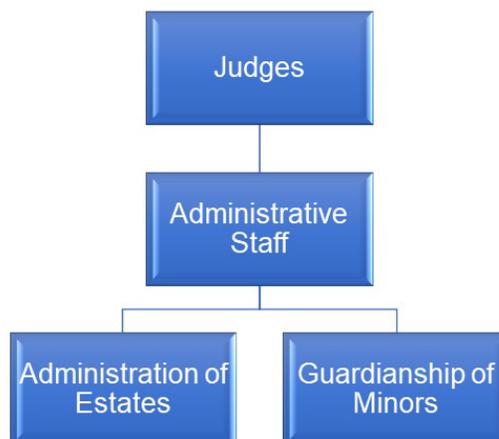


Orphans' Court



MISSION AND SERVICES

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

- 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
- 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

FY 2019 KEY ACCOMPLISHMENTS

- Maintained an efficient and effective level of service to the public despite an increase of pleadings and 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.
- Continued to refer estate cases to the Orphans' Court Alternative Dispute Resolution (ADR) program. The program continues to provide residents of Prince George's County the opportunity for mediation, and/or collaborative process and settlement conferences in resolving probate matters.

STRATEGIC FOCUS AND INITIATIVES FOR FY 2020

The agency's top priorities in FY 2020 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' Courts ADR program.

FY 2020 BUDGET SUMMARY

The FY 2020 proposed budget for the Orphans' Court is \$561,200, an increase of \$116,200 or 26.1% over the FY 2019 approved budget.

Expenditure by Fund Type

Fund Types	FY 2018 Actual		FY 2019 Budget		FY 2019 Estimate		FY 2020 Proposed	
	Amount	% Total						
General Fund	\$424,503	92.3%	\$445,000	89.3%	\$512,000	100.0%	\$561,200	100.0%
Grant Funds	35,517	7.7%	53,200	10.7%	—	0.0%	—	0.0%
Total Expenditures	\$460,020	100.0%	\$498,200	100.0%	\$512,000	100.0%	\$561,200	100.0%

GENERAL FUNDS

The FY 2020 proposed General Fund budget for the Orphans' Court is \$561,200, an increase of \$116,200 or 26.1% over the FY 2019 approved budget.

Reconciliation from Prior Year

	Expenditures
FY 2019 Approved Budget	\$445,000
Add: Compensation - New Position — Community Developer as the Alternative Dispute Resolution (ADR) Program Coordinator	\$51,000
Increase Cost: Compensation - Mandated Salary Requirements	32,800
Increase Cost: Fringe Benefits — Increase in the fringe benefit rate from 28.3% to 28.8% and an increase of one new position	25,700
Increase Cost: Operating - Office Automation — Increase in OIT charges to support anticipated costs for SAP maintenance and the countywide laptop refresh program	4,500
Add: Operating — Funding to purchase desk doorbells for security, public address system and office supplies to support the ADR Coordinator position	2,200
FY 2020 Proposed Budget	\$561,200

GRANT FUNDS

The FY 2020 proposed grant budget for the Orphans’ Court is \$0, a decrease of \$53,200 or 100% under the FY 2019 approved budget.

Reconciliation from Prior Year

	Expenditures
FY 2019 Approved Budget	\$53,200
Eliminate: Program — Alternative Dispute Resolution Program	\$(53,200)
FY 2020 Proposed Budget	\$—

STAFF AND BUDGET RESOURCES

Authorized Positions	FY 2018 Budget	FY 2019 Budget	FY 2020 Proposed	Change FY19-FY20
General Fund				
Full Time - Civilian	7	7	8	1
Full Time - Sworn	0	0	0	0
Subtotal - FT	7	7	8	1
Part Time	0	0	0	0
Limited Term	0	0	0	0
TOTAL				
Full Time - Civilian	7	7	8	1
Full Time - Sworn	0	0	0	0
Subtotal - FT	7	7	8	1
Part Time	0	0	0	0
Limited Term	0	0	0	0

Positions By Classification	FY 2020		
	Full Time	Part Time	Limited Term
Administrative Assistant	2	0	0
Community Developer	1	0	0
General Clerk	1	0	0
Judge	3	0	0
Law Clerk	1	0	0
TOTAL	8	0	0

Expenditure by Category - General Fund

Category	FY 2018 Actual	FY 2019 Budget	FY 2019 Estimate	FY 2020 Proposed	Change FY19-FY20	
					Amount (\$)	Percent (%)
Compensation	\$315,732	\$323,600	\$375,600	\$407,400	\$83,800	25.9%
Fringe Benefits	87,180	91,600	106,300	117,300	25,700	28.1%
Operating	21,591	29,800	30,100	36,500	6,700	22.5%
Capital Outlay	—	—	—	—	—	0.0%
SubTotal	\$424,503	\$445,000	\$512,000	\$561,200	\$116,200	26.1%
Total Expenditures	\$424,503	\$445,000	\$512,000	\$561,200	\$116,200	26.1%

In FY 2020, compensation expenditures increase 25.9% over the FY 2019 budget due to anticipated cost of living and merit adjustments and the addition of one Community Developer position transferred from grants. This position will coordinate the Alternative Dispute Resolution (ADR) Program. Compensation costs include funding for eight full time positions. Fringe benefit expenditures increase 28.1% over the FY 2019 budget due to compensation adjustments and one new position. Operating expenditures increase 22.5% over the FY 2019 budget due to an increase in office automation charges and the purchase of desk doorbells, a public address system and office supplies for the ADR Coordinator.

GRANT FUNDS SUMMARY

Expenditures by Category - Grant Funds

Category	FY 2018 Actual	FY 2019 Budget	FY 2019 Estimate	FY 2020 Proposed	Change FY19-FY20	
					Amount (\$)	Percent (%)
Compensation	\$32,955	\$27,100	\$—	\$—	\$(27,100)	-100.0%
Fringe Benefits	(1,723)	4,100	—	—	(4,100)	-100.0%
Operating	4,285	22,000	—	—	(22,000)	-100.0%
Capital Outlay	—	—	—	—	—	0.0%
Total	\$35,517	\$53,200	\$—	\$—	\$(53,200)	-100.0%

The FY 2020 proposed grant budget is \$0, a decrease of 100% under the FY 2019 budget. The Orphans' Court will not apply for this grant and operating costs are transferred to the General Fund.

Staff Summary by Division - Grant Funds

Staff Summary by Division & Grant Program	FY 2019			FY 2020		
	FT	PT	LTGF	FT	PT	LTGF
Orphans' Court						
Alternative Dispute Resolution (ADR) Program for Probate Matters	—	—	1	—	—	—
Total Orphans' Court	—	—	1	—	—	—
Total	—	—	1	—	—	—

In FY 2020, there are no staff for the ADR Program for Probate Matters Grant.

Grant Funds by Division

Grant Name	FY 2018 Actual	FY 2019 Budget	FY 2019 Estimate	FY 2020 Proposed	Change FY19-FY20	
					Amount (\$)	Percent (%)
Orphans' Court						
Alternative Dispute Resolution (ADR) Program for Probate Matters	\$35,517	\$53,200	\$—	\$—	\$(53,200)	-100.0%
Total Orphans' Court	\$35,517	\$53,200	\$—	\$—	\$(53,200)	-100.0%
Total Transfer from General Fund - (County Contribution/Cash Match)	—	—	—	—	—	0.0%
Total Expenditures	\$35,517	\$53,200	\$—	\$—	\$(53,200)	0.0%

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 2024 Target	FY 2017 Actual	FY 2018 Actual	FY 2019 Estimated	FY 2020 Projected	Trend
2,600	2,219	2,219	2,300	2,500	↑

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. Estates openings continue to fluctuate but are expected to slowly rise over time as the post WWII generation, the baby boomers, begin to age.

Since it was introduced in FY 2018, the number of cases referred to ADR have continued to grow. While still a relatively small proportion of the total caseload, this pathway alleviates most court proceedings reducing the overall workload of the court itself.

Performance Measures

Measure Name	FY 2016 Actual	FY 2017 Actual	FY 2018 Actual	FY 2019 Estimated	FY 2020 Projected
Resources (Input)					
Number of judges	3	3	3	3	3
Workload, Demand and Production (Output)					
Number of hearings	1,766	1,741	1,656	1,900	2,100
Number of pleadings	5,191	4,848	5,190	5,300	5,500
Number of estates open	2,163	2,313	2,073	2,200	2,500
Number of hearing notices, orders and writs issued	2,672	2,653	2,313	2,500	2,800
Number of cases referred to Alternative Dispute Resolution	—	—	28	34	60
Efficiency					
Average number of hearings per judge	588.7	580.3	552.0	633.0	700.0
Average number of pleadings per judge	1,730.3	1,616.0	1,730.0	1,767.0	1,833.0
Quality					
Percent of estate decisions upheld on appeal	100%	100%	100%	100%	100%
Impact (Outcome)					
Number of intact estates	2,063	2,219	2,219	2,300	2,500

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 2024 Target	FY 2017 Actual	FY 2018 Actual	FY 2019 Estimated	FY 2020 Projected	Trend
60	29	42	50	60	↑

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.

Unlike traditional probate cases, guardianships may remain open and under the Court's jurisdiction for years. As new cases outpace those that are closed, the aggregate number of cases managed by the Court will continue to grow. Although guardianships are a small percentage of the Court's volume, CountyStat and the Court will continue to monitor their impact on Court operations.

Performance Measures

Measure Name	FY 2016 Actual	FY 2017 Actual	FY 2018 Actual	FY 2019 Estimated	FY 2020 Projected
Resources (Input)					
Number of judges	3	3	3	3	3
Workload, Demand and Production (Output)					
Number of hearings	143	131	96	140	150
Number of pleadings	453	328	236	250	265
Number of guardianships open	86	81	55	65	70
Number of orders and writs issued	443	361	202	250	260
Efficiency					
Average number of hearings per judge	47.7	43.7	32.0	47.0	50.0
Average number of pleadings per judge	151.0	109.3	79.0	83.0	87.0
Quality					
Number of appeals	—	—	—	—	—
Impact (Outcome)					
Number of intact guardianships	30	29	42	50	60

