

**REGISTER OF WILLS
FISCAL YEAR 2024 BUDGET TESTIMONY
APRIL 25, 2023**

INTRODUCTION

Good morning, President Clarke and Members of City Council. I am Tracey Gordon, Register of Wills and Clerk of Orphans' Court. Joining me today are Emilio DiGregorio, Deputy of Government Affairs and Erald Dika, Finance Director. I am pleased to provide testimony on the Register of Wills' Fiscal Year 2024 Operating Budget.

DEPARTMENT MISSION & PLANS

Mission: The Register of Wills & Clerk of Orphans' Court (ROW) serves the residents of Philadelphia with professionalism, compassion, and integrity in overseeing the administration of estates, the issuance of marriage licenses, and the fee collection and record keeping of all Philadelphia County Probate Estates, Trusts, Guardian Accounts, and Marriage Licenses and Records.

Plans for Fiscal Year 2024: Over FY24, The Register of Wills Estate Administration Program's core mission will be to continue to educate Philadelphians on the need for Estate Planning, the Probate Fee Deferral Program benefit, as well as stabilizing the Archives Collection. This will be in conjunction to the continuation of the Estate Administration's Program of providing essential services, which include virtual probates, to the Philadelphia Community while the global pandemic continues. The Community Outreach Department has taken the lead this past fiscal year in educating Philadelphians on the complexities of the probate process, while emphasizing the need for heirs to act quickly to protect their inheritances. By educating the community about proper estate planning, the Register of Wills has been able to proactively address the Tangled Title crisis plaguing Philadelphia. The Community Outreach team continues to alleviate Tangled Title problems by informing the public about the proper steps to ensure that their estate and assets can be passed on. With the aid of language facilitators, the outreach team schedules many events throughout different communities from a diverse cultural background.

To continue to reinforce the current Probate Deferment Initiative ("PDI") program the ROW will add two additional team members to the PDI unit to address PDI cases and related problems. The ROW will require additional funding in FY24 to onboard new team members. The continuation of a Fee Deferral Program has been the immediate solution for the financial hurdles that prohibit many within the Philadelphia community when probating an estate. The Fee Deferral Program works with low-income constituents to defer the probate fees. With the continuation of these two programs the Register of Wills will be able to execute its mission to reduce poverty and protect generational wealth across the City of Philadelphia. In addition, to PDI the ROW will continue educating the public about the importance of making a will. The ROW will educate the next generation about the importance to Generational Wealth Transference and will work to partner with Educational and Financial Institutions to develop a curriculum on financial health and management. Communities in Philadelphia and beyond have access to a diverse set of assets that did not exist in past generations: NFTs, Crypto, Virtual Real-estate, iPhone Intellectual Property, Name Image and Likeness that have both financial and social value. ROWPHL will work with local organizations to convene a collaborative, discuss and develop a financial literacy curriculum, for Philadelphia youth to educate about the importance of property ownership, maintenance, estate planning

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and with its creation and lifting PHLROWs work as a national model. In addition, the PHLROW will partner with the American Bar Association for Citywide Will Awareness.

Additionally, the Register of Wills office will continue to focus on stabilizing its Archive Facility and Historical Documents. Digitization is essential to secure the integrity of the records housed within the facility and will streamline the process required to access these records.

Moreover, the office is working to comply with the state audit findings and will seek a new legacy system that is more efficient with our operation as well as to reinforce the internal control policy as well that the current system is lacking. Funding was awarded in FY23 to begin the search for a suitable vendor.

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Budget Summary & Other Budget Drivers

Staff Demographics Summary (as of December 2022)				
	Total	Minority	White	Female
Number of Full-Time Staff	63	38	25	38
Number of Exempt Staff	63	38	25	38
Number of Executive Staff (deputy level and above)	6	3	3	3
Average Salary, Full-Time Staff	\$62,131	\$60,010	\$65,440	\$59,406
Average Salary, Exempt Staff	\$61,655	\$59,289	\$65,440	\$58,664
Average Salary, Executive Staff	\$110,284	\$111,082	\$109,485	\$111,082
Median Salary, Full-Time Staff	\$55,572	\$52,916	\$58,207	\$54,481
Median Salary, Exempt Staff	\$55,016	\$52,916	\$58,207	\$53,698
Median Salary, Executive Staff	\$101,047	\$95,248	\$106,845	\$95,248

Employment Levels (as of December 2022)		
	Budgeted	Filled
Number of Full-Time Positions	73	63

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Number of Part-Time Positions	4	0
Number of Exempt Positions	73	63
Number of Executive Positions (deputy level and above)	8	6
Average Salary of All Full-Time Positions	\$62,131	\$62,131
Median Salary of All Full-Time Positions	\$55,572	\$55,572

General Fund Financial Summary by Class						
	FY22 Original Appropriations	FY22 Actual Obligations	FY23 Original Appropriations	FY23 Estimated Obligations	FY24 Proposed Appropriations	Difference: FY24-FY23
Class 100 - Employee Compensation	\$3,956,193	\$4,221,695	\$4,309,771	\$4,327,557	\$4,450,243	\$122,686
Class 200 - Purchase of Services	\$185,000	\$181,769	\$406,959	\$406,959	\$421,959	\$15,000
Class 300/400 - Materials, Supplies & Equipment	\$140,236	\$115,665	\$140,236	\$140,236	\$152,596	\$12,360
	\$4,281,429	\$4,519,129	\$4,856,966	\$4,874,752	\$5,024,798	\$150,046

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Contracts Summary (Professional Services only)						
	FY20	FY21	FY22	FY23	FY23 YTD (Q1 & Q2)	FY24 Projected
Total amount of contracts	\$187,657	\$216,309	\$130,825	\$368,959	\$140,093	\$368,959
Total amount to M/W/DSBE	\$70,501	\$92,538	\$35,775	\$77,481	\$64,218	\$77,482
Participation Rate	38%	43%	27%	21%	46%	21%

Total M/W/DSBE Contract Participation Goal (Public Works; Services, Supplies & Equipment; and Professional Services combined)			
	FY22	FY23	FY24 Projected
M/W/DSBE Contract Participation Goal	21%	21%	21%

PROPOSED BUDGET OVERVIEW

Proposed Funding Request:

The proposed Fiscal Year 2024 General Fund budget totals \$5,024,798, a \$ 150,046 increase over Fiscal Year 2023 estimated obligation levels. This increase is primarily due to contract and inflation increase cost. The funding will continue to support the Registers’ vision to educate the public about tangled titles that for far too long have created racial inequality throughout the City of Philadelphia. 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:

- \$4,450,243 in Class 100, a \$122,686 increase over FY23 estimated obligation levels due to wage increase cost. This funding will maintain the office’s 73 full-time positions in addition to the office’s part time, season, and temporary positions.
- \$421,959 in Class 200, a \$15,000 increase over the over FY23 levels estimated obligation levels, to support the Register’s vision regarding racial disparities created through tangled titles. In addition, this funding will allow for the office to maintain its professional services, update its case-management software funded in FY23, continue to lease office equipment, provide necessary transportation, postage, and maintain equipment repairs.
- \$152,596 in Class 300/400, a \$12,360 increase over FY23 estimated obligation levels. 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 73 budgeted positions for FY24, level with FY23. 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

New Hires (from 7/1/2021 to December 2022)		
	Total Number of New Hires	Spanish
Black or African American	9	
Hispanic or Latino	1	1
White	4	
Total	14	1

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PERFORMANCE, CHALLENGES, AND INITIATIVES

ESTATE ADMINISTRATION

Measure	 FY22 ACTUAL	 FY23 TARGET	 FY24 TARGET
Median in-person wait time for Probate Filings (minutes)	37	40	40
Median timeframe to fulfill a research request (days)	7	10	10
Median time from filing to certification	5	5	5

FY24 STRATEGIC GOALS

- Continuation of Probate Fee Deferral Program.
- Stabilization of the Register of Wills Historic Archives.
- New Legacy System.

ORPHAN’S COURT ADMINISTRATION

Measure	 FY22 ACTUAL	 FY23 TARGET	 FY24 TARGET
Median timeframe to review E-Filing, GTS, and Manual petitions (minutes)	55	55	55
Median timeframe for application process (minutes)	18	19	19
Median timeframe to fulfill a request for a copy of marriage record (days)	6	7	7

FY24 STRATEGIC GOALS

- New Legacy System
- New Partnership with Historical Institutions to Highlight the Archival Needs for ROW and Orphan Courts

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OTHER BUDGETARY IMPACTS

Federal and State (Where Applicable)

NA

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CONTRACTING EXPERIENCE

M/W/DSBE Participation on Large Professional Services Contracts											
Top Five Largest Contracts, FY23											
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) [yes / no]	Waiver for Living Wage Compliance? [yes / no]
Counter Point	Software Support	\$20,000	12/1/2006	1/1/2007	MBE:	0%	\$0	0%	\$0	N	N
					WBE:	0%	\$0				
					DSBE:	0%	\$0				
TML Communications	Social Media Ads	\$25,000	10/1/2021	1/31/2022	MBE:	0%	\$0	100%	\$25,000	Y	N
					WBE:	100%	\$25,000				
					DSBE:	0%	\$0				
Nextar media	Advertising	\$20,000	7/15/2022	8/9/2022	MBE:	21%	\$4,200	21%	\$4,200	N	N

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					WBE:	0%	\$0				
					DSBE:	0%	\$0				
Nehru Consultant	Professional Development	\$22,038	8/1/2022	9/22/2022	MBE:	100%	\$22,038	100%	\$22,038	Y	N
					WBE:	0%	\$0				
					DSBE:	0%	\$0				
Philly Metro	Advertising	\$14,190	7/15/2022	8/22/2022	MBE:	21%	\$2,980	21%	\$2,980	Y	N
					WBE:	0%	\$0				
					DSBE:	0%	\$0				
Pugliese	Consulting	\$21,000	5/1/2021	7/1/2021	MBE:	0%	\$0	0%	\$0	N	N
					WBE:	0%	\$0				
					DSBE:	0%	\$0				

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EMPLOYEE DATA

Staff Demographics (as of December 2022)				
Full-Time Staff			Executive Staff	
	Male	Female	Male	Female
	African-American	African-American	African-American	African-American
<i>Total</i>	11	24	<i>Total</i>	0
<i>% of Total</i>	17%	38%	<i>% of Total</i>	50%
<i>Average Salary</i>	\$58,284	\$63,094	<i>Average Salary</i>	\$0
<i>Median Salary</i>	\$58,207	\$54,757	<i>Median Salary</i>	\$95,248
	White	White	White	White
<i>Total</i>	15	10	<i>Total</i>	3
<i>% of Total</i>	24%	16%	<i>% of Total</i>	50%
<i>Average Salary</i>	\$72,770	\$54,444	<i>Average Salary</i>	\$109,485
<i>Median Salary</i>	\$67,113	\$55,556	<i>Median Salary</i>	N/A
	Hispanic	Hispanic	Hispanic	Hispanic
<i>Total</i>	1	3	<i>Total</i>	0
<i>% of Total</i>	2%	5%	<i>% of Total</i>	0%
<i>Average Salary</i>	\$45,663	\$46,443	<i>Average Salary</i>	N/A
<i>Median Salary</i>	\$45,663	\$47,624	<i>Median Salary</i>	N/A
	Asian	Asian	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

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	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>	N/A	N/A	<i>Average Salary</i>	N/A	N/A
<i>Median Salary</i>	N/A	N/A	<i>Median Salary</i>	N/A	N/A
	Bilingual	Bilingual		Bilingual	Bilingual
<i>Total</i>	1	4	<i>Total</i>	0	0
<i>% of Total</i>	2%	6%	<i>% of Total</i>	0%	0%
<i>Average Salary</i>	\$97,365	\$45,416	<i>Average Salary</i>	N/A	N/A
<i>Median Salary</i>	\$97,365	\$44,978	<i>Median Salary</i>	N/A	N/A
	Male	Female		Male	Female
<i>Total</i>	25	38	<i>Total</i>	3	3
<i>% of Total</i>	40%	60%	<i>% of Total</i>	50%	50%
<i>Average Salary</i>	\$65,864	\$59,406	<i>Average Salary</i>	\$109,485	\$111,082
<i>Median Salary</i>	\$58,694	\$54,481	<i>Median Salary</i>	\$106,845	\$95,248

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Language Access

- 1. Provide the name of your language access coordinator, the date of your last department training, and a link to the posting of your language access plan.**

The Register of Wills' language access coordinator is Erald Dika, Finance Director. The supervisors and deputies were trained in FY19.

<https://www.phila.gov/media/20220511173314/Register-of-Wills-Language-Access-Plan-2022.pdf>

- 2. Breakdown new hires and existing staff by race and language. Breakdown how many front-line personnel are trained to provide language access services.**

The Register of Wills supervisors and deputies have received the language access training.

ROW STAFF

The ROW currently employs 63 employees.

White - White background - 33

Black or African American 24

Hispanic or Latino - 6

Bilingual Front-Line Staff

Record Clerk 2 Arabic

Record Clerk 1 Spanish

Record Clerk 1 Spanish

Record Clerk 2 Spanish

- 3. How many requests for language access services did your department receive in the past year? How many language access services were delivered by staff? Breakdown language access services provided, by language, including but not limited to the language line, translation of public notices and documents, website language services, and advertisement/publication services.**

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. We have received over 1,500 requests in Spanish which were serviced by staff. All the requests were performed in the Marriage License division frontline staff. The Row also contracted interpretation services from language line in French, Spanish, Creole, Russian, Chinese, and Korean.

- 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 FY2020 to improve our service to the public. In addition to its own language access plan found at the above link we work with our new contact to coordinate the language access services and have

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also introduced standard operating procedures on how to procure an in-person interpreter, phone line interpreter, video interpreter, and sign language interpreter.

CLIMATE CHANGE

1. How has climate change affected your department's provision of services?

The Register of Wills Estate Administration & Orphans Court department has re-envisioned its provisions of services to adapt to the new climate change and the demand for our services. Due to Covid-19 pandemic & variants the need for our services has increased in the areas of probate, inheritance tax, and records requests. Currently our services are provided both in person and virtual scheduled appointments. We attend walk-ins as well and the volume of requests continues to increase. We continue to adhere to the Covid-19 safety guidelines and follow the city implementing any changes required.

How might worsening climate change increase costs and demands for your department?

Worsening climate changes would not increase costs or demands for our department. Unless Covid-19 Safety protocols are changed, we foresee continued pandemic services at current levels.

2. How does your department intend to mitigate and adapt to climate change?

The Row continues to operate effectively and efficiently. Resources can be reprogramed to address issues adapting to the climate change. We also have been exploring outside funding resources such as federal grants, and state grants.