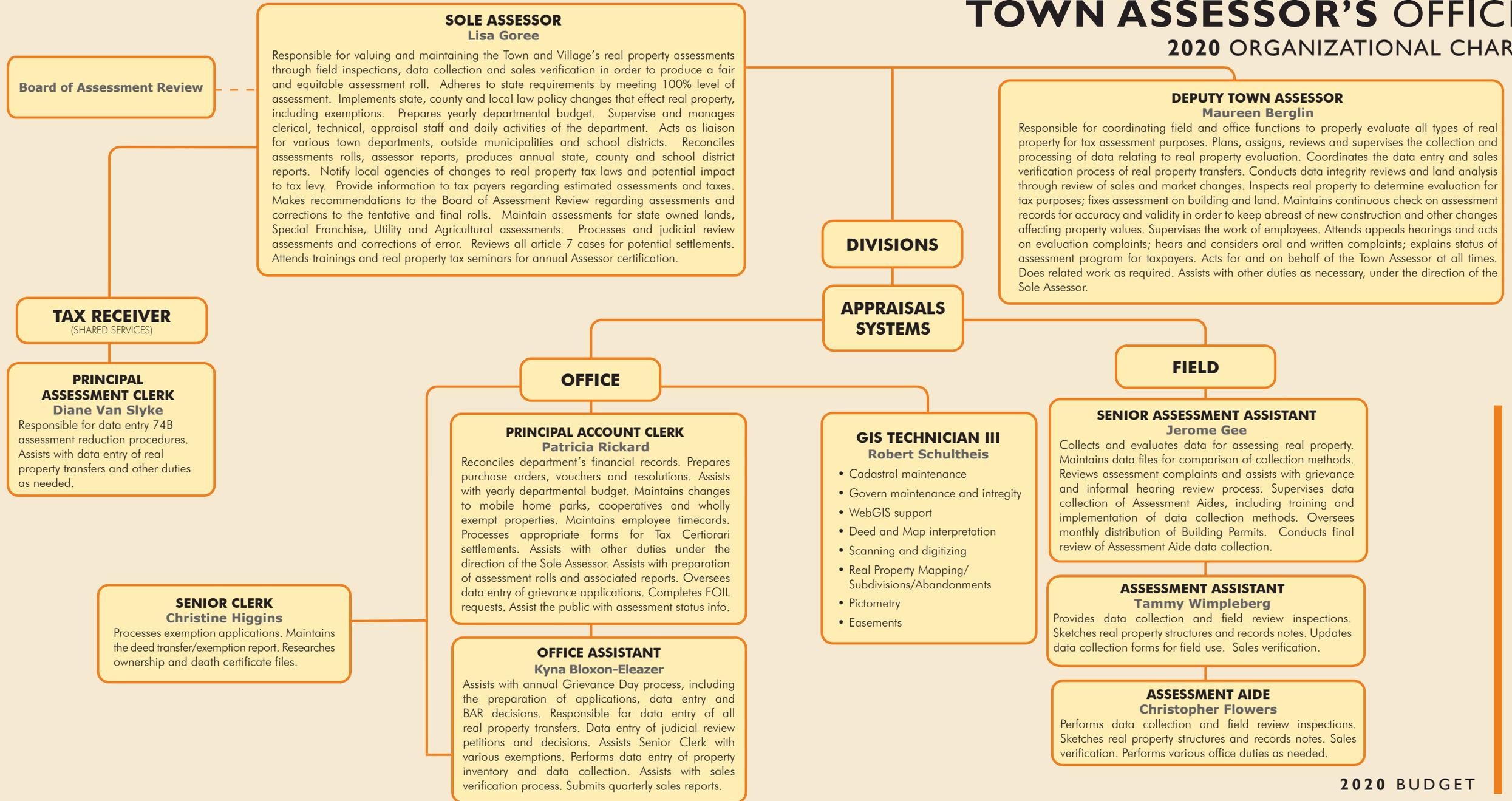


# TOWN ASSESSOR'S OFFICE

## 2020 ORGANIZATIONAL CHART





# Department Summary

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*Department: Town Assessor*

**Budget Year:** 2020  
**Division:** Town Assessor  
**Tax District:** Full Town

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

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**NOTES:**

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## **Departmental Mission & Responsibilities:**

The Assessor's Office is charged with producing an annual fair and equitable assessment roll, whereby each and every taxable parcel of property is accurately valued. The Office also determines the partial and wholly exempt status of persons and parcels, wherever necessary. Maintains continuous checks on assessment records through physical inventory inspections and up to date ownership records of all properties in the Town. Provides information regarding assessment status and exemption programs to taxpayers.

## **Workload:**

The Assessor's Office must review annual sales of property, review of building permit data, determine exempt status, handle numerous inquiries and conduct various physical inspections in a town containing over 52,000 parcels of land. We provide assessment information to 7 villages, 13 school districts and many local agencies.

The Assessor's Office continues to meet the Office of Real Property Tax Services assessment standards by attaining 100% market value. Southampton and Shelter Island are the only two municipalities on Long Island to achieve 100% market value. It is predicated on meeting the stringent requirements set by the state in order to maintain assessment equity. In 2019 we conducted an annual reappraisal reassessment. We mailed out over 33,000 assessment notices, a 50% increase over the previous year's mailing, and a 2% increase in the number of grievances filed against the assessments.

The Assessor's Office continues its use of Pictometry aerial imagery in order to provide accurate assessments through the use oblique aerial photos that illustrate property inventory, condition, quality and other measurable and qualitative factors that allow access to inventory at the convenience of the desktop thereby eliminating the need for onsite inspections. The most recent aeial imagery is dated April 2018. Pictometry has been approved by NYS and the International Association of Assessing Officers (IAAO) as valid inspection method. The Assessor's Office has been featured in the Bloomberg Magazine and the International Association of Assessing Officers (IAAO) for its use of Pictometry.

Geographic Information Systems (GIS) is also an instrumental tool in the annual assessment review process. The Assessor's Office is able to review property inventory, sales, neighbor influence factors as well as other features necessary to provide accurate assessments.

The Assessor's Office also administers and maintains over 1,200 Senior Citizen, 10,000 STAR, and many other various partial exemptions.

# Department Summary

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*Department: Town Assessor*

**Budget Year:** 2020  
**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:** 2020  
**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 1/1/20 | Alloc. % |
|-----------------------------------|--|----------------|---------------|------------|----------------|------------------|---------------|---------------|----------------|----------------|------------------------|----------------|----------|
| <b>Town Assessor</b>              |  |                |               |            |                |                  |               |               |                |                |                        |                |          |
| <b>Town Assessor</b>              |  |                |               |            |                |                  |               |               |                |                |                        |                |          |
| <b>Town Assessor - 1355</b>       |  |                |               |            |                |                  |               |               |                |                |                        |                |          |
| Assessor                          | ADMINISTRATIVE   | 128,320        | 5,000         | 0          | 133,320        | 29,340           | 8,587         | 16,988        | 2,737          | 57,652         | 190,972                | 19.2           | 100.0    |
| Deputy Town Assessor              | ADMINSUPPORT   | 93,636         | 3,746         | 0          | 97,382         | 29,340           | 7,576         | 12,408        | 2,002          | 51,326         | 148,708                | 14.3           | 100.0    |
| Board of Assessment Review        | APPOINTBOARD   | 4,500          | 0             | 0          | 4,500          | 0                | 350           | 574           | 112            | 1,036          | 5,536                  |                | 100.0    |
| Board of Assessment Review        | APPOINTBOARD   | 7,000          | 0             | 0          | 7,000          | 0                | 545           | 893           | 165            | 1,602          | 8,602                  | 11.9           | 100.0    |
| Board of Assessment Review        | APPOINTBOARD   | 4,500          | 0             | 0          | 4,500          | 0                | 350           | 574           | 112            | 1,036          | 5,536                  |                | 100.0    |
| Board of Assessment Review        | APPOINTBOARD   | 4,500          | 0             | 0          | 4,500          | 0                | 350           | 574           | 112            | 1,036          | 5,536                  |                | 100.0    |
| Board of Assessment Review        | APPOINTBOARD   | 4,500          | 0             | 0          | 4,500          | 0                | 350           | 574           | 112            | 1,036          | 5,536                  | 1.0            | 100.0    |
| Office Assistant                  | CSEA40HOUR - 7-1-2010 /<br>CSEA40HOUR - 7-1-2010 - B /<br>Step 2 | 43,285         | 0             | 0          | 43,285         | 28,488           | 3,370         | 5,519         | 929            | 38,306         | 81,590                 | 0.8            | 100.0    |
| Principal Assessment Clerk        | CSEA40HOUR - 7-1-2010 /<br>CSEA40HOUR - 7-1-2010 - F /<br>Step 8 | 31,310         | 1,252         | 0          | 32,562         | 14,244           | 2,533         | 4,149         | 672            | 21,599         | 54,161                 | 8.3            | 50.0     |
| Assessment Aide                   | CSEA40HOUR-NEW /<br>CSEA40HOUR-NEW - B / Step<br>6               | 46,756         | 2,805         | 0          | 49,562         | 14,400           | 3,854         | 6,313         | 1,012          | 25,579         | 75,141                 | 15.5           | 100.0    |
| Assessment Assistant              | CSEA40HOUR-NEW /<br>CSEA40HOUR - 7-1-2010 - D /<br>Step 2        | 50,675         | 0             | 0          | 50,675         | 28,488           | 3,945         | 6,461         | 1,085          | 39,979         | 90,654                 | 1.2            | 100.0    |
| Geographic Info Sys Tech III      | CSEA40HOUR-NEW /<br>CSEA40HOUR-NEW - I / Step<br>6               | 74,571         | 5,966         | 0          | 80,536         | 28,488           | 6,261         | 10,256        | 1,608          | 46,613         | 127,150                | 17.4           | 100.0    |
| Principal Account Clerk           | CSEA40HOUR-NEW /<br>CSEA40HOUR-NEW - G / Step<br>3               | 63,421         | 3,805         | 0          | 67,227         | 28,488           | 5,228         | 8,563         | 1,366          | 43,646         | 110,872                | 12.9           | 100.0    |
| Senior Assessment Assistant       | CSEA40HOUR-NEW /<br>CSEA40HOUR-NEW - F / Step<br>6               | 62,620         | 3,757         | 0          | 66,377         | 14,400           | 5,162         | 8,455         | 1,349          | 29,366         | 95,743                 | 12.3           | 100.0    |
| Senior Clerk                      | CSEA40HOUR-NEW /<br>CSEA40HOUR-NEW - D / Step<br>5               | 54,175         | 3,251         | 0          | 57,425         | 28,488           | 4,393         | 7,195         | 213            | 40,289         | 97,714                 | 14.5           | 100.0    |
| Senior Assessment Clerk           | PART-TIME  | 2,601          | 0             | 0          | 2,601          | 0                | 202           | 0             | 72             | 275            | 2,876                  | 33.8           | 100.0    |
| <b>Total Town Assessor - 1355</b> |  | <b>676,369</b> | <b>29,582</b> | <b>0</b>   | <b>705,951</b> | <b>244,164</b>   | <b>53,059</b> | <b>89,496</b> | <b>13,658</b>  | <b>400,377</b> | <b>1,106,328</b>       |                |          |

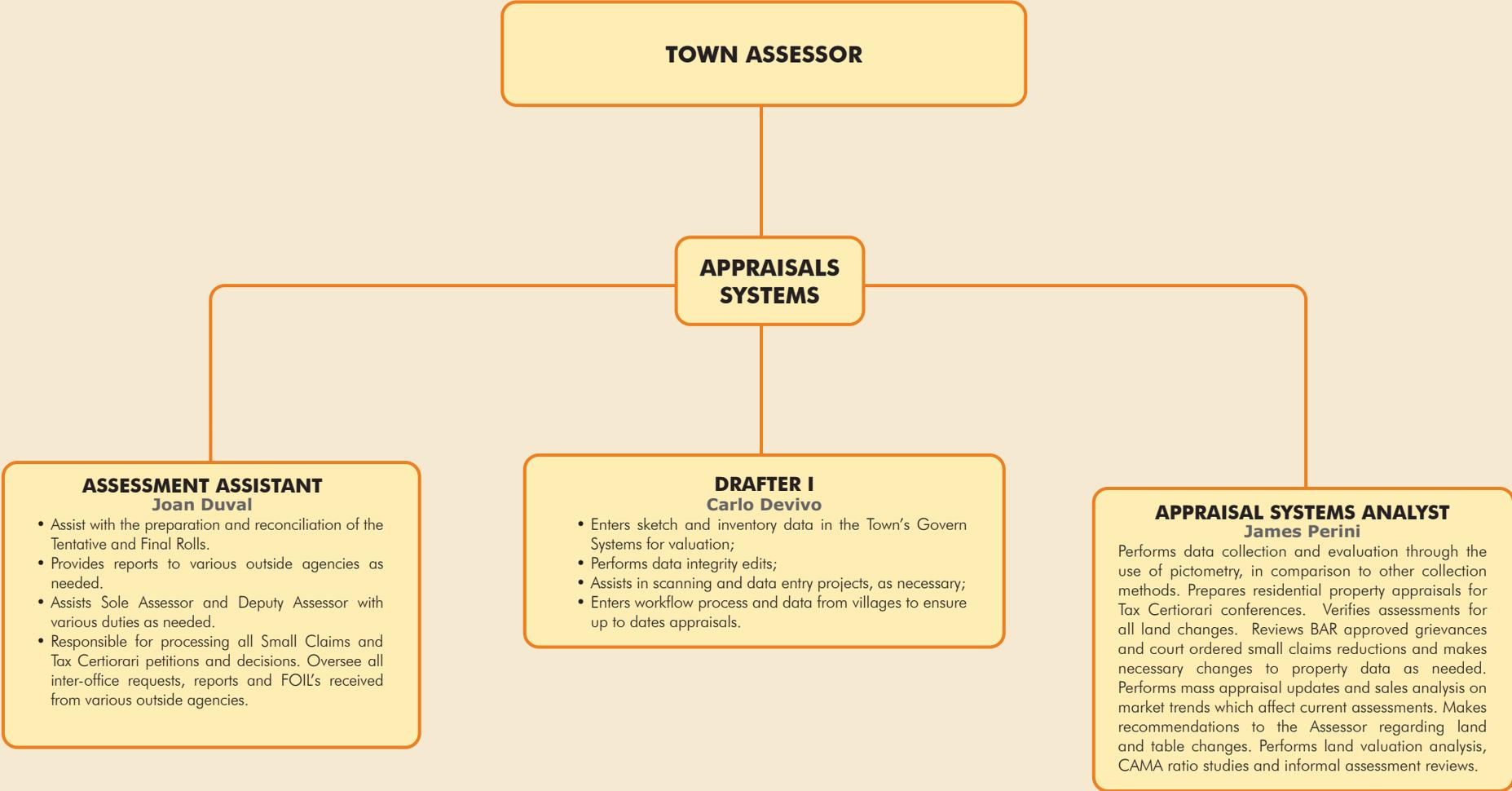
**NOTES:**





# APPRAISAL SYSTEMS

## 2020 ORGANIZATIONAL CHART



# Department Summary

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*Department: Appraisal Systems*

**Budget Year:** 2020  
**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 1/1/20 | Alloc. % |
|---------------------------------------|--|----------------|--------------|------------|----------------|------------------|---------------|---------------|----------------|----------------|------------------------|----------------|----------|
| <b>Town Assessor</b>                  |  |                |              |            |                |                  |               |               |                |                |                        |                |          |
| <b>Town Assessor</b>                  |  |                |              |            |                |                  |               |               |                |                |                        |                |          |
| <b>Appraisal Systems - 1688</b>       |  |                |              |            |                |                  |               |               |                |                |                        |                |          |
| Appraisal Systems Analyst             | CSEA40HOUR - 7-1-2010 /<br>CSEA40HOUR - 7-1-2010 - H /<br>Step 6 | 69,137         | 2,765        | 0          | 71,903         | 28,488           | 5,594         | 9,162         | 1,483          | 44,726         | 116,629                | 7.7            | 100.0    |
| Assessment Assistant                  | CSEA40HOUR - 7-1-2010 /<br>CSEA40HOUR - 7-1-2010 - D /<br>Step 3 | 51,425         | 0            | 0          | 51,425         | 13,104           | 3,934         | 6,444         | 192            | 23,674         | 75,099                 | 2.3            | 100.0    |
| Drafter I                             | CSEA40HOUR-NEW /<br>CSEA40HOUR-NEW - B / Step<br>6               | 46,756         | 2,805        | 0          | 49,562         | 14,400           | 3,854         | 6,313         | 1,012          | 25,579         | 75,141                 | 14.3           | 100.0    |
| <b>Total Appraisal Systems - 1688</b> |  | <b>167,319</b> | <b>5,571</b> | <b>0</b>   | <b>172,890</b> | <b>55,992</b>    | <b>13,382</b> | <b>21,919</b> | <b>2,687</b>   | <b>93,979</b>  | <b>266,869</b>         |                |          |

**NOTES:**

# Town of Southampton

## 2020 Adopted Budget

### Appraisal Systems - 1688

| Account Code                        | Description                              | 2018 Adopted Budget | 2018 Actual    | 2019 Adopted Budget | 2019 Amended Budget | 2019 Dec YTD Actual | 2020 Requested Budget | 2020 Tentative Budget | 2020 Preliminary Budget | 2020 Adopted Budget | 2020 Adopted / 2019 Amended Difference | 2020 Adopted / 2019 Amended % of Change | 2021 Requested Budget | 2021 Tentative Budget | 2021 Preliminary Budget | 2021 Adopted Budget |  |
|-------------------------------------|--|---------------------|----------------|---------------------|---------------------|---------------------|-----------------------|-----------------------|-------------------------|---------------------|--|---|-----------------------|-----------------------|-------------------------|---------------------|--|
| <b>Real Property Taxes:</b>         |  |                     |                |                     |                     |                     |                       |                       |                         |                     |  |   |                       |                       |                         |                     |  |
| 1001                                | Property Taxes                           | 266,144             | 266,144        | 261,349             | 261,349             | 261,349             | 267,903               | 266,869               | 266,869                 | 266,869             | 5,520                                  | 2.11%                                   | 274,324               | 273,261               | 273,261                 | 273,261             |  |
|                                     | <b>Total Real Property Taxes</b>         | <b>266,144</b>      | <b>266,144</b> | <b>261,349</b>      | <b>261,349</b>      | <b>261,349</b>      | <b>267,903</b>        | <b>266,869</b>        | <b>266,869</b>          | <b>266,869</b>      | <b>5,520</b>                           | <b>2.11%</b>                            | <b>274,324</b>        | <b>273,261</b>        | <b>273,261</b>          | <b>273,261</b>      |  |
| <b>Other Revenue:</b>               |  |                     |                |                     |                     |                     |                       |                       |                         |                     |  |   |                       |                       |                         |                     |  |
| 2701                                | Miscellaneous Tax Receipts               | 0                   | 19             | 0                   | 0                   | 0                   | 0                     | 0                     | 0                       | 0                   | 0                                      | 0.00%                                   | 0                     | 0                     | 0                       | 0                   |  |
|                                     | <b>Total Other Revenue</b>               | <b>0</b>            | <b>19</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>                               | <b>0.00%</b>                            | <b>0</b>              | <b>0</b>              | <b>0</b>                | <b>0</b>            |  |
|                                     | <b>Total Revenue</b>                     | <b>266,144</b>      | <b>266,163</b> | <b>261,349</b>      | <b>261,349</b>      | <b>261,349</b>      | <b>267,903</b>        | <b>266,869</b>        | <b>266,869</b>          | <b>266,869</b>      | <b>5,520</b>                           | <b>2.11%</b>                            | <b>274,324</b>        | <b>273,261</b>        | <b>273,261</b>          | <b>273,261</b>      |  |
| <b>Salaries:</b>                    |  |                     |                |                     |                     |                     |                       |                       |                         |                     |  |   |                       |                       |                         |                     |  |
| 6100                                | Salaries                                 | 156,970             | 156,976        | 161,755             | 161,755             | 141,433             | 167,319               | 167,319               | 167,319                 | 167,319             | (5,564)                                | (3.44%)                                 | 172,412               | 172,412               | 172,412                 | 172,412             |  |
| 6110                                | Longevity                                | 5,273               | 5,262          | 5,404               | 5,404               | 5,404               | 5,571                 | 5,571                 | 5,571                   | 5,571               | (167)                                  | (3.09%)                                 | 5,723                 | 5,723                 | 5,723                   | 5,723               |  |
|                                     | <b>Total Salaries</b>                    | <b>162,243</b>      | <b>162,238</b> | <b>167,159</b>      | <b>167,159</b>      | <b>146,837</b>      | <b>172,890</b>        | <b>172,890</b>        | <b>172,890</b>          | <b>172,890</b>      | <b>(5,731)</b>                         | <b>(3.43%)</b>                          | <b>178,135</b>        | <b>178,135</b>        | <b>178,135</b>          | <b>178,135</b>      |  |
| <b>Employee Benefits - Current:</b> |  |                     |                |                     |                     |                     |                       |                       |                         |                     |  |   |                       |                       |                         |                     |  |
| 6810                                | Employee Retirement - Active             | 22,481              | 20,924         | 21,852              | 21,852              | 18,084              | 22,026                | 21,919                | 21,919                  | 21,919              | (66)                                   | (0.30%)                                 | 22,694                | 22,583                | 22,583                  | 22,583              |  |
| 6830                                | FICA Tax Expenditure                     | 12,508              | 12,103         | 13,020              | 13,020              | 10,956              | 13,448                | 13,382                | 13,382                  | 13,382              | (363)                                  | (2.78%)                                 | 13,855                | 13,788                | 13,788                  | 13,788              |  |
| 6835                                | MTA Tax                                  | 556                 | 538            | 579                 | 579                 | 487                 | 598                   | 595                   | 595                     | 595                 | (16)                                   | (2.79%)                                 | 616                   | 613                   | 613                     | 613                 |  |
| 6840                                | Worker's Compensation                    | 1,257               | 1,127          | 3,031               | 3,031               | 2,338               | 2,897                 | 2,040                 | 2,040                   | 2,040               | 992                                    | 32.71%                                  | 2,980                 | 2,098                 | 2,098                   | 2,098               |  |
| 6860                                | Medical Insurance - Active Employees     | 63,060              | 48,565         | 51,660              | 51,660              | 43,606              | 51,852                | 51,852                | 51,852                  | 51,852              | (192)                                  | (0.37%)                                 | 51,852                | 51,852                | 51,852                  | 51,852              |  |
| 6865                                | Dental & Optical                         | 3,953               | 4,024          | 3,996               | 3,996               | 3,515               | 4,140                 | 4,140                 | 4,140                   | 4,140               | (144)                                  | (3.60%)                                 | 4,140                 | 4,140                 | 4,140                   | 4,140               |  |
| 6875                                | Disability                               | 86                  | 0              | 52                  | 52                  | 0                   | 52                    | 52                    | 52                      | 52                  | 0                                      | 0.00%                                   | 52                    | 52                    | 52                      | 52                  |  |
|                                     | <b>Total Employee Benefits - Current</b> | <b>103,902</b>      | <b>87,280</b>  | <b>94,190</b>       | <b>94,190</b>       | <b>78,985</b>       | <b>95,013</b>         | <b>93,979</b>         | <b>93,979</b>           | <b>93,979</b>       | <b>211</b>                             | <b>0.22%</b>                            | <b>96,189</b>         | <b>95,126</b>         | <b>95,126</b>           | <b>95,126</b>       |  |
|                                     | <b>Total Employee Costs</b>              | <b>266,144</b>      | <b>249,518</b> | <b>261,349</b>      | <b>261,349</b>      | <b>225,823</b>      | <b>267,903</b>        | <b>266,869</b>        | <b>266,869</b>          | <b>266,869</b>      | <b>(5,520)</b>                         | <b>(2.11%)</b>                          | <b>274,324</b>        | <b>273,261</b>        | <b>273,261</b>          | <b>273,261</b>      |  |
|                                     | <b>Total Expenditures</b>                | <b>266,144</b>      | <b>249,518</b> | <b>261,349</b>      | <b>261,349</b>      | <b>225,823</b>      | <b>267,903</b>        | <b>266,869</b>        | <b>266,869</b>          | <b>266,869</b>      | <b>(5,520)</b>                         | <b>(2.11%)</b>                          | <b>274,324</b>        | <b>273,261</b>        | <b>273,261</b>          | <b>273,261</b>      |  |
|                                     | <b>Net Surplus (Deficit)</b>             | <b>0</b>            | <b>16,645</b>  | <b>0</b>            | <b>0</b>            | <b>35,527</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>            |  |