

**REGISTER OF WILLS AND ORPHANS' COURT  
FISCAL YEAR 2019 BUDGET TESTIMONY**

**DEPARTMENT MISSION & PLANS**

**Mission:** The Office of the Register of Wills (ROW) is comprised of the Register of Wills Division and the Clerk of Orphans' Court Division. The Register of Wills is an elected official serving as the Administrative Officer overseeing these Divisions. The mission of this Office is delivered within two main functions:

- The Register of Wills provides the City of Philadelphia with the resources necessary for the efficient probate of wills presented for the grant of Letters Testamentary, estates requiring Letters of Administration, and the maintenance and preservation of these records. Probate records are eventually archived off-site. Revenue is generated through fees associated with estates probated, additional fees for previous estates, record research and the collection of inheritance taxes due to the Commonwealth of Pennsylvania.
- The Orphans' Court Division oversees Trust, Decedent and Guardian Accounts for the City of Philadelphia, as well as manages all procedures relating to the issuance of Marriage Licenses and maintenance of Marriage Records.

**Plans for Fiscal Year 2019:** The Register of Wills shall continue to serve the City of Philadelphia through a diverse workforce providing exemplary customer service and an efficient work flow. While maintaining its outstanding service environment, the office can begin the second phase of its restoration project. This project was initiated as the result of the magnitude and fragility of documents under the office's care, some being centuries old. Over time these records and documents become brittle to the point where handling them is nearly no longer an option. Based on the recommendation of the Department of Records and through consulting with the Conservation Center's Preservation Services Department, the Register of Wills has taken steps to investigate a cost-effective process for preserving its oldest records.

This process will be realized in two subsequent phases. The first part of phase 2 will assess records for restoration. Due to the costliness of the restoration process, full record restoration will initially be limited to records with significant importance, such as historic documents. Upon completion of that assessment, the Register of Wills will initiate a second part in phase 2, which will place emphasis on the digitization of old records that will not meet the requirements necessary for physical restoration of historic records. It is the intention of the Register of Wills office to achieve a system whereby records can be maintained in confidence, access of information will be readily available to the public of Philadelphia and beyond, and the office can continue to operate as a public facing agency providing exceptional customer service.

Register of Wills

**BUDGET SUMMARY & OTHER BUDGET DRIVERS**

<b>Staff Demographics Summary (as of December 2017)</b>				
	Total	Minority	White	Female
Number of Full-Time Staff	69	25	44	35
Number of Exempt Staff	N/A	N/A	N/A	N/A
Number of Executive Staff (deputy level and above)	10	3	7	2
Average Salary, Full-Time Staff	\$53,270	\$46,592	\$57,152	\$45,638
Average Salary, Executive Staff	\$89,890	\$82,582	\$93,022	\$95,092
Median Salary, Full-Time Staff	\$48,410	\$40,649	\$50,000	\$41,929
Median Salary, Executive Staff	\$86,076	\$74,462	\$90,000	\$95,092

<b>Employment Levels (as of December 2017)</b>		
	Budgeted	Filled
Number of Full-Time Positions	74	69
Number of Part-Time Positions	7	6
Number of Executive Positions (deputy level and above)	10	10
Average Salary of All Full-Time Positions	\$53,270	\$53,270
Median Salary of All Full-Time Positions	\$48,410	\$48,410

<b>General Fund Financial Summary by Class</b>						
	FY17 Original Appropriations	FY17 Actual Obligations	FY18 Original Appropriations	FY18 Estimated Obligations	FY19 Proposed Appropriations	Difference: FY19-FY18
Class 100 - Employee Compensation	\$3,563,499	\$3,842,824	\$3,979,046	\$3,975,157	\$3,975,157	\$0
Class 200 - Purchase of Services	\$75,486	\$48,971	\$75,486	\$75,486	\$75,486	\$0
Class 300/400 - Materials, Supplies & Equipment	\$33,210	\$24,629	\$189,750	\$189,750	\$189,750	\$0
	<b>\$3,672,195</b>	<b>\$3,916,424</b>	<b>\$4,244,282</b>	<b>\$4,240,393</b>	<b>\$4,240,393</b>	<b>\$0</b>

<b>Contracts Summary (Professional Services only)</b>						
	FY13	FY14	FY15	FY16	FY17	FY18 YTD (Q1 & Q2)
Total amount of contracts	\$23,340	\$63,320	\$23,340	\$27,000	\$27,000	\$52,853
Total amount to M/W/DSBE	\$0	\$0	\$0	\$0	\$0	\$0
Participation Rate	0%	0%	0%	0%	0%	0%

<b>Total M/W/DSBE Contract Participation Goal (Public Works; Services, Supplies &amp; Equipment; and Professional Services combined)</b>			
	FY17	FY18	FY19
M/W/DSBE Contract Participation Goal	0%	0%	0%

## **PROPOSED BUDGET OVERVIEW**

### **Proposed Funding Request:**

The proposed Fiscal Year 2019 General Fund budget totals \$4,240,393, which remains unchanged from Fiscal Year 2018 estimated obligation levels. This budget represents the amount needed to maintain staffing levels and have a funding for the operation of a successful office and its initiatives.

The proposed budget includes:

- \$3,975,157 in Class 100, and represents no change over FY18. This funding will maintain the office's current 69 full-time positions and maintain permanent part-time positions as well as seasonal and temporary employees.
- \$75,486 in Class 200, and represents no change over FY18. This funding will allow for our repair and maintenance charges, office equipment needs, computer software and postage.
- \$189,750 in Class 300/400, and represents no change over FY18. This funding will maintain office supplies, printing costs associated with the office's function and provide a basis for the restoration and preservation project of archived records.

**STAFFING LEVELS**

The department is requesting 70 budgeted positions for FY19, a decrease of 4 positions with unchanged funding over the FY18 budgeted and approved 74 positions, composed of 35 positions filled by women and 25 positions held by minorities.

This funding is used to ensure staff levels are maintained and outstanding customer service and user-friendly services are provided to all those requiring the Register of Wills and Orphans' Court's services. The Register of Wills continues to look for ways to provide the City of Philadelphia the absolute best services through a diverse staff.

**NEW HIRES**

New Hires (from 7/1/2017 to December 2017)	
	Total Number of New Hires
Black or African American	1
White	1
Total	2

**PERFORMANCE, CHALLENGES, AND INITIATIVES**

<b>FY19 Performance Measures</b>				
Measure	FY17 Actual	FY18 YTD (Q1 + Q2)	FY18 Target	FY19 Target
Probateable Estates	5,304	2,814	5,394	5,400
Mail-in Research	3,195	1,114	2,200	2,200
Walk-in Research	1,907	2,431	4,000	4,000
Title Company Research	19,787	14,354	28,000	26,000
Inheritance Tax Receipts	10,367	5,167	9,656	9,850
Short Certificates - Probate	15,483	7,550	15,500	15,500
Issuance of Marriage Licenses	10,149	5,426	10,087	10,000
Orphan's Court Accounts Filed (Decedent, Trust, Guardian)	99	49	123	100

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**OTHER BUDGETARY IMPACTS**

**Federal and State (Where Applicable)**

N/A

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**CONTRACTING EXPERIENCE**

M/W/DSBE Participation on Large Professional Services Contracts											
Top Largest Contracts, FY18											
Vendor Name	Service Provided	Dollar Amount of Contract	RFP Issue Date	Contract Start Date	Ranges in RFP	% of M/W/DSBE Participation Achieved	\$ Value of M/W/DSBE Participation	Total % Participation - All DSBES	Total \$ Value Participation - All DSBES	Local Business (principal place of business located within City limits) <i>[yes / no]</i>	Waiver for Living Wage Compliance? <i>[yes / no]</i>
Counterpoint	Computer Software Maintenance	\$27,000	N/A	FY2006	MBE: Best Efforts	0%	\$0	0%	\$0	Yes	No
					WBE: Best Efforts	0%	\$0				
					DSBE: Best Efforts	0%	\$0				

**EMPLOYEE DATA**

<b>Staff Demographics (as of December 2017)</b>					
<b>Full-Time Staff</b>			<b>Executive Staff</b>		
	Male	Female		Male	Female
	African-American	African-American		African-American	African-American
<i>Total</i>	5	13	<i>Total</i>	2	0
<i>% of Total</i>	7%	19%	<i>% of Total</i>	20%	0%
<i>Average Salary</i>	\$59,350	\$41,366	<i>Average Salary</i>	\$69,780	\$0
<i>Median Salary</i>	\$63,324	\$40,649	<i>Median Salary</i>	\$69,780	\$0
	White	White		White	White
<i>Total</i>	28	17	<i>Total</i>	6	1
<i>% of Total</i>	40%	25%	<i>% of Total</i>	60%	10%
<i>Average Salary</i>	\$65,959	\$47,436	<i>Average Salary</i>	\$94,859	\$82,000
<i>Median Salary</i>	\$57,106	\$43,260	<i>Median Salary</i>	\$90,000	\$82,000
	Hispanic	Hispanic		Hispanic	Hispanic
<i>Total</i>	1	5	<i>Total</i>	0	1
<i>% of Total</i>	1%	7%	<i>% of Total</i>	0%	10%
<i>Average Salary</i>	\$38,573	\$50,627	<i>Average Salary</i>	\$0	\$108,185
<i>Median Salary</i>	\$38,573	\$35,500	<i>Median Salary</i>	\$0	\$108,185
	Asian	Asian		Asian	Asian
<i>Total</i>	0	0	<i>Total</i>	0	0
<i>% of Total</i>	0%	0%	<i>% of Total</i>	0%	0%
<i>Average Salary</i>	\$0	\$0	<i>Average Salary</i>	\$0	\$0
<i>Median Salary</i>	\$0	\$0	<i>Median Salary</i>	\$0	\$0
	Other	Other		Other	Other
<i>Total</i>	0	0	<i>Total</i>	0	0
<i>% of Total</i>	0%	0%	<i>% of Total</i>	0%	0%
<i>Average Salary</i>	\$0	\$0	<i>Average Salary</i>	\$0	\$0
<i>Median Salary</i>	\$0	\$0	<i>Median Salary</i>	\$0	\$0
	Bilingual	Bilingual		Bilingual	Bilingual
<i>Total</i>	4	6	<i>Total</i>	0	1
<i>% of Total</i>	6%	9%	<i>% of Total</i>	0%	9%
<i>Average Salary</i>	\$58,813	\$49,399	<i>Average Salary</i>	\$0	\$108,185
<i>Median Salary</i>	\$53,175	\$38,245	<i>Median Salary</i>	\$0	\$108,185
	Male	Female		Male	Female
<i>Total</i>	34	35	<i>Total</i>	8	2
<i>% of Total</i>	49%	51%	<i>% of Total</i>	80%	20%
<i>Average Salary</i>	\$61,364	\$45,638	<i>Average Salary</i>	\$88,589	\$95,093
<i>Median Salary</i>	\$56,781	\$41,929	<i>Median Salary</i>	\$86,076	\$95,093



## **LANGUAGE ACCESS**

**1) Has your leadership received language access training?**

Yes.

**2) Do you currently have a language access coordinator?**

Yes, Caren Berger serves as our language access coordinator.

**3) Has your department written a language access plan and is it posted online?**

Our department does have a written language access plan. It is not posted online.

**4) Explain what your department has done to improve language access services over the past year.**

The department has improved language access services through posting signs throughout the office, increased information on documents used in office to address questions relating to this, providing cards for customers to fill out specifying their needs and the appointment of a coordinator to direct the best help for these citizens.