

TOWN CLERK'S OFFICE

2018 ORGANIZATIONAL CHART

TOWN CLERK
Sundy Schermeyer

- Manages Town Clerk office organizational functions, policies and staffing of operations in Town Hall Office and Records Management Center in Hampton Bays;
- Records Management Officer responsible for protecting and managing the paper and electronic records for 30-plus Town departments;
- Coordinates correspondence with State and Local agencies and municipalities, and legislative filings of local laws with New York State;
- Recording Secretary maintaining the agendas and minutes of Town Board meetings;
- Manages Special Event Administration;
- Licensing and filing agent for New York State;
- Registrar of Vital Statistics for the unincorporated communities within the Township;
- Manages Historic Division and coordinates preservation and conservation projects;
- Serves as ex-officio member of Historic Burial Ground Committee;
- Freedom of Information Officer.

DEPUTY TOWN CLERK
Kimberly Ottati

- Maintains legislative files including inter-governmental, Town Board and inter-departmental correspondence, affidavits of publication, land use applications (moratorium exemptions, change-of-zones, PDD applications);
- Provides legislative support to Supervisor, Town Board and Department Heads;
- Coordinates review, processing and electronic distribution of Town Board agendas;
- Coordinates requirements for regular and special Town Board meetings;
- Maintains and distributes "Communications" that are received in Town Clerk's Office;
- Prepares documents associated with home rule requests to Assembly and Senate, bonds, legal publication, local laws, liaison with bond counsel, maintains files;
- Supervises processing of taxi and peddlers permits;
- Coordinates FOILS and code changes;
- Maintains files, posts and circulates Fire Department officer elections, hearings and budget;
- Deputy Registrar

DEPUTY TOWN CLERK
Linda Marzano

- Coordinates Town-wide bid process and related requirements; filing information, distribution, securities, legal ads, maintains postings and signboards;
- Assists with review, processing and electronic distribution of Town Board agendas and coordination of requirements for regular and special Town Board meetings;
- Coordinates the finalization of all adopted resolutions, creating and closing legislative files, required postings, affidavits, legal ads and printing of official record for vault;
- Coordinates filing, acceptance, indexing and release of performance and maintenance bonds;
- Coordinates filings of financial disclosures with Town Attorney and Ethics Board;
- Coordinates internal General Code updates
- Sub Registrar

CONFIDENTIAL SECRETARY
Tara Farrell

- Coordinates Special Events application review and distribution, report tracking, resolution preparation and issuance of permits;
- Daily consolidations and balance transaction reports;
- Processes purchase orders and claim vouchers as necessary for contracts, supplies and equipment purchases;
- Provides support for legislative functions, distributes communication
- Backs up counter as needed providing general customer service;
- NYS DEC liaison
- Coordinates Town Clerk's software with IT.
- Sub Registrar

DIVISIONS

VITAL STATISTICS/ PERMITS & LICENSES

SENIOR CLERK TYPIST

Michele Orestis

- Trains part-time counter staff on the issuance licenses, permits and general functions;
- Coordinates with NYS agencies for licensing requests and marriage, birth, death corrections;
- Sub registrar of vital statistics;
- Processes and inputs information for marriages licenses, birth and death certificates and processes certified copies;
- Oversees processing of State/Town licenses and permits;
- Answers phones and responds to constituent requests;
- Assist with bid process and provides notary services.

DATA ENTRY OPERATOR

Kelley Kostuk

- Answers phones and responds to constituent requests;
- Processes State/ Town licenses and permits;
- Processes and inputs information for marriages licenses, birth and death certificates and processes certified copies;
- Distribute liquor licence notices and reports;
- Assist with FOIL intake and distribution;
- Prepare and distribute monthly financial reports, verify and reconcile financial statements;
- Prepares liquor license renewals, distributes to departments and files reports;
- Provides notary services.

PART TIME CLERK-TYPISTS

Southampton (2)

- Performs general customer service duties as required including answering phones, issuing State/Town licenses and permits;
- May assist with records management projects as directed.

RECORDS MANAGEMENT

ADMINISTRATIVE ASSISTANT

Candace Brambley

- Supervises records management staff and coordinated projects;
- Implement and oversee roll out of new records management software system;
- Oversees issuance of licenses and permits at Annex office;
- Maintains Records Management database;
- Assesses all incoming records and assigns new retention times to them;
- Assists departments with their Records Management needs through department visits and training;
- Performs continuous records inventories;
- Creates purging/disposition lists and carries out disposition of approved records;
- Sub Registrar.

RECORDS MANAGEMENT ASSISTANT

Ted Bruns

- Works on project to research, organize, link and scan all Building Department history records;
- Fills record requests for Building Department files and other departments, performs property searches;
- Re-files returned records and interfiles new incoming documents;
- Performs data entry of items into Govern, Impact and Records Management software;
- Tallies statistics of all FOIL requests.

CLERK TYPIST

Ted Salmon

- Working on project to organize, research, purge and scan all Land Management Records including Conservation, Planning and ZBA;
- Fills and refills all record requests for ZBA, Conservation and other LM files and performs data entry of incoming records into database;
- Scans oversized documents from all departments (plans, surveys, etc);
- Works on condensing and inter filing projects with records from various departments;
- Helps with organization of boxes in records room and shreds documents approved for disposal.

DATA ENTRY OPERATOR

Alexander Allen

- Input data into the records management database
- Verifies correctness of entered data; detects and deletes errors and re-enters correct data
- Operates scanner in conjunction with personal computer to enter and save information.
- Help with the organization of the records by labeling and bar coding each file
- Interfile new building department documents
- Input data for state and town licenses/permits.
- Answer/direct phone calls

HISTORIAN/ARCHIVES PART-TIME STAFF

HISTORIAN

Julie Greene

- Oversees the safekeeping of archival documents and materials;
- Appraises condition of permanent records and historically valuable documents and makes recommendations to the Town Clerk;
- Participates in research activities, upon request, based on archival materials.
- Coordinates preservation and conservation projects;
- Does related work on special projects, displays, etc.;
- Prepares and maintains a comprehensive list of landmark buildings,
- Serves on Historic Burial Ground Committee;
- Serves as an ex-officio member of Historic Landmarks Board.

ARCHIVES ASSISTANT

Christopher Robinson

- Prepares reference aids such as indexing and guides for historic collection;
- Manages inventory organization and updating of information into Past Perfect software;
- Assists historian with ongoing archive projects as needed.

HISTORIC PROJECTS

Julian Shapiro

- Photographs delicate historic maps, records, deeds, and documents for on-going preservation project;
- Creates electronic images from photos with software for reproduction purposes and for offsite security storage;
- Indexes images, as they are created, to facilitate retrieval and future access.

Department Summary

Department: Town Clerk

Budget Year: 2018
Division: Town Clerk
Tax District: Full Town

Cost Center #: 1410
Manager: Sundy Schermeyer

NOTES:

Departmental Mission & Responsibilities:

The Office of the Town Clerk's mission is to improve access to government information, expedite application processes and find ways to further upgrade the office to be more effective and more efficient in our service delivery while reducing resources required to accomplish those goals.

The Town Clerk serves as the Secretary to the Town Board, Records Management Officer, Registrar of Vital Statistics, NYS Licensing Agent and Marriage Officer for the Town of Southampton. In addition the Town Clerk manages the Town's Historic Division and serves as Liaison to the Historic Burying Ground Committee.

Department Summary

Department: Town Clerk

Budget Year: 2018
Division: Town Clerk
Tax District: Full Town

Cost Center #: 1410
Manager: Sundy Schermeyer

NOTES:

Workload:

The Office of the Town Clerk is responsible for accomplishing the following:

1. Preparing the Town Board agenda, attending and taking official minutes at all Town Board meetings.
2. Maintaining the content of the Town Clerk Portal that allows interested parties to access information about Town Board meetings, agendas and adopted legislation.
3. Acting as custodian of all Town Records, as Records Management Officer, coordinating procedures for retention and maintenance of inactive records.
4. Administering a Town wide bid process; coordinate associated legal ads, track acceptance and release of maintenance and performance bonds.
5. Filing Town budgets, annual financial reports, school, ambulance and fire district budgets.
6. Processing claims, notices of defect, petitions, law suits, and change of zone/planned development district applications.
7. Maintaining originals for all Town contracts, leases, agreements and mortgages.
8. Coordinating Freedom of Information requests received in Town Clerk's Office.
9. Coordinating inter-municipal required filings and liquor license renewals.
10. Overseeing oaths of office and acceptance of all financial disclosures.

Annually, the Town Clerk's Office administers and processes Town Board meetings; Regular meetings, Special meetings and Hampton Bays Water District meetings and conducts bid openings, in addition to filing several local laws of adopted legislation with New York State.

Thousands of transactions are processed annually including but not limited to vital records, special events, peddlers, accessibility and long term parking permits, notaries, marriage, livery, taxi, games of chance, hunting, fishing and dog licenses.

Department Summary

Department: Town Clerk

Budget Year: 2018
Division: Town Clerk
Tax District: Full Town

Cost Center #: 1410
Manager: Sundy Schermeyer

Goals & Objectives:

An ongoing objective of the Town Clerk is to increase public access to government information. Using the Town website to make information that is of public interest readily available continues to be a priority.

Continue upgrading the online bid packet and request for proposal system implemented by the Town Clerk's Office in cooperation with Information Technology to increase functionality to better serve the public and internal departments.

Upgrade Town Clerk software to expedite licensing initiatives.

Ensure smooth departmental transition of expansion from two to three Town Code books to accommodate inclusion of land management overlay districts.

Implement next phase of new Records Management Software to improve response turnaround of internal records retrieval and public records access.

Legal Authority:

The State mandate and/or Town Law, Section 30 establishing Town Clerk's Office.

NOTES:

2018 Town Clerk Fee Schedule

Fee Schedule	2017 Fee Schedule	2018 Fee Schedule	Proposed Increase
Special Event & Parade Application Fees (§283-5):			
For parades and 1 day events with less than	250 people: \$50.00 per event day; \$25.00 per set up day	250 people: \$50.00 per event day; \$25.00 per set up day	
For events occurring over more than one day and/or events with	250 - 500 people: \$150.00 per event day; \$75.00 per set up day	250 - 500 people: \$150.00 per event day; \$75.00 per set up day	
For events occurring over more than one day and/or events with	500 - 1000 people: \$300.00 per event day; \$150.00 per set up day	500 - 1000 people: \$300.00 per event day; \$150.00 per set up day	
For events occurring over more than one day and/or events with	1000 – 3000 people: \$500.00 per event day; \$250.00 per set up day	1000 – 3000 people: \$500.00 per event day; \$250.00 per set up day	
For events occurring over more than one day and/or events with more than	3000 people: \$1000.00 per event day; \$500.00 per set up day	3000 people: \$1000.00 per event day; \$500.00 per set up day	
Special Events held on parcels with PDD designation			
For parades and 1 day events with less than	250 people: \$50.00 per event day; \$25.00 per set up day	250 people: \$50.00 per event day; \$25.00 per set up day	
For events occurring over more than one day and/or events with	250 - 500 people: \$100.00 per event day; \$50.00 per set up day	250 - 500 people: \$100.00 per event day; \$50.00 per set up day	
For events occurring over more than one day and/or events with more than	500 people: \$200.00 per event day; \$100.00 per set up day	500 people: \$200.00 per event day; \$100.00 per set up day	
Fee for amendment to application (§283-8):			
Any amendment to the application for a parade or Special Event permit will be subject to an amendment fee of 25% of the applicable application fee. Amendments may include changes to the location, route, parking plan, number of people expected, etc. Amendments to Incident Action Plans or Parking Plans at the request of the Town are not considered amendments to the application.			
Late Application Fee (§283-5):			
Special Event & Parade Late Application Fee:	\$10/per day beyond the submission deadline in §283-2B.	\$10/per day beyond the submission deadline in §283-2B.	
	\$20/per day. If more than 60 days late and application is accepted	\$20/per day. If more than 60 days late and application is accepted	

NOTES:

2018 Town Clerk Fee Schedule

Fee Schedule	2017 Fee Schedule	2018 Fee Schedule	Proposed Increase
Liability Insurance (§283-3A):			
Pursuant to §283-3A, the applicant and/or property owner shall furnish the Town with a comprehensive liability insurance policy, naming the Town as an additional insured, in the amount of the Town's self-insured retention, which is currently \$1,000,000.00 General Aggregate and Each Occurrence. Also pursuant to §283-3A, if serving alcohol at an event, Liquor Liability Insurance Policy naming the Town as an additional insured in the amount of the \$1,000,000.00 General Aggregate and Each Occurrence, will also be required.			
Appeal Fee (§283-9B):			
Appeal before Public Safety Commission:	\$150/per application	\$150/per application	
Cost Reimbursement (§283-3B):			
Chapter 283 allows for cost reimbursement to the Town for all necessary staffing at an event or parade. Applicants will be billed at the highest going rate and highest overtime rate for any Police Officer, Traffic Control Officer, Traffic Control Specialist, Police Officer, Captain, Detective, Fire Marshal, Code Enforcement Officer, or Highway Department employee used at the event or parade. Also, applicants will be billed a 28% surcharge to reflect salary contributions towards FICA, Medicare, Workers Compensation, and retirement.			

NOTES:

2018 Town Clerk Fee Schedule

Fee Schedule	2017 Fee Schedule	2018 Fee Schedule	Proposed Increase
Filming Permit Application Fees (§162-5):			
For films involving less than 25 people:		\$250.00 non-refundable application fee plus additional \$250.00 per day of filming.	
For films occurring over more than one day and/or films involving 26-100 people:		\$250.00 non-refundable application fee and additional \$500.00 fee per day of filming.	
For films occurring over more than one day and/or films involving 100-200 people:		\$250.00 non-refundable application fee and additional \$1000.00 fee per day of filming.	
For films occurring over more than one day and/or films involving more than 200 people:		\$250.00 non-refundable application fee and additional \$1500.00 fee per day of filming	
Fee for amendment to application (§162-6):			
Any amendment to the application for a Filming permit will be subject to an amendment fee of 25% of the applicable application fee. Amendments may include changes to the location, parking plan, number of people expected, etc. Amendments at the request of the Town are not considered amendments to the application.			
Late Application Fee (§162-5):			
Filming Late Application Fee:		\$50/per day beyond the submission deadline in §162-2B.	
Liability Insurance (§162-3A):			
Pursuant to §162-3A, the applicant and/or property owner shall furnish the Town with a comprehensive liability insurance policy, naming the Town as an additional insured, in the amount of the Town's self-insured retention, which is currently \$2,000,000.00 General Aggregate/ \$1,000,000 Each Occurrence.			
Appeal Fee (§162-7):			
Appeal before Public Safety Commission:		\$150/per application	
Cost Reimbursement (§162-3B):			
Chapter 162 allows for cost reimbursement to the Town for all necessary staffing during filming activity. Applicants will be billed at the highest going rate and highest overtime rate for any Police Officer, Traffic Control Officer, Traffic Control Specialist, Police Officer, Captain, Detective, Fire Marshal, Code Enforcement Officer, or Highway Department employee used during filming. Also, applicants will be billed a 28% surcharge to reflect salary contributions towards FICA, Medicare, Workers Compensation, and retirement.			

NOTES:

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 1/1/18	Alloc. %
Town Clerk													
Town Clerk Summary													
Town Clerk - 1410													
Confidential Secretary	ADMINSUPPORT	53,060	0	5,637	58,697	1,318	4,537	8,155	841	14,850	73,547	2.3	100.0
Deputy Town Clerk	ADMINSUPPORT	90,871	4,000	5,637	100,508	1,318	7,769	13,964	1,419	24,469	124,977	27.7	100.0
Deputy Town Clerk	ADMINSUPPORT	79,593	3,902	0	83,495	27,346	6,457	11,606	1,231	46,640	130,135	18.8	100.0
Data Entry Operator	CSEA40HOUR - 7-1-2010 / CSEA40HOUR - 7-1-2010 - CSEA40HOUR - 7-1-2010 - B / Step 3	42,041	0	0	42,041	12,406	3,253	5,847	657	22,163	64,204	1.6	100.0
Senior Clerk Typist	CSEA40HOUR-NEW / CSEA40HOUR-NEW - C / Step 6	48,759	2,926	0	51,685	26,686	3,997	7,184	767	38,633	90,318	10.6	100.0
Town Clerk	ELECTOFFICIALS	111,427	4,000	3,000	118,427	27,346	8,357	16,460	1,717	53,880	172,307	15.9	100.0
Clerk Typist	PART-TIME	12,750	0	0	12,750	0	987	0	219	1,206	13,956		100.0
Clerk Typist	PART-TIME	12,750	0	0	12,750	0	987	0	219	1,206	13,956		100.0
Total Town Clerk - 1410		451,251	14,828	14,274	480,353	96,418	36,344	63,216	7,071	203,047	683,400		

NOTES:

Town of Southampton

2018 Tentative Budget

Town Clerk - 1410

Account Code	Description	2016 Adopted Budget	2016 Actual	2017 Adopted Budget	2017 Amended Budget	2017 Dec YTD Actual	2018 Requested Budget	2018 Tentative Budget	2018 Tentative/2017 Amended Difference	2018 Tentative/2017 Amended % of Change	2019 Requested Budget	2019 Tentative Budget	2019 Tentative/2018 Tentative Difference	2019 Tentative/2018 Tentative % of Change
Real Property Taxes:														
1001	Property Taxes	471,280	474,315	380,775	380,775	380,775	476,789	465,950	85,176	22.37%	470,563	524,687	58,736	12.61%
	Total Real Property Taxes	471,280	474,315	380,775	380,775	380,775	476,789	465,950	85,176	22.37%	470,563	524,687	58,736	12.61%
Other Revenue:														
1255	Town Clerk Fees	105,000	150,905	105,000	105,000	129,261	150,000	150,000	45,000	42.86%	105,000	105,000	(45,000)	(30.00%)
2544	Dog Licenses	9,000	9,927	9,000	9,000	6,069	9,000	9,000	0	0.00%	10,000	10,000	1,000	11.11%
2551	Taxi Permits	75,000	200,555	200,000	200,000	90,575	85,000	85,000	(115,000)	(57.50%)	150,000	85,000	0	0.00%
2554	LT Parking Permits	13,000	14,764	13,000	13,000	9,775	13,000	13,000	0	0.00%	13,000	13,000	0	0.00%
	Total Other Revenue	202,000	376,151	327,000	327,000	235,679	257,000	257,000	(70,000)	(21.41%)	278,000	213,000	(44,000)	(17.12%)
	Total Revenue	673,280	850,466	707,775	707,775	616,454	733,789	722,950	15,176	2.14%	748,563	737,687	14,736	2.04%
Salaries:														
6100	Salaries	407,378	405,231	411,741	411,741	291,564	425,751	425,751	(14,011)	(3.40%)	434,886	434,886	(9,134)	(2.15%)
6105	Part Time Salaries	22,000	20,166	25,500	25,500	15,303	25,500	25,500	0	0.00%	26,010	26,010	(510)	(2.00%)
6110	Longevity	1,875	1,869	14,684	14,684	0	14,828	14,828	(144)	(0.98%)	14,886	14,886	(59)	(0.39%)
6113	Other Pay	3,000	3,000	3,000	3,000	2,125	3,000	3,000	0	0.00%	3,000	3,000	0	0.00%
6127	Cash in Lieu of Health Benefits	4,000	8,364	10,200	10,200	5,752	11,274	11,274	(1,074)	(10.53%)	11,274	11,274	0	0.00%
	Total Salaries	438,253	438,629	465,125	465,125	314,745	480,353	480,353	(15,228)	(3.27%)	490,056	490,056	(9,703)	(2.02%)
Employee Benefits - Current:														
6810	Employee Retirement - Active	69,514	64,814	62,207	62,207	42,526	65,055	63,216	(1,009)	(1.62%)	66,370	64,494	(1,278)	(2.02%)
6830	FICA Tax Expenditure	33,322	33,035	34,997	34,997	23,664	36,344	36,344	(1,347)	(3.85%)	36,955	36,955	(611)	(1.68%)
6835	MTA Tax	1,490	1,453	1,581	1,581	992	1,651	1,651	(69)	(4.39%)	1,684	1,684	(33)	(2.02%)

Town of Southampton

2018 Tentative Budget

Town Clerk - 1410

Account Code	Description	2016 Adopted Budget	2016 Actual	2017 Adopted Budget	2017 Amended Budget	2017 Dec YTD Actual	2018 Requested Budget	2018 Tentative Budget	2018 Tentative/2017 Amended Difference	2018 Tentative/2017 Amended % of Change	2019 Requested Budget	2019 Tentative Budget	2019 Tentative/2018 Tentative Difference	2019 Tentative/2018 Tentative % of Change
6840	Worker's Compensation	1,718	1,835	4,882	4,882	3,326	5,189	5,189	(308)	(6.30%)	5,300	5,300	(111)	(2.14%)
6860	Medical Insurance - Active Employees	73,092	67,667	79,392	79,392	55,573	88,512	88,512	(9,120)	(11.49%)	88,512	88,512	0	0.00%
6865	Dental & Optical	7,811	5,937	7,811	7,811	4,537	7,906	7,906	(94)	(1.21%)	7,906	7,906	0	0.00%
6875	Disability	230	164	230	230	89	230	230	0	0.00%	230	230	0	0.00%
Total Employee Benefits - Current		187,177	174,904	191,100	191,100	130,707	204,886	203,047	(11,947)	(6.25%)	206,957	205,081	(2,034)	(1.00%)
Total Employee Costs		625,430	613,533	656,225	656,225	445,451	685,239	683,400	(27,176)	(4.14%)	697,013	695,137	(11,736)	(1.72%)
Contractual:														
6401	Contracts	0	0	0	0	0	0	0	0	0.00%	0	0	0	0.00%
6403	Gasoline	600	327	600	600	253	600	600	0	0.00%	600	600	0	0.00%
6406	Repair Equipment	300	0	300	300	0	300	300	0	0.00%	300	300	0	0.00%
6411	Printing and Stationery	6,400	7,996	10,000	10,000	3,115	7,000	7,000	3,000	30.00%	10,000	10,000	(3,000)	(42.86%)
6412	Publications	15,500	7,433	15,500	15,500	5,772	15,500	10,000	5,500	35.48%	15,500	10,000	0	0.00%
6416	Travel, Dues and Related	2,050	2,187	2,400	2,400	2,039	2,400	2,400	0	0.00%	2,400	2,400	0	0.00%
6420	Other	0	321	250	250	47	250	250	0	0.00%	250	250	0	0.00%
6421	Legal Notices	12,000	7,404	12,000	12,000	5,454	12,000	12,000	0	0.00%	12,000	12,000	0	0.00%
6425	Office Supplies	1,500	1,769	1,500	1,500	1,192	1,500	1,500	0	0.00%	1,500	1,500	0	0.00%
6451	Document Restoration	4,500	4,500	4,500	4,500	0	4,500	1,000	3,500	77.78%	4,500	1,000	0	0.00%
6477	Copier Leases	5,000	2,034	4,500	4,500	1,425	4,500	4,500	0	0.00%	4,500	4,500	0	0.00%
Total Contractual		47,850	33,972	51,550	51,550	19,298	48,550	39,550	12,000	23.28%	51,550	42,550	(3,000)	(7.59%)
Total Expenditures		673,280	647,505	707,775	707,775	464,750	733,789	722,950	(15,176)	(2.14%)	748,563	737,687	(14,736)	(2.04%)

Town of Southampton

2018 Tentative Budget

Town Clerk - 1410

Account Code	Description	2016 Adopted Budget	2016 Actual	2017 Adopted Budget	2017 Amended Budget	2017 Dec YTD Actual	2018 Requested Budget	2018 Tentative Budget	2018 Tentative/2017 Amended Difference	2018 Tentative/2017 Amended % of Change	2019 Requested Budget	2019 Tentative Budget	2019 Tentative/2018 Difference	2019 Tentative/2018 % of Change
	Net Surplus (Deficit)	0	202,961	0	0	151,704	0	0			0	0		
	Net Surplus (Deficit)	0	202,961	0	0	151,704	0	0			0	0		

Department Summary

Department: Records Management

Budget Year: 2018
Division: Town Clerk
Tax District: Full Town

Cost Center #: 1460
Manager: Sundy Schermeyer

NOTES:

Departmental Mission & Responsibilities:

By law, the Town Clerk serves as the Records Management Officer overseeing the archived records of over thirty plus Town Departments and Divisions. The Records Management Division maintains a complete record inventory of all archival files, takes measures to preserve historical records while instituting a professional, consistent records management program.

Records Management is also responsible for the following:

1. Development of policies and procedures for classifying, indexing and filing archives to provide the Town with an organized, effective records management program.
2. Providing training to Records Access Officers to ensure the policies and procedures are manageable in each department and identifying any special circumstances or individual department needs.
3. Identifying and disposing of records that have reached the end of their retention period according to the NYS MU-1 schedule.

Workload:

The Town Clerk is responsible for the coordination and oversight of the implementation of both a paper and electronic records management program. The Records Management Division located in the Hampton Bays Community Center serves as the Town's depository for archived records.

The Records Management Office currently serves as an Annex to the Town Clerk's main office located in Southampton. Records Management is responsible for performing the following tasks:

1. Retrieval and daily transport of internal Town department records requests and for archived records from Records Center to Southampton Town Hall.
2. Maintain database in the Records Management software system to track the movement of records throughout the Town to ensure timely access to archived records.
3. The office serves as an Annex to the Town Clerk's Main Office. It is open two days a week to provide services to the western section of the Town which includes issuing licenses and permits. It also serves as an intake office for those wanting to do Town business but are unable to travel to Southampton.

Department Summary

Department: Records Management

Budget Year: 2018

Division: Town Clerk

Tax District: Full Town

Cost Center #: 1460

Manager: Sundy Schermeyer

Goals & Objectives:

1. Continue the implementation of the Electronic Document Management System (EDMS) to identify departmental records that are not currently maintained in an organized easily locatable format. The EDMS allows departments to categorize, index, identify originals from duplicates, assign retention schedules and improve access. The electronic records need to follow the same retention schedule as the paper records that the Town maintains in its records management center and this EDMS system assists the Town in accomplishing that goal.
2. Continue digitization of the Land Management Planning records to incorporate those records into the GIS/Govern software system increasing internal and public access of this record series.
3. Continue the implementation of the new Records Management Software which includes the complete modernization of records intake, retrieval and dissemination. The new software has enabled the Records Management Division of the Town Clerk's Office to pioneer a new process of utilizing a bar coding system for all Town records that are submitted to the Division.
4. Continue digitization of oversized archive maps to increase access and free up valuable records storage space.

Legal Authority:

Records Management was established in the Town Clerk's Office, per Resolution adopted June 26, 1993.

NOTES:

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 1/1/18	Alloc. %
Town Clerk													
Town Clerk Summary													
Records Management - 1460													
Administrative Assistant	CSEA40HOUR - 7-1-2010 / CSEA40HOUR - 7-1-2010 - F / Step 8	59,974	0	0	59,974	26,686	4,641	8,341	925	40,592	100,566	3.9	100.0
Data Entry Operator	CSEA40HOUR - 7-1-2010 / CSEA40HOUR - 7-1-2010 - CSEA40HOUR - 7-1-2010 - B / Step 2	41,147	0	5,637	46,784	1,318	3,615	6,498	663	12,093	58,877	0.8	100.0
Records Management Assistant	CSEA40HOUR - 7-1-2010 / CSEA40HOUR - 7-1-2010 - C / Step 3	45,598	0	0	45,598	12,406	3,528	6,342	710	22,986	68,584	3.0	100.0
Total Records Management - 1460		146,719	0	5,637	152,356	40,409	11,784	21,181	2,297	75,672	228,028		

NOTES:

Town of Southampton
2018 Tentative Budget
Records Management - 1460

Account Code	Description	2016 Adopted Budget	2016 Actual	2017 Adopted Budget	2017 Amended Budget	2017 Dec YTD Actual	2018 Requested Budget	2018 Tentative Budget	2018 Tentative/2017 Amended Difference	2018 Tentative/2017 Amended % of Change	2019 Requested Budget	2019 Tentative Budget	2019 Tentative/2018 Difference	2019 Tentative/2018 % of Change
	Contractual:													
6401	Contracts	828	350	828	828	0	828	828	0	0.00%	828	828	0	0.00%
6425	Office Supplies	800	790	850	850	520	850	850	0	0.00%	850	850	0	0.00%
6426	Supplies - Other	600	554	600	600	375	600	600	0	0.00%	600	600	0	0.00%
	Total Contractual	2,228	1,695	2,278	2,278	895	2,278	2,278	0	0.00%	2,278	2,278	0	0.00%
	Total Expenditures	171,511	153,848	165,701	165,129	105,368	230,922	230,306	(65,176)	(39.47%)	236,117	235,484	(5,178)	(2.25%)
	Net Surplus (Deficit)	0	17,663	0	0	59,761	0	0			0	0		
	Net Surplus (Deficit)	0	17,663	0	0	59,761	0	0			0	0		

Town of Southampton

2018 Tentative Budget

Records Management - 1460

Account Code	Description	2016 Adopted Budget	2016 Actual	2017 Adopted Budget	2017 Amended Budget	2017 Dec YTD Actual	2018 Requested Budget	2018 Tentative Budget	2018 Tentative/2017 Amended Difference	2018 Tentative/2017 Amended % of Change	2019 Requested Budget	2019 Tentative Budget	2019 Tentative/2018 Difference	2019 Tentative/2018 % of Change
Real Property Taxes:														
1001	Property Taxes	171,511	171,511	165,701	165,129	165,129	230,922	230,306	65,176	39.47%	236,117	235,484	5,178	2.25%
	Total Real Property Taxes	171,511	171,511	165,701	165,129	165,129	230,922	230,306	65,176	39.47%	236,117	235,484	5,178	2.25%
	Total Revenue	171,511	171,511	165,701	165,129	165,129	230,922	230,306	65,176	39.47%	236,117	235,484	5,178	2.25%
Salaries:														
6100	Salaries	101,841	96,560	102,444	101,872	69,056	146,719	146,719	(44,847)	(44.02%)	150,924	150,924	(4,205)	(2.87%)
6110	Longevity	0	0	1,145	1,145	0	0	0	1,145	100.00%	0	0	0	0.00%
6127	Cash in Lieu of Health Benefits	0	679	0	810	810	5,637	5,637	(4,827)	(595.93%)	5,637	5,637	0	0.00%
	Total Salaries	101,841	97,239	103,589	103,827	69,866	152,356	152,356	(48,529)	(46.74%)	156,561	156,561	(4,205)	(2.76%)
Employee Benefits - Current:														
6810	Employee Retirement - Active	17,007	15,858	14,658	14,658	10,020	21,797	21,181	(6,523)	(44.50%)	22,399	21,766	(585)	(2.76%)
6830	FICA Tax Expenditure	7,791	7,122	7,925	7,925	5,248	11,784	11,784	(3,860)	(48.71%)	12,110	12,110	(325)	(2.76%)
6835	MTA Tax	346	317	352	352	220	524	524	(172)	(48.71%)	538	538	(14)	(2.76%)
6840	Worker's Compensation	407	435	1,178	1,178	803	1,687	1,687	(509)	(43.22%)	1,736	1,736	(48)	(2.87%)
6860	Medical Insurance - Active Employees	39,228	28,969	33,060	32,250	16,820	36,456	36,456	(4,206)	(13.04%)	36,456	36,456	0	0.00%
6865	Dental & Optical	2,604	2,167	2,604	2,604	1,495	3,953	3,953	(1,349)	(51.81%)	3,953	3,953	0	0.00%
6875	Disability	58	46	58	58	4	86	86	(29)	(50.00%)	86	86	0	0.00%
	Total Employee Benefits - Current	67,441	54,914	59,834	59,024	34,608	76,288	75,672	(16,647)	(28.20%)	77,278	76,645	(973)	(1.29%)
	Total Employee Costs	169,283	152,153	163,423	162,851	104,474	228,644	228,028	(65,176)	(40.02%)	233,839	233,206	(5,178)	(2.27%)

Department Summary

Department: Archives & Historian

Budget Year: 2018
Division: Town Clerk
Tax District: Full Town

Cost Center #: 7520
Manager: Sundy Schermeyer

NOTES:

Departmental Mission & Responsibilities:

The mission of the Historic Division of the Town Clerk's Office is to preserve and protect the Town's historic holdings from elements that compromise their integrity, including the passage of time, while taking initiatives to improve the public's access to the historic collection. The records contain a significant amount of information that is of great interest to researchers, historic organizations and government agencies. It is our responsibility to provide access to those that seek this information and in order to do that effectively, we need to continue the digitization of the historic collection to facilitate research while preserving and protecting the original documents.

Time is of the essence when it comes to the preservation of some of the more fragile holdings. The projects in progress, in the Historic Division, have proven invaluable for accomplishing this goal and will be continued to completion.

Workload:

The Historic Division maintains the Town's historic holdings, which is comprised of a collection of archives, records and artifacts. The inventory and appraisal of the items in the collection is used to determine the needs and appropriate methods for their conservation and preservation and is an ongoing project of utmost importance.

The Historic Division has been working on several important projects to catalog and link information that will improve access to facilitate research and requests for genealogy searches. With limited resources and staff, it is essential to continue efforts to organize the information in the collection to make it less time consuming to respond to requests.

The Historic Division has been working on an ongoing project of photographing the most fragile documents in our possession, which accomplishes many goals, including the preservation of the Town's history in the event of a catastrophe, electronic access and ability to create reproductions that can be handled by the public.

The Town Historic division will continue to collaborate with the historic community and town school districts to present educational opportunities whenever possible.

Department Summary

Department: Archives & Historian

Budget Year: 2018
Division: Town Clerk
Tax District: Full Town

Cost Center #: 7520
Manager: Sundy Schermeyer

NOTES:

Goals & Objectives:

To complete the digitization of the Town's historic holdings to preserve and protect them in order to ensure that many generations to come will be able to enjoy the heritage and historic treasures of the Town of Southampton. The entire collection of the Town's record books has now been posted on the Town's website. The majority of the Town's records are transcribed in these record books and the completion of this project has significantly increased the public's ability to do their own research, including genealogy searches.

Provide necessary support to the development of the Town's Cemetery website that has become a resource and destination for those doing genealogical research. The website was developed by the inspiration that came from the Historic Burying Ground Committee members, who donated their time and energy to create a unique website that has provided an in depth look at the Town's historic cemeteries and the vital records that are contained on our historic headstones.

Work closely as liaison to Historic Burying Grounds Committee, expand website, provide resources and guidance to acquire grant funding, oversee restoration and preservation projects for the Town's ten historic cemeteries, and provide educational opportunities.

Legal Authority:

Town Law.

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 1/1/18	Alloc. %
Town Clerk													
Town Clerk Summary													
Archives & Historian - 7520													
Secretarial Assistant	PART-TIME	12,000	0	0	12,000	0	929	0	208	1,137	13,137		100.0
Town Historian	PART-TIME	30,000	0	0	30,000	0	2,386	0	1,320	3,705	33,705		100.0
Total Archives & Historian - 7520		42,000	0	0	42,000	0	3,314	0	1,528	4,842	46,842		

NOTES:

Town of Southampton

2018 Tentative Budget

Archives & Historian - 7520

Account Code	Description	2016 Adopted Budget	2016 Actual	2017 Adopted Budget	2017 Amended Budget	2017 Dec YTD Actual	2018 Requested Budget	2018 Tentative Budget	2018 Tentative/2017 Amended Difference	2018 Tentative/2017 Amended % of Change	2019 Requested Budget	2019 Tentative Budget	2019 Tentative/2018 Tentative Difference	2019 Tentative/2018 Tentative % of Change
Real Property Taxes:														
1001	Property Taxes	50,460	50,460	50,936	50,936	50,936	51,042	51,042	106	0.21%	51,978	51,978	936	1.83%
	Total Real Property Taxes	50,460	50,460	50,936	50,936	50,936	51,042	51,042	106	0.21%	51,978	51,978	936	1.83%
	Total Revenue	50,460	50,460	50,936	50,936	50,936	51,042	51,042	106	0.21%	51,978	51,978	936	1.83%
Salaries:														
6105	Part Time Salaries	42,000	28,854	42,000	42,000	17,699	42,000	42,000	0	0.00%	42,840	42,840	(840)	(2.00%)
	Total Salaries	42,000	28,854	42,000	42,000	17,699	42,000	42,000	0	0.00%	42,840	42,840	(840)	(2.00%)
Employee Benefits - Current:														
6830	FICA Tax Expenditure	3,213	2,207	3,213	3,213	1,354	3,314	3,314	(101)	(3.15%)	3,381	3,381	(66)	(2.00%)
6835	MTA Tax	143	98	143	143	57	147	147	(5)	(3.15%)	150	150	(3)	(2.00%)
6840	Worker's Compensation	1,047	1,118	1,323	1,323	901	1,323	1,323	0	0.00%	1,349	1,349	(26)	(2.00%)
6875	Disability	58	57	58	58	35	58	58	0	0.00%	58	58	0	0.00%
	Total Employee Benefits - Current	4,460	3,480	4,736	4,736	2,348	4,842	4,842	(106)	(2.23%)	4,938	4,938	(96)	(1.98%)
	Total Employee Costs	46,460	32,334	46,736	46,736	20,047	46,842	46,842	(106)	(0.23%)	47,778	47,778	(936)	(2.00%)
Contractual:														
6401	Contracts	3,000	2,990	3,000	3,000	1,409	3,000	3,000	0	0.00%	3,000	3,000	0	0.00%
6416	Travel, Dues and Related	500	440	600	600	271	600	600	0	0.00%	600	600	0	0.00%

Town of Southampton
2018 Tentative Budget
 Archives & Historian - 7520

Account Code	Description	2016 Adopted Budget	2016 Actual	2017 Adopted Budget	2017 Amended Budget	2017 Dec YTD Actual	2018 Requested Budget	2018 Tentative Budget	2018 Tentative/2017 Amended Difference	2018 Tentative/2017 Amended % of Change	2019 Requested Budget	2019 Tentative Budget	2019 Tentative/2018 Tentative Difference	2019 Tentative/2018 Tentative % of Change
6425	Office Supplies	500	485	600	600	586	600	600	0	0.00%	600	600	0	0.00%
	Total Contractual	4,000	3,915	4,200	4,200	2,266	4,200	4,200	0	0.00%	4,200	4,200	0	0.00%
	Total Expenditures	50,460	36,249	50,936	50,936	22,313	51,042	51,042	(106)	(0.21%)	51,978	51,978	(936)	(1.83%)
	Net Surplus (Deficit)	0	14,211	0	0	28,624	0	0			0	0		
	Net Surplus (Deficit)	0	14,211	0	0	28,624	0	0			0	0		