

COMMUNITY PRESERVATION FUND

2019 ORGANIZATIONAL CHART

COMMUNITY PRESERVATION FUND MANAGER

Mary C. Wilson, Esq.

Professional oversight & management of the Community Preservation Project Plan and the Management and Stewardship Plan. Prioritizes list of parcels for the Town Board, conducts Public Hearings and prepares resolutions regarding acquisitions. Negotiates on behalf of the Town to acquire targeted parcels at or below fair market value. Orders appraisals, title premiums & surveys; prepares purchase agreements, easements, covenants and closing documents. Establishes active management & stewardship routines; enforcement of rules and regulations pertaining to Town-owned lands, trail blazing & maintenance. Examines real estate title reports, tax maps, legal descriptions of real property, reviews appraisals, manages inventory of real property and coordinates stewardship tasks. Oversees compliance with State law and local requirements for PILOT payments to eligible special districts with financial certifications by the Town Comptroller, as to calculations made by the Tax Receiver for proposed payments or reductions to tax levies. Oversees, processes and interprets the First Time Homebuyers Exemption to the 2% real estate transfer tax. Coordinates with other Town, County, State, Federal and private agencies to ensure open space and stewardship goals are achieved. Prepares a 3-year Management & Stewardship Plan and conducts Public Hearings on same. Updates this Plan as often as permitted by statute and as needed to address emerging stewardship and management needs. Oversees an annual independent audit of the CPF revenues as required by statute. Develops working relationships with Federal, State and County agencies involved in land acquisitions. Management oversight of all CPF historic construction restoration projects and stewardship oversight. Management includes compliance with all relevant local, state and federal legislation, as well as grant funding compliance responsibilities. Professional management, oversight and implementation of Water Quality Improvement component of fund.

WATER QUALITY IMPROVEMENT ADVISORY COMMITTEE

COMMUNITY PRESERVATION FUND ADVISORY BOARD

COMMUNITY PRESERVATION FUND ADVISORY BOARD SENIOR ADMINISTRATIVE ASSISTANT

Adlin Y. Auffant

In addition to functioning as the Office Manager for the Community Preservation Department, performs many additional duties such as the maintenance of numerous databases, management, coordination and compliance with lending sources, auditing of monthly Peconic Bay Region transfer tax returns, updating the CPF Project Plan and Management and Stewardship Plan, as well as handling of daily inquiries and processing of statutory tax exemptions. Handles all aspects of real estate closings, preparation of 60-100 real estate presentations annually and preparation of resolutions and agendas for the Town Board. Also examines real estate title reports, tax maps, legal descriptions of real property, reviews appraisals, manages inventory of real property and coordinates stewardship tasks. Manages all aspects of CPF historic construction projects including, but not limited to, bid review, vendor payments, budgeting and processing of all required documentation.

PRINCIPAL ENVIRONMENTAL ANALYST

Laura Smith

Performs over 250 monitoring inspections and reports yearly with additional environmental inspections for prospective acquisitions. Provides technical support for PILOT analyses, required reports, and acts as liaison to the Friends of the Long Pond Greenbelt and staffs the Long Pond Greenbelt Nature Center and staffs the Long Pond Greenbelt Nature Center. Supervises and performs stewardship tasks; drafts management plans for preserved real property. Completes all federal, state and local applications for demolition and removal of structures in environmental areas. Manages and monitors intra-Town and other invasive plant species removal projects.

PARK RANGER / ORDINANCE ENFORCEMENT OFFICER

(Vacant)

Performs numerous enforcement and monitoring projects for CPF acquired parcels. Annually investigates approximately 90 complaints, performs at least 60 inspections and patrols 200 properties. Provides support for baseline inspections and numerous stewardship responsibilities including sign installation and trail maintenance. Instrumental in major property clean-ups, preventing unauthorized ATV use on lands and installing security measures on CPF lands.

ENVIRONMENTAL ANALYST

Juliana Quant

Performs monitoring inspections and reports, initial environmental reports. Performs stewardship tasks, completes governmental applications for demolition and removal of structures; assists in management and monitoring of invasive plant and animal species. Works under direct supervision of the Principal Environmental Analyst.

LAND STEWARD/ MAINTENANCE MECHANIC III

Lance Aldrich (PT)

Performs a variety of stewardship tasks for CPF preserved lands including, but not limited to, sign installation, fence installation, trail and access road maintenance and repair, property inspections, painting, equipment maintenance and repair, carpentry, historic property maintenance and repair, boundary line determinations and other related stewardship duties.

Department Summary

Department: Community Preservation

Budget Year: 2019

Division: Community Preservation Department

Tax District: Community Preservation Fund

Cost Center #: 1940

Manager: Mary Wilson

NOTES:

Departmental Mission & Responsibilities:

The Community Preservation Department is responsible for administration of the Town's land acquisition program financed through CPF transfer tax revenues. In addition, enforcement matters and stewardship duties are handled by department staff for assets acquired. Transfer taxes are not real property taxes, but rather a closing cost paid by the buyer when property changes title in the Town to a new purchaser. (Certain exemptions apply)

1. Provide professional oversight and management of the Community Preservation Project Plan and the Management and Stewardship Plan.
2. Maintain numerous databases.
3. Prioritize list of parcels to Town Board, conduct Public Hearings and prepare resolutions regarding acquisitions.
4. Negotiate on behalf of Town to acquire targeted parcels at or below fair market value.
5. Order appraisals, title premiums and surveys; prepare purchase agreements, easements, covenants and closing documents.
6. Baseline documentation and inspection reports for parcels acquired.
7. Establish active management and stewardship routines; enforce rules and regulations pertaining to Town-owned lands, trail blazing and maintenance.
8. Oversee compliance by Town with State law and local requirements for Payment in Lieu of Taxes (PILOT) payments to eligible special districts with financial certifications by the Town Comptroller as to calculations made by the Tax Receiver for proposed payments or reductions to tax levies.
9. Oversee, process and interpret the First Time Home buyers Exemption to the 2% real estate transfer tax.
10. Oversee, manage and coordinate 5-10 CPF historic preservation construction projects.
11. Administration of Water Quality Improvement Project Plan including database maintenance, rebate administration compliance, develop grant application and review criteria, attend committee meetings, assist in Town Board presentations, implement evaluation process, manage budget and disbursements and provide for project accountability.

Workload:

1. Prepare and implement open space management plans regarding specific target areas and individual parcels.

Department Summary

Department: Community Preservation

Budget Year: 2019
Division: Community Preservation Department
Tax District: Community Preservation Fund

Cost Center #: 1940
Manager: Mary Wilson

NOTES:

2. Coordinate with other Town, County, State, Federal and private agencies to ensure open space and stewardship goals are achieved.
3. Prepare a 3-year Stewardship and Management Plan and conduct Public Hearings on same. Update this Plan as often as permitted by statute and as needed to address emerging stewardship and management needs.
4. The CPF Program Manager shall insure an annual independent audit of the CPF revenues is performed as required by statute.
5. The Principal Environmental Analyst performs over 300 initial and annual monitoring inspections and reports, as well as drafts long-term management plans. The CPF Program has acquired interest in over 375 properties, all of which require an initial inspection by the Principal Environmental Analyst, annual monitoring inspections and reports, as well as a long-term management plan. The Principal Environmental Analyst performs additional environmental inspections for prospective acquisitions. This individual also manages complex stewardship projects including drafting and submitting required governmental environmental permit applications. The Principal Environmental Analyst also provides technical support for PILOT analyses, required reports, acts as liaison to the Friends of the Long Pond Greenbelt, staffs the Long Pond Greenbelt Nature Center, conducts invasive plant species removal programs and coordinates various stewardship projects.
6. The Park Ranger / Ordinance Enforcement Officer performs numerous enforcement and monitoring projects for CPF acquired parcels. The Park Ranger / Ordinance Enforcement Officer annually, investigates approximately 90 complaints, performs at least 60 inspections and patrols 300 properties. In addition, the Park Ranger / Ordinance Enforcement Officer provides support for baseline inspections and numerous stewardship responsibilities including sign installation, trail maintenance and property security measures. This person is instrumental in major property cleanups, preventing unauthorized ATV use on lands and installing security measures on CPF lands. This individual is also a member of three subcommittees of the Pine Barrens Law Enforcement Council.
7. The Senior Administrative Assistant, in addition to functioning as the office manager for the CPF Department, performs many additional duties such as the maintenance of numerous databases, management, coordination and compliance with lending sources, auditing of monthly Peconic Bay Region transfer tax returns, updating the CPF Project Plan and Management and Stewardship Plan, as well as handling daily inquiries and processing of statutory tax exemptions. This staff person also handles all aspects of real estate closings, which currently average 15- 20 per calendar year and prepares 60-100 real estate presentations annually, as well as resolutions and agendas for the Town Board and the CPF Advisory Board. In addition, this individual coordinates, manages and processes all aspects of historic construction projects. Administration of Water Quality Improvement Project Plan including database maintenance, rebate administration compliance and project accountability.
8. The environmental analyst assists and performs stewardship tasks including the completion of baseline documentation, annual property inspections, initial environmental inspections as well as a variety of stewardship tasks working in concert with the Principal Environmental Analyst.
9. Land Steward/ Maintenance Mechanic II performs a variety of stewardship tasks for CPF preserved lands including, but not limited to, sign installation, fence installation, trail and access road maintenance and repair, property inspections, painting, equipment maintenance and repair, carpentry, historic property maintenance and repair, boundary line determinations and other related stewardship duties.

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Goals & Objectives:

The CPF transfer tax has been in place for 14 years, and the success of the program is evidenced in the 3,900 acres of land acquired for protection. These thousands of acres require stewardship and management in order for the intent of this program to be honored and these community resources are preserved and maintained. In the next year, there will be a strong focus on stewardship and management of the Town's varied CPF lands. Lands include beach access areas, wetlands, woodlands, parks and historic properties and places.

1. Accelerate the processes necessary to further the goals of the Community Preservation Project Plan, specifically through the use of CPF revenues and, if necessary, the \$30 million bond authorization passed to accelerate the preservation of priority open space and farmland.
2. Develop working relationships with Federal, State and County agencies involved in land acquisitions.
3. Coordinate the local and Town Departments to implement the Community Preservation Project Plan.
4. Coordinate and facilitate educational and recreational programs to increase public awareness of the Town's Community Preservation Program.
5. Prepare material with descriptions of preserved lands that are open to the public, including recreational opportunities, trail maps, aerial photographs and other information desired by the public.
6. The Town's several CPF historical properties require a special kind of stewardship, which includes the management of licensee organizations. Such management includes ever increasing oversight and review of these organizations' activities and compliance review of the use of CPF stewardship funds. CPF stewardship of historic properties also includes renovation/construction management and general compliance with all relevant local, state, and federal legislation, as well as grant funding compliance responsibilities and complex bid preparation.
7. Implement recommendations of the 2008 State Comptroller Audit and annual audits and consider augmenting staff resources with additional stewardship staff resources.

Legal Authority:

Pursuant to Chapter 140 (Community Preservation) of the Town Code and NYS Town Law Section 64.

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. %
Community Preservation Department													
Community Preservation Department													
Community Preservation - 1940													
Assistant Town Attorney (CPF Program M	ADMINISTRATIVE	113,235	4,529	0	117,764	29,184	8,341	15,230	1,270	54,025	171,789	16.7	100.0
Senior Administrative Assistant (CPF Pro	ADMINSUPPORT	65,331	2,614	0	67,945	13,344	5,333	8,951	2,018	29,646	97,591	18.3	100.0
Environmental Analyst	CSEA40HOUR - 7-1-2010 / CSEA40HOUR - 7-1-2010 - H / Step 2	63,839	0	0	63,839	28,344	5,082	8,529	2,829	44,783	108,623	0.7	100.0
Maintenance Mechanic III	CSEA40HOUR - 7-1-2010 / CSEA40HOUR - 7-1-2010 - G / Step 1	59,364	0	0	59,364	28,344	4,780	8,023	3,346	44,493	103,857	0.3	100.0
Assistant Town Planning Director	CSEA40HOUR-NEW / O / Step 1	19,389	1,629	1,200	22,219	266	1,668	3,045	608	5,587	27,805	15.6	20.0
Principal Environmental Analyst	CSEA40HOUR-OLD / 17 / Step 5	102,030	10,203	9,680	121,913	1,332	8,449	16,184	4,578	30,544	152,457	25.1	100.0
Land Steward / Maintenance Mechanic III	PART-TIME	21,216	0	0	21,216	0	1,707	0	1,197	2,904	24,120	2.4	100.0
Maintenance Mechanic II	PART-TIME	28,560	0	0	28,560	0	2,298	0	1,605	3,903	32,463		100.0
Ordinance Enforcement Officer	PART-TIME	20,800	0	0	20,800	0	1,656	0	933	2,589	23,389		100.0
Total Community Preservation - 1940		493,765	18,975	10,880	523,620	100,814	39,314	59,961	18,384	218,474	742,094		

NOTES:

Town of Southampton

2019 Adopted Budget

Community Preservation - 1940

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
Other Revenue:																
1190	Community Preservation 2%	46,200,000	56,540,098	46,200,000	46,200,000	39,710,506	47,900,476	47,103,857	47,103,857	47,103,857	903,857	1.96%	47,898,998	47,106,496	47,106,496	47,106,496
1201	Interest And Earnings	200,000	679,525	600,000	600,000	1,252,212	750,000	750,000	750,000	750,000	150,000	25.00%	750,000	750,000	750,000	750,000
2701	Miscellaneous Tax Receipts	0	679	0	0	37	0	0	0	0	0	0.00%	0	0	0	0
2770	Miscellaneous	6,343	2,160	6,343	6,343	6,351	6,343	6,343	6,343	6,343	0	0.00%	6,343	6,343	6,343	6,343
3910	State Aid - Conservation	0	0	0	0	7,569	0	0	0	0	0	0.00%	0	0	0	0
5031	Interfund Transfer - Revenue	130,000	980,000	545,964	545,964	620,948	0	125,000	125,000	125,000	(420,964)	(77.10%)	0	0	0	0
	Total Other Revenue	46,536,343	58,202,461	47,352,307	47,352,307	41,597,623	48,656,819	47,985,200	47,985,200	47,985,200	632,893	1.34%	48,655,341	47,862,839	47,862,839	47,862,839
	Total Revenue	46,536,343	58,202,461	47,352,307	47,352,307	41,597,623	48,656,819	47,985,200	47,985,200	47,985,200	632,893	1.34%	48,655,341	47,862,839	47,862,839	47,862,839
Salaries:																
6100	Salaries	328,739	277,509	409,960	409,960	255,570	364,794	424,159	424,159	424,159	(14,198)	(3.46%)	374,014	435,453	435,453	435,453
6102	Severance Pay	0	26,578	0	0	0	0	0	0	0	0	0.00%	0	0	0	0
6103	Accumulated Sick/Personal Days	0	0	800	800	0	3,678	3,678	3,678	3,678	(2,878)	(359.75%)	3,678	3,678	3,678	3,678
6105	Part Time Salaries	48,800	30,756	48,800	50,800	29,700	49,776	70,576	70,576	70,576	(19,776)	(38.93%)	50,772	71,572	71,572	71,572
6110	Longevity	23,133	17,737	16,264	16,264	0	18,975	18,975	18,975	18,975	(2,711)	(16.67%)	19,310	19,310	19,310	19,310
6127	Cash in Lieu of Health Benefits	0	1,296	0	5,636	2,818	7,202	7,202	7,202	7,202	(1,566)	(27.79%)	7,202	7,202	7,202	7,202
	Total Salaries	400,672	353,877	475,824	483,460	288,088	444,426	524,590	524,590	524,590	(41,129)	(8.51%)	454,976	537,215	537,215	537,215
Employee Benefits - Current:																
6810	Employee Retirement - Active	49,790	50,032	60,207	60,207	45,776	51,938	59,961	59,961	59,961	247	0.41%	53,201	61,503	61,503	61,503
6830	FICA Tax Expenditure	30,651	26,775	36,540	36,694	21,776	32,879	39,314	39,314	39,314	(2,621)	(7.14%)	33,327	39,930	39,930	39,930
6835	MTA Tax	1,362	1,190	1,666	1,673	968	1,553	1,839	1,839	1,839	(166)	(9.94%)	1,590	1,884	1,884	1,884
6840	Worker's Compensation	8,420	8,358	14,210	14,220	10,747	12,443	16,402	16,402	16,402	(2,182)	(15.34%)	12,770	16,837	16,837	16,837
6860	Medical Insurance - Active Employees	56,088	45,856	100,452	94,816	31,031	66,876	93,888	93,888	93,888	928	0.98%	66,876	93,888	93,888	93,888
6865	Dental & Optical	5,208	4,261	6,588	6,588	3,294	5,594	6,926	6,926	6,926	(338)	(5.14%)	5,594	6,926	6,926	6,926
6875	Disability	173	79	202	231	54	108	143	143	143	88	38.13%	108	143	143	143
	Total Employee Benefits - Current	151,691	136,551	219,865	214,429	113,646	171,392	218,474	218,474	218,474	(4,045)	(1.89%)	173,466	221,112	221,112	221,112
	Total Employee Costs	552,363	490,428	695,689	697,889	401,734	615,817	743,063	743,063	743,063	(45,174)	(6.47%)	628,442	758,327	758,327	758,327
Equipment:																
6201	Vehicles	40,000	0	0	45,000	0	0	0	0	0	45,000	100.00%	0	0	0	0
6208	Land Purchase	32,306,185	43,382,690	24,019,079	20,185,075	14,528,487	13,542,182	22,931,479	22,931,479	22,931,479	(2,746,404)	(13.61%)	20,631,468	24,105,518	24,105,518	24,105,518
6209	Water Quality Improvement Program	0	50,384	11,016,693	11,016,693	1,902,585	11,308,020	11,308,020	11,308,020	11,308,020	(291,327)	(2.64%)	11,308,020	11,308,020	11,308,020	11,308,020
	Total Equipment	32,346,185	43,433,074	35,035,772	31,246,768	16,431,072	24,850,202	34,239,499	34,239,499	34,239,499	(2,992,731)	(9.58%)	31,939,488	35,413,538	35,413,538	35,413,538
Contractual:																
6400	Contracts - Other	40,286	19,786	37,761	37,761	17,260	37,761	37,761	37,761	37,761	0	0.00%	37,761	37,761	37,761	37,761
6401	Contracts	250,000	209,350	250,000	253,800	105,750	250,000	250,000	250,000	250,000	3,800	1.50%	250,000	250,000	250,000	250,000
6403	Gasoline	3,000	1,663	3,000	3,000	2,106	3,000	3,000	3,000	3,000	0	0.00%	3,000	3,000	3,000	3,000
6410	Postage	500	385	400	455	454	400	400	400	400	55	12.09%	400	400	400	400
6412	Publications	400	414	300	500	274	300	300	300	300	200	40.00%	300	300	300	300
6416	Travel, Dues and Related	2,100	488	2,100	2,100	926	2,100	2,100	2,100	2,100	0	0.00%	2,100	2,100	2,100	2,100
6418	Uniforms	100	0	100	100	0	100	100	100	100	0	0.00%	100	100	100	100
6424	Taxes - Town Property	300,000	162,784	250,000	249,945	120,353	250,000	250,000	250,000	250,000	(55)	(0.02%)	250,000	250,000	250,000	250,000

Town of Southampton
2019 Adopted Budget
Community Preservation - 1940

Account Code	Description	2017	2017	2018	2018	2018	2019	2019	2019	2019	2019	2019	2020	2020	2020	2020
		Adopted Budget	Actual	Adopted Budget	Amended Budget	Dec YTD Actual	Requested Budget	Tentative Budget	Preliminary Budget	Adopted Budget	Adopted / 2018 Amended Difference	Adopted / 2018 % of Change	Requested Budget	Tentative Budget	Preliminary Budget	Adopted Budget
6425	Office Supplies	500	206	500	700	166	500	500	500	500	200	28.57%	500	500	500	500
6426	Supplies - Other	500	947	500	700	412	500	500	500	500	200	28.57%	500	500	500	500
6442	Property Stewardship	374,482	557,298	196,429	1,098,790	386,274	11,308,000	673,838	673,838	673,838	424,952	38.67%	6,863,950	2,021,514	2,021,514	2,021,514
6450	Schools & Training	1,000	845	1,000	1,000	495	1,000	1,000	1,000	1,000	0	0.00%	1,000	1,000	1,000	1,000
6460	Pilot Payments	4,800,000	4,851,995	4,852,000	4,893,499	4,893,499	5,654,000	5,000,000	5,000,000	5,000,000	(106,501)	(2.18%)	5,654,000	5,000,000	5,000,000	5,000,000
6466	Telephone - Wireless	400	122	400	400	0	400	400	400	400	0	0.00%	400	400	400	400
6474	Other - Landfill Charges	200	61	200	200	8	200	200	200	200	0	0.00%	200	200	200	200
6477	Copier Leases	1,000	334	900	900	24	400	400	400	400	500	55.56%	400	400	400	400
6490	Consultants	75,000	61,367	75,000	297,070	136,603	260,000	260,000	260,000	260,000	37,070	12.48%	260,000	260,000	260,000	260,000
	Total Contractual	5,849,468	5,868,046	5,670,590	6,840,920	5,664,603	17,768,661	6,480,499	6,480,499	6,480,499	360,421	5.27%	13,324,611	7,828,175	7,828,175	7,828,175
	Debt Service:															
6600	Debt Service Principal Expense	4,292,098	4,292,098	4,477,098	4,477,098	3,527,098	27,506,456	27,506,456	27,506,456	27,506,456	(23,029,358)	(514.38%)	2,681,805	2,681,805	2,681,805	2,681,805
6700	Debt Service Interest Expense	1,465,912	1,461,733	1,308,066	1,308,066	1,042,101	915,683	915,683	915,683	915,683	392,383	30.00%	80,994	80,994	80,994	80,994
6900	Interfund Transfer Expense	2,030,317	2,178,157	165,092	2,787,466	2,786,603	0	1,100,000	1,100,000	1,100,000	1,687,466	60.54%	0	1,100,000	1,100,000	1,100,000
	Total Debt Service	7,788,327	7,931,988	5,950,256	8,572,630	7,355,802	28,422,139	29,522,139	29,522,139	29,522,139	(20,949,509)	(244.38%)	2,762,799	3,862,799	3,862,799	3,862,799
	Total Expenditures	46,536,343	57,723,535	47,352,307	47,358,207	29,853,211	71,656,819	70,985,200	70,985,200	70,985,200	(23,626,993)	(49.89%)	48,655,341	47,862,839	47,862,839	47,862,839
	Net Surplus (Deficit)	0	478,926	0	(5,900)	11,744,412	(23,000,000)	(23,000,000)	(23,000,000)	(23,000,000)			0	0	0	0
	Appropriated Fund Balance:															
9090	Appropriated Fund Balance	0	0	0	5,900	0	23,000,000	23,000,000	23,000,000	23,000,000			0	0	0	0
	Net Surplus (Deficit)	0	478,926	0	0	11,744,412	0	0	0	0			0	0	0	0