

ORPHANS' COURT - 106

MISSION AND SERVICES

Mission - The Orphans' Court provides supervision of decedents' estates and children's property to the beneficiaries in order to protect decedents' and children's assets.

Core Services -

- Administration of decedents' estates, primarily through probate hearings; determination of the validity of wills and claims against estates for the benefit of the heir(s) of the estate
- Administration of children's property, including appointing and supervising the guardianship of minors

Strategic Focus in FY 2018 -

The Court's top priorities in FY 2018 are:

- Increase the number of decedents' assets that are intact through having one sitting judge review caseload and dockets
- Increase the number of guardianships with assets intact through having one sitting judge review caseload and dockets

FY 2018 BUDGET SUMMARY

The FY 2018 approved budget for the Orphans' Court is \$533,300, an increase of \$114,100 or 27.2% over the FY 2017 approved budget.

GENERAL FUNDS

The FY 2018 approved General Fund budget for the Orphans' Court is \$463,200, an increase of \$44,000 or 10.5% over the FY 2017 approved budget.

Budgetary Changes -

FY 2017 APPROVED BUDGET	\$419,200
Add: Compensation - New Position - Net cost of one Law Clerk to provide legal support to the Orphans' Court judges	\$23,200
Increase Cost: Compensation - Mandated Salary Requirements	\$11,800
Increase Cost: Fringe Benefits - Increase due to new position added to the staffing complement and compensation adjustments.	\$7,400
Increase Cost: Operating - Increase for judges' membership dues and supplies for the Law Clerk	\$1,600
FY 2018 APPROVED BUDGET	\$463,200

GRANT FUNDS

The FY 2018 approved grant budget for the Orphans' Court is \$70,100, an increase of \$70,100 or 100% over the FY 2017 approved budget. Major changes in the FY 2018 approved budget include:

- New grant funding from the Maryland Judiciary, Administrative Office of the Courts

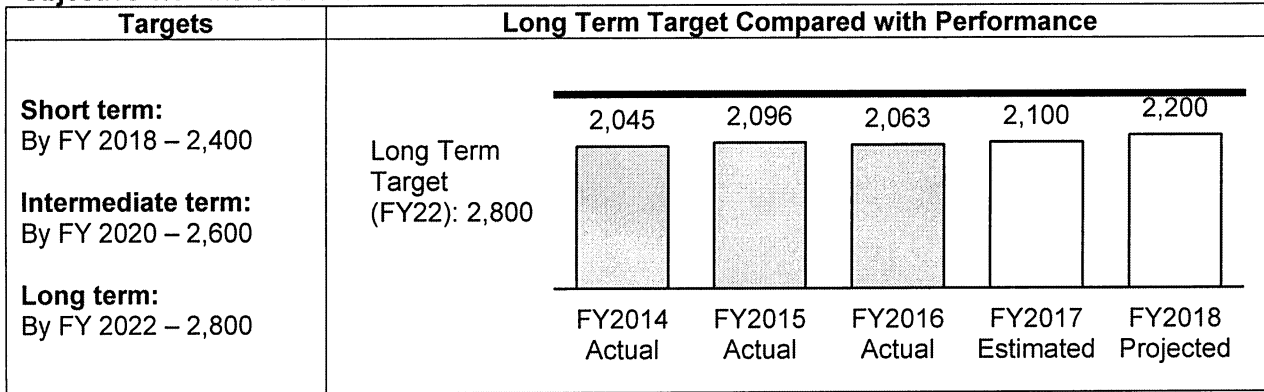
Budgetary Changes -

FY 2017 APPROVED BUDGET	\$0
Add: New Grant - Alternative Dispute Resolution Program	\$70,100
FY 2018 APPROVED BUDGET	\$70,100

SERVICE DELIVERY PLAN AND PERFORMANCE

GOAL 1 - To monitor the property of a deceased resident of the County in order to carry out the wishes of the decedent and to ensure distribution to the beneficiaries.

Objective 1.1 - Increase the number of decedents' assets that are intact.



Trend and Analysis -

The Orphans' Court workload and volume metrics are related directly to estate filings and are not tied to any economic or other traditional workload cycles.

Performance Measures -

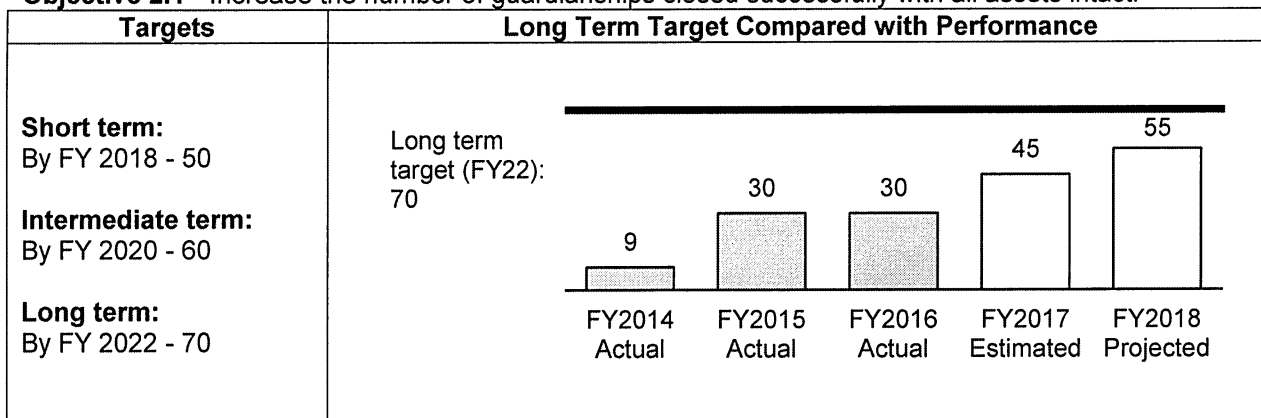
Measure Name	FY 2014 Actual	FY 2015 Actual	FY 2016 Actual	FY 2017 Estimated	FY 2018 Projected
Resources (input)					
Number of judges	3	3	3	3	3
Workload, Demand and Production (output)					
Number of hearings	2,004	1,792	1,766	2,000	2,100
Number of pleadings	5,741	5,552	5,191	5,000	5,500
Number of estates open	2,198	2,201	2,163	2,250	2,400
Number of hearing notices, orders and writs issued	2,307	2,531	2,672	2,600	2,800
Efficiency					
Average number of hearings per judge	668.0	597.3	588.7	666.7	700.0
Average number of pleadings per judge	1,913.7	1,850.7	1,730.3	1,666.7	1,833.3
Quality					
Percent of estate decisions upheld on appeal	100%	100%	100%	100%	100%
Impact (outcome)					
Number of intact estates	2,045	2,096	2,063	2,100	2,200

Strategies to Accomplish the Objective -

- **Strategy 1.1.1** - Have one sitting judge three days per week to review and rule on the case docket
- **Strategy 1.1.2** - Follow up on all rulings and applicable wills by reviewing a decedent's and heir's accounts to ensure decedent's assets are distributed within the law

GOAL 2 - To provide protection of children’s assets until they are legally adults (18 years of age) in order to ensure proper monetary distribution for their short-term and long-term needs.

Objective 2.1 - Increase the number of guardianships closed successfully with all assets intact.



Trend and Analysis -

The Orphans’ Court workload and volume metrics are related directly to estate filings and are not tied to any economic or other traditional workload cycles.

Performance Measures -

Measure Name	FY 2014 Actual	FY 2015 Actual	FY 2016 Actual	FY 2017 Estimated	FY 2018 Projected
Resources (input)					
Number of judges	3	3	3	3	3
Workload, Demand and Production (output)					
Number of hearings	199	143	143	155	170
Number of pleadings	548	437	453	400	450
Number of guardianships open	123	106	86	115	125
Number of orders and writs issued	352	345	443	400	455
Efficiency					
Average number of hearings per judge	66.3	47.7	47.7	51.7	56.7
Average number of pleadings per judge	182.7	145.7	151.0	133.3	150.0
Quality					
Number of appeals	0	0	0	0	0
Impact (outcome)					
Number of intact guardianships	9	30	30	45	55

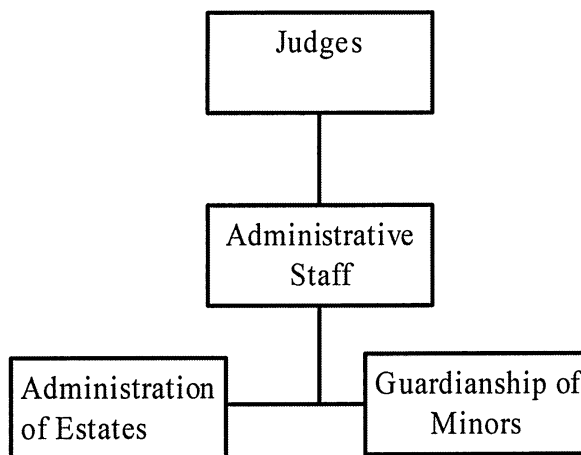
Strategies to Accomplish the Objective -

- **Strategy 2.1.1** - Have one sitting judge three days per week to review and rule on the case docket
- **Strategy 2.1.2** - Review accounts of guardianships to ensure withdraws are proper and important

FY 2017 KEY ACCOMPLISHMENTS

- Maintained an efficient and effective level of service to the public despite an increase in complex cases being heard.
- Held quarterly meetings with Estate and Trusts Section of the Prince George's County Bar Association to discuss new laws, procedures or concerns of the Bar and its clients and any other matter relating to probate.
- Implemented a pilot Alternative Dispute Resolution program for the Court. The program provides residents of Prince George's County the opportunity for mediation, and/or collaborative process and settlement conferences in resolving probate matters.

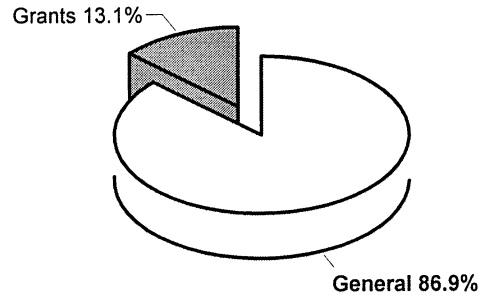
ORGANIZATIONAL CHART



	FY2016 ACTUAL	FY2017 BUDGET	FY2017 ESTIMATED	FY2018 APPROVED	CHANGE FY17-FY18
TOTAL EXPENDITURES	\$ 409,524	\$ 419,200	\$ 484,700	\$ 533,300	27.2%
EXPENDITURE DETAIL					
Orphans' Court	409,524	419,200	424,700	463,200	10.5%
Grants	0	0	60,000	70,100	100%
Recoveries	0	0	0	0	0%
TOTAL	\$ 409,524	\$ 419,200	\$ 484,700	\$ 533,300	27.2%
SOURCES OF FUNDS					
General Fund	\$ 409,524	\$ 419,200	\$ 424,700	\$ 463,200	10.5%
Other County Operating Funds:					
Grants	0	0	60,000	70,100	100%
TOTAL	\$ 409,524	\$ 419,200	\$ 484,700	\$ 533,300	27.2%

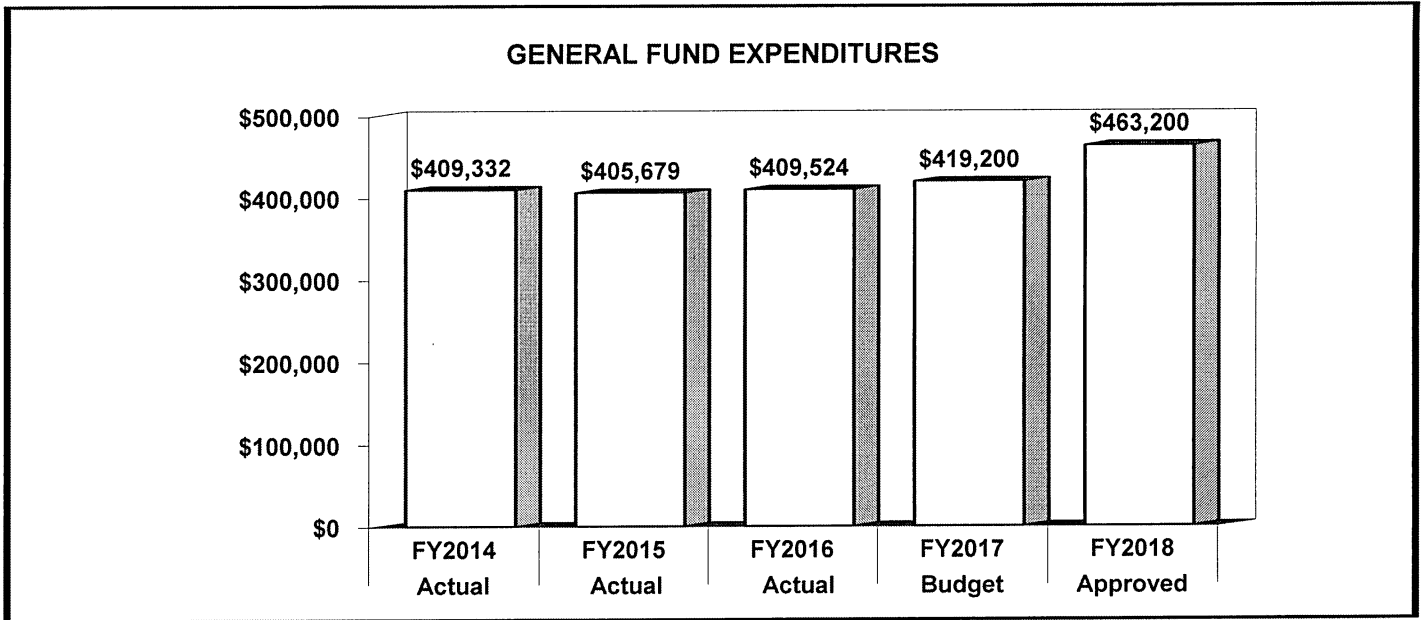
FY2018 SOURCES OF FUNDS

This agency is supported by two funding sources: General Fund and Grant Funds. Major grant program includes the Alternative Dispute Resolution Program.

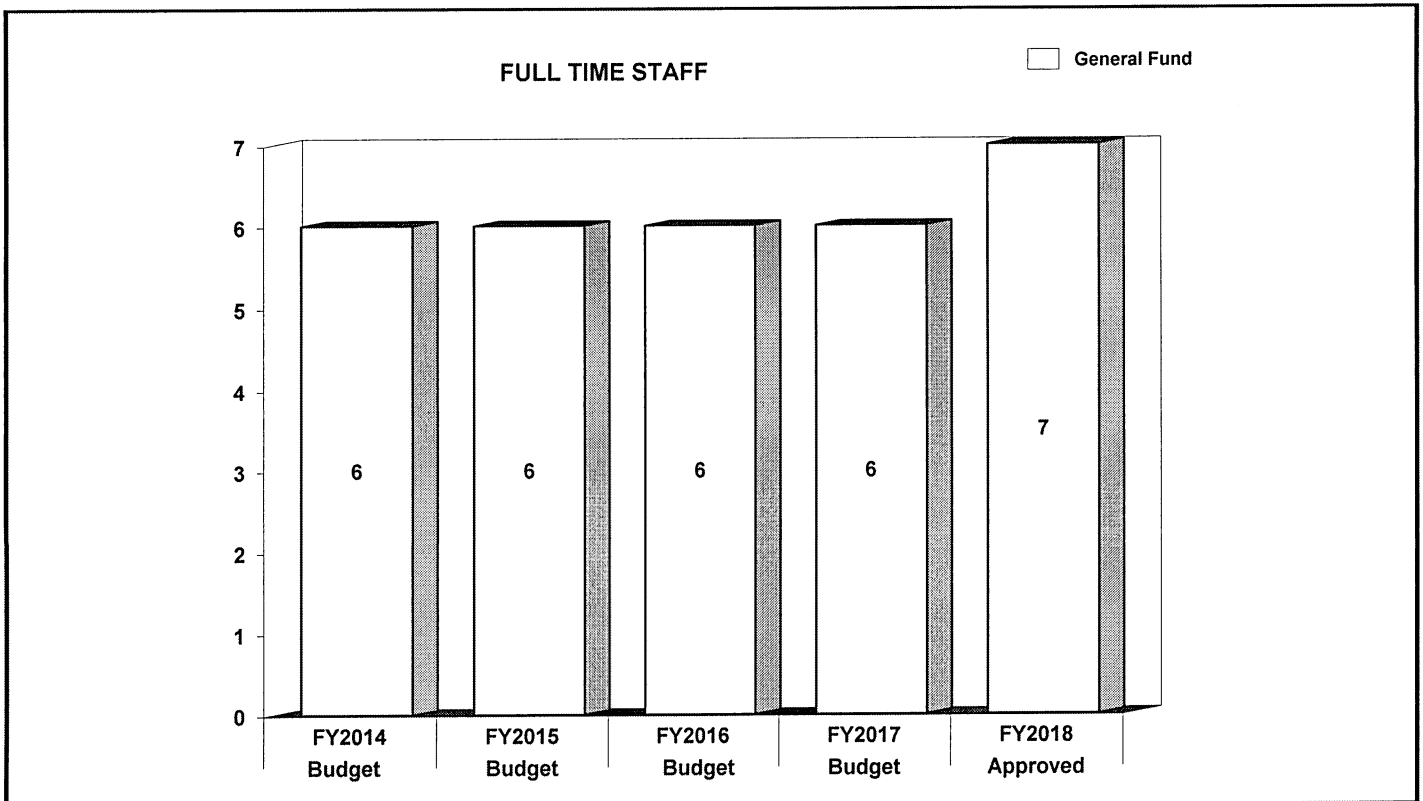


	FY2016 BUDGET	FY2017 BUDGET	FY2018 APPROVED	CHANGE FY17-FY18
GENERAL FUND STAFF				
Full Time - Civilian	6	6	7	1
Full Time - Sworn	0	0	0	0
Part Time	0	0	0	0
Limited Term	0	0	0	0
OTHER STAFF				
Full Time - Civilian	0	0	0	0
Full Time - Sworn	0	0	0	0
Part Time	0	0	0	0
Limited Term Grant Funded	0	0	1	1
TOTAL				
Full Time - Civilian	6	6	7	1
Full Time - Sworn	0	0	0	0
Part Time	0	0	0	0
Limited Term	0	0	1	1

POSITIONS BY CATEGORY	FULL TIME	PART TIME	LIMITED TERM
Judges	3	0	0
Administrative Assistant IV	1	0	0
Administrative Assistant II	1	0	0
General Clerk III	1	0	0
Community Developer I	0	0	1
Law Clerk I	1	0	0
TOTAL	7	0	1



The Court's expenditures increased 0.05% from FY 2014 to FY 2016. This increase was primarily driven by salary requirements. The FY 2018 approved budget is 10.5% over the FY 2017 budget.



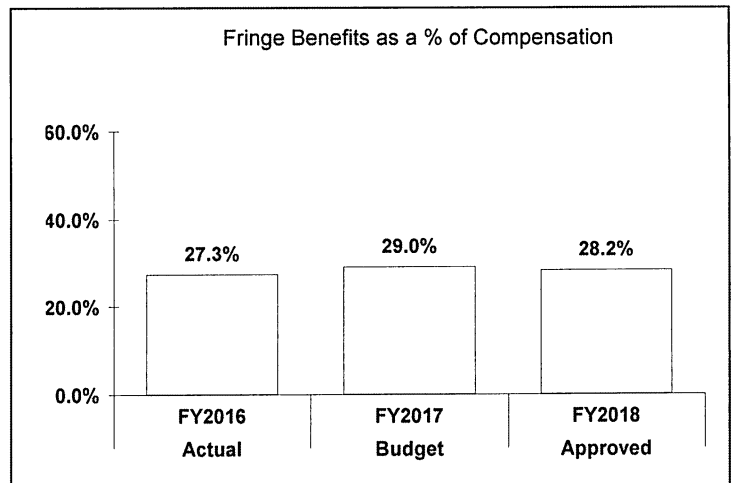
The Courts's authorized staffing complement remained unchanged from FY 2014 to FY 2017. The FY 2018 staffing total increases by one position from the FY 2017 budget to support a Law Clerk.

	FY2016 ACTUAL	FY2017 BUDGET	FY2017 ESTIMATED	FY2018 APPROVED	CHANGE FY17-FY18
EXPENDITURE SUMMARY					
Compensation	\$ 312,654	\$ 311,700	\$ 316,000	\$ 346,700	11.2%
Fringe Benefits	85,507	90,400	91,600	97,800	8.2%
Operating Expenses	11,363	17,100	17,100	18,700	9.4%
Capital Outlay	0	0	0	0	0%
	\$ 409,524	\$ 419,200	\$ 424,700	\$ 463,200	10.5%
Recoveries	0	0	0	0	0%
TOTAL	\$ 409,524	\$ 419,200	\$ 424,700	\$ 463,200	10.5%
STAFF					
Full Time - Civilian	-	6	-	7	16.7%
Full Time - Sworn	-	0	-	0	0%
Part Time	-	0	-	0	0%
Limited Term	-	0	-	0	0%

In FY 2018, compensation expenditures increase 11.2% over the FY 2017 budget due to anticipated cost of living and merit adjustments and the staffing complement change. Compensation costs include funding for seven out of seven full-time positions, which reflects the addition of a Law Clerk position. Fringe benefit expenditures increase 8.2% over the FY 2017 budget. This is due an increase in staffing and compensation adjustments.

Operating expenditures increase 9.4% over the FY 2017 budget due to costs associated with supplies and membership fees. Operating expenses reflect funding for office automation and general office supplies.

MAJOR OPERATING EXPENDITURES FY2018	
Office Automation	\$ 12,600
Operating and Office Supplies	\$ 4,000
Telephones	\$ 1,100
Memberships	\$ 1,000



	FY 2016 ACTUAL	FY 2017 BUDGET	FY 2017 ESTIMATED	FY 2018 APPROVED	CHANGE FY17-FY18
EXPENDITURE SUMMARY					
Compensation	\$ -	\$ -	\$ 20,600	\$ 29,400	100.0%
Fringe Benefits	-	-	3,100	4,400	100.0%
Operating Expenses	-	-	36,300	36,300	100.0%
Capital Outlay	-	-	-	-	0.0%
TOTAL	\$ -	\$ -	\$ 60,000	\$ 70,100	100.0%

The FY 2018 approved grant budget is \$70,100, an increase of 100% over the FY 2017 budget. This increase is driven by funding received for the Alternative Dispute Resolution Program.

STAFF SUMMARY BY DIVISION & GRANT PROGRAM	FY 2017			FY 2018		
	FT	PT	LTGF	FT	PT	LTGF
Administration Division						
Alternative Dispute Resolution Program	0	0	0	0	0	1
Sub-Total	0	0	0	0	0	1
TOTAL	0	0	0	0	0	1

In FY 2018, funding is provided for one limited term grant funded (LTGF) position.

GRANTS BY DIVISION	FY 2016 ACTUAL	FY 2017 BUDGET	FY 2017 ESTIMATED	FY 2018 APPROVED	\$ CHANGE FY17 - FY18	% CHANGE FY17 - FY18
<u>Administration Division</u>						
Alternative Dispute Resolution Program	\$ -	\$ -	\$ 60,000	\$ 70,100	\$ 70,100	100.0%
Orphans' Court Total Grants - Outside Sources	\$ -	\$ -	\$ 60,000	\$ 70,100	\$ 70,100	100.0%
Total Transfer from General Fund - (County Contribution/Cash Match)	\$ -	\$ -	\$ -	\$ -	\$ -	0.0%
Total Grant Expenditures	\$ -	\$ -	\$ 60,000	\$ 70,100	\$ 70,100	100.0%

ALTERNATIVE DISPUTE RESOLUTION PROGRAM -- \$70,100

The Maryland Judiciary Administrative Office of the Courts provides funding for mediation, settlement conferences and collaborative law processes for probate matters.