

# COMMUNITY PRESERVATION FUND

## 2012 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.

### COMMUNITY PRESERVATION COMMITTEE

### 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.

### 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.

### 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.

# Department Summary

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*Department: Community Preservation*

**Budget Year:** 2012

**Division:** Community Preservation Fund

**Tax District:** CPF Trust

**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 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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**NOTES:**

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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 CPF Program acquired over 250 properties, all of which require an initial inspection by the Principal Environmental Analyst and annual monitoring inspections and reports, as well as a long-term management plan. The Principal Environmental Analyst performs upwards of 200 monitoring inspections and reports yearly with additional environmental inspections for prospective acquisitions. The Principal Environmental Analyst also, 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.
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 200 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. He has been instrumental in major property cleanups, preventing unauthorized ATV use on lands and installing security measures on CPF lands. He 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.

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*Department: Community Preservation*

**Budget Year:** 2012

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## **Goals & Objectives:**

The CPF transfer tax has been in place for 12 years, and the success of the program is evidenced in the 3,000 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 2012, 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.
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 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.
7. Implement recommendations of the 2008 State Comptroller Audit and annual audits and consider augmenting staff resources with additional stewardship staff resources.

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**NOTES:**

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# Department Summary

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**Legal Authority:**

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

**Revenue:**

The Community Preservation Department projects approximately \$33 million in revenues for 2012. Operating Expenses for 2012 total \$654,615 for program management; \$2,490,937 for 2012 CPF PILOTS, \$9,815,518 for debt service and \$500,000 for stewardship projects. Therefore, there is a projected revenue stream allowing for purchase of land on a “pay-as-you-go” basis in the amount of approximately \$18 million for 2012.

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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 1/1/12
<b>Community Preservation Fund</b>												
<b>Community Preservation - 1940</b>												
Assistant Town Attorney	ADMINISTRATIVE	90,515	0	0	90,515	19,006	6,924	11,314	271	37,824	128,339	9.7
Senior Administrative Assist	ADMINSUPPORT	53,854	0	0	53,854	19,006	4,200	6,863	176	30,432	84,286	11.3
Environmental Aide - Vacant	CSEA40HOUR - 7-1-2010 / B /	0	0	0	0	0	0	0	0	0	0	
Ordinance Enforcement Officer	CSEA40HOUR-NEW / J / 4	66,412	5,313	2,500	74,225	1,226	5,678	9,278	2,240	18,674	92,899	14.9
Principal Environmental Analyst	CSEA40HOURPROMO	83,337	6,667	0	90,004	10,366	6,885	11,250	2,803	31,611	121,615	18.1
<b>Total Community Preservation - 1940</b>		<b>295,169</b>	<b>11,980</b>	<b>2,500</b>	<b>309,649</b>	<b>49,603</b>	<b>23,688</b>	<b>38,706</b>	<b>5,490</b>	<b>118,540</b>	<b>428,189</b>	

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# Town of Southampton

## 2012 Adopted Budget

### Community Preservation - 1940

Account Code	Description	2010 Adopted Budget	2010 Actual	2011 Adopted Budget	2011 Amended Budget	2011 Oct YTD Actual	2012 Requested Budget	2012 Tentative Budget	2012 Preliminary Budget	2012 Adopted Budget	2012 Adopted / 2011 Difference	2012 Adopted / 2011 % of Change	2013 Requested Budget	2013 Tentative Budget	2013 Preliminary Budget	2013 Adopted Budget
<b>Other Revenue:</b>																
1190	Community Preservation 2%	19,200,000	34,225,797	33,000,000	33,000,000	30,762,468	33,000,000	33,000,000	33,000,000	33,000,000	0	0.00%	33,000,000	33,000,000	33,000,000	33,000,000
1201	Interest And Earnings	192,000	213,427	280,000	280,000	242,000	280,000	200,000	200,000	200,000	(80,000)	(28.57%)	280,000	200,000	200,000	200,000
2770	Miscellaneous	6,343	3,529	6,343	6,343	6,343	6,343	6,343	6,343	6,343	0	0.00%	6,343	6,343	6,343	6,343
3910	State Aid - Conservation	0	25,000	0	0	381,924	15,000	15,000	15,000	15,000	15,000	100.00%	15,000	15,000	15,000	15,000
5031	Interfund Transfer - Revenue	0	0	0	0	268,858	0	0	0	0	0	0.00%	0	0	0	0
<b>Total Other Revenue</b>		<b>19,398,343</b>	<b>34,467,753</b>	<b>33,286,343</b>	<b>33,286,343</b>	<b>31,661,593</b>	<b>33,301,343</b>	<b>33,221,343</b>	<b>33,221,343</b>	<b>33,221,343</b>	<b>(65,000)</b>	<b>(0.20%)</b>	<b>33,301,343</b>	<b>33,221,343</b>	<b>33,221,343</b>	<b>33,221,343</b>
<b>Total Revenue</b>		<b>19,398,343</b>	<b>34,467,753</b>	<b>33,286,343</b>	<b>33,286,343</b>	<b>31,661,593</b>	<b>33,301,343</b>	<b>33,221,343</b>	<b>33,221,343</b>	<b>33,221,343</b>	<b>(65,000)</b>	<b>(0.20%)</b>	<b>33,301,343</b>	<b>33,221,343</b>	<b>33,221,343</b>	<b>33,221,343</b>
<b>Salaries:</b>																
6100	Salaries	280,449	281,831	286,260	286,260	238,448	348,156	326,816	326,816	295,169	(8,909)	(3.11%)	356,353	352,748	352,748	301,755
6110	Longevity	9,928	10,041	10,288	10,288	8,574	11,980	11,980	11,980	11,980	(1,692)	(16.44%)	12,174	12,174	12,174	12,174
6127	Cash in Lieu of Health Benefits	2,500	2,500	0	2,500	1,250	2,500	2,500	2,500	2,500	0	0.00%	2,500	2,500	2,500	2,500
6144	Clothing Cleaning	0	0	0	300	300	0	300	300	300	0	0.00%	0	300	300	300
<b>Total Salaries</b>		<b>292,876</b>	<b>294,372</b>	<b>296,549</b>	<b>299,349</b>	<b>248,571</b>	<b>362,636</b>	<b>341,596</b>	<b>341,596</b>	<b>309,949</b>	<b>(10,600)</b>	<b>(3.54%)</b>	<b>371,027</b>	<b>367,722</b>	<b>367,722</b>	<b>316,729</b>
<b>Employee Benefits - Current:</b>																
6810	Employee Retirement - Active	20,208	28,130	34,103	34,103	28,407	45,148	42,572	42,572	38,706	(4,603)	(13.50%)	53,611	49,416	49,416	42,718
6830	FICA Tax Expenditure	22,405	22,520	22,686	22,686	18,360	27,742	26,109	26,109	23,688	(1,002)	(4.42%)	28,384	28,108	28,108	24,207
6835	MTA Tax	0	993	1,060	1,060	816	1,233	1,160	1,160	1,053	7	0.67%	1,261	1,249	1,249	1,076
6840	Worker's Compensation	6,223	5,231	6,472	11,315	9,428	14,525	6,013	6,013	5,375	5,940	52.50%	14,893	6,779	6,779	5,505
6860	Medical Insurance - Active Employees	47,773	47,914	72,509	70,009	42,138	71,310	54,190	54,190	44,700	25,309	36.15%	77,015	65,910	65,910	44,700
6865	Dental & Optical	3,936	3,890	4,320	4,320	3,526	6,129	5,516	5,516	4,903	(583)	(13.50%)	6,620	6,497	6,497	5,197
6875	Disability	115	58	115	115	48	144	130	130	115	0	0.00%	144	144	144	115
<b>Total Employee Benefits - Current</b>		<b>100,661</b>	<b>108,736</b>	<b>141,265</b>	<b>143,608</b>	<b>102,723</b>	<b>166,230</b>	<b>135,690</b>	<b>135,690</b>	<b>118,540</b>	<b>25,067</b>	<b>17.46%</b>	<b>181,927</b>	<b>158,103</b>	<b>158,103</b>	<b>123,519</b>
<b>Total Employee Costs</b>		<b>393,538</b>	<b>403,108</b>	<b>437,814</b>	<b>442,957</b>	<b>351,294</b>	<b>528,866</b>	<b>477,286</b>	<b>477,286</b>	<b>428,489</b>	<b>14,467</b>	<b>3.27%</b>	<b>552,954</b>	<b>525,825</b>	<b>525,825</b>	<b>440,248</b>
<b>Equipment:</b>																
6201	Vehicles	0	0	42,000	42,000	24,123	0	0	0	0	42,000	100.00%	30,000	30,000	30,000	30,000
6208	CPF Land Purchase	6,938,832	8,239,791	21,790,322	25,720,322	9,239,088	18,322,572	18,294,452	18,294,452	18,143,586	7,576,736	29.46%	19,593,788	19,541,217	19,541,217	19,427,131
<b>Total Equipment</b>		<b>6,938,832</b>	<b>8,239,791</b>	<b>21,832,322</b>	<b>25,762,322</b>	<b>9,263,211</b>	<b>18,322,572</b>	<b>18,294,452</b>	<b>18,294,452</b>	<b>18,143,586</b>	<b>7,618,736</b>	<b>29.57%</b>	<b>19,623,788</b>	<b>19,571,217</b>	<b>19,571,217</b>	<b>19,457,131</b>
<b>Contractual:</b>																
6400	Contracts - Other	110,000	53,811	50,000	50,000	43,687	110,000	110,000	110,000	110,000	(60,000)	(120.00%)	110,000	110,000	110,000	110,000
6401	Contracts	71,112	51,750	80,000	113,450	80,600	100,000	100,000	100,000	100,000	13,450	11.86%	100,000	100,000	100,000	100,000
6403	Gasoline	3,000	1,910	3,000	3,400	2,529	3,400	3,400	3,400	3,400	0	0.00%	3,400	3,400	3,400	3,400
6410	Postage	1,000	413	1,000	1,000	577	800	800	800	800	200	20.00%	800	800	800	800
6412	Publications	500	35	250	250	192	250	250	250	250	0	0.00%	250	250	250	250
6416	Travel, Dues and Related	300	117	300	300	0	500	500	500	500	(200)	(66.67%)	500	500	500	500
6418	Uniforms	100	0	200	100	0	200	100	100	100	0	0.00%	200	100	100	100
6424	Taxes - Town Property	150,000	80,970	150,000	150,000	164	150,000	150,000	150,000	150,000	0	0.00%	150,000	150,000	150,000	150,000



**Town of Southampton**  
**2012 Adopted Budget**  
**Community Preservation - 1940**

Account Code	Description	2010 Adopted Budget	2010 Actual	2011 Adopted Budget	2011 Amended Budget	2011 Oct YTD Actual	2012 Requested Budget	2012 Tentative Budget	2012 Preliminary Budget	2012 Adopted Budget	2012 Adopted / 2011	2012 Adopted / 2011	2013 Requested Budget	2013 Tentative Budget	2013 Preliminary Budget	2013 Adopted Budget
											Amended Difference	% of Change				
6425	Office Supplies	600	498	600	600	479	600	600	600	600	0	0.00%	600	600	600	600
6426	Supplies - Other	600	545	600	600	146	2,600	2,600	2,600	2,600	(2,000)	(333.33%)	2,600	2,600	2,600	2,600
6442	Property Stewardship	500,000	26,935	1,958,697	1,433,697	51,341	1,730,000	1,730,000	1,730,000	1,730,000	(296,303)	(20.67%)	500,000	500,000	500,000	500,000
6443	Clothing	200	200	200	0	0	200	0	0	0	0	0.00%	200	0	0	0
6450	Schools & Training	1,200	1,337	1,200	1,200	843	1,200	1,200	1,200	1,200	0	0.00%	1,500	1,500	1,500	1,500
6460	Pilot Payments	2,169,480	2,169,480	2,490,939	2,490,939	2,477,015	2,490,937	2,490,937	2,490,937	2,690,600	(199,661)	(8.02%)	2,490,937	2,490,937	2,490,937	2,690,600
6477	Copier Leases	3,900	4,275	3,900	3,900	2,763	3,700	3,700	3,700	3,700	200	5.13%	3,700	3,700	3,700	3,700
6490	Consultants	5,000	1,010	0	40,000	2,975	40,000	40,000	40,000	40,000	0	0.00%	40,000	40,000	40,000	40,000
6497	Misc Expenses	0	(12)	0	0	0	0	0	0	0	0	0.00%	0	0	0	0
	<b>Total Contractual</b>	<b>3,016,992</b>	<b>2,393,273</b>	<b>4,740,886</b>	<b>4,289,436</b>	<b>2,663,310</b>	<b>4,634,387</b>	<b>4,634,087</b>	<b>4,634,087</b>	<b>4,833,750</b>	<b>(544,314)</b>	<b>(12.69%)</b>	<b>3,404,687</b>	<b>3,404,387</b>	<b>3,404,387</b>	<b>3,604,050</b>
	<b>Debt Service:</b>															
6600	Debt Service Principal Expense	5,705,000	5,705,000	3,860,000	3,860,000	3,110,000	7,530,000	7,530,000	7,530,000	7,530,000	(3,670,000)	(95.08%)	7,570,000	7,570,000	7,570,000	7,570,000
6700	Debt Service Interest Expense	2,730,995	2,730,946	2,415,321	2,415,321	1,877,476	2,285,518	2,285,518	2,285,518	2,285,518	129,803	5.37%	2,149,914	2,149,914	2,149,914	2,149,914
6900	Interfund Transfer Expense	0	862,200	0	525,000	275,000	0	0	0	0	525,000	100.00%	0	0	0	0
	<b>Total Debt Service</b>	<b>8,435,995</b>	<b>9,298,146</b>	<b>6,275,321</b>	<b>6,800,321</b>	<b>5,262,476</b>	<b>9,815,518</b>	<b>9,815,518</b>	<b>9,815,518</b>	<b>9,815,518</b>	<b>(3,015,197)</b>	<b>(44.34%)</b>	<b>9,719,914</b>	<b>9,719,914</b>	<b>9,719,914</b>	<b>9,719,914</b>
	<b>Total Expenditures</b>	<b>18,785,357</b>	<b>20,334,317</b>	<b>33,286,343</b>	<b>37,295,036</b>	<b>17,540,291</b>	<b>33,301,343</b>	<b>33,221,343</b>	<b>33,221,343</b>	<b>33,221,343</b>	<b>4,073,692</b>	<b>10.92%</b>	<b>33,301,343</b>	<b>33,221,343</b>	<b>33,221,343</b>	<b>33,221,343</b>
	<b>Net Surplus (Deficit)</b>	<b>612,986</b>	<b>14,133,436</b>	<b>0</b>	<b>(4,008,693)</b>	<b>14,121,302</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>Appropriated Fund Balance:</b>															
9090	Appropriated Fund Balance	(612,986)	0	0	4,008,693	0	0	0	0	0			0	0	0	0
	<b>Net Surplus (Deficit)</b>	<b>0</b>	<b>14,133,436</b>	<b>0</b>	<b>0</b>	<b>14,121,302</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>