

# COMMUNITY PRESERVATION FUND

## 2017 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

**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

**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**

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.

### 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

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*Department: Community Preservation*

**Budget Year:** 2017

**Division:** Community Preservation Department

**Tax District:** Community Preservation Fund

**Cost Center #:** 1940

**Manager:** Mary Wilson

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**NOTES:**

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## **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.

# Department Summary

*Department: Community Preservation*

**Budget Year:** 2017

**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 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 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 3,900 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.

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**NOTES:**

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# 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 1/1/17	Alloc. %
<b>Community Preservation Department</b>													
<b>Community Preservation Department</b>													
<b>Community Preservation - 1940</b>													
Assistant Town Attorney	ADMINISTRATIVE	99,936	3,920	0	103,856	24,615	7,945	14,696	1,131	48,387	152,243	14.7	100.0
Senior Administrative Assistant	ADMINSUPPORT	60,343	2,367	0	62,710	11,583	4,797	8,873	936	26,190	88,900	16.3	100.0
Ordinance Enforcement Officer	CSEA40HOUR-OLD / 13 / 5	76,797	7,680	0	84,476	12,548	6,462	11,953	3,349	34,314	118,790	19.9	100.0
Principal Environmental Analyst	CSEA40HOURPROMO	91,663	9,166	0	100,830	12,548	7,713	14,267	3,992	38,522	139,351	23.1	100.0
Land Steward / Maintenance Mechanic III	PART-TIME	20,800	0	0	20,800	0	1,591	0	100	1,691	22,491	0.4	100.0
Maintenance Mechanic II	PART-TIME	28,000	0	0	28,000	0	2,142	0	446	2,588	30,588		100.0
<b>Total Community Preservation - 1940</b>		<b>377,539</b>	<b>23,133</b>	<b>0</b>	<b>400,672</b>	<b>61,296</b>	<b>30,651</b>	<b>49,790</b>	<b>9,955</b>	<b>151,691</b>	<b>552,363</b>		

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# Town of Southampton

## 2017 Adopted Budget

### Community Preservation - 1940

Account Code	Description	2015 Adopted Budget	2015 Actual	2016 Adopted Budget	2016 Amended Budget	2016 Dec YTD Actual	2017 Requested Budget	2017 Tentative Budget	2017 Preliminary Budget	2017 Adopted Budget	2017 Adopted / 2016 Amended Difference	2017 Adopted / 2016 Amended % of Change	2018 Requested Budget	2018 Tentative Budget	2018 Preliminary Budget	2018 Adopted Budget
<b>Other Revenue:</b>																
1190	Community Preservation 2%	42,000,000	60,660,717	46,200,000	60,000,000	39,113,191	46,114,000	46,200,000	46,200,000	46,200,000	(13,800,000)	(23.00%)	46,112,388	46,112,388	46,112,388	46,112,388
1201	Interest And Earnings	150,000	363,939	200,000	200,000	370,077	200,000	200,000	200,000	200,000	0	0.00%	200,000	200,000	200,000	200,000
2701	Miscellaneous Tax Receipts	0	2,960	0	0	0	0	0	0	0	0	0.00%	0	0	0	0
2770	Miscellaneous	6,343	5,445	6,343	6,343	3,051	5,906	6,343	6,343	6,343	0	0.00%	5,768	6,343	6,343	6,343
5031	Interfund Transfer - Revenue	0	0	0	0	0	130,000	130,000	130,000	130,000	130,000	100.00%	0	0	0	0
<b>Total Other Revenue</b>		<b>42,156,343</b>	<b>61,033,061</b>	<b>46,406,343</b>	<b>60,206,343</b>	<b>39,486,319</b>	<b>46,449,906</b>	<b>46,536,343</b>	<b>46,536,343</b>	<b>46,536,343</b>	<b>(13,670,000)</b>	<b>(22.71%)</b>	<b>46,318,156</b>	<b>46,318,731</b>	<b>46,318,731</b>	<b>46,318,731</b>
<b>Total Revenue</b>		<b>42,156,343</b>	<b>61,033,061</b>	<b>46,406,343</b>	<b>60,206,343</b>	<b>39,486,319</b>	<b>46,449,906</b>	<b>46,536,343</b>	<b>46,536,343</b>	<b>46,536,343</b>	<b>(13,670,000)</b>	<b>(22.71%)</b>	<b>46,318,156</b>	<b>46,318,731</b>	<b>46,318,731</b>	<b>46,318,731</b>
<b>Salaries:</b>																
6100	Salaries	366,517	314,302	376,106	376,106	268,547	328,739	328,739	328,739	328,739	47,368	12.59%	335,960	335,960	335,960	335,960
6103	Accumulated Sick/Personal Days	0	0	6,198	6,198	0	0	0	0	0	6,198	100.00%	0	0	0	0
6105	Part Time Salaries	0	24,644	28,000	28,000	17,194	48,800	48,800	48,800	48,800	(20,800)	(74.29%)	48,800	48,800	48,800	48,800
6110	Longevity	14,389	14,484	14,830	14,830	0	23,133	23,133	23,133	23,133	(8,303)	(55.99%)	23,535	23,535	23,535	23,535
6144	Clothing Cleaning	300	300	300	300	0	0	0	0	0	300	100.00%	0	0	0	0
<b>Total Salaries</b>		<b>381,206</b>	<b>353,730</b>	<b>425,434</b>	<b>425,434</b>	<b>285,741</b>	<b>400,672</b>	<b>400,672</b>	<b>400,672</b>	<b>400,672</b>	<b>24,763</b>	<b>5.82%</b>	<b>408,294</b>	<b>408,294</b>	<b>408,294</b>	<b>408,294</b>
<b>Employee Benefits - Current:</b>																
6810	Employee Retirement - Active	62,899	66,904	66,372	66,372	55,299	49,262	49,790	49,790	49,790	16,582	24.98%	50,329	50,868	50,868	50,868
6830	FICA Tax Expenditure	29,162	26,822	32,546	32,546	21,620	30,651	30,651	30,651	30,651	1,894	5.82%	31,235	31,235	31,235	31,235
6835	MTA Tax	1,296	1,192	1,446	1,446	961	1,362	1,362	1,362	1,362	84	5.82%	1,388	1,388	1,388	1,388
6840	Worker's Compensation	7,881	7,115	7,831	7,831	7,046	7,340	8,420	8,420	8,420	(588)	(7.51%)	7,507	8,607	8,607	8,607
6860	Medical Insurance - Active Employees	70,320	48,325	70,356	70,356	42,133	56,088	56,088	56,088	56,088	14,268	20.28%	56,088	56,088	56,088	56,088
6865	Dental & Optical	6,512	4,928	6,512	6,512	4,104	5,208	5,208	5,208	5,208	1,304	20.03%	5,208	5,208	5,208	5,208
6875	Disability	144	83	173	173	62	173	173	173	173	0	0.00%	173	173	173	173
<b>Total Employee Benefits - Current</b>		<b>178,215</b>	<b>155,368</b>	<b>185,236</b>	<b>185,236</b>	<b>131,223</b>	<b>150,084</b>	<b>151,691</b>	<b>151,691</b>	<b>151,691</b>	<b>33,544</b>	<b>18.11%</b>	<b>151,927</b>	<b>153,567</b>	<b>153,567</b>	<b>153,567</b>
<b>Total Employee Costs</b>		<b>559,421</b>	<b>509,098</b>	<b>610,670</b>	<b>610,670</b>	<b>416,964</b>	<b>550,756</b>	<b>552,363</b>	<b>552,363</b>	<b>552,363</b>	<b>58,307</b>	<b>9.55%</b>	<b>560,221</b>	<b>561,861</b>	<b>561,861</b>	<b>561,861</b>
<b>Equipment:</b>																
6201	Vehicles	30,000	0	0	40,000	0	40,000	40,000	40,000	40,000	0	0.00%	0	0	0	0
6208	Land Purchase	21,796,839	30,053,797	34,225,282	74,075,282	61,716,027	32,221,355	32,306,185	32,306,185	32,306,185	41,769,097	56.39%	34,276,410	34,275,345	34,275,345	34,275,345
<b>Total Equipment</b>		<b>21,826,839</b>	<b>30,053,797</b>	<b>34,225,282</b>	<b>74,115,282</b>	<b>61,716,027</b>	<b>32,261,355</b>	<b>32,346,185</b>	<b>32,346,185</b>	<b>32,346,185</b>	<b>41,769,097</b>	<b>56.36%</b>	<b>34,276,410</b>	<b>34,275,345</b>	<b>34,275,345</b>	<b>34,275,345</b>
<b>Contractual:</b>																
6400	Contracts - Other	73,962	27,013	40,411	40,411	21,997	40,286	40,286	40,286	40,286	125	0.31%	37,761	37,761	37,761	37,761
6401	Contracts	200,000	225,500	200,000	200,000	151,850	250,000	250,000	250,000	250,000	(50,000)	(25.00%)	200,000	200,000	200,000	200,000
6403	Gasoline	3,400	2,244	3,400	3,400	1,825	3,000	3,000	3,000	3,000	400	11.76%	3,400	3,400	3,400	3,400
6410	Postage	784	398	500	500	280	500	500	500	500	0	0.00%	500	500	500	500
6412	Publications	300	248	400	405	405	400	400	400	400	5	1.23%	400	400	400	400
6416	Travel, Dues and Related	600	1,672	600	595	485	2,100	2,100	2,100	2,100	(1,505)	(252.94%)	600	600	600	600
6418	Uniforms	200	0	100	100	0	100	100	100	100	0	0.00%	100	100	100	100
6424	Taxes - Town Property	200,000	301,106	300,000	299,700	202,078	300,000	300,000	300,000	300,000	(300)	(0.10%)	300,000	300,000	300,000	300,000
6425	Office Supplies	400	165	600	600	208	500	500	500	500	100	16.67%	600	600	600	600
6426	Supplies - Other	600	93	600	600	458	500	500	500	500	100	16.67%	600	600	600	600
6442	Property Stewardship	7,078,833	209,734	55,965	205,765	83,832	374,482	374,482	374,482	374,482	(168,717)	(82.00%)	350,000	350,000	350,000	350,000

