

# 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 2016** -

The Court's top priorities in FY 2016 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 2016 BUDGET SUMMARY

The FY 2016 approved budget for the Orphans' Court is \$407,800, a decrease of \$7,900 or -1.9% under the FY 2015 budget.

**Budgetary Changes** -

<b>FY 2015 BUDGET</b>	<b>\$415,700</b>
Increase in fringe rate from 25.7% to 28.3%	\$5,000
Net decrease in operating due to spending controls and based on reduction in OIT charges that include annual costs for the Court Smart System (\$4,200)	(\$1,200)
Decrease in compensation due to hiring new personnel at lower salary and spending controls	(\$11,700)
<b>FY 2016 APPROVED BUDGET</b>	<b>\$407,800</b>

## 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.

Targets	Long Term Target Compared with Performance										
<p><b>Short term:</b> By FY 2016 - 2,300</p> <p><b>Intermediate term:</b> By FY 2018 - 2,600</p> <p><b>Long term:</b> By FY 2020 - 2,800</p>	<div style="display: flex; align-items: center;"> <div style="margin-right: 20px;"> <p>Long Term Target (FY20): 2,800</p> </div> <table style="margin-left: auto; margin-right: auto; border-collapse: collapse;"> <tr> <td style="text-align: center;">2,068</td> <td style="text-align: center;">2,145</td> <td style="text-align: center;">2,045</td> <td style="text-align: center;">2,200</td> <td style="text-align: center;">2,300</td> </tr> <tr> <td style="text-align: center;">FY 2012 Actual</td> <td style="text-align: center;">FY 2013 Actual</td> <td style="text-align: center;">FY 2014 Actual</td> <td style="text-align: center;">FY 2015 Estimated</td> <td style="text-align: center;">FY 2016 Projected</td> </tr> </table> </div>	2,068	2,145	2,045	2,200	2,300	FY 2012 Actual	FY 2013 Actual	FY 2014 Actual	FY 2015 Estimated	FY 2016 Projected
2,068	2,145	2,045	2,200	2,300							
FY 2012 Actual	FY 2013 Actual	FY 2014 Actual	FY 2015 Estimated	FY 2016 Projected							

**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 -**

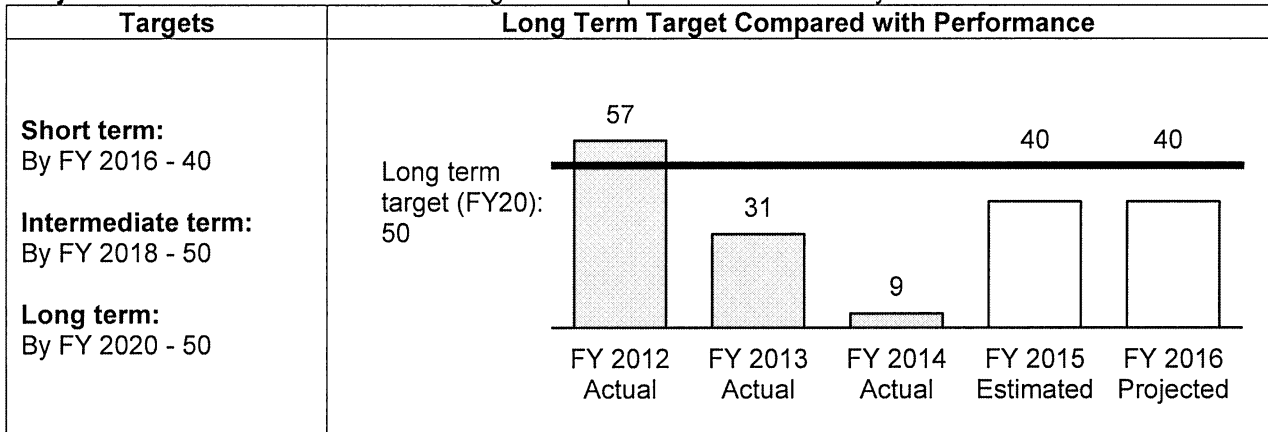
Measure Name	FY 2012 Actual	FY 2013 Actual	FY 2014 Actual	FY 2015 Estimated	FY 2016 Projected
Number of judges	3	3	3	3	3
<b>Workload, Demand and Production (output)</b>					
Number of hearings	2,142	2,172	2,004	2,300	2,400
Number of pleadings	6,428	6,539	5,741	6,200	6,350
Number of estates open	2,179	2,207	2,198	2,300	2,450
Number of hearing notices, orders and writs issued	2,503	2,235	2,307	2,700	2,850
<b>Efficiency</b>					
Average number of hearings per judge	714.0	724.0	668.0	766.7	800.0
Average number of pleadings per judge	2,142.7	2,179.7	1,913.7	2,066.7	2,116.7
<b>Quality</b>					
Percent of estate decisions upheld on appeal	100%	100%	100%	100%	100%
<b>Impact (outcome)</b>					
Number of intact estates	2,068	2,145	2,045	2,200	2,300

**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 2012 Actual	FY 2013 Actual	FY 2014 Actual	FY 2015 Projected	FY 2016 Projected
<b>Resources (input)</b>					
Number of judges	3	3	3	3	3
<b>Workload, Demand and Production (output)</b>					
Number of hearings	213	163	199	200	230
Number of pleadings	665	505	548	625	700
Number of guardianships open	108	118	123	160	190
Number of orders and writs issued	497	387	352	400	475
<b>Efficiency</b>					
Average number of hearings per judge	71.0	54.3	66.3	66.7	76.7
Average number of pleadings per judge	221.7	168.3	182.7	208.3	233.3
<b>Quality</b>					
Number of appeals	0	0	0	0	0
<b>Impact (outcome)</b>					
Number of intact guardianships	57	31	9	40	40

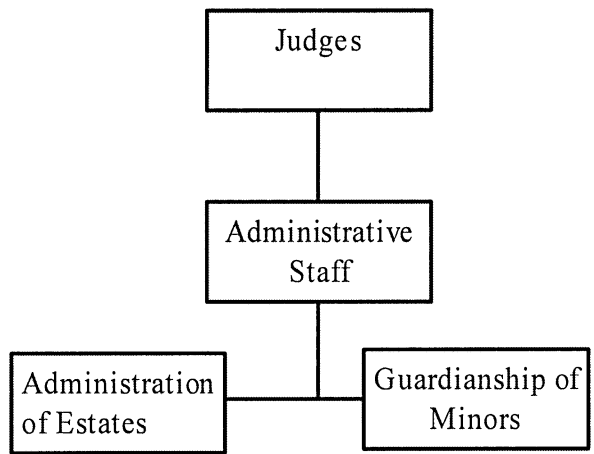
**Strategies to Accomplish the Objective -**

- **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 2015 KEY ACCOMPLISHMENTS**

- Maintained an efficient and effective level of service to the public despite an increase in the number of estate pleadings filed by lay persons, which in turn may result in estate hearings.
- Continued to hold quarterly meetings with Estates & 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 others matters relating to probate.

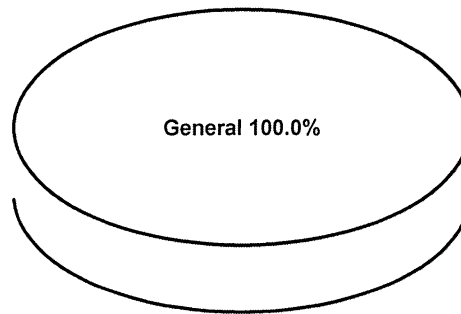
ORGANIZATIONAL CHART



	FY2014 ACTUAL	FY2015 BUDGET	FY2015 ESTIMATED	FY2016 APPROVED	CHANGE FY15-FY16
<b>TOTAL EXPENDITURES</b>	\$ 409,332	\$ 415,700	\$ 400,800	\$ 407,800	-1.9%
<b>EXPENDITURE DETAIL</b>					
Orphans' Court	409,332	415,700	400,800	407,800	-1.9%
Recoveries	0	0	0	0	0%
<b>TOTAL</b>	\$ 409,332	\$ 415,700	\$ 400,800	\$ 407,800	-1.9%
<b>SOURCES OF FUNDS</b>					
General Fund	\$ 409,332	\$ 415,700	\$ 400,800	\$ 407,800	-1.9%
Other County Operating Funds:					
<b>TOTAL</b>	\$ 409,332	\$ 415,700	\$ 400,800	\$ 407,800	-1.9%

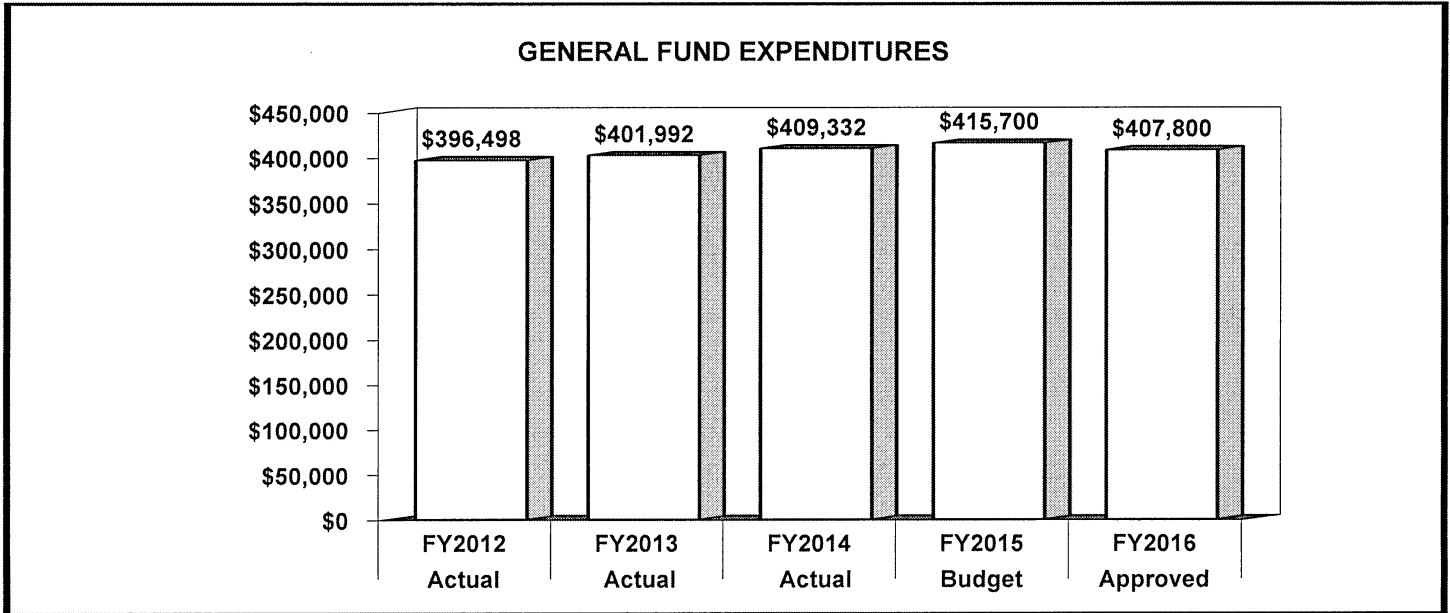
**FY2016 SOURCES OF FUNDS**

This agency's funding is derived solely from the County's General Fund.

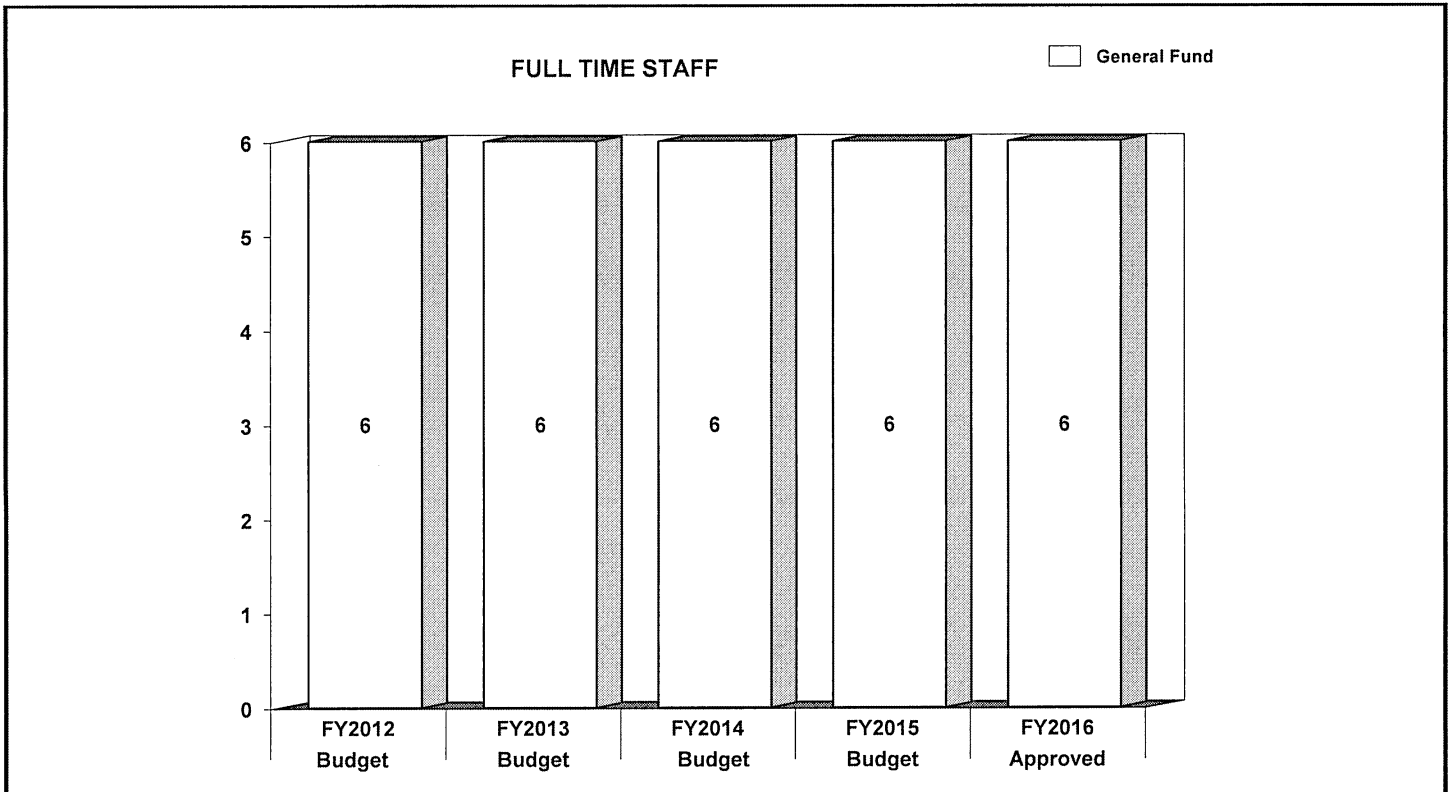


	FY2014 BUDGET	FY2015 BUDGET	FY2016 APPROVED	CHANGE FY15-FY16
<b>GENERAL FUND STAFF</b>				
Full Time - Civilian	6	6	6	0
Full Time - Sworn	0	0	0	0
Part Time	0	0	0	0
Limited Term	0	0	0	0
<b>OTHER STAFF</b>				
Full Time - Civilian				
Full Time - Sworn				
Part Time				
Limited Term Grant Funded				
<b>TOTAL</b>				
Full Time - Civilian	6	6	6	0
Full Time - Sworn	0	0	0	0
Part Time	0	0	0	0
Limited Term	0	0	0	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
General Clerk III	1	0	0
<b>TOTAL</b>	<b>6</b>	<b>0</b>	<b>0</b>



The agency's expenditures increase 3.2% from FY 2012 to FY 2014. This increase was driven by the annual cost to maintain the required software for the court smart system. The FY 2016 approved budget is 1.9% less than the FY 2015 budget. This decrease is due to spending controls.



The agency's staffing complement remained unchanged from FY 2012 to FY 2015. The FY 2016 staffing totals remain unchanged from FY 2015.

	FY2014 ACTUAL	FY2015 BUDGET	FY2015 ESTIMATED	FY2016 APPROVED	CHANGE FY15-FY16
<b>EXPENDITURE SUMMARY</b>					
Compensation	\$ 310,942	\$ 317,200	\$ 294,700	\$ 305,500	-3.7%
Fringe Benefits	83,269	81,500	89,100	86,500	6.1%
Operating Expenses	15,121	17,000	17,000	15,800	-7.1%
Capital Outlay	0	0	0	0	0%
	<b>\$ 409,332</b>	<b>\$ 415,700</b>	<b>\$ 400,800</b>	<b>\$ 407,800</b>	<b>-1.9%</b>
Recoveries	0	0	0	0	0%
<b>TOTAL</b>	<b>\$ 409,332</b>	<b>\$ 415,700</b>	<b>\$ 400,800</b>	<b>\$ 407,800</b>	<b>-1.9%</b>
<b>STAFF</b>					
Full Time - Civilian	-	6	-	6	0%
Full Time - Sworn	-	0	-	0	0%
Part Time	-	0	-	0	0%
Limited Term	-	0	-	0	0%

In FY 2016, compensation expenditures decrease 3.7% under the FY 2015 budget due to a new hire at a lower salary and spending controls. Compensation costs include funding for six full-time employees. Fringe benefit expenditures increase 6.1% over the FY 2015 budget to align with actual expenses.

Operating expenditures decrease 7.1% under the FY 2015 budget due to a reduction in OIT charges and spending controls. The office automation account also supports the annual maintenance costs of the Court Smart System.

MAJOR OPERATING EXPENDITURES FY2016	
Office Automation	\$ 11,600
Operating and Office Supplies	\$ 3,200
Telephones	\$ 1,000

