

COMMUNITY PRESERVATION FUND

2016 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

The environmental analyst works closely with the Community Preservation Program Manager and the CPF Principal Environmental Analyst to establish an ongoing Stewardship program for the Community Preservation Fund (CPF) program of the Town of Southampton and to contribute where ever possible to supporting a practical vision for monitoring and managing all CPF acquired properties. This includes assuming responsibility for monitoring CPF assets, land management needs and program initiatives in the Town.

Department Summary

Department: Community Preservation

Budget Year: 2016

Division: Community Preservation Department

Tax District: Community Preservation Fund

Cost Center #: 1940

Manager: Mary Wilson

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.

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Department Summary

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Budget Year: 2016

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Cost Center #: 1940

Manager: Mary Wilson

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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	TRS Srv 1/1/16	Alloc. %
Community Preservation Department									
Community Preservation Department									
Community Preservation - 1940									
Assistant Town Attorney	ADMINISTRATIVE	97,976	0	0	97,976	47,022	144,998	13.7	100.0
Senior Administrative Assistant	ADMINSUPPORT	59,160	0	0	59,160	25,819	84,979	15.3	100.0
Environmental Analyst - Vacant	CSEA40HOUR - 7-1-2010 / G / E	56,152	0	0	56,152	33,998	90,150		100.0
Ordinance Enforcement Officer	CSEA40HOUR-NEW / J / 5	72,601	5,808	300	78,709	33,791	112,500	18.9	100.0
Principal Environmental Analyst	CSEA40HOURPROMO	90,217	9,022	6,198	105,437	40,977	146,414	22.1	100.0
Maintenance Mechanic II	PART-TIME	28,000	0	0	28,000	2,378	30,378		100.0
Total Community Preservation - 1940		404,106	14,830	6,498	425,434	183,986	609,420		

NOTES:

Town of Southampton

2016 Adopted Budget

Community Preservation - 1940

Account Code	Description	2014 Adopted Budget	2014 Actual	2015 Adopted Budget	2015 Amended Budget	2015 Oct YTD Actual	2016 Requested Budget	2016 Tentative Budget	2016 Preliminary Budget	2016 Adopted Budget	2016 Adopted / 2015 Amended Difference	2016 Adopted / 2015 % of Change	2017 Requested Budget	2017 Tentative Budget	2017 Preliminary Budget	2017 Adopted Budget
Other Revenue:																
1190	Community Preservation 2%	33,464,020	65,110,117	42,000,000	42,000,000	43,603,507	45,000,000	45,000,000	46,200,000	46,200,000	4,200,000	10.00%	45,000,000	45,000,000	45,000,000	45,000,000
1201	Interest And Earnings	150,000	130,034	150,000	150,000	294,080	200,000	200,000	200,000	200,000	50,000	33.33%	200,000	200,000	200,000	200,000
2701	Miscellaneous Tax Receipts	0	15,454	0	0	2,960	0	0	0	0	0	0.00%	0	0	0	0
2710	Premium on Obligations	0	263,082	0	0	0	0	0	0	0	0	0.00%	0	0	0	0
2770	Miscellaneous	6,343	14,090	6,343	6,343	2,160	6,343	6,343	6,343	6,343	0	0.00%	6,343	6,343	6,343	6,343
5031	Interfund Transfer - Revenue	0	37,459	0	0	0	0	0	0	0	0	0.00%	0	0	0	0
5791	Proceeds of Refunding Bonds	0	5,977,570	0	0	0	0	0	0	0	0	0.00%	0	0	0	0
Total Other Revenue		33,620,363	71,547,807	42,156,343	42,156,343	43,902,706	45,206,343	45,206,343	46,406,343	46,406,343	4,250,000	10.08%	45,206,343	45,206,343	45,206,343	45,206,343
Total Revenue		33,620,363	71,547,807	42,156,343	42,156,343	43,902,706	45,206,343	45,206,343	46,406,343	46,406,343	4,250,000	10.08%	45,206,343	45,206,343	45,206,343	45,206,343
Salaries:																
6100	Salaries	343,839	306,092	366,517	366,517	262,123	376,929	376,106	376,106	376,106	(9,589)	(2.62%)	385,307	384,468	384,468	384,468
6103	Accumulated Sick/Personal Days	0	0	0	0	0	6,198	6,198	6,198	6,198	(6,198)	(100.00%)	6,198	6,198	6,198	6,198
6105	Part Time Salaries	0	0	0	30,000	18,213	0	28,000	28,000	28,000	2,000	6.67%	0	28,000	28,000	28,000
6110	Longevity	14,202	14,199	14,389	14,389	0	14,830	14,830	14,830	14,830	(441)	(3.06%)	15,126	15,126	15,126	15,126
6144	Clothing Cleaning	300	300	300	300	300	300	300	300	300	0	0.00%	300	300	300	300
Total Salaries		358,341	320,591	381,206	411,206	280,635	398,257	425,434	425,434	425,434	(14,228)	(3.46%)	406,932	434,092	434,092	434,092
Employee Benefits - Current:																
6810	Employee Retirement - Active	46,226	68,802	62,899	62,899	59,733	66,509	66,372	66,372	66,372	(3,473)	(5.52%)	67,958	67,817	67,817	67,817
6830	FICA Tax Expenditure	27,413	24,287	29,162	31,462	21,270	30,467	32,546	32,546	32,546	(1,083)	(3.44%)	31,092	33,170	33,170	33,170
6835	MTA Tax	1,218	1,079	1,296	1,422	945	1,354	1,446	1,446	1,446	(24)	(1.71%)	1,384	1,476	1,476	1,476
6840	Worker's Compensation	8,522	6,765	7,881	7,881	6,000	8,141	6,581	7,831	7,831	50	0.63%	8,332	6,714	6,714	6,714
6860	Medical Insurance - Active Employees	66,195	47,144	70,320	70,320	40,301	72,432	70,356	70,356	70,356	(36)	(0.05%)	72,432	70,356	70,356	70,356
6865	Dental & Optical	6,512	4,857	6,512	6,512	4,003	6,512	6,512	6,512	6,512	0	0.00%	6,512	6,512	6,512	6,512
6875	Disability	144	49	144	144	60	144	173	173	173	(29)	(20.00%)	144	173	173	173
Total Employee Benefits - Current		156,230	152,984	178,215	180,641	132,312	185,559	183,986	185,236	185,236	(4,595)	(2.54%)	187,853	186,218	186,218	186,218
Total Employee Costs		514,571	473,574	559,421	591,847	412,948	583,816	609,420	610,670	610,670	(18,823)	(3.18%)	594,785	620,310	620,310	620,310
Equipment:																
6201	Vehicles	30,000	0	30,000	30,000	0	0	0	0	0	30,000	100.00%	0	0	0	0
6208	Land Purchase	16,476,794	39,193,920	21,796,839	52,419,846	26,477,710	34,305,112	34,279,508	34,278,258	34,278,258	18,141,588	34.61%	30,128,662	30,103,137	30,103,137	30,103,137
Total Equipment		16,506,794	39,193,920	21,826,839	52,449,846	26,477,710	34,305,112	34,279,508	34,278,258	34,278,258	18,171,588	34.65%	30,128,662	30,103,137	30,103,137	30,103,137
Contractual:																
6400	Contracts - Other	78,800	37,411	73,962	73,962	27,013	40,411	40,411	40,411	40,411	33,551	45.36%	40,286	40,286	40,286	40,286
6401	Contracts	150,000	120,180	200,000	285,000	152,200	200,000	200,000	200,000	200,000	85,000	29.82%	200,000	200,000	200,000	200,000
6403	Gasoline	3,400	3,373	3,400	3,400	2,048	3,400	3,400	3,400	3,400	0	0.00%	3,400	3,400	3,400	3,400
6410	Postage	784	461	784	784	262	500	500	500	500	284	36.22%	500	500	500	500
6412	Publications	300	328	300	300	207	400	400	400	400	(100)	(33.33%)	400	400	400	400
6416	Travel, Dues and Related	490	789	600	2,100	1,040	600	600	600	600	1,500	71.43%	600	600	600	600
6418	Uniforms	200	42	200	200	0	100	100	100	100	100	50.00%	100	100	100	100
6424	Taxes - Town Property	200,000	156,321	200,000	350,000	293,859	300,000	300,000	300,000	300,000	50,000	14.29%	300,000	300,000	300,000	300,000
6425	Office Supplies	588	144	400	400	165	600	600	600	600	(200)	(50.00%)	600	600	600	600

Town of Southampton
2016 Adopted Budget
Community Preservation - 1940

Account Code	Description	2014	2014	2015	2015	2015	2016	2016	2016	2016	2016	2016	2016	2016	2016	2016	2016
		Adopted Budget	Actual	Adopted Budget	Amended Budget	Oct YTD Actual	Requested Budget	Tentative Budget	Preliminary Budget	Adopted Budget	Adopted / 2015 Amended Difference	Adopted / 2015 % of Change	Requested Budget	Tentative Budget	Preliminary Budget	Adopted Budget	
6426	Supplies - Other	600	856	600	600	93	600	600	600	600	0	0.00%	600	600	600	600	
6442	Property Stewardship	3,396,969	41,348	7,078,833	242,150	143,560	200,000	55,965	55,965	55,965	186,185	76.89%	4,500,000	4,500,000	4,500,000	4,500,000	
6450	Schools & Training	1,200	1,555	1,200	1,200	650	2,000	2,000	2,000	2,000	(800)	(66.67%)	2,000	2,000	2,000	2,000	
6460	Pilot Payments	3,222,266	3,172,303	3,222,266	3,222,181	3,213,912	3,600,000	3,600,000	4,800,000	4,800,000	(1,577,819)	(48.97%)	3,600,000	3,600,000	3,600,000	3,600,000	
6466	Telephone - Wireless	550	399	400	400	327	400	400	400	400	0	0.00%	400	400	400	400	
6474	Other - Landfill Charges	0	0	0	85	85	0	0	0	0	85	100.00%	0	0	0	0	
6477	Copier Leases	1,200	715	1,200	1,200	746	1,000	1,000	1,000	1,000	200	16.67%	1,000	1,000	1,000	1,000	
6490	Consultants	40,000	39,498	40,000	60,000	33,660	75,000	75,000	75,000	75,000	(15,000)	(25.00%)	75,000	75,000	75,000	75,000	
	Total Contractual	7,097,347	3,575,722	10,824,145	4,243,962	3,869,827	4,425,011	4,280,976	5,480,976	5,480,976	(1,237,014)	(29.15%)	8,724,886	8,724,886	8,724,886	8,724,886	
	Debt Service:																
6600	Debt Service Principal Expense	7,595,000	4,097,156	7,163,599	7,163,599	3,240,899	4,247,060	4,247,060	4,247,060	4,247,060	2,916,539	40.71%	4,292,098	4,292,098	4,292,098	4,292,098	
6700	Debt Service Interest Expense	1,906,651	1,865,537	1,782,339	1,782,339	1,459,778	1,645,344	1,645,344	1,645,344	1,645,344	136,995	7.69%	1,465,912	1,465,912	1,465,912	1,465,912	
6900	Interfund Transfer Expense	0	2,721,417	0	1,957,176	1,957,176	0	144,035	144,035	144,035	1,813,141	92.64%	0	0	0	0	
6998	Refunded Bond Escrow Agent	0	6,240,652	0	0	0	0	0	0	0	0	0.00%	0	0	0	0	
	Total Debt Service	9,501,651	14,924,763	8,945,938	10,903,114	6,657,853	5,892,404	6,036,439	6,036,439	6,036,439	4,866,675	44.64%	5,758,010	5,758,010	5,758,010	5,758,010	
	Total Expenditures	33,620,363	58,167,979	42,156,343	68,188,769	37,418,338	45,206,343	45,206,343	46,406,343	46,406,343	21,782,426	31.94%	45,206,343	45,206,343	45,206,343	45,206,343	
	Net Surplus (Deficit)	0	13,379,828	0	(26,032,426)	6,484,369	0	0	0	0			0	0	0	0	
	Appropriated Fund Balance:																
9090	Appropriated Fund Balance	0	0	0	26,032,426	0	0	0	0	0	0	0	0	0	0	0	
	Net Surplus (Deficit)	0	13,379,828	0	0	6,484,369	0	0	0	0			0	0	0	0	