

Orphans' Court - Fiscal Year 2022 Budget Review Summary

Proposed FY 2022 Operating Budget

Category	FY 2021 Approved	FY 2021 Estimated	FY 2022 Proposed	Change Amount	Percentage Change
General Fund	\$ 565,600	\$ 546,700	\$ 567,000	\$ 1,400	0.2%
Total	\$ 565,600	\$ 546,700	\$ 567,000	\$ 1,400	0.2%

Authorized Staffing Count

	FY 2021 Approved	FY 2022 Proposed	Change Amount	Percentage Change
Full-Time	8	8	0	0.0%
Total	8	8	0	0.0%

FY 2022 Proposed Budget – Key Highlights

- Vacancies (As of 3/19/21): One (1) position - a Law Clerk I; the Court anticipates this position will be filled October 2021.
- Decreased Compensation (\$6,200): Due to anticipated salary lapse for the one (1) vacant position.
- Increased Fringe Benefits Cost (\$3,100): To align with anticipated costs.
- Increased Operating Cost (\$4,500): Increase in OIT technology cost allocation due to anticipated countywide costs, offset by a decrease in training and printing costs.

Expenditures by Category

Category	FY 2021 Approved	FY 2021 Estimated	FY 2022 Proposed	Change Amount	% Change
Compensation	\$ 409,100	\$ 393,500	\$ 402,900	\$ (6,200)	-1.5%
Fringe Benefits	115,800	111,400	118,900	3,100	2.7%
Operating Expenses	40,700	41,800	45,200	4,500	11.1%
Total	\$ 565,600	\$ 546,700	\$ 567,000	\$ 1,400	0.2%



THE PRINCE GEORGE'S COUNTY GOVERNMENT

Office of Audits and Investigations

MEMORANDUM

April 15, 2021

TO: Calvin S. Hawkins II, Chair
Committee of the Whole (COW)

THRU: David H. Van Dyke, County Auditor *DHV*

FROM: Zachary Bartlett, Staff Auditor *ZB*

RE: Orphans' Court
Fiscal Year 2022 Budget Review

Budget Overview

The FY 2022 Proposed Budget for the Orphans' Court is \$567,000. This is an increase of \$1,400 or 0.2%, over the FY 2021 Approved Budget, primarily due to an increase in OIT charges for anticipated countywide costs, and fringe benefits costs.

Budget Comparison - General Fund

Approved Fiscal Year 2021 to Proposed Fiscal Year 2022

Category	FY 2020 Actual	FY 2021 Approved	FY 2021 Estimated	% Change - Est vs App	FY 2022 Proposed	Change Amount	Percentage Change
Compensation	\$ 407,132	\$ 409,100	\$ 393,500	-3.8%	\$ 402,900	\$(6,200)	-1.5%
Fringe Benefits	119,564	115,800	111,400	-3.8%	118,900	3,100	2.7%
Operating Expenses	34,188	40,700	41,800	2.7%	45,200	4,500	11.1%
Total	\$ 560,884	\$ 565,600	\$ 546,700	-3.3%	\$ 567,000	\$ 6,116	1.1%

Authorized Staffing Count - General Fund

	FY 2021 Approved	FY 2022 Proposed	Change Amount	Percentage Change
Full-Time	8	8	0	0.0%
Total	8	8	0	0.0%

Staffing Changes and Compensation

- The FY 2022 Proposed Budget includes authorization for eight (8) full-time General funded positions, which remains consistent with the FY 2021 approved staff level.
- The FY 2022 General Fund compensation is proposed at \$402,900 which represents a decrease of \$6,200, or 1.5%, below the FY 2021 Approved Budget. This decrease is due to anticipated salary lapse for the general Law Clerk I position.
- As of March 19, 2021, the Court reported one (1) vacant position, a Law Clerk I. The Court anticipates that the position will be filled October 2021.

Fringe Benefits

- Fringe benefits expenditures are proposed at \$118,900, which is an increase of \$3,100, or 2.7%, above the FY 2021 Approved Budget.
- A five-year trend analysis of fringe benefit expenditures is included below.

Fringe Benefits Historical Trend					
	FY 2018	FY 2019	FY 2020	FY 2021	FY 2022
	Actual	Actual	Actual	Estimated	Proposed
Compensation	\$ 315,732	\$ 362,567	\$ 407,132	\$ 393,500	\$ 402,900
As a % of Compensation	27.6%	24.5%	29.4%	28.3%	29.5%
Annual % Change		1.9%	34.6%	-6.8%	6.7%

Operating Expenses

- In FY 2022, operating expenses are proposed at \$45,200 and are comprised of the following items:
 - Office Automation \$37,900
 - General Office Supplies \$5,000
 - Membership Fees \$1,200
 - Telephone \$1,100
- The accompanying table compares the FY 2022 Proposed Budget operating expenditures with the FY 2021 Approved Budget operating expenditures. In one (1) of the categories, the FY 2022 Proposed Budget level increases from the FY 2021 Approved Budget. In two (2) of the categories, the FY 2022 Proposed Budget level decreases compared to the FY 2021 approved Budget. In three (3) of the categories the Proposed Budget levels remain unchanged compared to the approved FY 2021 levels.

Operating Objects	FY 2021 Approved	FY 2022 Proposed	FY 2021 - FY 2022	
			\$ Change	% Change
Office Automation	\$ 31,900	\$ 37,900	\$ 6,000	18.8%
General Office Supplies	5,000	5,000	-	0.0%
Membership Fees	1,200	1,200	-	0.0%
Telephone	1,100	1,100	-	0.0%
Training	1,000	-	(1,000)	-100.0%
Printing	500	-	(500)	-100.0%
TOTAL	\$ 40,700	\$ 45,200	\$ 4,500	11.1%

- The only increase between the FY 2021 Approved Budget and the FY 2022 Proposed Budget is in the Office Automation category (\$6,000 increase) and is a result of the OIT’s technology cost allocation calculation per agency use.

HIGHLIGHTS

Workload/Performance Trends

- The Orphans’ Court is a public office established under the Constitution of Maryland. The Court hears all matters involving decedent’s estates which are contested and supervises all those estates which are probated judicially. The Court approves accounts and awards personal representative’s commissions and attorney’s fees, when applicable. The Court also has concurrent jurisdiction with the Circuit Court in guardianships of minors and their property. All matters involving the validity of wills and the transfer of property in which legal questions and disputes occur are resolved by the Orphans’ Court.
- The Court projects its caseload related to estates and guardianships to be 12,300 cases in FY 2022. These cases include hearings, pleadings, estates opened, hearing notices, orders, and writs issued.
- The Court estimates that 2,900 estate cases will be open, and 2,000 estate cases will be closed in FY 2022. Additionally, the Court estimates that 70 guardianship cases will be open, and 60 of those will be closed in FY 2022.
- The County’s current Orphans’ Court judges are as follows:
 - Chief Judge Wendy A. Cartwright
 - Associate Judge Athena Malloy Groves
 - Associate Judge Vicky L. Ivory-Orem
- The Court previously mentioned that the majority of its docket, which includes guardianship cases, is composed of *pro se litigant* cases (cases without attorney representation).
- The biggest challenge for the Court, as a result of the pandemic, was moving hearings to a virtual platform. Once the Court was able to begin virtual hearings, it had to restructure its way of scheduling, managing and holding hearings. This has created more steps for the Court staff, who continues to reschedule hearings from 2020, while maintaining other operations of the Court.

- The Court continues to offer and refer cases to its Alternative Dispute Resolution (ADR) program. The ADR program provides litigants an opportunity for mediation to resolve probate matters. From March 2020 – March 2021, the Court referred 25 cases to ADR – six cases were settled, six are still pending, and thirteen opt-ed out or were removed/settled outside of ADR.