

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 2021 KEY ACCOMPLISHMENTS

- Maintained consistent work flow and services during the pandemic (Covid-19).
- Implemented virtual hearings; prior to Covid-19 the Court did not have this technology/option.

STRATEGIC FOCUS AND INITIATIVES FOR FY 2022

The court's top priorities in FY 2022 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 2022 BUDGET SUMMARY

The FY 2022 proposed budget for the Orphans' Court is \$567,000, an increase of \$1,400 or 0.2% over the FY 2021 approved budget.

Expenditures by Fund Type

Fund Types	FY 2020 Actual		FY 2021 Budget		FY 2021 Estimate		FY 2022 Proposed	
	Amount	% Total	Amount	% Total	Amount	% Total	Amount	% Total
General Fund	\$560,884	100.0%	\$565,600	100.0%	\$546,700	100.0%	\$567,000	100.0%
Total	\$560,884	100.0%	\$565,600	100.0%	\$546,700	100.0%	\$567,000	100.0%

Reconciliation from Prior Year

	Expenditures
FY 2021 Approved Budget	\$565,600
Increase Cost: Operating - Technology Cost Allocation — Increase in OIT charges based on anticipated countywide costs for technology	\$5,500
Increase Cost: Fringe Benefits — Increase in the fringe benefit rate from 28.3% to 29.5% to support projected costs	3,100
Add: Operating — Increase in other technology costs to support virtual court hearings	500
Decrease Cost: Operating — Anticipated reduction in training and printing expenses to align with anticipated costs	(1,500)
Decrease Cost: Compensation — Anticipated salary lapse for the general law clerk position	(6,200)
FY 2022 Proposed Budget	\$567,000

STAFF AND BUDGET RESOURCES

Authorized Positions	FY 2020 Budget	FY 2021 Budget	FY 2022 Proposed	Change FY21-FY22
General Fund				
Full Time - Civilian	8	8	8	0
Full Time - Sworn	0	0	0	0
Subtotal - FT	8	8	8	0
Part Time	0	0	0	0
Limited Term	0	0	0	0
TOTAL				
Full Time - Civilian	8	8	8	0
Full Time - Sworn	0	0	0	0
Subtotal - FT	8	8	8	0
Part Time	0	0	0	0
Limited Term	0	0	0	0

Positions By Classification	FY 2022		
	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

Expenditures by Category - General Fund

Category	FY 2020 Actual	FY 2021 Budget	FY 2021 Estimate	FY 2022 Proposed	Change FY21-FY22	
					Amount (\$)	Percent (%)
Compensation	\$407,132	\$409,100	\$393,500	\$402,900	\$(6,200)	-1.5%
Fringe Benefits	119,564	115,800	111,400	118,900	3,100	2.7%
Operating	34,188	40,700	41,800	45,200	4,500	11.1%
Capital Outlay	—	—	—	—	—	
SubTotal	\$560,884	\$565,600	\$546,700	\$567,000	\$1,400	0.2%
Recoveries	—	—	—	—	—	
Total	\$560,884	\$565,600	\$546,700	\$567,000	\$1,400	0.2%

In FY 2022, compensation expenditures decrease 1.5% below the FY 2021 budget due to anticipated salary lapse. Compensation costs include funding for eight full time positions. Fringe benefit expenditures increase 2.7% over the FY 2021 budget due to an increase in the fringe benefit rate from 28.3% to 29.5% to align with anticipated costs.

Operating expenditures increase 11.1% over the FY 2021 budget due to an increase in the technology cost allocation charge and other anticipated technology costs.

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 2026 Target	FY 2019 Actual	FY 2020 Actual	FY 2021 Estimated	FY 2022 Projected	Trend
2,800	2,270	2,259	2,400	2,600	↔

Trend and Analysis

The Court has seen a decrease with filings for estate requirements that were open prior to Covid-19. As the Court and public continue to adjust to Covid-19 restrictions, the Court believes the number of filings will increase.

Performance Measures

Measure Name	FY 2018 Actual	FY 2019 Actual	FY 2020 Actual	FY 2021 Estimated	FY 2022 Projected
Resources (Input)					
Judges	3	3	3	3	3
Workload, Demand and Production (Output)					
Hearings	1,656	1,766	1,517	1,600	1,600
Pleadings	5,190	5,531	4,755	4,500	5,000
Estates open	2,073	2,134	2,255	2,400	2,500
Hearing notices, orders and writs issued	2,313	2,381	2,883	3,000	3,200
Cases referred to Alternative Dispute Resolution	28	52	20	25	25
Efficiency					
Hearings per Judge	552.0	552.0	506.0	553.0	553.0
Pleadings per Judge	1,730.0	1,730.0	1,585.0	1,500.0	1,500.0
Quality					
Estate decisions upheld on appeal	100%	100%	100%	100%	100%
Impact (Outcome)					
Intact estates	2,219	2,270	2,259	2,400	2,600

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 2026 Target	FY 2019 Actual	FY 2020 Actual	FY 2021 Estimated	FY 2022 Projected	Trend
65	99	44	50	50	↔

Trend and Analysis

The Court has seen a decrease with filings for estate requirements that were open prior to Covid-19. As the Court and public continue to adjust to Covid-19 restrictions, the Court believes the number of filings will increase.

Performance Measures

Measure Name	FY 2018 Actual	FY 2019 Actual	FY 2020 Actual	FY 2021 Estimated	FY 2022 Projected
Resources (Input)					
Judges	3	3	3	3	3
Workload, Demand and Production (Output)					
Hearings	96	113	91	75	100
Pleadings	236	374	371	350	350
Guardianships open	55	68	36	60	60
Orders and writs issued	202	262	243	300	300
Efficiency					
Hearings per Judge	32.0	38.0	30.0	25.0	33.0
Pleadings per Judge	79.0	125.0	124.0	117.0	117.0
Quality					
Appeals	0	0	3	0	0
Impact (Outcome)					
Intact guardianships	42	99	44	50	50