

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 2019 -

The Court's top priorities in FY 2019 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
- Provide residents the opportunity for mediation, and/or collaborative process and settlement conferences in resolving probate matters through the Orphans' Court's Alternative Dispute Resolution (ADR) Program

FY 2019 BUDGET SUMMARY

The FY 2019 approved budget for the Orphans' Court is \$498,200, a decrease of \$35,100 or 6.6% under the FY 2018 approved budget.

GENERAL FUNDS

The FY 2019 approved General Fund budget for the Orphans' Court is \$445,000, a decrease of \$18,200 or 3.9% under the FY 2018 approved budget.

Budgetary Changes -

FY 2018 APPROVED BUDGET	\$463,200
Add: Compensation - Mandated Requirement - The Maryland General Assembly during the 2017 session (SB 509) raised the annual salary of the Chief and Associate Judges effective the new term of office	\$14,300
Increase Cost: Operating - Reflects a change in the office automation charge methodology based on the number of funded positions	\$10,600
Increase Cost: Operating - Increase in office supplies to meet operational needs	\$500
Decrease Cost: Fringe Benefits - Net decrease due to compensation savings related to the retirement of an employee; The fringe benefit rate increases from 28.2% to 28.3%	(\$6,200)
Decrease Cost: Compensation - Mandated Salary Requirements - Compensation savings due to the retirement of an employee; The Court is backfilling positions at a lower rate	(\$37,400)
FY 2019 APPROVED BUDGET	\$445,000

GRANT FUNDS

The FY 2019 approved grant budget for the Orphans' Court is \$53,200, a decrease of \$16,900 or 24.1% under the FY 2018 approved budget. Major source of funds in the FY 2019 approved budget include:

- Maryland Judiciary, Administrative Office of the Courts

Budgetary Changes –

FY 2018 APPROVED BUDGET	\$70,100
Reduce: Existing Program/Service - Alternative Dispute Resolution Program	(\$16,900)
FY 2019 APPROVED BUDGET	\$53,200

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					
FY 2023 Target	FY 2016 Actual	FY 2017 Actual	FY 2018 Estimated	FY 2019 Projected	Trend
2,500	2,063	2,219	2,300	2,400	↑

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 2015 Actual	FY 2016 Actual	FY 2017 Actual	FY 2018 Estimated	FY 2019 Projected
Resources (input)					
Number of judges	3	3	3	3	3
Workload, Demand and Production (output)					
Number of hearings	1,792	1,766	1,741	1,900	2,000
Number of pleadings	5,552	5,191	4,848	5,100	5,500
Number of estates open	2,201	2,163	2,313	2,400	2,600
Number of hearing notices, orders and writs issued	2,531	2,672	2,653	2,600	2,800
Number of cases referred to Alternative Dispute Resolution [NEW]				50	75
Efficiency					
Average number of hearings per judge	597.3	588.7	580.3	633.3	666.7
Average number of pleadings per judge	1,850.7	1,730.3	1,616.0	1,700.0	1,833.3
Quality					
Percent of estate decisions upheld on appeal	100%	100%	100%	100%	100%
Impact (outcome)					
Number of intact estates	2,096	2,063	2,219	2,300	2,400

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					
FY 2023 Target	FY 2016 Actual	FY 2017 Actual	FY 2018 Estimated	FY 2019 Projected	Trend
40	30	29	40	40	↔

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.

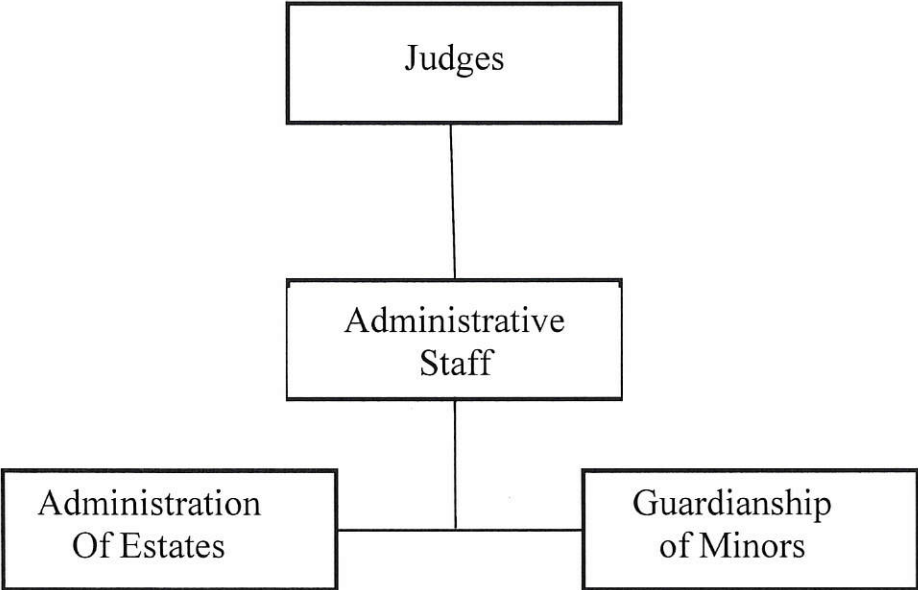
Performance Measures

Measure Name	FY 2015 Actual	FY 2016 Actual	FY 2017 Actual	FY 2018 Estimated	FY 2019 Projected
Resources (input)					
Number of judges	3	3	3	3	3
Workload, Demand and Production (output)					
Number of hearings	143	143	131	145	155
Number of pleadings	437	453	328	300	375
Number of guardianships open	106	86	81	90	100
Number of orders and writs issued	345	443	361	345	400
Efficiency					
Average number of hearings per judge	47.7	47.7	43.7	48.3	51.7
Average number of pleadings per judge	145.7	151.0	109.3	100.0	125.0
Quality					
Number of appeals	0	0	0	0	0
Impact (outcome)					
Number of intact guardianships	30	30	29	40	40

FY 2018 KEY ACCOMPLISHMENTS

- Maintained an efficient and effective level of service to the public despite an increase of pleadings and an increase of complex cases being heard.
- Held quarterly meetings with the 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 ADR program to provide residents of Prince George's County the opportunity for mediation and/or collaborative process and settlement conferences in resolving probate matters.

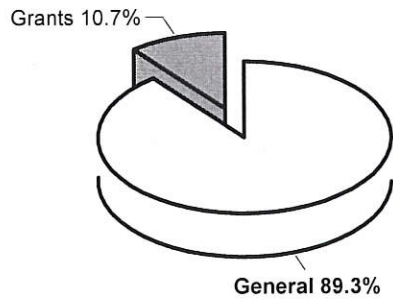
ORGANIZATIONAL CHART



	FY2017 ACTUAL	FY2018 BUDGET	FY2018 ESTIMATED	FY2019 APPROVED	CHANGE FY18-FY19
TOTAL EXPENDITURES	\$ 462,815	\$ 533,300	\$ 499,800	\$ 498,200	-6.6%
EXPENDITURE DETAIL					
Orphans' Court	417,749	463,200	455,800	445,000	-3.9%
Grants	45,066	70,100	44,000	53,200	-24.1%
Recoveries	0	0	0	0	0%
TOTAL	\$ 462,815	\$ 533,300	\$ 499,800	\$ 498,200	-6.6%
SOURCES OF FUNDS					
General Fund	\$ 417,749	\$ 463,200	\$ 455,800	\$ 445,000	-3.9%
Other County Operating Funds:					
Grants	45,066	70,100	44,000	53,200	-24.1%
TOTAL	\$ 462,815	\$ 533,300	\$ 499,800	\$ 498,200	-6.6%

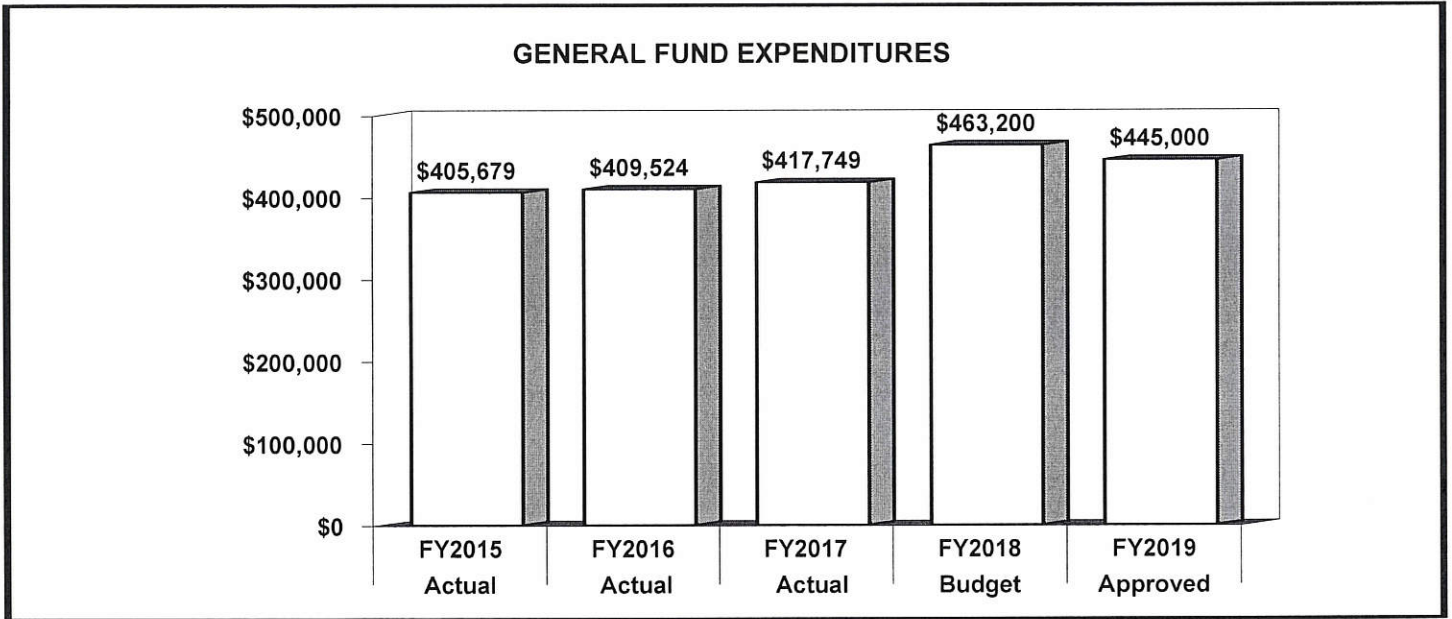
FY2019 SOURCES OF FUNDS

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

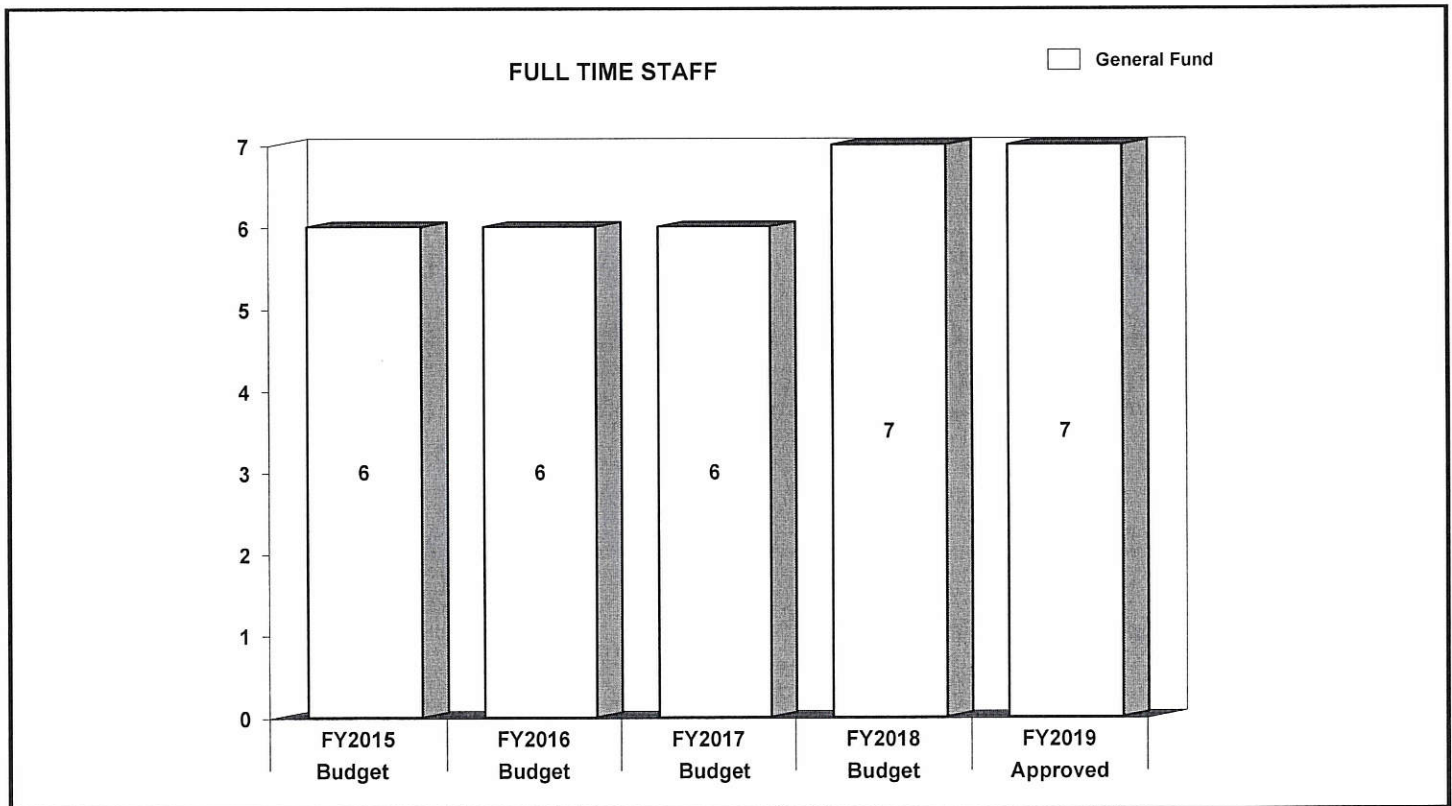


	FY2017 BUDGET	FY2018 BUDGET	FY2019 APPROVED	CHANGE FY18-FY19
GENERAL FUND STAFF				
Full Time - Civilian	6	7	7	0
Full Time - Sworn	0	0	0	0
Part Time	0	0	0	0
Limited Term	0	0	0	0
OTHER STAFF				
Full Time - Civilian	0	0	0	0
Full Time - Sworn	0	0	0	0
Part Time	0	0	0	0
Limited Term Grant Funded	0	1	1	0
TOTAL				
Full Time - Civilian	6	7	7	0
Full Time - Sworn	0	0	0	0
Part Time	0	0	0	0
Limited Term	0	1	1	0

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
Community Developer I	0	0	1
Law Clerk I	1	0	0
General Clerk II	1	0	0
TOTAL	7	0	1



The Court's expenditures increased 3.0% from FY 2015 to FY 2017. This increase is primarily driven by salary requirements. The FY 2019 approved budget is 3.9% under the FY 2018 budget mainly due to the retirement of an employee.



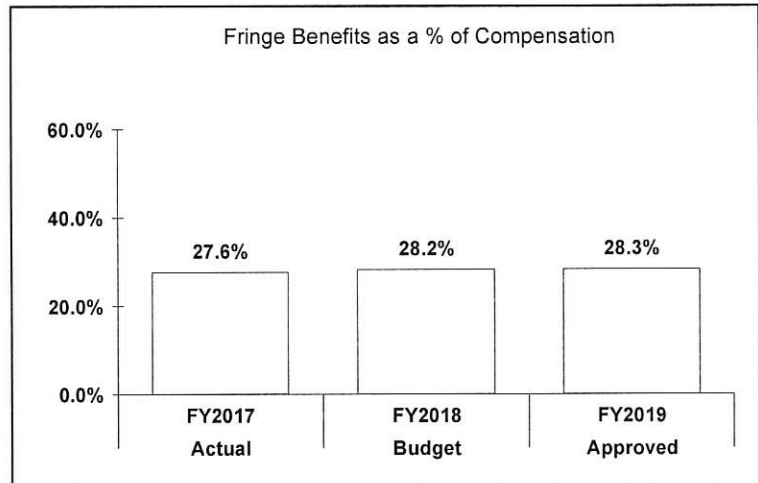
The Court's authorized General Fund staffing complement increased by one position from FY 2015 to FY 2018. This increase is due to the creation of the Law Clerk in FY 2018. The FY 2019 General Fund staffing total remains unchanged from the FY 2018 level.

	FY2017 ACTUAL	FY2018 BUDGET	FY2018 ESTIMATED	FY2019 APPROVED	CHANGE FY18-FY19
EXPENDITURE SUMMARY					
Compensation	\$ 315,910	\$ 346,700	\$ 341,600	\$ 323,600	-6.7%
Fringe Benefits	87,294	97,800	96,400	91,600	-6.3%
Operating Expenses	14,545	18,700	17,800	29,800	59.4%
Capital Outlay	0	0	0	0	0%
	\$ 417,749	\$ 463,200	\$ 455,800	\$ 445,000	-3.9%
Recoveries	0	0	0	0	0%
TOTAL	\$ 417,749	\$ 463,200	\$ 455,800	\$ 445,000	-3.9%
STAFF					
Full Time - Civilian	-	7	-	7	0%
Full Time - Sworn	-	0	-	0	0%
Part Time	-	0	-	0	0%
Limited Term	-	0	-	0	0%

In FY 2019, compensation expenditures decrease 6.7% under the FY 2018 budget due to the net change in salary requirements as a result of the retirement of an employee. Funding is included for anticipated cost of living and merit adjustments and State mandated adjustments for the Chief and Associate Judges salaries. Compensation costs include funding for seven full-time positions. Fringe benefit expenditures decrease 6.3% under the FY 2018 budget due to compensation adjustments.

Operating expenditures increase 59.4% over the FY 2018 budget due to an increase in office automation charges based on the number of funded positions and office supplies.

MAJOR OPERATING EXPENDITURES FY2019	
Office Automation	\$ 23,200
Operating and Office Supplies	\$ 4,500
Telephones	\$ 1,100
Memberships	\$ 1,000



	FY 2017 ACTUAL	FY 2018 BUDGET	FY 2018 ESTIMATED	FY 2019 APPROVED	CHANGE FY18-FY19
EXPENDITURE SUMMARY					
Compensation	\$ 5,469	\$ 29,400	\$ 27,100	\$ 27,100	-7.8%
Fringe Benefits	-	4,400	4,100	4,100	-6.8%
Operating Expenses	39,597	36,300	12,800	22,000	-39.4%
Capital Outlay	-	-	-	-	0.0%
TOTAL	\$ 45,066	\$ 70,100	\$ 44,000	\$ 53,200	-24.1%

The FY 2019 approved grant budget is \$53,200, a decrease of 24.1% under the FY 2018 budget. This decrease is largely driven by reduced training requirements.

STAFF SUMMARY BY DIVISION & GRANT PROGRAM	FY 2018			FY 2019		
	FT	PT	LTGF	FT	PT	LTGF
Administration Division						
ADR Program for Probate Matters	0	0	1	0	0	1
Sub-Total	0	0	1	0	0	1
TOTAL	0	0	1	0	0	1

In FY 2019, funding is provided for one limited term grant funded (LTGF) position.

GRANTS BY DIVISION	FY 2017 ACTUAL	FY 2018 BUDGET	FY 2018 ESTIMATED	FY 2019 APPROVED	\$ CHANGE FY18 - FY19	% CHANGE FY18 - FY19
<u>Administration Division</u>						
Alternative Dispute Resolution Program for Probate Matters	\$ 45,066	\$ 70,100	\$ 44,000	\$ 53,200	\$ (16,900)	-24.1%
Orphans' Court Total Grants - Outside Sources	\$ 45,066	\$ 70,100	\$ 44,000	\$ 53,200	\$ (16,900)	-24.1%
Total Transfer from General Fund - (County Contribution/Cash Match)	\$ -	\$ -	\$ -	\$ -	\$ -	0.0%
Total Grant Expenditures	\$ 45,066	\$ 70,100	\$ 44,000	\$ 53,200	\$ (16,900)	-24.1%

ALTERNATIVE DISPUTE RESOLUTION PROGRAM FOR PROBATE MATTERS -- \$53,200

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