>	<b>0</b>	<b>0</b>	<b>0</b>	<b>0</b>
	<b>Total Revenue</b>	<b>243,936</b>	<b>238,336</b>	<b>266,144</b>	<b>266,144</b>	<b>266,163</b>	<b>261,349</b>	<b>261,349</b>	<b>261,349</b>	<b>261,349</b>	<b>(4,795)</b>	<b>(1.80%)</b>	<b>267,580</b>	<b>267,580</b>	<b>267,580</b>	<b>267,580</b>
<b>Salaries:</b>																
6100	Salaries	152,382	129,063	156,970	156,970	137,255	161,755	161,755	161,755	161,755	(4,785)	(3.05%)	166,680	166,680	166,680	166,680
6110	Longevity	5,685	3,343	5,273	5,273	5,262	5,404	5,404	5,404	5,404	(131)	(2.49%)	5,550	5,550	5,550	5,550
	<b>Total Salaries</b>	<b>158,067</b>	<b>132,405</b>	<b>162,243</b>	<b>162,243</b>	<b>142,517</b>	<b>167,159</b>	<b>167,159</b>	<b>167,159</b>	<b>167,159</b>	<b>(4,917)</b>	<b>(3.03%)</b>	<b>172,230</b>	<b>172,230</b>	<b>172,230</b>	<b>172,230</b>
<b>Employee Benefits - Current:</b>																
6810	Employee Retirement - Active	22,367	22,475	22,481	22,481	18,802	21,852	21,852	21,852	21,852	629	2.80%	22,515	22,515	22,515	22,515
6830	FICA Tax Expenditure	12,092	10,358	12,508	12,508	10,632	13,020	13,020	13,020	13,020	(512)	(4.09%)	13,414	13,414	13,414	13,414
6835	MTA Tax	537	460	556	556	473	579	579	579	579	(23)	(4.09%)	596	596	596	596
6840	Worker's Compensation	1,752	1,740	1,257	1,257	1,039	3,031	3,031	3,031	3,031	(1,774)	(141.06%)	3,117	3,117	3,117	3,117
6860	Medical Insurance - Active Employees	45,120	38,659	63,060	63,060	42,435	51,660	51,660	51,660	51,660	11,400	18.08%	51,660	51,660	51,660	51,660
6865	Dental & Optical	3,913	2,989	3,953	3,953	3,459	3,996	3,996	3,996	3,996	(43)	(1.09%)	3,996	3,996	3,996	3,996
6875	Disability	86	0	86	86	0	52	52	52	52	34	39.58%	52	52	52	52
	<b>Total Employee Benefits - Current</b>	<b>85,868</b>	<b>76,681</b>	<b>103,902</b>	<b>103,902</b>	<b>76,839</b>	<b>94,190</b>	<b>94,190</b>	<b>94,190</b>	<b>94,190</b>	<b>9,711</b>	<b>9.35%</b>	<b>95,350</b>	<b>95,350</b>	<b>95,350</b>	<b>95,350</b>
	<b>Total Employee Costs</b>	<b>243,936</b>	<b>209,087</b>	<b>266,144</b>	<b>266,144</b>	<b>219,356</b>	<b>261,349</b>	<b>261,349</b>	<b>261,349</b>	<b>261,349</b>	<b>4,795</b>	<b>1.80%</b>	<b>267,580</b>	<b>267,580</b>	<b>267,580</b>	<b>267,580</b>
	<b>Total Expenditures</b>	<b>243,936</b>	<b>209,087</b>	<b>266,144</b>	<b>266,144</b>	<b>219,356</b>	<b>261,349</b>	<b>261,349</b>	<b>261,349</b>	<b>261,349</b>	<b>4,795</b>	<b>1.80%</b>	<b>267,580</b>	<b>267,580</b>	<b>267,580</b>	<b>267,580</b>
	<b>Net Surplus (Deficit)</b>	<b>0</b>	<b>29,249</b>	<b>0</b>	<b>0</b>	<b>46,807</b>	<b>0</b>	<b>0</b>	<b>0</b>	<b>0</b>			<b>0</b>	<b>0</b>	<b>0</b>	<b>0</b>