

Register of Wills & Clerk of Orphans' Court
FISCAL YEAR 2017 BUDGET TESTIMONY
May 27, 2016

DEPARTMENT MISSION/PLANS

Mission: To efficiently probate wills presented, grant Letters Testamentary and Letters of Administration, and to properly maintain and preserve wills and records of administrations. To collect all probate fees due, and to collect inheritance taxes for the Commonwealth of Pennsylvania.

Plans for Fiscal Year 2017:

By having a full complement of employees, the Register of Wills can continue to maintain its outstanding reputation of efficient and user-friendly service for all citizens. The office of the Register of Wills has always had and will continue to have a diverse workforce so that all who come for service are treated in a fair, respectful, and understanding manner. The Register of Wills will maintain its superior quality of customer service and continuing education for its workforce in the current year and subsequent years to follow. We have had to cross-train our workforce due to the increased services of policing the court-mandated filings and the increased number of applications processed since the passage of same-sex marriage in Pennsylvania. The restoration and preservation of our old records is of great concern. We have begun to explore how we will be able to finance and move forward with this product.

**Register of Wills & Clerk of Orphans' Court
BUDGET SUMMARY AND OTHER BUDGET DRIVERS**

Staff Demographics Summary (as of January 2016)

	Total	Minority	White	Female
Full-Time Staff	68	24	44	35
Executive Staff	7	3	4	2
Average Salary - Full-Time Staff	\$50,964	\$45,145	\$54,138	\$42,894
Average Salary - Executive Staff	\$82,844	\$75,437	\$88,399	\$77,096
Median Salary - Full-Time Staff	\$66,265	\$64,000	\$66,265	\$49,478
Median Salary - Executive Staff	\$79,000	\$72,119	\$79,565	\$98,000

Employment Levels (as of January 2016)

	Budgeted	Approved	Filled
Full-Time Positions	69	69	68
Part-Time Positions	4	4	4
Executive Positions	7	7	7
Overall Average Salary	\$49,538	\$49,538	\$49,538
Overall Median Salary	\$60,170	\$60,170	\$60,170

Financial Summary by Class - General Fund

	Fiscal 2015 Actual Obligations	Fiscal 2016 Original Appropriations	Fiscal 2016 Estimated Obligations	Fiscal 2017 Proposed Appropriations	Difference FY17-FY16
Class 100 - Employee Compensation	\$3,538,207	\$3,413,499	\$3,563,499	\$3,563,499	\$0
Class 200 - Purchase of Services	\$46,684	\$75,486	\$75,486	\$75,486	\$0
Class 300 - Materials and Supplies	\$23,517	\$23,850	\$123,850	\$23,850	(\$100,000)
Class 400 - Equipment	\$0	\$9,360	\$9,360	\$9,360	\$0
Class 500 - Contributions	\$0	\$0	\$0	\$0	\$0
Class 700 - Debt Service	\$0	\$0	\$0	\$0	\$0
Class 800 - Payment to Other Funds	\$0	\$0	\$0	\$0	\$0
Class 900 - Advances/Misc. Payments	\$0	\$0	\$0	\$0	\$0
TOTAL	\$3,608,408	\$3,522,195	\$3,772,195	\$3,672,195	(\$100,000)

Contracts Summary (as of December 2015)

	FY11	FY12	FY13	FY14	FY15	FY16*
Total amount of contracts	\$45,840	\$23,340	\$23,340	\$63,320	\$23,340	\$0
Total amount to M/W/DBE	\$0	\$0	\$0	\$0	\$0	\$0
Participation Rate	0%	0%	0%	0%	0%	0%

* as of December 2015. A \$27,000 contract was added during the second half of FY16.

Register of Wills & Clerk of Orphans' Court
PROPOSED BUDGET OVERVIEW

PROPOSED FUNDING REQUEST

The proposed Fiscal Year 2017 general fund budget totals \$3,672,195, a decrease of \$100,000 over Fiscal Year 2016 estimated obligation levels. This one-time decrease is primary due to a reduction of funding for restoration of records.

The proposed budget includes:

- \$3,563,499 in Class 100 has no change from FY16. This funding will cover the office's current (as of 5/5/16) 69 full-time positions and permanent part-time and temporary/seasonal positions.
- \$75,486 in Class 200 has no change from FY16. This funding will cover our repair and maintenance charges for office equipment, computer software, and postage.
- \$23,850 in Class 300, an \$100,000 decrease from FY16. This funding will cover our office supplies and printing costs for file folders.
- \$9,360 in Class 400 has no change from FY16. This funding will cover office and computer equipment.

STAFFING LEVELS

- As of April 2016, the Register of Wills office has 69 budgeted, approved and filled full-time positions, 25 of which are filled by minorities and 36 of which are filled by women. There are 4 filled part-time positions, 3 of which are filled by minorities, and 7 filled executive positions, 3 of which are filled by minorities.

NEW HIRES FOR FY16

- Full-time Caucasian - 2 male, 5 female (total of 7)
- Part-time Caucasian - 1 male, 1 female (total of 2)
- Full-time African-Americans - 3 female
- Part-time African-American - 1 female

Register of Wills & Clerk of Orphans' Court
PERFORMANCE, CHALLENGES AND INITIATIVES

DEPARTMENT PERFORMANCE (OPERATIONS)

N/A

Register of Wills & Clerk of Orphans' Court
OTHER BUDGETARY IMPACTS

FEDERAL AND STATE (WHERE APPLICABLE)

N/A

Register of Wills & Clerk of Orphans' Court – CONTRACTING EXPERIENCE

**M/W/DSBE Participation on Large Contracts
FY16 Contracts**

Vendor	Service Provided	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 % and \$ Value Participation - All DSBES	Local Business	Living Wage Compliant?
Counterpoint Software	Computer Maintenance	\$27,000	FY05	FY06	MBE: Best Efforts	0%	\$0	0%	yes	yes
					WBE: Best Efforts	0%	\$0			
					DSBE: Best Efforts	0%	\$0			

Register of Wills & Clerk of Orphans' Court - EMPLOYEE DATA

Staff Demographics (as of January 2016)

Full-Time Staff				Executive Staff			
		Male	Female			Male	Female
		African-American	African-American			African-American	African-American
<i>Total</i>		5	13	<i>Total</i>		1	1
<i>% of Total</i>		7.4%	19.1%	<i>% of Total</i>		14.3%	14.3%
<i>Average Salary</i>		\$56,615	\$40,096	<i>Average Salary</i>		\$72,119	\$56,193
<i>Median Salary</i>		\$58,348	\$37,662	<i>Median Salary</i>		\$72,119	\$56,193
		White	White			White	White
<i>Total</i>		26	18	<i>Total</i>		4	0
<i>% of Total</i>		38.2%	26.5%	<i>% of Total</i>		57.1%	0.0%
<i>Average Salary</i>		\$61,781	\$43,098	<i>Average Salary</i>		\$88,399	-
<i>Median Salary</i>		\$51,983	\$37,500	<i>Median Salary</i>		\$79,565	-
		Hispanic	Hispanic			Hispanic	Hispanic
<i>Total</i>		2	4	<i>Total</i>		0	1
<i>% of Total</i>		2.9%	5.9%	<i>% of Total</i>		0.0%	14.3%
<i>Average Salary</i>		\$37,449	\$51,065	<i>Average Salary</i>		-	\$98,000
<i>Median Salary</i>		\$37,767	\$37,131	<i>Median Salary</i>		-	\$98,000
		Asian	Asian			Asian	Asian
<i>Total</i>		0	0	<i>Total</i>		0	0
<i>% of Total</i>		0.0%	0.0%	<i>% of Total</i>		0.0%	0.0%
<i>Average Salary</i>		-	-	<i>Average Salary</i>		-	-
<i>Median Salary</i>		-	-	<i>Median Salary</i>		-	-
		Other	Other			Other	Other
<i>Total</i>		0	0	<i>Total</i>		0	0
<i>% of Total</i>		0.0%	0.0%	<i>% of Total</i>		0.0%	0.0%
<i>Average Salary</i>		-	-	<i>Average Salary</i>		-	-
<i>Median Salary</i>		-	-	<i>Median Salary</i>		-	-
		Bi-lingual	Bi-lingual			Bi-lingual	Bi-lingual
<i>Total</i>		2	4	<i>Total</i>		0	1
<i>% of Total</i>		2.9%	5.9%	<i>% of Total</i>		0.0%	14.3%
<i>Average Salary</i>		\$37,449	\$51,065	<i>Average Salary</i>		-	\$98,000
<i>Median Salary</i>		\$37,767	\$37,131	<i>Median Salary</i>		-	\$98,000
		Male	Female			Male	Female
<i>Total</i>		33	35	<i>Total</i>		5	2
<i>% of Total</i>		48.5%	51.5%	<i>% of Total</i>		71.4%	28.6%
<i>Average Salary</i>		\$59,524	\$42,894	<i>Average Salary</i>		\$85,143	\$77,096
<i>Median Salary</i>		\$50,922	\$49,478	<i>Median Salary</i>		\$79,565	\$98,000

Register of Wills & Clerk of Orphans' Court
APPENDIX (Other Relevant Data and Charts)

Number of Bilingual Employees (as of January 2016)

	Spanish
Register of Wills	3
Orphans' Court	3
Total - All Divisions	6
Total - # of Bilingual Employees	6
Total - # of Languages Spoken	1