

COMMUNITY PRESERVATION FUND

2015 ORGANIZATIONAL CHART

COMMUNITY PRESERVATION FUND MANAGER

Mary C. Wilson, Esq.

Professional oversight and management of the Community Preservation Project Plan and the Management and Stewardship Plan. Prioritizes list of parcels to Town Board, conduct 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 and surveys; prepares purchase agreements, easements, covenants and closing documents. Establishes active management and stewardship routines; enforcement of rules and regulations pertaining to Town-owned lands, trail blazing and maintenance. 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 new 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 and Stewardship Plan and conduct 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. 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 may also include renovation/construction management in concert with the licensee organization and general compliance with all relevant local, state and federal legislation, as well as grant funding compliance responsibilities. Examines real estate title reports, tax maps, legal descriptions of real property, reviews appraisals, manages inventory of real property and coordinates stewardship tasks

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.

PRINCIPAL ENVIRONMENTAL ANALYST Laura Smith

Performs upwards of 200 monitoring inspections and reports yearly with additional environmental inspections for prospective acquisitions. Provides technical support for PILOT analyses, required reports, acts as liaison to the Friends of the Long Pond Greenbelt and staffs the Long Pond Greenbelt Nature Center. Supervises and performs stewardship tasks; drafts management plans for preserved real property.

PARK RANGER / ORDINANCE ENFORCEMENT OFFICER Ron Carter

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 Vacant (FT)

Department Summary

Department: Community Preservation

Budget Year: 2015

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 new First Time Home buyers Exemption to the 2% real estate transfer tax.
10. Oversee, manage and coordinate historic preservation construction projects.

Department Summary

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Budget Year: 2015

Division: Community Preservation Department

Tax District: Community Preservation Fund

Cost Center #: 1940

Manager: Mary Wilson

NOTES:

Workload:

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

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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 3,700 acres of land acquired for protection. These thousands of acres require stewardship and management so that the intent of this program is 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. These 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	Total Benefits	Total Comp. & Benefits	Yrs Srv 1/1/15	Alloc. %
Community Preservation Department									
Community Preservation Department									
Community Preservation - 1940									
Assistant Town Attorney	ADMINISTRATIVE	96,055	0	0	96,055	47,124	143,179	12.7	100.0
Senior Administrative Assistant	ADMINSUPPORT	58,000	0	0	58,000	25,532	83,532	14.3	100.0
Environmental Analyst - Requested	CSEA40HOUR - 7-1-2010 / G / E	54,485	0	0	54,485	35,810	90,296		100.0
Groundskeeper I - Vacant	CSEA40HOUR - 7-1-2010 / B / 1	0	0	0	0	0	0		0.0
Ordinance Enforcement Officer	CSEA40HOUR-NEW / J / 5	70,442	5,635	300	76,378	32,151	108,529	17.9	100.0
Principal Environmental Analyst	CSEA40HOURPROMO	87,535	8,753	0	96,288	37,596	133,885	21.1	100.0
Total Community Preservation - 1940		366,517	14,389	300	381,206	178,215	559,421		

NOTES:

Town of Southampton

2015 Adopted Budget

Community Preservation - 1940

Account Code	Description	2013 Adopted Budget	2013 Actual	2014 Adopted Budget	2014 Amended Budget	2014 Oct YTD Actual	2015 Requested Budget	2015 Tentative Budget	2015 Preliminary Budget	2015 Adopted Budget	2015 Adopted / 2014 Difference	2015 Adopted / 2014 % of Change	2016 Requested Budget	2016 Tentative Budget	2016 Preliminary Budget	2016 Adopted Budget
Other Revenue:																
1190	Community Preservation 2%	33,000,000	58,058,512	33,464,020	43,464,020	42,583,704	42,000,000	42,000,000	42,000,000	42,000,000	(1,464,020)	(3.37%)	42,000,000	42,000,000	42,000,000	42,000,000
1201	Interest And Earnings	150,000	126,817	150,000	150,000	95,907	150,000	150,000	150,000	150,000	0	0.00%	150,000	150,000	150,000	150,000
2701	Miscellaneous Tax Receipts	0	0	0	0	15,454	0	0	0	0	0	0.00%	0	0	0	0
2710	Premium on Obligations	0	0	0	237,851	237,851	0	0	0	0	(237,851)	(100.00%)	0	0	0	0
2770	Miscellaneous	6,343	5,325	6,343	6,343	6,216	6,343	6,343	6,343	6,343	0	0.00%	6,343	6,343	6,343	6,343
5031	Interfund Transfer - Revenue	0	55,644	0	0	0	0	0	0	0	0	0.00%	0	0	0	0
5791	Proceeds of Refunding Bonds	0	0	0	2,027,570	2,027,570	0	0	0	0	(2,027,570)	(100.00%)	0	0	0	0
Total Other Revenue		33,156,343	58,246,298	33,620,363	45,885,783	44,966,702	42,156,343	42,156,343	42,156,343	42,156,343	(3,729,440)	(8.13%)	42,156,343	42,156,343	42,156,343	42,156,343
Total Revenue		33,156,343	58,246,298	33,620,363	45,885,783	44,966,702	42,156,343	42,156,343	42,156,343	42,156,343	(3,729,440)	(8.13%)	42,156,343	42,156,343	42,156,343	42,156,343
Salaries:																
6100	Salaries	300,098	300,098	343,839	343,839	255,077	369,638	365,667	366,517	366,517	(22,678)	(6.60%)	377,845	377,845	374,662	374,662
6110	Longevity	12,229	12,227	14,202	14,202	0	14,389	14,389	14,389	14,389	(187)	(1.32%)	14,677	14,677	14,677	14,677
6127	Cash in Lieu of Health Benefits	2,500	0	0	0	0	0	0	0	0	0	0.00%	0	0	0	0
6144	Clothing Cleaning	300	300	300	300	300	300	300	300	300	0	0.00%	300	300	300	300
Total Salaries		315,127	312,625	358,341	358,341	255,377	384,326	380,356	381,206	381,206	(22,865)	(6.38%)	392,821	392,821	389,639	389,639
Employee Benefits - Current:																
6810	Employee Retirement - Active	42,502	88,274	46,226	52,276	44,212	63,414	62,759	62,899	62,899	(10,623)	(20.32%)	64,816	64,816	64,290	64,290
6830	FICA Tax Expenditure	24,084	23,677	27,413	27,413	19,337	29,401	29,097	29,162	29,162	(1,749)	(6.38%)	30,051	30,051	29,807	29,807
6835	MTA Tax	1,070	1,053	1,218	1,218	859	1,307	1,293	1,296	1,296	(78)	(6.38%)	1,336	1,336	1,325	1,325
6840	Worker's Compensation	5,483	5,483	8,522	8,522	5,706	7,894	7,878	7,881	7,881	640	7.52%	8,079	8,079	8,066	8,066
6860	Medical Insurance - Active Employees	36,612	44,766	66,195	66,195	38,004	70,320	70,320	70,320	70,320	(4,125)	(6.23%)	70,320	70,320	70,320	70,320
6865	Dental & Optical	5,197	4,521	6,512	6,512	3,979	6,512	6,512	6,512	6,512	0	0.00%	6,512	6,512	6,512	6,512
6875	Disability	115	100	144	144	41	144	144	144	144	0	0.00%	144	144	144	144
Total Employee Benefits - Current		115,064	167,873	156,230	162,280	112,138	178,991	178,003	178,215	178,215	(15,935)	(9.82%)	181,257	181,257	180,464	180,464
Total Employee Costs		430,191	480,498	514,571	520,621	367,515	563,318	558,359	559,421	559,421	(38,800)	(7.45%)	574,078	574,078	570,103	570,103
Equipment:																
6201	Vehicles	50,000	0	30,000	30,000	0	30,000	30,000	30,000	30,000	0	0.00%	0	0	0	0
6208	Land Purchase	18,272,647	28,993,074	16,476,794	46,476,794	34,635,725	21,792,942	21,797,901	21,796,839	21,796,839	24,679,955	53.10%	31,806,397	31,806,397	31,810,372	31,810,372
Total Equipment		18,322,647	28,993,074	16,506,794	46,506,794	34,635,725	21,822,942	21,827,901	21,826,839	21,826,839	24,679,955	53.07%	31,806,397	31,806,397	31,810,372	31,810,372
Contractual:																
6400	Contracts - Other	78,800	39,712	78,800	78,800	37,411	73,962	73,962	73,962	73,962	4,838	6.14%	71,549	71,549	71,549	71,549
6401	Contracts	150,000	129,650	150,000	150,000	97,530	200,000	200,000	200,000	200,000	(50,000)	(33.33%)	200,000	200,000	200,000	200,000
6403	Gasoline	3,400	2,216	3,400	3,400	2,822	3,400	3,400	3,400	3,400	0	0.00%	3,400	3,400	3,400	3,400
6410	Postage	784	526	784	784	402	784	784	784	784	0	0.00%	784	784	784	784
6412	Publications	245	279	300	400	198	300	300	300	300	100	25.00%	300	300	300	300
6416	Travel, Dues and Related	490	0	490	791	789	600	600	600	600	191	24.15%	600	600	600	600
6418	Uniforms	196	0	200	200	0	200	200	200	200	0	0.00%	200	200	200	200
6424	Taxes - Town Property	147,000	297,332	200,000	200,000	142,164	200,000	200,000	200,000	200,000	0	0.00%	200,000	200,000	200,000	200,000
6425	Office Supplies	588	182	588	587	144	400	400	400	400	187	31.86%	400	400	400	400
6426	Supplies - Other	600	252	600	1,210	833	600	600	600	600	610	50.41%	600	600	600	600

Town of Southampton
2015 Adopted Budget
Community Preservation - 1940

Account Code	Description	2013 Adopted Budget	2013 Actual	2014 Adopted Budget	2014 Amended Budget	2014 Oct YTD Actual	2015 Requested Budget	2015 Tentative Budget	2015 Preliminary Budget	2015 Adopted Budget	2015 Adopted / 2014		2016 Requested Budget	2016 Tentative Budget	2016 Preliminary Budget	2016 Adopted Budget
											Amended Difference	% of Change				
6442	Property Stewardship	1,646,000	93,022	3,396,969	3,375,769	36,045	7,078,833	7,078,833	7,078,833	7,078,833	(3,703,064)	(109.70%)	125,000	125,000	125,000	125,000
6450	Schools & Training	1,176	863	1,200	1,390	1,180	1,200	1,200	1,200	1,200	190	13.67%	1,200	1,200	1,200	1,200
6460	Pilot Payments	2,879,312	2,872,770	3,222,266	3,222,266	3,172,303	3,222,266	3,222,266	3,222,266	3,222,266	0	0.00%	3,222,266	3,222,266	3,222,266	3,222,266
6466	Telephone - Wireless	0	279	550	550	290	400	400	400	400	150	27.27%	400	400	400	400
6477	Copier Leases	3,200	3,065	1,200	1,200	408	1,200	1,200	1,200	1,200	0	0.00%	1,200	1,200	1,200	1,200
6490	Consultants	39,200	16,915	40,000	40,000	23,715	40,000	40,000	40,000	40,000	0	0.00%	40,000	40,000	40,000	40,000
6497	Misc Expenses	0	3,600	0	0	0	0	0	0	0	0	0.00%	0	0	0	0
	Total Contractual	4,950,991	3,460,663	7,097,347	7,077,347	3,516,233	10,824,145	10,824,145	10,824,145	10,824,145	(3,746,798)	(52.94%)	3,867,899	3,867,899	3,867,899	3,867,899
	Debt Service:															
6600	Debt Service Principal Expense	7,440,000	3,940,000	7,595,000	7,595,000	3,247,156	7,163,599	7,163,599	7,163,599	7,163,599	431,401	5.68%	4,247,060	4,247,060	4,247,060	4,247,060
6700	Debt Service Interest Expense	2,012,514	2,007,919	1,906,651	1,906,651	1,550,225	1,782,339	1,782,339	1,782,339	1,782,339	124,312	6.52%	1,660,909	1,660,909	1,660,909	1,660,909
6900	Interfund Transfer Expense	0	879,650	0	20,000	2,721,417	0	0	0	0	20,000	100.00%	0	0	0	0
6998	Refunded Bond Escrow Agent	0	0	0	2,265,421	2,265,421	0	0	0	0	2,265,421	100.00%	0	0	0	0
	Total Debt Service	9,452,514	6,827,569	9,501,651	11,787,072	9,784,218	8,945,938	8,945,938	8,945,938	8,945,938	2,841,134	24.10%	5,907,969	5,907,969	5,907,969	5,907,969
	Total Expenditures	33,156,343	39,761,804	33,620,363	65,891,833	48,303,692	42,156,343	42,156,343	42,156,343	42,156,343	23,735,490	36.02%	42,156,343	42,156,343	42,156,343	42,156,343
	Net Surplus (Deficit)	0	18,484,494	0	(20,006,050)	(3,336,990)	0	0	0	0			0	0	0	0
	Appropriated Fund Balance:															
9090	Appropriated Fund Balance	0	0	0	20,006,050	0	0	0	0	0	0		0	0	0	0
	Net Surplus (Deficit)	0	18,484,494	0	0	(3,336,990)	0	0	0	0			0	0	0	0