



Budget Office

CITY OF PHILADELPHIA

May 13, 2022

The Honorable Darrell Clarke
City Council President
City Hall, Room 490
Philadelphia, PA 19107

Dear Council President Clarke,

This letter is in response to questions raised by Councilmembers during the FY23 Council Budget Hearing for the Register of Wills Office:

1. **Please provide a comprehensive Organizational Chart which includes names and titles, as well as a supervisory tree. Additionally, please include whether the employee is full-time or part-time.**

See attachment "A"

2. **Please provide a list of the individuals who have been laid off or fired since January of 2020?**

See attachment "B"

3. **Please provide a list of new hires since 1/1/2021.**

See attachment "B"

4. **Please provide a copy of the Register of Wills Strategic Plan to address the over 10,000 tangled titles that currently exist in Philadelphia.**

The Tangled Title problem as it currently exists in Philadelphia results from a decades-long disinvestment in the financial literacy of Philadelphia residents. The problem is complex as many of the cases require extensive investigation to find the decedent's heirs and multiple estates may be required to be opened to properly complete the probate process. This problem is unique to our city amongst the entire Commonwealth. There has never been a comprehensive study of the situation, or plan to address it until this ROW administration took office.

In order to address this issue, the affected properties must first be uniquely identified. The Pew Charitable Trust Tangled Title Study only identified tracts containing properties that may be in a Tangled Title, not the addresses of the properties themselves. The current residents must then recognize they have a Tangled Title and seek to rectify the issue. Residents must also be connected with legal services to assist in the process because of the complex nature of the cases. Ideally, ROW will help navigate individuals through the probate process without the need of an attorney. However due to the complex nature of Tangled Titles each case will need assessment to determine whether legal assistance is required. In addition, we view community



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education on the topic of Tangled Titles equally, if not more important to stop the cycle of intestacy and prevent the crisis from continuing to grow.

ROW seeks to address this problem by facilitating the identification of Tangled Title properties, notifying potentially affected residents through community outreach, and connecting affected persons with legal resources to assist them with addressing their Tangled Title issue. In addition, ROW has established the Probate Deferment Initiative to ensure that the process is not slowed down by the resident's inability to pay probate fees. As a part of the Probate Deferment Initiative Program, ROW will educate up to 7,500 residents within their communities in 2022-2023 with the goal that the information will be disseminated in the community in a variety of ways by those persons. ROW will establish a centralized Tangled Title Help Desk, staffed by a ROW employee, a to be determined Department of Records employee, and volunteer attorneys in conjunction with our legal services organization partners, where residents who come to ROW or other city departments and discover they have a Tangled Title issue can be sent for legal assistance. ROW will also establish six (6) satellite offices in the communities that are known to be disproportionately affected by Tangled Titles. ROW will also conduct a "Plan. Prepare. Protect." tour to increase citywide awareness ROW functions and how Tangled Titles affect all city residents.

5. Projecting out, how many tangled titles does the Register of Wills plan to untangle annually?

It is a conflict of interest for ROW to do the legal work of untangling titles. ROW will facilitate the identification of affected properties, notify the residents of the affected properties, connect affected persons with legal services and provide data on what organizations/attorneys are providing the necessary legal services and what residents are actually receiving legal services moving forward. ROW would be able to establish a baseline value of how many Tangled Title cases were completed in one calendar year at the end of this pilot period.

For additional context to your question, the Philadelphia Tangled Title Fund (Funded by the City of Philadelphia through its Division of Housing and Community Development (DHCD)), has been in existence for many years. The usage of that fund to help pay fees related to the probate process has been used marginally year over year. As you are aware, City Council has directed additional dollars to this fund.

6. You have asked for funding from City Council to hire attorneys for your office, could you provide clarity regarding the role, responsibilities, and duties these attorneys would fill?

Attorneys/paralegals are required for identification of issues, as laypersons are unable to assess whether a particular case requires Tangled Title assistance. Legal resources are required to address the Tangled Title issue in a timely manner. ROW has discovered that a lack of capacity at the legal services organizations results in many persons never receiving services to address their Tangled Title issue, or service being delayed for unreasonably long periods resulting in discouraged residents. ROW's PDI attorney will be the intake point for Tangled Title cases in the



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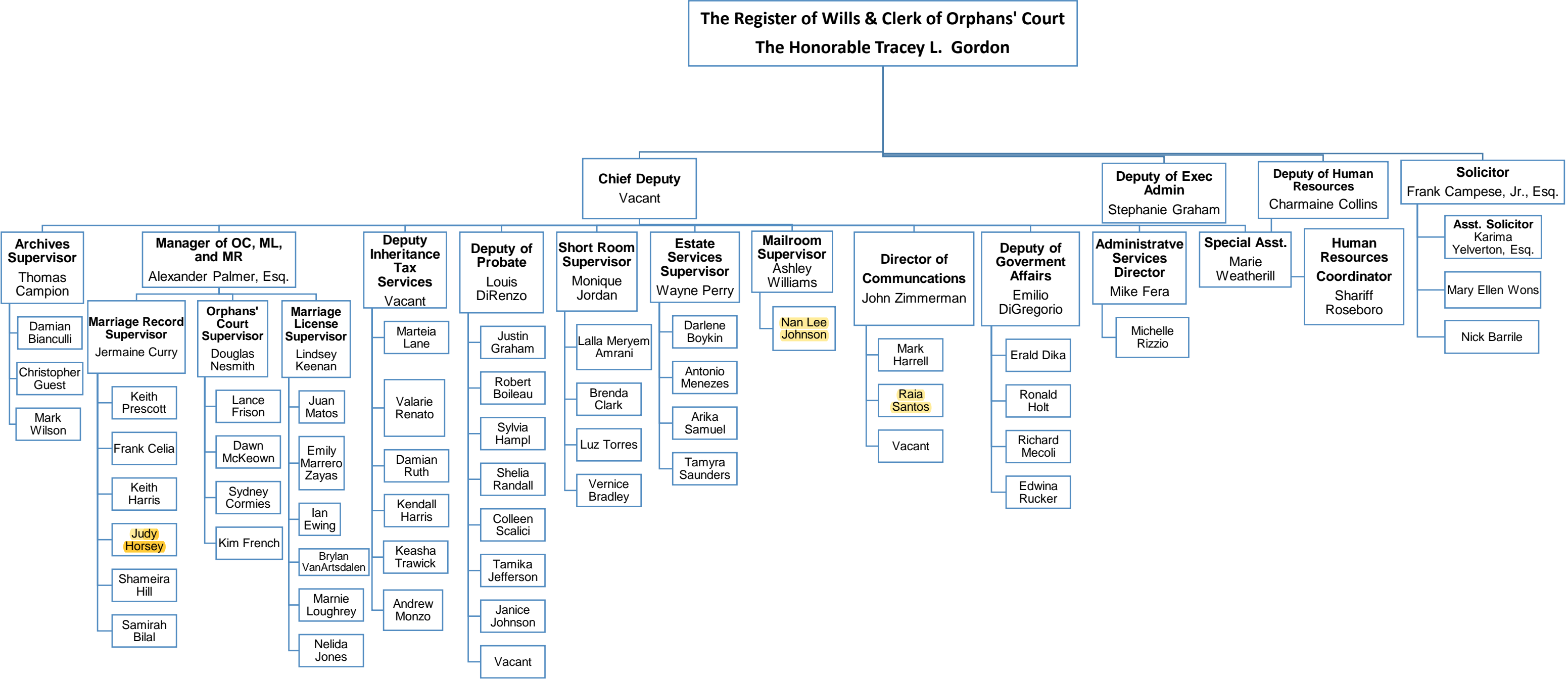
city and the city's liaison with the legal services organizations, providing data to ensure that the cases are completed.

7. **What is the average starting salary of clerical positions within the Office of the Register of Wills?** The average starting salary for clerical positions is \$ \$44,110. The Register addressed racial and gender disparities that were not addressed by the previous administration.
8. **How much does the Office of the Register of Wills spend on filming online ads and commercials annually?** This is the first year The Register of Wills has ever used paid external video vendors. The Probate Deferment Initiative PSA videos cost a total of \$15,775 to create. This covered 2 days of filming with 14 Union Screen Actors Guild Members. All the writing, pre-production, post-production, and editing done in house by Register of Wills Communication team. This has provided us content which can be use across any format to raise awareness now and in the future.
9. **Does the Office of the Register of Wills intend to spend money on billboards? If so, please provide a detailed plan. Additionally, please provide the Communications Plan for the Office of the Register of Wills.**

We currently do not have plans to use Billboards. However, we consistently review strategies based on the needs of the office, all while maintaining a fiscally conservative approach. See attachment "C" for Communications Plan
10. **Please provide a detailed report of all renovations at the Office of the Register of Wills since January of 2020, specifically bathroom renovations to Ms. Gordon's personal office.**

In working with the Office of the Council President, the Register of Wills Office was able to repair deteriorating plastered walls and flooring in 3 rooms. We have submitted a request to public property for costs since we were not involved in the requisitions of services, nor the payment. Bathroom: A vanity cabinet for storage of sanitary products, which was not present prior, was purchased from Home Depot (\$159), later installed by public property.
11. **Could you provide clarity regarding a constituent issue that has come to my office's attention. Did the Office of the Register of Wills terminate an employee who was sick with cancer? Furthermore, did the Office of the Register of Wills terminate this gentleman's wife, also suffering from cancer, with only three months to go to retirement during COVID?**

We have no knowledge of any married staff members previously employed at the Register of Wills Office and we are not at liberty to discuss the medical status of any present or former employees.
12. **Please provide the Office of the Register of Wills procedures and protocols relating to the receipt of gifts.** As a Philadelphia County office, the Register of Wills adheres to the PENNSYLVANIA PUBLIC OFFICIAL AND EMPLOYEE ETHICS ACT 65 Pa.C.S. §1101 et seq.



ATTACHMENT "B"

QUESTION #2

Golden, Charles	Bailey, Troy	Cermele, Richard
Campbell III, Edgar	Tursi, Furdinando	Williams, Gary
Catalano, Claudine	Edwards, Lillian	Boyd, Malik
Santi, Justin	Autrey, Marcella	Harrison, Tyrice
Tenuto, Giavana	Sannini, Steven	Hairston, Regina
Mack-Hines, Teneda	Solvable, Robert	Berger, Caren
Albert, Regina	Raimondi, John	Neal-Beyah, Lucretia
Clark, Rosemaria	Savage, Patrick	Barone, Nicholas
Thornton, Carla	Sabelli, Guy	

QUESTION #3

Monzo, Andrew James	Marrero Zayas, Emily	Johnson, Janice
Harris, Kendall	Gordon, Nicole	Santos, Raia
Johnson, Nan Lee	Campese, Frank Jr.	Saunders, Tamyra C
Smith, Erika *	Asad Ali, El Shafiq *	Bristow, Ernestine *
Thompson, Evette *	* Resigned	

Register of Wills (ROW) General Communications and Outreach Plan

a. Brand Awareness and Education

For the first time in Philadelphia history Register Tracey Gordon has created an Outreach Unit for the office. We have successfully utilized digital and in person outreach efforts which have included social media, tabling, seminars, workshops and other educational and entertainment work. These efforts have been made to help educate Philadelphians about the importance of our office and the essential services we provide to the public that includes, marriage licenses, probating estates and historic record keeping. Tangled Title crisis in Philadelphia, that has been unaddressed for decades has been a focus of our educational efforts. Through our Outreach unit we have taught the value of proper estate planning and preserving generational wealth. In Philadelphia there are over 10,000 Tangled Titles, according to the PEW Charitable Trusts. These Tangled Titles lock up over one billion dollars in dead capital. Tangle Title homes are typically in the name of a deceased relative. These homes with Tangled Titles cannot be sold, legally passed down, get insurance or other basic services. With the development of a Community Outreach Department, the complexities of the probate process will be simplified through education. By educating the community about proper estate planning, the Register of Wills will be able to proactively address the Tangled Titled epidemic plaguing Philadelphia. The Community Outreach Initiative today, will alleviate the Tangled Title problems of tomorrow.

b. Existence of the office/Brand Awareness

- i. Improving the visibility of the office is a proactive initiative. By making people aware of ROW it increases people's familiarity with our services.

1. In person Outreach

- a. In addition to Register Gordon and her Solicitors. We have a team of Outreach Coordinators that regularly attend events all over the city. We hand out fliers and talk to the public about our office and the services we provide. Including the NEW Probate Deferment Initiative.

- i. [West Philly Community Event](#)
- ii. [Kensington Resource Fair](#)
- iii. [Senior Day](#)
- iv. [Bar Association Block Clean Up](#)
- v. [Blood Drive](#)

2. Register Gordon's Public Remarks

Register Gordon and her solicitors speak directly with constituents at these events about the office. This generates trust with communities and educates the public. We have also participated in town halls, lectures and other events that let us interact directly with the public.

- a. [Tangled Titles and Violence Presser](#)

- i. [NEWS – WHYY](#)
 - ii. [NEWS - NBC10](#)
 - b. [Temple Lecture](#)
 - c. [Making Her Story](#)
 - d. [PEW TANGLED TITLES PRESSER](#)
 - e. [State of Urgency Rally](#)
 - f. [Keeping you in your home – Sen. Street event](#)
 - g. [#GetVaccinated](#)
- 3. **Workshops and other events**

We regularly hold workshops featuring our Solicitors and staff. At these events we educate about the different functions and services of our office. We have held these events for Elected Officials Staff, City Employees, Professional Organizations and others.

 - a. [Lunch And Learn #1](#)
 - b. [Public Defenders event](#)
 - c. [PA Dems Policy hearing](#)
- 4. **Social Media and Virtual Presence**

We want to reach people about Tangled Titles, PDI and the services we provide. We are aggressively using social media to improve the access to this information. It is the most cost-effective vehicle available to us. Our physical fliers are branded the same as the digital content.

 - a. **Facebook:** Primary social media platform. This is the main platform we use to promote events.
 - i. Booted: Events, graphics, videos and other marketing related to PDI.
 - b. **Instagram:** Used for our photo and videos
 - i. Boosted PDI videos
 - c. **LinkedIn:** Our use of this platform is a work in progress. We ideally would like to use the platform to recruit lawyers to help fix Tangled Titles.
 - i. Boosting our Lawyer recruitment PDI PSA
 - d. **TikTok:** We started using this platform because most government offices did not utilize it. It set us apart. We currently have a respectable following and hope this will, one day, help generate additional national news coverage.
 - e. **Twitter:** We currently do not boost on this platform. We mainly utilized Twitter to try and receive attention from journalist and influential leaders.
 - f. **DIGITAL DIVIDE:** We fully understand that not everyone is online. The digital divide is real – especially in disinvested black and brown communities. Our hope is to encourage people to take the information back to their families and friends that are not online. We will not reach all Seniors via social media, however we can reach their children and grandchildren, and

encourage them to talk to their elders and families about the issues of Tangled Titles and Estate Planning.

- i. NOTE: Many thought leaders, journalists and elected officials are on social media. These platforms can be used to influence the conversation around Tangled Tiles. Making it easier to rally allies and move assets.

2. Marriage Licenses

All people that get married in Philadelphia County must come to our office and get a Marriage License. It is an essential service. We have partnered with Mural Arts, 311, Parks and Rec and others to raise the awareness of how to accomplish this.

- a. We share Marriage License office hours weekly on all social platforms - [LINK](#)
- b. [Wedding Wednesday](#)
- c. [311 Blog Post](#)
- d. [Marriage Mural](#)
 - i. [1 year later - Mini Doc](#)
 - ii. [Inquirer](#)
 - iii. [CBS3](#)
 - iv. [KYW](#)
 - v. [ABC6](#)

3. Register Reacts

We have successfully been using pop culture to educate the public about the importance of Estate Planning. This series received rave reviews and has been featured at numerous outdoor movie nights around the city. We also were covered in the Inquirer. It is important to find creative ways to broach an often dry or taboo subject such as death and estate planning.

- a. Register Reacts – [Youtube Playlist](#)
- b. Register Reacts – [Stephanie Farr Article](#)
- c. Register Reacts – Showrunner, Producer and Director of “Queen Sugar” on OWN Ava DuVernay comments on the episode featuring her show. - [LINK TO HER COMMENT](#)
- d. Public Remarks during an outdoor movie night featuring Register Reacts - [LINK](#)
- e. We are preparing for Season 2

4. Plan. Prepare. Protect.

Register Gordon’s semiweekly show. These PPP’s featuring elected officials and community leaders and discuss the topics of the day with a focus on Generational Wealth and Estate Planning. We do a fall and spring season with a live ZOOM audience on Thursdays at 6pm. The show is edited and rebroadcast the following Tuesday at 6pm. The Reruns air on PHLGOVTV.

- a. [Plan. Prepare. Protect. - Youtube Playlist](#)
 - i. We have had done almost 40 episodes. Including some in Mandarin, French and Spanish. We started during Covid as a way of getting information out to the public and the show has grown since.
 - ii. [NEWS – Philadelphia Neighborhoods](#) - PPP | Violence Safety and Solutions
 - iii. [NEWS – Tribune – PPP](#) | Congressional Delegation
- b. [PPP Tour – Youtube Playlist](#)
 - i. We often take the information discussed in our semiweekly show and do it at community gatherings. We normally brand this as a PPP tour. During covid

they have largely been virtual, but we hope that as things reopen, we can do more in person.

c. [FAQ VIDEOS – YouTube Playlist](#)

i. We pull “FAQ Videos” from the PPPs and use them to educate about specific issues.

d. Boosted content: We boosted a PPP FB event that was focused exclusively on PDI to increase interest. The turnout was excellent.

5. Tangled Titles and the Probate Deferment Initiative (pilot program)

In partnership with the Recorder of Deeds we are deferring fees associated with Tangled Titles. In our unique role at ROW, we have the ability to elevate the issue of Tangled Titles. We can implement policy to help reduce some of the financial burden and motivate people to fix their Tangled Titles. We do this in partnership, along with deeds, with local Legal Aid organizations like Christian Legal Clinics and Philadelphia Legal Assistance.

a. In person Outreach

i. Signature program. We mention it often in our virtual and in person outreach.

ii. Fliers. We hand out PDI fliers at all of our tabling events. They are also boosted on social media.

iii. Community events. We are often invited to community events and trainings about our office. We mention PDI at all events we attend.

iv. Other gatherings: We have given testimony, held workshops, seminars and lectures on Tangled Titles and PDI.

b. [PDI Announcement](#)

i. Filmed at the Nichols Law Library at City Hall. We use content from this shoot in boosted posts to educate about PDI. Some examples below.

1. [PDI Announcement - 001](#)

2. [PDI Announcement - 003](#)

c. [PDI PSA | Can you help?](#)

i. Lawyer recruitment PSA. We boost this on LinkedIn in an effort to recruit lawyers to the cause.

d. [Plan. Prepare. Protect. | PDI](#)

i. Recent PPP episode featuring the legal aid groups that work on PDI.

e. [Probate Deferment Initiative – YouTube Playlist](#)

i. A collection of PDI video content.

f. NEWS COVERAGE

i. [Tangled Titles/PDI - Inquirer](#)

ii. [Tangled Titles Opinion Piece - Inquirer](#)

iii. [Tangled Titles in Philadelphia - Axios](#)

iv. [Tangled Titles - Hidden City](#)

v. [PDI - Tribune](#)

vi. [Tangled Titles - Tribune](#)

vii. [FROM OUT OF STATE: Post and Courier – David Slade](#)

g. PDI PSAs

i. Commercials – Create a series of PDI PSAs featuring different demographics. We hired 14 SAG Union actors to perform in the PSAs. Then boost the videos

about PDI, estate planning and Tangled Titles on social media. We then used those videos to create Radio ads to target people not on Social Media. In the future we would like to put the ads on local TV.

1. 3 “Families”

- a. An African American & a mixed race family performing in English
- b. A Hispanic/Latino Family performing in Spanish.

2. PDI PSAs (more are coming) – [YouTube Playlist](#)

3. Radio - WURD, WDAS, Philly Favor

4. Social Media

- a. LinkedIn – PDI Lawyer recruitment
- b. Facebook/Instagram - General Philadelphia Population
- c. Boost content every month.
 - i. *NOTE: We would boost it ourselves. However, the City does not allow us to work with digital vendors. WE have to go through a third-party vendor at another additional cost.*

5. “FREE MEDIA” Once created we will shop them around to local radio and TV stations and ask them to be ran as PSA. We also hope to leverage our other partners to share them.

ii. Future PSA Ad Goals:

- 1. TV – We would want to do a TV ad buy on local stations.
 - a. PHL17, local news, evening sitcoms, etc
- 2. Radio – expand our radio presence to more stations
 - a. More contemporary music stations
- 3. Newspapers -
 - a. take out ads in local papers.
 - b. Buy inserts in areas with high concentrations of Tangled Titles

6. **Print Media**

a. **Water Insert**

We are sending out a notice in all the Water Bills about the Probate Deferment Initiative. This should reach over 300,000 people. [FLIER LINK](#)

b. **Fliers**

We have a large collection of fliers that we hand out at tabling and community events. Educating the public on Tangled Titles, our office, Deed Fraud, and other programming. We also share our partners fliers. Most are made in house or printed at Central Duplication.

c. **Brochures**

We have brochures on Wills and Marriage Licenses. We are working on others that cover Tangled Titles and the Probate Deferment Initiative.

7. **COVID**

The office was only closed briefly during the first few weeks of Covid, but returned swiftly and remained open.

- a. **Expand digital presence!** Like many, we used virtual meetings and videos as a way to engage the public locked up at home.
 - i. Plan. Prepare. Protect.
 - ii. [Deeds Vs. Row](#)
 - iii. [#GetVaccinated](#)
- b. NEWS COVERAGE:
 - i. [Making Wills during Covid](#)
 - ii. [Quaker Weddings – Self Unity License](#)

8. Tangled Titles:

- a. There are over 10,000 Tangled Titles in Philadelphia. The Probate Deferment Initiative (PDI) is Register Tracey Gordon’s answer to the Tangled Title crisis here in Philadelphia.
- b. Social media – Use innovative content to drive a conversation around the issue. Make “Tangled Titles” a kitchen table topic. Create enough online content where people are forced to address the issue of creating a Will in family conversations.
- c. In person – Be present at community and tabling events to hand out fliers and educate the public.
- d. Partnerships – leverage partnerships with organizations to move assets toward combating the Tangled Title Crisis.
 - i. [PEW report](#)
 - ii. [PEW presser](#)
 - iii. [A PEW graphics example](#)
 - iv. [Tangled Titles | City Council Testimony | Full Hearing](#)
 - v. [Committee on Commerce and Economic Development | Bill No. 210671](#)
- e. Intersection with violence –
 - i. [UPENN BSRP Study](#) - When people get access to Basic System Repair Grants crime drops 22% on the block face. Tangled Titles are the biggest obstacle to the grants.
 - ii. [Maps showing Tangled Titles in relation to gun victims](#)
 - 1. NOTE: We used Controller Rhynhart’s violence map
 - iii. [Tangled Titles and Violence Presser](#)
 - 1. [NEWS – WHYY](#)
 - 2. [NEWS - NBC10](#)

9. Archives

ROW is responsible housing and maintaining archives dating from 1600s to present. We store archives at City Hall and Spring Garden. We see potential for new revenue generated through the public access to these records for genealogical research. Ultimately we need additional funding to get digitize these records.

- a. [Preserving historic Records](#) – Budget hearing
- b. [Archives Grant Request Video](#)

10. Outreach Unit

We have 2 fulltime staff members that focus on in person events. This unit is supported by a forward-facing Solicitor and led by a Communications Director, who is also responsible for content creation and press relations. This unit puts together workshops, community events,

and tabling. They also work on our weekly show helping to find and schedule guests. They also do relationship building with partners and stakeholders.

a. Goals

- i. Raise the brand awareness of ROW
 1. Educate the public about the service and function of the office
- ii. Elevate the issue of Tangled Titles.
 1. With its solution being PDI and proper estate planning.
 2. Help preserve Philadelphia's Generational Wealth
- iii. Hold events with community groups and thought leaders. In order to build relationships that help us further ROWs mission.
 1. Examples
 - a. [Wynnefield Residents Association](#)
 - b. [Germantown United](#)
 - c. [Kensington NAC](#)
 - d. [Urban League](#)
 - e. [Quaker State Funeral Association](#)
 - f. Recorder of Deeds - [Deeds Vs. Row](#)

b. Plan

We plan to visit every neighborhood impacted by Tangled Titles to help educate about the crisis and help untie the one billion dollars of dead capitol trapped in these Tangled Titles.

- i. Tabling: We table multiple events every week and most weekends. This summer we are going to be pushing more into North Philly.
- ii. Workshops: Hold workshops about our office and its services with different organizations around the city.
- iii. Partnerships: Partner with local organizations to further the reach of the message.

11. Communications and Digital Media

The goal is to create innovative content to draw attention to the office. By doing so we hope to help to generate awareness about Tangled Titles, PDI and our offices services.

a. Content Creation

We plan to continue to create new, innovating educational material that takes often technical and dry material and make it appealing and informative.

- i. [Plan. Prepare. Protect.](#)
- ii. [Register Reacts](#)
- iii. [Mail Room content](#)
- iv. Event [Photos](#) and [Videos](#)
- v. [PDI Announcement](#)
- vi. Memes
- vii. Info graphics
- viii. [fliers](#)

12. Messaging

The style of language should reflect the severity of the crisis. If we can change course on

Tangled Titles we stand to free up 1.1 Billion dollars of dead capitol, drop crime, and slow gentrification. Communities affected by Tangled Titles will see less blight, violence, and drugs.

a. Some General Talking Points

- i. **It's not 10,000 Tangled Titles - its 10,000 families.**
- ii. **PDI is the best non policing solution to crime we have available**
- iii. **Free up over 1 Billion (yes, with a B) dollars in dead Philadelphia capitol**
- iv. **Tangled Titles are the biggest obstacle to the BSRP grants. When just 1 house gets a BSRP grant crime drops 22% on the block.**
- v. **Fixing the Tangled Title crisis will change history. But it requires all of us.**
- vi. **Make a Will. Every Will made is one less Tangled Title in the Future.**

b. Press Strategy

- i. **Local:** Hold interesting events and create visually engaging content to draw the attention of journalists. When we have the attention – talk about PDI and Tangled Titles.
- ii. **Non-Local:** Use our social media to draw the attention of journalists outside of our area. In time we hope to draw the attention of larger and larger news networks and journalists.
 - 1. [David Slade – Post and Courier, South Carolina](#)
 - 2. [Hiers Property Forum Atlanta](#)
 - 3. **TikTok:** Everyone has a FB, Insta and Twitter. We hope this will help to set us apart when stories are being chosen.