

**REGISTER OF WILLS**  
**FISCAL YEAR 2027 BUDGET TESTIMONY**  
**APRIL 28<sup>TH</sup>, 2026**

**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 2027 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 2027:** In FY27, the Register of Wills Estate Administration Program will continue advancing its core mission of educating Philadelphians on the importance of estate planning, expanding the Title Clearance Unit, replacing its operational software systems, and stabilizing and preserving the department's archives collection. These initiatives will complement the continuation of essential estate administration services provided to the Philadelphia community, including virtual probate proceedings that expand accessibility and improve efficiency.

The Department will further strengthen its public engagement initiatives to educate residents on the complexities of the probate process and emphasize the importance of acting promptly to protect inherited assets. The Public Engagement Team continues to provide guidance to residents on the proper legal steps necessary to ensure estates and assets are transferred effectively to heirs. With the assistance of language facilitators, the team hosts numerous outreach events across Philadelphia's culturally diverse communities, ensuring residents remain informed and empowered on probate and estate matters.

In conjunction with the Public Engagement Team, the Title Clearance Unit (TCU) funded during the FY25 Budget Season—remains a critical component of the department's efforts to advance property stability and generational wealth. The Unit works directly with constituents to remove title barriers that impede lawful property ownership. Since its inception, the Unit has screened more than 500 multi-level cases and successfully cleared more than 150 property titles. The Department will continue expanding this effort to assist residents facing complex title challenges. By focusing on working-class families that often just miss the income cutoff for free

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legal services, the TCU has significantly impacted entire communities. When these titles are cleared, the new owners are financially stable enough to begin improvement projects. The result is increased property value, not only for them, but also their neighbors.

Additionally, the Department remains committed to addressing findings from the most recent state audit. The Register of Wills, in partnership with the Office of Information Technology, has worked diligently over the past several months to issue a Request for Proposals (RFP) to replace the current legacy system. The existing software no longer meets operational or internal control standards and cannot be sustained through incremental security upgrades. The Department is currently in the final stages of vendor selection. Implementation of a modernized system will enhance operational efficiency, strengthen compliance, and reinforce internal controls.

**PROPOSED BUDGET OVERVIEW & OTHER BUDGET DRIVERS**

| <b>General Fund Financial Summary by Class</b>  |                              |                         |                              |                            |                              |  |
|---|------------------------------|-------------------------|------------------------------|----------------------------|------------------------------|--|
|   | FY25 Original Appropriations | FY25 Actual Obligations | FY26 Original Appropriations | FY26 Estimated Obligations | FY27 Proposed Appropriations | Difference: FY27 Proposed-FY25 Estimated |
| Class 100 - Employee Compensation               | \$5,200,243                  | \$5,036,216             | \$5,393,539                  | \$5,439,571                | \$5,454,916                  | \$15,345                                 |
| Class 200 - Purchase of Services                | \$421,959                    | \$421,257               | \$671,959                    | \$671,959                  | \$421,959                    | \$(250,000)                              |
| Class 300/400 - Materials, Supplies & Equipment | \$152,596                    | \$152,596               | \$152,596                    | \$152,596                  | \$152,596                    | \$0                                      |
| Class 500 - Contributions                       | \$0                          | \$275,000               | \$0                          | \$0                        | \$0                          | \$0                                      |
|   | <b>\$5,774,798</b>           | <b>\$5,884,255</b>      | <b>\$6,218,094</b>           | <b>\$6,264,126</b>         | <b>\$6,029,471</b>           | <b>\$(234,655)</b>                       |

| <b>Contracts Summary (Professional Services only)</b> |           |           |           |           |                    |                |
|---|-----------|-----------|-----------|-----------|--------------------|----------------|
|   | FY23      | FY24      | FY25      | FY26      | FY26 YTD (Q1 & Q2) | FY27 Projected |
| Total amount of contracts                             | \$335,762 | \$368,959 | \$388,959 | \$639,006 | \$310,473          | \$421,959      |
| Total amount to S/LBE                                 | \$36,178  | \$205,590 | \$261,709 | \$190,554 | \$302,200          | \$171,000      |
| Total amount to M/W/DSBE                              | \$70,038  | \$240,419 | \$146,749 | \$190,554 | \$302,200          | \$171,000      |
| S/LBE Participation Rate                              | 11%       | 56%       | 67%       | 30%       | 97%                | 41%            |
| M/W/DSBE Participation Rate                           | 21%       | 65%       | 38%       | 30%       | 97%                | 41%            |

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| Total S/LBE Contract Participation Goal (Public Works; Services, Supplies & Equipment; and Professional Services combined) |      |      |                |
|--|------|------|----------------|
|  | FY25 | FY26 | FY27 Projected |
| S/LBE Contract Participation Goal  | 21%  | 21%  | 41%            |

### **Proposed Funding Request:**

The proposed Fiscal Year 2027 General Fund budget totals \$6,029,471, a \$250,000 decrease over Fiscal Year 2026 estimated obligation levels due to onetime funding on professional services contract 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:

- \$5,454,916 in Class 100, an increase of \$15,345 over FY26 estimated obligation levels due to contract increase cost. This funding will maintain the office's 85 full-time positions in addition to the office's part-time, seasonal, and temporary positions.
- \$421,959 in Class 200, a decrease of \$250,000 over the over FY26 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, continue to lease office equipment, provide necessary transportation, postage, and maintain repair equipment.
- \$152,596 in Class 300/400, no increase over FY26 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 FY27, level with FY26. 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.

| <b>Employment Levels (as of November 2025)</b>         |               |                            |               |
|--|---------------|----------------------------|---------------|
|  | FY26 Budgeted | Filled as of November 2025 | FY27 Proposed |
| Number of Full-Time Positions                          | 85            | 79                         | 85            |
| Number of Exempt Positions                             | 85            | 79                         | 85            |
| Number of Executive Positions (deputy level and above) |               | 9                          |               |
| Average Salary of All Full-Time Positions              |               | \$68,828                   |               |
| Median Salary of All Full-Time Positions               |               | \$63,550                   |               |

**NEW HIRES**

| <b>New Hires (from 7/1/2025 to November 2025)</b> |                           |
|---|---------------------------|
|   | Total Number of New Hires |
| Black or African American                         | 4                         |
| White   | 2                         |
| Total   | 6                         |

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**VACANCY RATE AND ALLOWANCE**

| <b>Vacancy Rate Summary (General Fund)</b> |  |  |   |   |  |   |
|--|--|--|---|---|--|---|
|  | <b>FY25 Actual Vacancy Rate</b><br>(Filled number of positions from November 2024 increment run divided by total budgeted positions) | <b>FY26 Budgeted Vacancy Allowance</b><br>(Dollar amount of the vacancy allowance - should match \$ listed in Budget Detail Schedule J for FY26) | <b>FY26 Vacancy Rate</b><br>(Filled positions from November 2025 increment run divided by budgeted positions) | <b>FY26 Budgeted Vacancy Allowance Rate</b><br>(FY26 Vacancy Allowance \$ divided by Total Full-Time Salaries (Schedule J)) | <b>FY27 Budgeted Vacancy Allowance</b><br>(Dollar amount of vacancy allowance listed in Schedule J for FY27) | <b>FY27 Budgeted Vacancy Allowance Rate</b><br>(FY27 Vacancy Allowance \$ divided by FY27 Total Full-Time Salaries) |
| Departmental Total                         | 75.3%  | \$252,332  | 81.2%   | 4.79%   | \$327,459  | 6.1%  |

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**PROGRAM BASED BUDGETING: REGISTER OF WILLS**

**Program Name:** Estate Administration

**Program Number:** 11

**FY27 Proposed General Fund:** \$ 4,851,543

**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.

**FY27 Strategic Goals:**

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

**FY27 Performance Measures:**

| Measure  | FY25 Actual | FY26 Target | FY27 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           |

**Program Name:** Orphans' Court

**Program Number:** 12

**FY27 Proposed General Fund:** \$1,177,928

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- **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.

**FY27 Strategic Goals:**

- Replace Legacy System
- Digitizing Historic Records
- Row Capital Upgrades

**FY27 Performance Measures:**

| Measure   | FY25 Actual | FY26 Target | FY27 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, FY26                                |                  |                           |                |                     |               |                                      |                                    |                                   |  |  |   |
| 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] |
| JX Consulting   | Consulting       | \$95,700                  | 7/1/2025       | 7/1/2025            | MBE: BGFE     | 100%                                 | \$95,700                           | 100%                              | \$95,700                                 | Y  | N   |
|   |                  |                           |                |                     | WBE: BGFE     | 0%                                   | \$0                                |                                   |  |  |   |
|   |                  |                           |                |                     | DSBE: BGFE    | 0%                                   | \$0                                |                                   |  |  |   |
| EG. Blagman   | Communications   | \$15,600                  | 7/1/2025       | 7/1/2025            | MBE: BGFE     | 100%                                 | \$15,600                           | 100%                              | \$15,600                                 | Y  | N   |
|   |                  |                           |                |                     | WBE: BGFE     | 0%                                   | \$0                                |                                   |  |  |   |
|   |                  |                           |                |                     | DSBE: BGFE    | 0%                                   | \$0                                |                                   |  |  |   |
| AMSS  | Outreach         | \$60,000                  | 7/1/2025       | 7/1/2025            | MBE: BGFE     | 0%                                   | \$0                                | 100%                              | \$60,000                                 | Y  | N   |
|   |                  |                           |                |                     | WBE: BGFE     | 100%                                 | \$60,000                           |                                   |  |  |   |
|   |                  |                           |                |                     | DSBE: BGFE    | 0%                                   | \$0                                |                                   |  |  |   |
| RG3   | Outreach         | \$40,000                  | 2/1/2025       | 2/1/2025            | MBE: BGFE     | 100%                                 | \$40,000                           | 100%                              | \$40,000                                 | Y  | N   |
|   |                  |                           |                |                     | WBE: BGFE     | 0%                                   | \$0                                |                                   |  |  |   |
|   |                  |                           |                |                     | DSBE: BGFE    | 0%                                   | \$0                                |                                   |  |  |   |
| 1983 Strategies   | Probate          | \$90,000                  | 7/1/2025       | 7/1/2025            | MBE: BGFE     | 0%                                   | \$0                                | 0%                                | \$0                                      | Y  | N   |
|   |                  |                           |                |                     | WBE: BGFE     | 0%                                   | \$0                                |                                   |  |  |   |
|   |                  |                           |                |                     | DSBE: BGFE    | 0%                                   | \$0                                |                                   |  |  |   |