



April 6, 2023

MEMORANDUM

TO: Krystal Oriadha, Chair
Health, Human Services and Public Safety Committee (HHSPS)

THRU: ~~Josh Hamlin~~
Director of Budget and Policy Analysis

FROM: Roger Banegas *RG/B*
Legislative Budget and Policy Analyst

RE: Orphans' Court
Fiscal Year 2024 Budget Review

Budget Overview

The FY 2024 Proposed Budget for the Orphans' Court is \$657,200. This is an increase of \$75,100, or 12.9%, over the FY 2023 Approved Budget. The increase is primarily due to an increase in compensation, fringe benefits and office automation charges.

Category	FY 2022 Actual	FY 2023 Approved	FY 2023 Estimated	% Change - Est vs App	FY 2024 Proposed	Change Amount	Percentage Change
Compensation	\$ 348,393	\$ 400,500	\$ 397,500	-0.7%	\$ 452,600	\$ 52,100	13.0%
Fringe Benefits	96,358	134,200	118,300	-11.8%	151,600	17,400	13.0%
Operating Expenses	48,854	47,400	50,000	5.5%	53,000	5,600	11.8%
Total	\$ 493,605	\$ 582,100	\$ 565,800	-2.8%	\$ 657,200	\$ 75,100	12.9%

Authorized Staffing Count - General Fund

	FY 2023 Approved	FY 2024 Proposed	Change Amount	Percentage Change
Full-Time	8	8	0	0.0%
Total	8	8	0	0.0%

Staffing Changes and Compensation

- The FY 2024 Proposed Budget includes authorization for eight (8) full-time General Funded positions, which remains consistent with the FY 2023 approved staff level.
- The FY 2024 General Fund compensation is proposed at \$452,600, which represents an increase of \$52,100, or 13%, above the FY 2023 Approved Budget. This increase is due to anticipated salary lapse for the unfunded general Law Clerk I position along with FY 2023 salary adjustments, FY 2024 Merits and COLAs. There will be a \$5,000 Vacancy Lapse that the court does not anticipate using for other expenses.
- As of March 9, 2023, the Court reported one (1) vacant position, a Law Clerk I, which will remain unfunded in FY 2024.

Fringe Benefits

- Fringe benefit expenditures are proposed at \$151,600, which is an increase of \$17,400, or 13%, above the FY 2023 Approved Budget.
- A five-year trend analysis of fringe benefit expenditures is included below.

	FY 2020 Actual	FY 2021 Actual	FY 2022 Actual	FY 2023 Estimated	FY 2024 Proposed
Compensation	\$ 407,132	\$ 405,134	\$ 348,393	\$ 397,500	\$ 452,600
Fringe Benefit Expenditures	\$ 119,564	\$ 120,270	\$ 96,358	\$ 118,300	\$ 151,600
As a % of Compensation	29.4%	29.7%	27.7%	29.8%	33.5%

Operating Expenses

- In FY 2024, operating expenses are proposed at \$53,000, which is an increase of \$5,600, or nearly 12%, above the FY 2023 Approved Budget.
- The accompanying table compares the FY 2024 Proposed Budget operating expenditures with the FY 2023 Approved Budget operating expenditures. In one (1) of the categories, the FY 2024 Proposed Budget level increases from the FY 2023 Approved Budget. In three (3) of the categories the FY 2024 Proposed Budget levels remain unchanged compared to the approved FY 2023 levels.

Operating Objects	FY 2023 Approved Budget	FY 2024 Proposed Budget	FY 2023 - FY 2024	
			\$ Change	% Change
Office Automation	\$ 40,100	\$ 45,700	\$ 5,600	14.0%
General Office Supplies	5,000	5,000	-	0.0%
Membership Fees	1,200	1,200	-	0.0%
Telephone	1,100	1,100	-	0.0%
TOTAL	\$ 47,400	\$ 53,000	\$ 5,600	11.8%

- The only increase between the FY 2023 Approved Budget and the FY 2024 Proposed Budget is in the Office Automation category (\$5,600 increase), as a result of an increase in countywide OIT costs.

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 County's current Orphans' Court judges are as follows:
 - Chief Judge Wendy A. Cartwright
 - Associate Judge Athena Malloy Groves
 - Associate Judge Jason A. DeLoach
- The Court reports that, as of March 9, 2023, 2,103 estate cases are open, and 1,476 estate cases have been closed in FY 2023. From FY 2020 – FY 2023 (YTD) 10,408 estate cases have been opened, and 8,172 have been closed.
- The Court reports that, as of March 9, 2023, 31 guardianship cases are open, and 41 guardianship cases have been closed in FY 2023. From FY 2020 – FY 2023 (YTD) 188 guardianship cases have been opened, and 179 have been closed.
- The Court was able to resume in-person hearings in August 2022, but the pandemic continues to have a residual impact on the Court. The backlogs due to the pandemic have increased workloads for the Court. To address the backlog of hearings the Court has increased dockets. The Court also conducted virtual hearings/dockets using technology (PolyCom TC8 Touchscreen Videoconferencing Interface installed in March 2023) when hybrid hearings were needed.
- 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. For FY 2023, the Court has referred 14 cases with four (4) cases being settled, three (3) are not settled, four (4) are pending and three (3) cases were referred but vacated or removed.