

**REGISTER OF WILLS
FISCAL YEAR 2026 BUDGET TESTIMONY
MAY 6TH, 2025**

INTRODUCTION

Good afternoon, President Johnson and Members of City Council. I am John P Sabatina Esq., Register of Wills and Clerk of Orphans' Court. Joining me today are Robert Stewart, Chief Deputy, and Erald Dika, Finance Director. I am pleased to provide testimony on the Register of Wills' Fiscal Year 2026 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 2026: In FY26, The Register of Wills Estate Administration Program's core mission will be to continue to educate Philadelphians on the need for Estate Planning and stabilize the Archives Collection. This will be in conjunction with the continuation of the Estate Administration's Program of providing essential services, which include virtual probates, to the Philadelphia Community. In addition, the department will continue the outreach program throughout communities to educate Philadelphians on the complexities of the probate process, while emphasizing the need for heirs to act quickly to protect their inheritances. The Community Outreach team continues to provide guidance to the public on 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, keeping the public informed and educated on probate legal matters.

The Register of Wills Department has also implemented a Title Clearance Unit which was funded in the FY25 Budget Season. The Title Clearance Unit works hand in hand with constituents to clear title barriers toward the path of property ownership, a strategy introduced during the FY25 Budget season. The unit has screened more than 100 multilevel cases and will continue to work with constituents with title clearance barriers.

Furthermore, the Register of Wills office will continue to focus on stabilizing its Archive Facility and Historical Documents. Digitization and preservation are essential to secure the integrity of the records housed within the facility and will streamline the process required to access these records. In addition, the department is preparing for the 250th anniversary of the signing of the United States Declaration of Independence which will be celebrated in 2026 marking the 250th year of history since the Founding Fathers Declared our Independence from Great Britain.

Lastly, the office is working to comply with the last state audit findings and will seek a new legacy system that is more efficient with our operation as well as reinforcing the internal control requirements that the current system is lacking. The ROW can no longer extended the life of our existing

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software through security upgrades and currently is working with the Office of Information Technology on an RFP to replace the current antiquated system.

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PROPOSED BUDGET OVERVIEW

General Fund Financial Summary by Class						
	FY24 Original Appropriations	FY24 Actual Obligations	FY25 Original Appropriations	FY25 Estimated Obligations	FY26 Proposed Appropriations	Difference: FY26 Proposed-FY25 Estimated
Class 100 - Employee Compensation	\$4,450,243	\$4,353,222	\$5,200,243	\$5,392,287	\$5,393,539	\$1,252
Class 200 - Purchase of Services	\$421,959	\$420,549	\$421,959	\$421,959	\$421,959	\$0
Class 300/400 - Materials, Supplies & Equipment	\$152,596	\$146,488	\$152,596	\$152,596	\$152,596	\$0
Class 500 - Contributions	\$0	\$125,000	\$0	\$0	\$0	\$0
	\$5,024,798	\$5,045,259	\$5,774,798	\$5,966,842	\$5,968,094	\$1,252

Contracts Summary (Professional Services only)						
	FY22	FY23	FY24	FY25	FY25 YTD (Q1 & Q2)	FY26 Projected
Total amount of contracts	\$130,825	\$335,762	\$368,959	\$388,959	\$160,415	\$388,959
Total amount to M/W/DSBE	\$35,775	\$70,038	\$272,169	\$140,712	\$140,712	\$140,712
Participation Rate	27%	21%	74%	36%	88%	36%

Total M/W/DSBE Contract Participation Goal (Public Works; Services, Supplies & Equipment; and Professional Services combined)			
	FY24	FY25	FY26 Projected
M/W/DSBE Contract Participation Goal	21%	21%	36%

Proposed Funding Request:

The proposed Fiscal Year 2026 General Fund budget totals \$5,968,094, \$1,252 increase over Fiscal Year 2025 estimated obligation levels due to contract increase cost. 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:

- \$5,393,539 in Class 100, an increase of \$1,252 increase over FY25 estimated obligation levels due to contract increase cost. This funding will maintain the office's 85 full-time positions in

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- addition to the office's part-time, seasonal, and temporary positions.
- \$421,959 in Class 200, no increase over the over FY25 levels estimated obligation levels, to support the Register's vision regarding racial disparities created through tangled titles. In addition, this funding will allow the office to maintain its professional services, update its case-management software funded in FY25, continue to lease office equipment, provide necessary transportation, postage, and maintain equipment repairs.
- \$152,596 in Class 300/400, no increase over FY25 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 85 budgeted positions for FY26, level with FY25. 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 with the absolute best services through its diverse staff.

Employment Levels (as of November 2024)			
	FY25 Budgeted	Filled as of November 2024	FY26 Proposed
Number of Full-Time Positions	85	73	85
Number of Part-Time Positions	3	1	3
Number of Exempt Positions	85	73	85
Number of Executive Positions (deputy level and above)	8	7	8
Average Salary of All Full-Time Positions	68,394	68,394	68,394
Median Salary of All Full-Time Positions	60,099	60,099	60,099

NEW HIRES

New Hires (from 7/1/2024 to November 2024)	
	Total Number of New Hires
Black or African American	4
White	6
Total	10

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PROGRAM BASED BUDGETING: REGISTER OF WILLS

Program Name: Estate Administration

Program Number: 11

FY26 Proposed General Fund: \$ 4,825,987

Program Description: The Estate Administration program oversees the probate process for Philadelphia estates. This includes the issuance of Letters Testamentary and Letters of Administration, collection of fees and inheritance taxes, and the creation and maintenance of the records.

FY26 Strategic Goals:

- Stabilization of the Register of Wills Historic Archives.
- Replace Legacy System.

FY26 Performance Measures:

Measure	FY24 Actual	FY25 Target	FY26 Target
Median in-person wait time for probate filings (minutes)	38	40	40
Median timeframe to fulfill a research request (days)	8	10	10
Median time from filing to certification	5	5	5

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Program Name: Orphans' Court

Program Number: 12

FY26 Proposed General Fund: \$1,142,107

- **Program Description:** The Orphans' Court Administration program oversees the creation, maintenance, and associated fees for trust, decedent, and guardian accounts as well as the issuance of marriage licenses in Philadelphia.

FY26 Strategic Goals:

- Replace Legacy System
- Digitizing Historic Records

FY26 Performance Measures:

Measure	FY24 Actual	FY25 Target	FY26 Target
Median timeframe to review e-filing, Guardianship Tracking System (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)	7	7	7

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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 Five Largest Contracts, FY25											
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	Waiver for Living Wage Compliance?
JX Consulting	Consulting	\$95,700	1/3/2024	1/24/2024	MBE: BGFE	100%	\$95,700	100%	\$95,700	Y	N
					WBE: BGFE	0%	\$0				
					DSBE: BGFE	0%	\$0				
Buzz Communication	Communications	\$75,000	1/3/2024	1/24/2024	MBE: BGFE	0%	\$0	100%	\$75,000	Y	N
					WBE: BGFE	0%	\$0				
					DSBE: BGFE	100%	\$75,000				
AMSS	Outreach	\$50,000	4/1/2024	5/1/2024	MBE: BGFE	100%	\$50,000	100%	\$50,000	Y	N
					WBE: BGFE	0%	\$0				
					DSBE: BGFE	0%	\$0				
Counter Point	Software Support	\$30,000	12/1/2006	1/1/2007	MBE: BGFE	0%	\$0	0%	\$0	N	N
					WBE: BGFE	0%	\$0				
					DSBE: BGFE	0%	\$0				
Horsey Darden	Advertising	\$27,884	5/1/2024	6/1/2024	MBE: BGFE	100%	\$27,884	100%	\$27,884	Y	N
					WBE: BGFE	0%	\$0				
					DSBE: BGFE	0%	\$0				

Non-Profit Vendor Demographics not applicable.