

**THE REGISTER OF WILLS AND CLERK OF THE ORPHANS' COURT
FISCAL YEAR 2020 BUDGET TESTIMONY**

DEPARTMENT MISSION & PLANS

Mission: The Office of the Register of Wills consists of two divisions, The Register of Wills and The Clerk of Orphans' Court. The Register of Wills position is an elected official serving as the Administrative Officer for these divisions. The mission of the Register of Wills Office can be described by the individual missions of its divisions.

- The Register of Wills is responsible for the probate process concerning decedents of the City of Philadelphia, or decedents having title to assets specific to the City of Philadelphia. The Register of Wills provides the necessary resources to compassionately and effectively probate wills for the Grant of Letters Testamentary, assist in the filing of Letters of Administration, as well maintaining and preserving these records. Revenue is generated in the Register of Wills division through fees associated with registering probate estates, reconciling additional fees due from previous estates, the fees for record research and duplication, and commissions commensurate with the collection of Inheritance Taxes collected on behalf of the Commonwealth of Pennsylvania. The Register of Wills mission is to continually seek the best possible administrative solutions in these processes, and to provide the most compassionate experience for all those served.
- The Orphans' Court division oversees Trust, Decedent and Guardian Accounts in the City of Philadelphia. Additionally, it manages all procedural matters for the issuance of Marriage Licenses as well as the archiving and maintenance of Marriage Records. Revenue for the Orphans' Court division is generated through fees associated with account creation for Trusts, Decedent Estates and Guardianship matters, as well as payments for the creation and duplication of marriage licenses and records. The mission of the Orphans' Court is to continually provide the most effective case management, streamline the application process for Marriage Licenses and efficiently process record requests while offering city residents and those in need of the office's services respect and courtesy.

Plans for Fiscal Year 2020: The Register of Wills will continue to serve the City of Philadelphia through its diverse staff, exemplary customer service, and efficient work flow. The upcoming plans for the divisions of the Register of Wills and Orphans' Court include the continued initiative of computer systems updates. Improvements to the physical infrastructure of its main offices have started for increased work flow as well as at its archive location. The office will also continue the effort of scanning and digitization of older records.

BUDGET SUMMARY & OTHER BUDGET DRIVERS

Staff Demographics Summary (as of November 2018)				
	Total	Minority	White	Female
Number of Full-Time Staff	70	28	42	32
Number of Exempt Staff	0	0	0	0
Number of Executive Staff (deputy level and above)	9	3	6	2
Average Salary, Full-Time Staff	\$56,515	\$49,378	\$61,273	\$48,769
Average Salary, Exempt Staff	N/A	N/A	N/A	N/A
Average Salary, Executive Staff	\$93,322	\$86,334	\$82,985	\$98,500
Median Salary, Full-Time Staff	\$51,180	\$43,722	\$52,698	\$45,378
Median Salary, Exempt Staff	N/A	N/A	N/A	N/A
Median Salary, Executive Staff	\$85,026	\$79,652	\$89,088	\$98,500

Employment Levels (as of November 2018)		
	Budgeted in FY19	Filled as of the Increment Run (11/18)
Number of Full-Time Positions	70	70
Number of Part-Time Positions	7	7
Number of Exempt Positions	0	0
Number of Executive Positions (deputy level and above)	9	9
Average Salary of All Full-Time Positions	\$53,240	\$56,515
Median Salary of All Full-Time Positions	\$48,140	\$51,180

General Fund Financial Summary by Class						
	FY18 Original Appropriations	FY18 Actual Obligations	FY19 Original Appropriations	FY19 Estimated Obligations	FY20 Proposed Appropriations	Difference: FY20-FY19
Class 100 - Employee Compensation	\$3,979,046	\$4,021,761	\$4,173,645	\$4,173,645	\$4,286,409	\$112,764
Class 200 - Purchase of Services	\$75,486	\$75,196	\$200,486	\$200,486	\$125,000	(\$75,486)
Class 300/400 - Materials, Supplies & Equipment	\$189,750	\$29,905	\$64,750	\$64,750	\$140,236	\$75,486
	\$4,244,282	\$4,126,862	\$4,438,881	\$4,438,881	\$4,551,645	\$112,764

Contracts Summary (Professional Services only)						
	FY14	FY15	FY16	FY17	FY18	FY19 YTD (Q1 & Q2)
Total amount of contracts	\$63,320	\$23,340	\$27,000	\$27,000	\$52,853	\$27,000
Total amount to M/W/DSBE	\$0	\$0	\$0	\$0	\$0	\$0
Participation Rate	0%	0%	0%	0%	0%	0%

Total M/W/DSBE Contract Participation Goal (Public Works; Services, Supplies & Equipment; and Professional Services combined)			
	FY18	FY19	FY20
M/W/DSBE Contract Participation Goal	0%	0%	0%

PROPOSED BUDGET OVERVIEW

Proposed Funding Request:

The proposed Fiscal Year 2020 General Fund budget totals \$4,551,645, an increase of \$112,764 over Fiscal Year 2019 estimated obligation levels. This increase is primarily due to union contract negotiations for class 100 budget. With little else changed, this budget represents the amount needed to maintain current staffing levels and provide funding for the successful operation and initiatives of the office.

The proposed budget includes:

- \$4,286,409 in Class 100, a \$112,765 increase over FY19. This funding will maintain the office's current 70 full-time positions in addition to the office's part time, season and temporary positions. The increase is the result of negotiated union contract requirements for employees of the Register of Wills and Orphans' Court.
- \$125,000 in Class 200, a \$75,486 decrease due to the completion of a FY19 software update. This funding will allow for the office to maintain its professional services, update its case-management software, continue to lease office rentals, provide necessary transportation, postage, and maintain equipment repairs.
- \$140,236 in Class 300/400, a \$75,486 increase over FY19, but a realignment with previous years. This funding will maintain office supplies, computer equipment and printing costs associated with Orphans' court mandated filings, and the office's archived records.

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STAFFING LEVELS

The department is requesting 70 budgeted positions for FY20, which remains unchanged from FY19. These positions ensure outstanding customer service and a user-friendly environment to 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 its diverse staff.

NEW HIRES

The Register of Wills has no new hires to report.

PERFORMANCE, CHALLENGES, AND INITIATIVES

FY20 Performance Measures				
Measure	FY18 Actual	FY19 YTD (Q1 + Q2)	FY19 Target	FY20 Target
Completed probate estate filings	5,341	2,487	5,400	5,200
Mail-in research	1,556	1,719	2,200	3,000
Walk-in research ¹	3,200	1,497	4,000	3,000
Title company research	32,009	15,175	26,000	30,000
Inheritance tax receipts	10,752	5,522	9,850	10,500
Short certificates for probate	15,793	7,144	15,500	15,000
Issuing of marriage licenses	10,326	5,253	10,000	10,200
Orphan's Court Accounts Filed (Decedent, Trust, Guardian)	94	44	100	100

¹ Due to effective filling of mail-in requests, fewer walk-in requests are being made.

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OTHER BUDGETARY IMPACTS

Federal and State (Where Applicable)

N/A

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CONTRACTING EXPERIENCE

N/A

EMPLOYEE DATA

Staff Demographics (as of November 2018)				
Full-Time Staff			Executive Staff	
	Male	Female		
	African-American	African-American		
<i>Total</i>	8	12	<i>Total</i>	2
<i>% of Total</i>	11%	17%	<i>% of Total</i>	0%
<i>Average Salary</i>	\$52,541	\$45,805	<i>Average Salary</i>	\$73,514
<i>Median Salary</i>	\$49,549	\$47,189	<i>Median Salary</i>	\$73,514
	White	White		
<i>Total</i>	26	17	<i>Total</i>	5
<i>% of Total</i>	37%	24%	<i>% of Total</i>	11%
<i>Average Salary</i>	\$68,408	\$49,988	<i>Average Salary</i>	\$99,180
<i>Median Salary</i>	\$63,579	\$45,672	<i>Median Salary</i>	\$93,150
	Hispanic	Hispanic		
<i>Total</i>	1	5	<i>Total</i>	0
<i>% of Total</i>	1%	7%	<i>% of Total</i>	11%
<i>Average Salary</i>	\$41,069	\$53,001	<i>Average Salary</i>	N/A
<i>Median Salary</i>	\$41,069	\$40,377	<i>Median Salary</i>	\$111,974
	Asian	Asian		
<i>Total</i>	0	0	<i>Total</i>	0
<i>% of Total</i>	0%	0%	<i>% of Total</i>	0%
<i>Average Salary</i>	N/A	N/A	<i>Average Salary</i>	N/A
<i>Median Salary</i>	N/A	N/A	<i>Median Salary</i>	N/A
	Other	Other		
<i>Total</i>	1	0	<i>Total</i>	0
<i>% of Total</i>	1%	0%	<i>% of Total</i>	0%
<i>Average Salary</i>	\$51,626	N/A	<i>Average Salary</i>	N/A
<i>Median Salary</i>	\$51,626	N/A	<i>Median Salary</i>	N/A
	Bilingual	Bilingual		
<i>Total</i>	5	5	<i>Total</i>	0
<i>% of Total</i>	7%	7%	<i>% of Total</i>	11%
<i>Average Salary</i>	\$66,743	\$53,001	<i>Average Salary</i>	\$0
<i>Median Salary</i>	\$68,000	\$40,377	<i>Median Salary</i>	\$111,974
	Male	Female		
<i>Total</i>	36	34	<i>Total</i>	7
<i>% of Total</i>	51%	49%	<i>% of Total</i>	22%
<i>Average Salary</i>	\$63,656	\$48,769	<i>Average Salary</i>	\$91,847
<i>Median Salary</i>	\$57,661	\$45,378	<i>Median Salary</i>	\$85,026
	Male	Female		
<i>Total</i>	36	34	<i>Total</i>	7
<i>% of Total</i>	51%	49%	<i>% of Total</i>	22%
<i>Average Salary</i>	\$63,656	\$48,769	<i>Average Salary</i>	\$91,847
<i>Median Salary</i>	\$57,661	\$45,378	<i>Median Salary</i>	\$85,026

LANGUAGE ACCESS

1. Has your leadership received language access training?

The Administrative Clerk of Orphans’ Court, Caren Berger, Esquire, has received Language Access training in conjunction with Orphans’ Court. The supervisors and deputies of the Register of Wills and Orphans’ Court will be trained, most likely, by August 2019. The Deputy of Human Resources is coordinating an in-office, Language Access Training course, with Orlando Almonte.

2. Do you currently have a language access coordinator?

Caren Berger, Esquire, Administrative Clerk of Orphans’ Court is serving as the contact person for the Register of Wills Department.

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

As a smaller City department, the Register of Wills Office follows the plans and guidelines of the City of Philadelphia. The Register of Wills defers to the City’s language access plan.

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

The Register of Wills has worked diligently with the language access agency, since the end of FY2018 to implement additional methods for improving our service to the public. Orlando Almonte of the Language Access Agency has graciously translated our most used documents into Spanish. Mr. Almonte has also worked with Caren Berger, Esquire, to create information and FAQ documents in Spanish for distribution. The office also provides information to members of the public about translation services, where necessary.