

VILLAGE OF SHOREHAM
JOB DESCRIPTIONS FOR CERTAIN VILLAGE OFFICIALS AND EMPLOYEES
As of December 12, 2017

DEFINITIONS

- A. **garden element** — any bulletin board, fence, flagpole, gate, gazebo, lighting fixture, potted planting, signage, stairway, walkway, waste receptacles or other such things.
- B. **parkland** — any area specifically designated as parkland, such as that along the west side of the Village, or Major Hopkins Park, among others.
- C. **public place** — any place owned or controlled by the Village, including any road right-of-way.
- D. **road or road right-of-way** — any road right-of-way located in the Village.
- E. **Village hall area** — that area between and including the retaining wall running along the south side of the Village beach and that line being parallel with said retaining wall running through the south side of the main entry columns and gate.

GENERAL NOTES

- A. Any person hired by the Village to assist with general maintenance, as distinguished from contracts such as those for landscaping services, shall be available to assist any Village official in coordination with the Village Clerk.
- B. Any Village official charged with the responsibility of the hiring, scheduling or management of any Village employee shall not terminate any such employee, or make any significant changes in the terms of such hiring, scheduling or management, without written approval of the Village Board.
- C. It shall be the homeowner's responsibility to restore any disrupted utility service, in coordination with the utility involved.
- D. Any question concerning the intent of the responsibilities set forth herein (i.e., who is responsible for what) shall be addressed by the Village Board.
- E. Village officials shall only be permitted to expend funds for the performance of any work, or purchase of any item, contained in their budget, by first completing a work order or purchase order for same, as the case may be, and thereafter securing written approval of such expenditure from the Village Board (by minutes of any Village Board meeting, or otherwise), with the understanding

that any such expenditure shall only be made in accordance with the above and any duly executed contract or other document between the parties resulting from the administration of the Village's procurement policy attached as Appendix A. Notwithstanding the above, Village officials shall be permitted to expend up to \$500 toward the cost of any budgeted work or item in a given fiscal period, without Village Board approval, provided such expenditure qualifies as a non-capital operating expense under generally accepted accounting practice (e.g., expenses incurred for the purchase of supplies, repairs or other such non-capital operating expenses) and such expenditure does not exceed the approved budget amount. Any vendor owned by a Village official, whether fully owned or otherwise, shall not be permitted to perform any work for the Village, or sell any item to the Village, if such work or sale is awarded on a non-bid basis.

Ad Hoc and Standing Committees

As authorized by the Village Board, currently including the:

- (1) Aesthetics Committee (standing), charged with the responsibility of making aesthetic decisions related to facilities or installations in any public place, including furniture, fixtures and finishes of the Village hall, both interior and exterior, and garden elements;
- (2) Compliance Committee (standing), charged with the responsibility of overseeing Village matters as deemed necessary by said committee; and
- (3) Special Projects Committee (ad hoc to be dissolved as directed by the Village Board), charged with the responsibility of determining the scope of the road and drainage project, the Bridge project, and other projects as established by the Village Board, and overseeing the bidding process for same (see Appendix B for "Special Projects" to be handled by the Special Projects Committee and others as indicated).

<i>Beach Commissioner</i>	<ul style="list-style-type: none"> A. Hiring, scheduling and management of lifeguard personnel. B. Management of the beach storage facilities, except for the outside, fenced-in area at the northwest corner of the Village hall. C. Cleaning of the Village beach and maintenance of any equipment or structure related thereto, including: <ul style="list-style-type: none"> (1) anchors, buoys and ropes used to demarcate the bathing area; (2) beach barbeque grills and fire pits; (3) beach benches and tables; (4) beach recreation equipment; (5) beach rocks, including those flanking the end of the outflow pipe; (6) beach signs; (7) beach steps and walkways; (8) beach storage racks; (9) lifeguard equipment, including the lifeguard boat (if any), first-aid equipment and stand; (10) the raft; and (11) other such things.
<i>Board of Appeals</i>	As set forth in Article VII of Chapter 31 of the Village Code.
<i>Board of Ethics</i>	As set forth in Chapter 11 of the Village Code.
<i>Building Commissioner</i>	As set forth in Chapter 5 of the Village Code.
<i>Building Inspector</i>	As set forth in Chapter 5 of the Village Code.
<i>Coastal Erosion Management Officer</i>	As set forth in: Chapter 4 of the Village Code, solely as said chapter relates to the performance of work on the beach or bluff, and Chapter 6 of the Village Code.

<p><i>Code Enforcement Commissioner</i></p>	<p>Hiring, scheduling and management of code enforcement personnel and enforcement of Village codes, including enforcement of:</p> <ul style="list-style-type: none"> (1) Chapters 9, 12, 15, 17, 18, 21, 23A, 28 and 30 of the Village Code. (2) Chapter 4 of the Village Code solely as said chapter relates to anything therein, except for the performance of work on the beach or bluff.
<p><i>Design Review Board</i></p>	<p>As set forth in Chapter 8 of the Village Code.</p>
<p><i>Grounds Commissioner</i></p>	<p>Maintenance of facilities located in certain public places, including:</p> <ul style="list-style-type: none"> (1) garbage collection facilities for all public places, including the Village hall area; (2) garden elements, including same located on any road right-of-way, including road-identification signage and fencing; but not parking or traffic-control signage, or any fence enclosing any part of the sumps mentioned below; (3) irrigation systems, including those systems in the Village hall area, but not the tennis court irrigation system; (4) lights, except for those being the responsibility of the Recreation Commissioner and those in Village hall areas; (5) utilities serving Village facilities, including anything related thereto; and (6) the water fountain located at the tennis courts; <p>but not anything located in parkland, the Village hall area unless otherwise noted, or in the fenced-in area of the tennis courts, including the fence itself and retaining walls being part thereof.</p>

<i>Parks Commissioner</i>	<ul style="list-style-type: none"> A. Cleaning of parkland and maintenance of any garden element or other structure located therein, but not maintenance of any garden element located outside parkland; B. Periodic inspection of trees the trunks of which are located entirely or partially in any public place, including any Village road right-of-way, to determine if any such trees are diseased or constitute a dangerous condition, and if so, to have same removed. C. Maintenance, planting, relocation or removing of vegetation located, or to be located, in any public place, including that area located in the fenced-in area of the tennis courts or the Village hall area, but not maintenance of any drainage facilities located in any parkland. D. As otherwise set forth herein.
<i>Planning Board</i>	As set forth in Article VI of Chapter 31 of the Village Code.
<i>Public Safety & Emergency Preparedness Commissioner</i>	Enforcement of the Village’s Emergency Preparedness Plan and as otherwise set forth herein.
<i>Public Works Commissioner</i>	<ul style="list-style-type: none"> A. Maintenance, repair, replacement and installation of Village road surfaces, curbs and drainage facilities, including: <ul style="list-style-type: none"> (1) the physical structure of the sumps, fencing surrounding such sumps, and drainage pipes leading thereto, owned by the Village at Overhill Road and owned by the Town and Village at Circle Drive North; (2) road drainage basins and associated interconnecting piping; (3) sluiceways; (4) the Village beach ramp and outflow pipe; and (5) Village parking areas, including the sealing and striping of such areas.

- B. In coordination with the Town of Brookhaven, or as otherwise directed by the Village Board, clearing of:
 - (1) the surface of sumps so as to prevent accumulation of stormwater; and
 - (2) salt, sand and other debris from road surfaces.
- C. Cleaning of road drainage basins on a periodic basis in coordination with the Utility Maintenance Commissioner and Town of Brookhaven, or as otherwise directed by the Village Board.
- D. Maintenance of parking and traffic-control signage.
- E. Plowing and removing of snow on roads and parking areas, and salting and sanding of same, in coordination with the Village Board and Town of Brookhaven, or as otherwise directed by the Village Board.
- F. In coordination with the Parks Commissioner and Public Safety & Emergency Preparedness Commissioner, keeping road surfaces clear of fallen trees, and any other vegetation encroaching on any such surface, so as to allow for the safe use of same.
- G. In coordination with the Parks Commissioner, removing of any tree, the trunk of which is located entirely or partially on any un-surfaced portion of any road right-of-way, if such tree is diseased or constitutes a dangerous condition.
- H. Coordinating with utilities serving the Village, as required, to accommodate any work required by any utility, whether to be performed along or on any road or other public place.
- I. Processing street-work permit applications as set forth in Chapter 26 of the Village Code.
- J. As otherwise set forth herein.

Recreation Commissioner

Maintenance, and management of the use, of any recreational equipment or facility located in any public place, including the following Village facilities and any equipment or structure related thereto:

- (1) baseball field, including the backstop, foul poles, bases, nets, telephone pole railing running along the east side of Woodville Road and other such equipment and structures;

- (2) basketball court, including the backboards, benches, nets, lights, playing surface and other such equipment and structures;
 - (3) playground equipment, benches and tables, including the maintenance of the border and mulch for said playground equipment;
 - (4) recreational equipment or facility located in the Village hall area or in any other public place not specifically referenced herein;
 - (5) platform tennis courts, including the heating system, lights, nets, warming hut and other such equipment and structures; and
 - (6) tennis courts, including the backboard, fence surrounding said courts and retaining walls being part thereof, nets, playing surface, referee chairs, seating areas, sheds, umbrellas and other such equipment or structure, and the irrigation system, and any garden element located in the fenced-in area of said courts;
- but not any recreational equipment or facility related to the use of the beach.

Steward

As set forth in the Duties of the Village Steward (with attachments), attached as Appendix C.

Stormwater Management Officers

As set forth in Chapter 14 and Chapter 26 of the Village Code.

Utility Maintenance Commissioner

- A. Clearing of stormwater drainage facilities, including:
 - (1) clearing of drainage piping leading to sumps;
 - (2) clearing of sluiceways; and
 - (3) internal clearing of all other drainage structures and interconnecting piping.
- B. In coordination with the Parks Commissioner:
 - (1) clearing of vegetation surrounding sumps, on the fencing surrounding sumps, or within the fenced-in area of sumps; and
 - (2) removing of vegetation interfering with any utility line.
- C. Coordinating with the Public Works Commissioner to allow said commissioner to effect periodic cleaning of road drainage basins.

<i>Village Clerk, et al</i>	As set forth in Appendix D.
<i>Village Hall Interior Design Commissioner</i>	In coordination with the Aesthetics Committee, all matters related to the design of the interior of the Village Hall.
<i>Village Hall Maintenance Commissioner</i>	All matters related to the Village hall area, including replacement of furniture in, and maintenance of, the Village hall, including general maintenance and repairs of, and improvements to, the building itself, including the outside, fenced-in area by the kitchen and the generator, the outside fenced-in area at the northwest corner of the building, the main entrance columns and gate, outbuildings, such as the storage shed and gazebo, lights, but not anything otherwise falling under the purview of any other Village official.

APPENDIX A

PROCUREMENT POLICY FOR THE INCORPORATED VILLAGE OF SHOREHAM

1. Every purchase to be made must be initially reviewed to determine whether it is a purchase contract or a public works contract. Once that determination is made, a good faith effort will be made to determine whether it is known or can reasonably be expected that the aggregate amount to be spent on the item of supply or service is not subject to competitive bidding, taking into account past purchases and the aggregate amount to be spent in a year. The following items are not subject to competitive bidding pursuant to Section 103 of the General Municipal Law: purchase contracts under \$20,000 and public works contracts under \$35,000; emergency purchases; certain municipal hospital purchases; goods purchased from agencies for the blind or severely handicapped; goods purchased from correctional institutions; purchases under State and County contracts; and surplus and second-hand purchases from another governmental entity.

The decision that a purchase is not subject to competitive bidding will be documented in writing by the individual making the purchase. This documentation may include written or verbal quotes from vendors, a memo from the purchaser indicating how the decision was arrived at, a copy of the contract indicating the source which makes the item or service exempt, a memo from the purchaser detailing the circumstances which led to an emergency purchase, or any other written documentation that is appropriate.

2. All goods and services will be secured by use of written requests for proposals, written quotations, verbal quotations, or any other method that assures that goods will be purchased at the lowest price and that favoritism will be avoided, except in the following circumstances: purchase contracts over \$20,000 and public works contracts over \$35,000; goods purchased from agencies for the blind or severely handicapped pursuant to Section 175-b of the State Finance Law; goods purchased from correctional institutions pursuant to Section 186 of the Correction Law; purchases under State contract pursuant to Section 104 of the General Municipal Law; purchases under County contracts pursuant to Section 103 (3) of the General Municipal Law; or purchases pursuant to subdivision 6 of this policy:

3. The following method of purchase will be used when required by this policy in order to achieve the highest savings:

<u>Estimated Amount of Purchase Contract</u>	<u>Method</u>
\$1,500 - 3,999	2 verbal quotations
\$4,000 - \$9,999	2 written/fax
\$10,000 - \$19,999	3 written/fax quotations or written request for proposals
\$20,000 and up	Public Bid
 <u>Estimated Amount of Public Works contract</u>	 <u>Method</u>
\$2,500 - 4,900	2 verbal quotations
\$5,000 - \$9,999	2 written/fax quotations
\$10,000 - \$34,999	3 written/fax quotations or written request for proposals
\$35,000 and up	Public Bid

A good faith effort shall be made to obtain the required number of proposals or quotations. If the purchaser is unable to obtain the required number of proposals or quotations, the purchaser will

document the attempt made at obtaining the proposals. In no event shall the failure to obtain the proposals be a bar to the procurement.

4. Documentation is required of each action taken in connection with each procurement.
5. Documentation and an explanation is required whenever a contract is awarded to other than the lowest responsible offeror. This documentation will include an explanation of how the award will achieve savings or how the offeror was not responsible. A determination that the offeror is not responsible shall be made by the purchaser and may not be challenged under any circumstances.
6. Pursuant to General Municipal Law Section 104-b(2) (f), the procurement policy may contain circumstances when, or types of procurements for which, in the sole discretion of the governing body, the solicitation of alternative proposals or quotations will not be in the best interest of the municipality. In the following circumstance it may not be in the best interests of the Incorporated Village of Shoreham to solicit quotations or document the basis for not accepting the lowest bid:

- a. Professional services or services requiring special or technical skill, training or expertise. The individual or company must be chosen based on accountability, reliability, responsibility, skill, education and training, judgment, integrity, and moral worth. These qualifications are not necessarily found in the individual or company that offers the lowest price and the nature of these services are such that they do not readily lend themselves to competitive procurement procedures.

In determining whether a service fits into this category, the Incorporated Village of Shoreham shall take into consideration the following guidelines; (a) whether the services are subject to State licensing of testing requirements; (b) whether substantial formal education or training is a necessary prerequisite to the performance of the services; and (c) whether the services require a personal relationship between the individual and municipal officials. Professional or technical services shall include but not be limited to the following: services of an attorney; services of a physician; technical services of an engineer or architect engaged to prepare plans, maps and estimates; securing insurance coverage and/or services of an insurance broker; services of a certified public accountant; investment management services; printing services involving extensive writing, editing or art work; management of municipally owned property; and computer software or programming services for customized programs, or services involved in substantial modification and customizing of pre-packaged software.

- b. Emergency purchases pursuant to Section 103(4) of the General Municipal Law. Due to the nature of this exception, these goods or services must be purchased immediately and a delay in order to seek alternate proposals may threaten the life, health, safety or welfare of the residents. This section does not preclude alternate proposals if time permits.

- c. Purchases of surplus and second-hand goods from any source. If alternate proposals are required, the Incorporated Village of Shoreham is precluded from purchasing surplus and second-hand goods at auctions or through specific advertised sources where the best prices are usually obtained. It is also difficult to try to compare prices of used goods and a lower price may indicate an older product.

- d. Goods or services under \$1,500. The time and documentation required to purchase through this policy may be more costly than the item itself and would therefore not be in the best interest of the taxpayer. In addition, it is not likely that such de minimis contracts would be awarded based on favoritism.

APPENDIX B

SPECIAL PROJECTS

- A. Consummation of use agreement with the resident immediately to the west of the Overhill sump: Brian Vail and Ed; matters related to said agreement prospectively to fall under the purview of the Village Board.
- B. “State Fund” work to be performed: Larry, Len, Brian Vail and Steve, with the scope of work being determined by Larry et al, subject to Village Board approval; maintenance/repair/replacement (“MRR”) of such type of work prospectively to fall under the purview of the Public Works Commissioner.
- C. “Bridge” work (if applicable): Brian Mahoney, Brian Vail and Ed; maintenance, repair and other matters related to the Bridge prospectively to fall under the purview of the Village Board.
- D. Traffic-control signage project: Larry and Ed; MRR of traffic-control signage prospectively to fall under the purview of the Public Works Commissioner.
- E. Street signage project: Brian Mahoney and Ed; MRR of street signage prospectively to fall under the purview of the Parks Commissioner.
- F. Parking lot lighting project: John Judy Buyar and Ed; MRR of parking lot lighting prospectively to fall under the purview of Village Hall Commissioner.
- G. Parkland maintenance project (east side of Village Hall east parking lot): Brian Mahoney and Ed; maintenance of parkland prospectively to fall under the purview of the Parks Commissioner.

APPENDIX C

Duties of the Village Steward

Revision 8/30/13

- (A) Village Hall, excluding events
 - a. Maintain the Hall and Village facilities and infrastructure in an orderly and organized fashion
 - b. Follow a work schedule and spending budget as agreed to with Supervisor
 - c. Answer phone, furnish information, notify appropriate officials as required
 - d. Supply information to interested parties regarding rentals, but active solicitation of interested parties is NOT a Village duty
 - e. Facility tours, oversight of event preparations, aftermath tasks
 - f. Arrange building access for scheduled work
 - g. Maintaining the Village Hall
 - i. Generally, follow a) above ii. Carry out listed work tasks (please see list, "Steward's Maintenance of Village Hall") iii. Carry out additional tasks as agreed to with Supervisor
 - iv. Order supplies (see list)
 - v. Schedule required maintenance work (see list)
- (B) Board Events: sponsored by Village Board or its appointee
 - a. Examples: Sunday brunch, Wednesday & Friday open house, July 4th
 - b. Prepare and cleanup as required, be present throughout event
 - c. Furnish food items as agreed, supply & cleanup any utensils used
 - d. Prepare coffee, hot water, etc.
 - e. Hire and supervise bus persons as needed
 - f. Collect, account for and remit any cash contributions to the Village Treasurer
- (C) Resident, Club and Preferred Caterer Events: sponsored by groups other than Village Board, all approved by Board
 - a. Primary duties: to protect the Village interests; to interact with the event's sponsor; to provide helpful advice regarding the use of the building and its supplies and equipment; to be present throughout the event; to enforce rules and regulations regarding the use of the building; to summon help (medical or security) if needed. Please see list, "Steward's Responsibilities Regarding an Event".
 - b. It is expected that the sponsor of the event will pay the Steward an appropriate fee for his/her time and help; for any work or services requested by the sponsor; that the Steward will be reimbursed for expenses that he/she might incur on behalf of the sponsor; that the

Steward's first responsibilities are to the Village; that his/her available time for the sponsor during the event is limited to that not required by Village duties.

- c. Specific duties:
 - i. Provide detailed information via the completed Rental Form to the Board regarding a proposed event. Request and obtain Board permission for event to proceed
 - ii. Ensure that rental fee has been paid before the beginning of the event
 - iii. Detailed interaction with the event's sponsor (a Village resident, Shoreham Country Club, or a Preferred Caterer)
 - iv. Interact with the food vendor (if required), band (if required), etc.
 - v. Oversee the event preparations and the cleanup post-event
 - vi. Determine need to retain funds from the posted bond after conclusion of the event

Attachment

Steward's Maintenance of Village Hall

Daily Check list

Set thermostats at 58 degrees through winter. Raise to 62 degrees during periods of bitter cold
Check sinks, toilets, urinals for running water. If unable to shut off, notify Village Hall commissioner immediately

Check that all windows, sliders, and doors are closed, latched and locked

Check that all appliances including the gas stove are OFF when not in use

Annually

All drapes cleaned

Lifeguard room cleaned and restocked

Arrange for professional kitchen cleaning if needed w/ Board approval

Biannually:

Clean out large basement storage room

Clean lower level kitchen, repair, replace items as needed

Change filter in ice machine

Clean tray holders

Clean out stage closet

Arrange for carpet shampooing as needed

Quarterly

Bleach tables
Clean trophy cases
Clean large equipment in kitchen
Clean pots and bakers rack
Inventory all dishes, glasses, silver, replace as needed
Clean out cage in Steward's office
Clean "rolling" carts
Defrost /clean ice machine
Clean out exterior kitchen enclosure/recyclables/crates/ carts
Replace oven liners
Clean bar glass shelves
Arrange for interior and exterior window washing as needed

Monthly

Clean door tracks
Clean and sort glasses (water, wine, champagne)
Sort silverware
Clean and organize shelves in bar area
Clean Steward's office
Clean front coat closet, dispose of extraneous and unclaimed items
Clean and put away mirrors and candles
Clean coffee urns and carafes
Clean and refill sugars, salts and peppers
Clean service trays and bus buckets
Clean tray stands

Weekly

Clean out ash tray pots
Haul garbage to dumpster
Clean kitchen if used
Clean upper level and lower level if used
Clean foyer
Clean outside pails
Police grounds

Wash, polish and refill all paper towel, toilet paper and soap dispensers as needed. Order any necessary supplies

After an Event

Arrange for general post event cleaning, including disinfecting restrooms, kitchen equipment and floors

Spot clean carpeting as needed

Complete any of the above needed after an event

Spot clean all interior glass and mirrors

Spot clean all areas such as door jams and light switches

Attachment

Steward's Responsibilities Regarding an Event

The rental of the catering facility in the Incorporated Village of Shoreham includes a Steward to supervise the event. His/her responsibilities are as follows:

- (1) Open the building 2 hours before the event begins for caterer's set up
- (2) Ensure proper use of kitchen equipment
- (3) Patrol grounds for improper use of facility
- (4) Service and maintain cleanliness of men's and ladies rooms
- (5) Resolve as best can, any problem with ac/heat, alarm and kitchen or bar equipment
- (6) Instruct catering staff on dosing responsibilities
- (7) Summon security if necessary

APPENDIX D

**DUTIES OF VILLAGE CLERK, DEPUTY CLERK,
TREASURER, VITAL STATISTICS OFFICER AND
RECORDS MANAGEMENT OFFICER**

Village Clerk

1. Maintain custody of Village books, records, papers, minutes and other public records (DEC, FEMA, OEM).
2. Publish and post legal notices as required, including those related to: bidding; tax assessments; laws and elections; the tax roll; and meetings of the Design Review Board, Planning Board and Zoning Board of Appeals.
3. Maintain and update the tax roll and ownership and addresses of properties.
4. Respond to Freedom of Information Requests (FOIL), with assistance from the Village Attorney when necessary.
5. Handle elections per local, State and Federal laws.
6. File enacted Village local laws with the State and maintain records of same.
7. Maintain oath-of-office records.
8. Maintain and assist in processing of contracts and inter-municipal agreements, including notarization of papers.
9. Create and mail tax bills and tax receipts.
10. Attend Village Board meetings (regular/special/executive) and prepare and maintain minutes thereof.
11. Attend meetings of the Design Review Board, Planning Board and Zoning Board of Appeals and prepare and maintain minutes thereof.
12. Issue to residents automobile parking stickers, gate access cards and guest passes.
13. Maintain contact information for residents.
14. Maintain email addresses for residents.
15. Interact with Code Enforcement Officers, providing them with updated resident information, including a resident name and address list and, to the extent known by the Village Clerk, the name of those who might need medical assistance, those who are elderly, those who are living alone and houses that may be vacant.
16. Notify Village Prosecutors of Justice Court dates.
17. Maintain Village employment applications.

18. Maintain bid documents and contracts.
19. Collect fees as required and transmit same to the Village Treasurer.
20. Perform the duties set forth on pages 4 and 5 hereof.

Village Deputy Clerk

Answer telephones, and among other things: assist in copying documents in preparation of board meetings; order supplies; maintain office files, including those related to Records Management and FOIL requests; deliver and receive mail; and make prepared deposits to the bank, returning deposit receipts to the Village Treasurer.

Village Treasurer

1. Maintain custody of Village funds and keep accounting pursuant to mandates of the Office of State Comptroller.
2. Receive tax deposits.
3. Provide tax receipts.
4. Accept and deposit revenues to the Village, including: taxes; rentals; fees, including those for building permits and those for design, planning and ZBA review, and gate access cards; grants; FOIL; and other such revenues.
5. Record deposits in general ledger.
6. Process payroll.
7. Obtain W-4s and W-9s.
8. Issue W-2s and 1099s and file same with State and Federal governments (annually).
9. File employee withholding with State and Federal governments (quarterly).
10. Reconcile bank accounts (monthly).
11. Reconcile credit card statements (monthly).
12. Reconcile petty cash.
13. Prepare budget (annually).
14. Monitor expenditures, both non-capital and capital in nature, comparing actual expenditures with those budgeted, and report results thereof to the Village Board (monthly).
15. Meet with commissioners as needed to provide budget information.
16. Require commissioners/trustees associated with any project to demonstrate compliance with the Village's Procurement Policy.

17. Meet with CPA (quarterly).
18. Interact with the Office of State Comptroller as required and complete and electronically file an annual financial report, and calculate and file the Constitutional Tax Limit (CTL), tax cap limit, tax freeze limit.
19. Perform the duties set forth on pages 4 and 5 hereof.

Vital Statistics Officer

1. Record and file Death and Birth Certificates.
2. File Death and Birth Certificates with the County, State, and health departments as required.
3. Prepare Burial Permits and coordinate with the funeral director.

Records Management Officer (RMO)

1. Maintain records required by M-II Schedule.
2. Destroy records as required and maintain log of record destruction.
3. Maintain subject list of records.

GENERAL DUTIES OF VILLAGE CLERK AND VILLAGE TREASURER AS APPLICABLE

Secretarial

1. Answer phone during office hours.
2. Respond to voicemail messages.
3. Respond to emails and/or forward same to appropriate recipients.
4. Maintain training log for Village officials and ensure that the Planning Board and ZBA members comply with mandatory training requirements.
5. Respond to postal service mail and/or forward same to appropriate recipients.

Procurement

1. Draft Requests for Proposals (RFPs) for refuse collection, snow & ice removal, landscaping, flower-pot maintenance, and other services, setting forth specifications for bid.
2. Identify and contact potential vendors for Village RFPs.

Office Manager

1. Update policies related to investments, credit cards, mileage reimbursement, violence prevention, unlawful harassment, antifraud, procurement and computer use.
2. Act as liaison between the Village Board and the general public, residents and other governments.
3. Act as office manager, interfacing with Village commissioners to obtain written approval for payment of claims, and to obtain and supply commissioners with certificates of insurance and proof of worker's compensation from Village vendors.
4. Order and stock office supplies.

Building Department

1. Accept phone calls for the Building Department and answer questions related to building matters, updating the Building Commissioner regarding same.
2. Accept and forward to the Building Commissioner applications for building permits, finalization packages, and title company requests for documents.

Tax Department

1. Provide tax information to mortgage companies, realtors, title companies and residents upon request.
2. Publish notice of Taxable Status Day, Completion of Tax Roll and Grievance Day (annually).
3. Provide and accept grievance forms.
4. Notify the Village Tax Assessor of building projects.
5. Notify residents of change in their property tax assessment.
6. Interface with the NYS Office of Real Property (ORPs) with respect to the annual Equalization Rate, Residential Assessment Ratio and Special Franchise Assessments.
7. Assist the Village Tax Assessor with written recommendations to the Board of Assessors (annually).
8. Assist the Village Tax Assessor with the Village Tax Assessor Annual Report filed with NYS ORPS.

Grants

1. Complete paperwork and provide documentation necessary to obtain Federal and State Disaster Recovery Funds.
2. In conjunction with other Village officials, assist in writing grant requests for Records Management Funds.
3. Complete paperwork and provide documentation necessary to obtain Department of Transportation CHIPS and Extreme Weather Recovery (EWR) funds.
4. Assist other Village officials with information and documents needed for various grant applications.