

March 31, 2015

REGISTER OF WILLS
FY2016
RECOMMENDED BUDGET
TO COUNTY COUNCIL



Register of Wills FY 16

MISSION

To help the person responsible for settling an estate, to collect the assets, pay the creditors and deliver to the heirs the balance of the estate after all legitimate claims have been paid. To provide safekeeping facilities for those who choose to deposit their wills with the Register of Wills before death, and education outreach.

Register of Wills
Ciro Poppitt, III
FY 16

Total number of Authorized Position = 19 full time

FUNCTIONS

Probate

- Receives Wills
- Enter Probate Orders-
- Process Real Property title transfers
- Audit, process Estate final documents
- Collection on Old Estates
- Scanning Documents and Uploading to File and Serve Express for Pro se clients

Archives

- Assist public and professional offices with searches
- Maintain archives

Safekeeping

- Provide public with Safekeeping for Wills

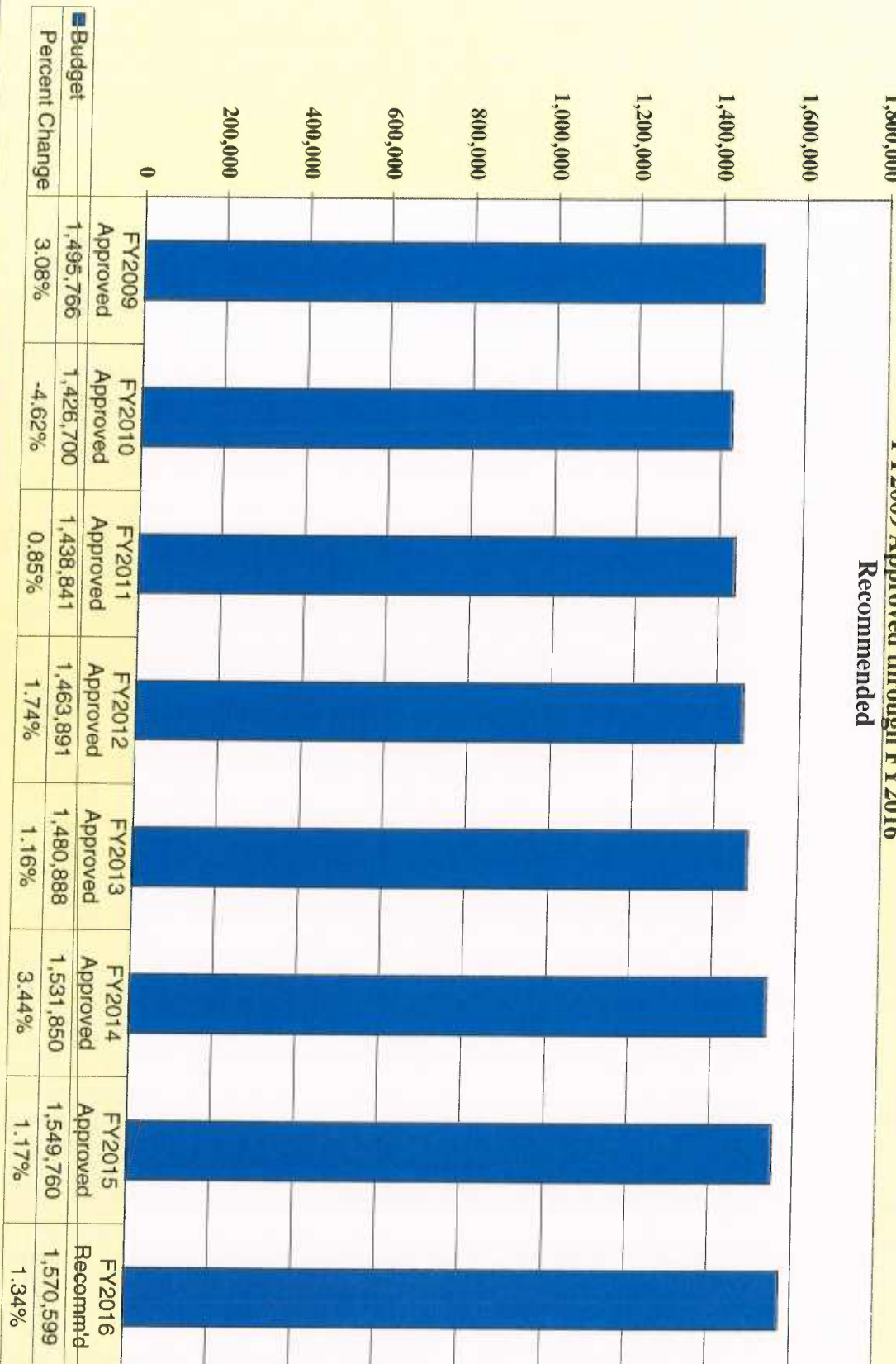
Court Related

- Liaison with Court of Chancery and State Agencies in reference to litigation in the Probate process

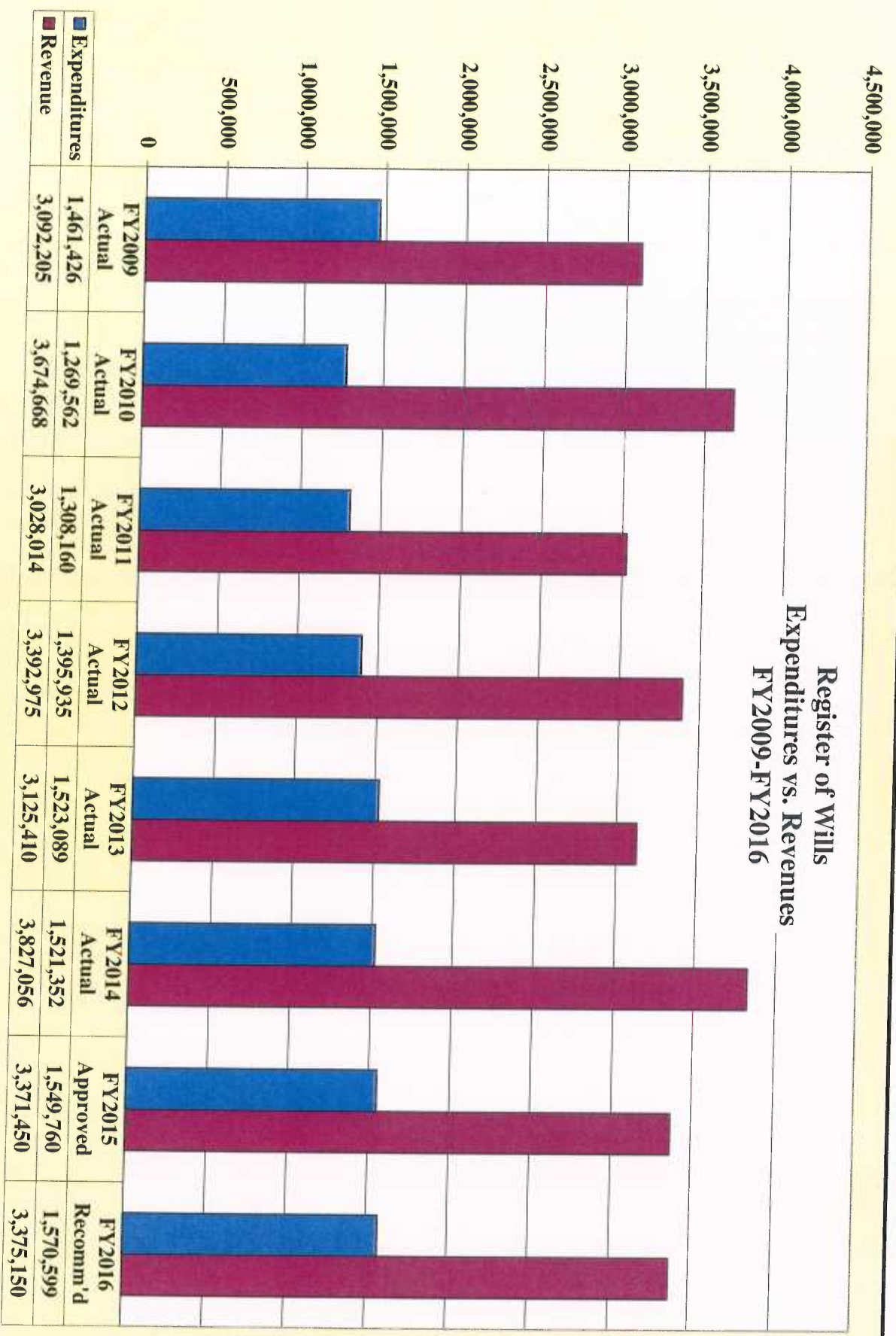
Education & Outreach

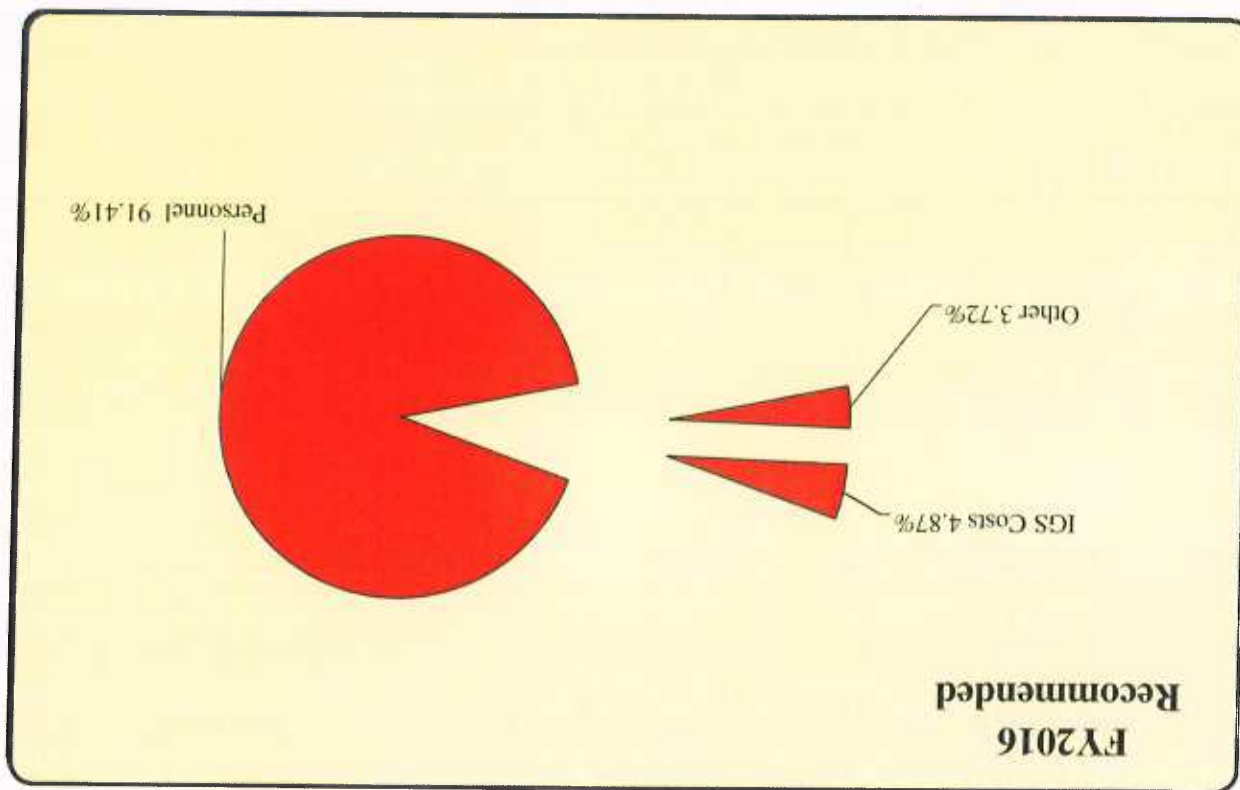
- Increase public awareness of Probate process thru workshops

**Register of Wills
Budget History
FY2009 Approved through FY2016
Recommended**



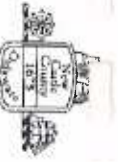
**Register of Wills
Expenditures vs. Revenues
FY2009-FY2016**



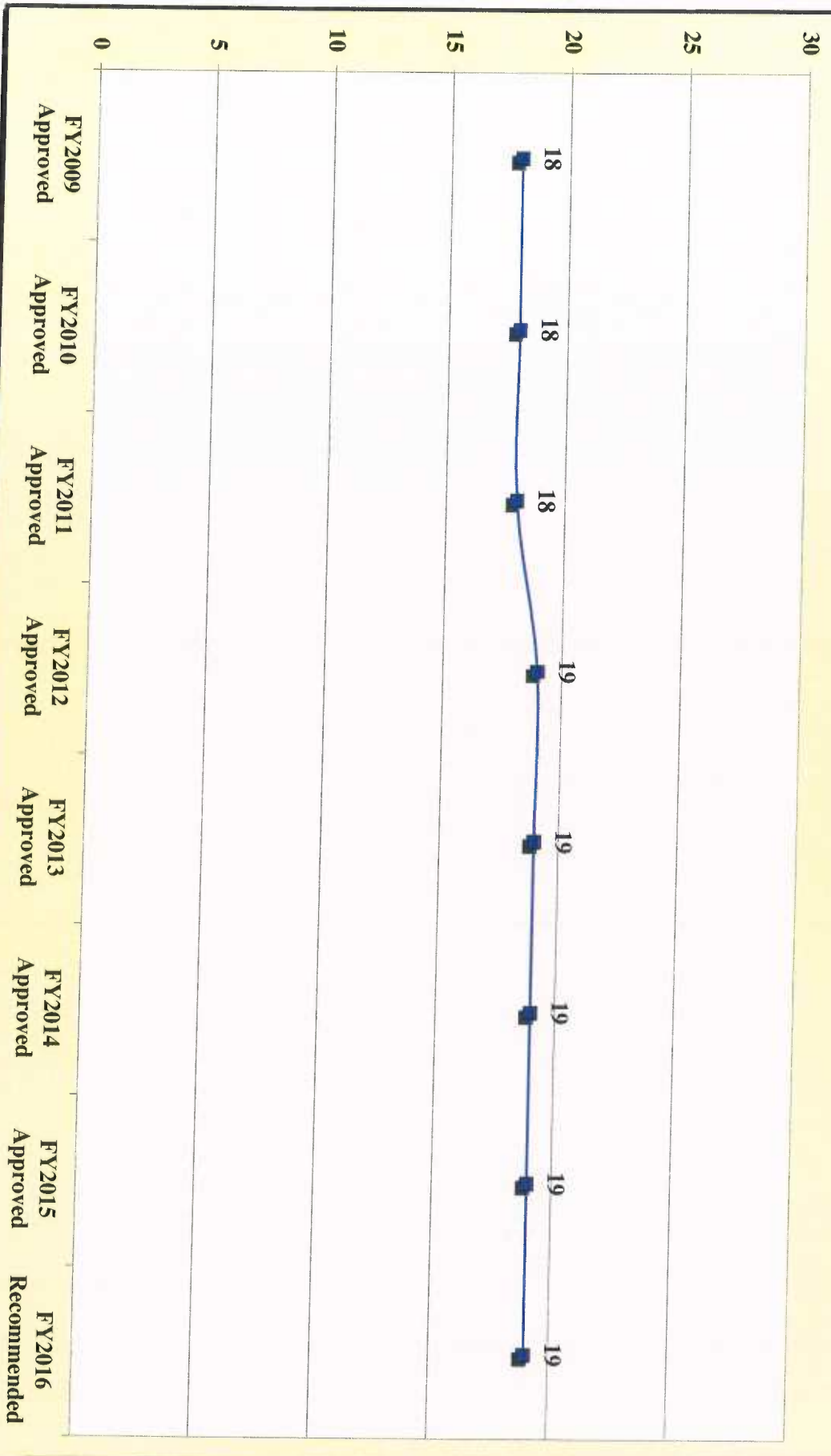


Object Level	FY2016 Recommended
Personnel	\$1,435,663
Other	\$58,382
IGS Costs	\$76,554
Total Budget	\$1,570,599

Other includes Training & Civic Affairs, Communication & Utilities, Materials & Supplies, Contractual Services and Equipment Replacement.



Register of Wills Position History: Fiscal Years 2009 through 2016





Register of Wills
Fiscal Year 2016 Budget Recommended
DIVERSITYCOMPARISON CY 2012-2014

JOB CATEGORIES	Overall Totals (Sum of Col. B-K)	NUMBER OF EMPLOYEES																
		MALE						FEMALE										
		A	B	C	D	E	F	G	H	I	J	K						
Officials and Administrators	2012 2013 2014	0 0 0																
Professionals	2012 2013 2014	1 1 1							1 1 1									
Technicians	2012 2013 2014	0 0 0																
Protective Service Workers	2012 2013 2014	0 0 0																
Paraprofessionals	2012 2013 2014	0 0 0																
Administrative Support	2012 2013 2014	15 15 15				1 1 1			8 7 10	4 5 4	1 1 1	1 1 1						
Skilled Craft Workers	2012 2013 2014	0 0 0																
Service-Maintenance	2012 2013 2014	0 0 0																
Certain Elected/Appointed Officials	2012 2013 2014	3 3 3	2 2 2												1 1 1			
TOTAL	2012 2013 2014	19 19 19	2 2 2	0 0 0	1 1 1	0 0 0	0 0 0	9 8 11	4 5 4	1 1 0	2 2 1	0 0 0						

State and Local Government Information (EEO-4) Report Format
COMMENTS:
 The Register of Wills Office is committed to workforce diversity. Currently our numbers reflect gender and racial diversity. Diversity in our workforce is a top priority for the Register of Wills office.

**REGISTER OF WILTS
BUDGET RECOMMENDATION
TO COUNTY COUNCIL**

Object Level	FY2015 Approved	FY2016 Recommended	FY15 Approved vs. FY16 Recommended	% Incr (Decr) over FY2015 Approved
Salaries and Wages	\$951,410	\$939,570	-\$11,840	-1.24%
Employee Benefits	488,073	496,093	8,020	1.64%
Training and Civic Affairs	3,682	21,682	18,000	488.86%
Communication and Utilities	8,485	9,485	1,000	11.79%
Materials and Supplies	11,000	13,000	2,000	18.18%
Contractual Services	13,415	13,415	0	0.00%
Equipment Replacement	800	800	0	0.00%
Fixed Charges	-	-	-	-
Land/Structures	-	-	-	-
Contingency	-	-	-	-
IGS Costs	72,895	76,554	3,659	5.02%
Intragov. Service Credits	-	-	-	-
Total:	\$1,549,760	\$1,570,599	\$20,839	1.34%

**REGISTER OF WILLS
BUDGET DETAILS**



Object Level	FY2016 Recommended	\$ Change	% Change
Salaries and Wages :	\$939,570	-\$11,840	-1.24%
The decrease in salary & wages is due to the expected filling of three open positions at lower salary steps, and is offset by annual merit increases, a COLA increase for the Register of Wills, as well as a reclassification for two Chief Deputies totaling \$14,920. This line item also reflects a 2% attrition rate.			
Employee Benefits:	\$496,093	\$8,020	1.64%
Reflects Employee Benefit rate of 52.8%.			
Training and Civic Affairs:	\$21,682	\$18,000	488.86%
Training and Civic Affairs expense includes \$18,000 to compensate employees for parking in city - New Item. Parking Fees - \$20,280 Membership Dues - \$640 Seminar Fees - \$700			
Communication and Utilities:	\$9,485	\$1,000	11.79%
Communication and Utilities expense increases \$1,000 due to increase in allocation for Postage expense related to Operation Backlog. Postage - \$6,600 Telephone Service - \$2,400			
Materials and Supplies:	\$13,000	\$2,000	18.18%
Materials and Supplies increases \$2,000 due to anticipated funding needs. Books and Subscriptions - \$750 Office Supplies - \$8,150 Computer Supplies - \$4,100			
Contractual Services:	\$13,415	\$0	0.00%
Major expenses include: Micrographics - \$1,500 Other Professional Services - \$2,500 Equipment Repair - \$2,365 Service Contracts - \$2,200 Printing - \$3,000			

**REGISTER OF WILLS
BUDGET DETAILS**



Object Level	FY2016	Recommended	\$ Change	% Change
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Equipment Replacement:	\$800	\$0	0.00%
Equipment Replacement expense includes: Office Equipment - \$800			

Fixed Charges:	\$0	\$0	0.00%
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Land/Structures:	\$0	\$0	0.00%
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Contingency:	\$0	\$0	0.00%
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IGS Costs:	\$76,554	\$3,659	5.02%
IS Contrac - Data Processing - \$66,354 IS Contrac - Photocopies - \$7,700 IS Contrac - Printing & Duplication - \$2,500			

REGISTER OF WILLS
FY2016 POSITION ADJUSTMENTS

Position addition		Unfunded Positions		Position deletion		Position Swaps	
INCREASE		DECREASE		DECREASE		INCREASE	
#	Title	#	Title	#	Title	#	Title
NONE		NONE		NONE		NONE	
TOTAL INCREASE		TOTAL DECREASE		TOTAL INCREASE		TOTAL DECREASE	
0		0		0		0	

**REGISTER OF WILLS
FY 2016 NEW/DELETED PROGRAMS/SERVICES/OTHER**

NEW PROGRAMS/SERVICES:

*Beginning December 1, 2012, Register of Wills began Court-mandated electronic filing, or e-filing, for both attorney and pro se clients. Use of this new way of filing documents will align our office with the Court of Chancery and enable us to stay on the forefront of technology.

DELETED PROGRAMS/SERVICES:

*There are no deleted programs/services in the FY2016 budget.

FY2015 SIGNIFICANT ACCOMPLISHMENTS

*Continued to provide courteous and prompt service for New Castle County residents during the probate process.

*Maintained monthly hours at the Middletown satellite office.

*Continued to pursue delinquent estates and collect the resulting fees.

*Held probate procedure seminars for the legal community, banks, and public to educate them

about our office and the probate process.

*Continued to improve the Register of Wills website by implementing necessary changes to policies

and procedures while creating user-friendly forms and instructions for the layperson.

*Continue to review, enhance, and improve e-filing procedures.

*Proactively continued work with Register of Wills offices in Kent and Sussex Counties in developing

combined forms and uniform procedures.

* Performance Measures by June 30, 2015:

Files Opened	2600 (Previously 2541)
Estates Probated	1400 (Previously 1402)
Wills filed for Safekeeping	350*
Number of Small Estate Affidavits	1075
Collected Revenue - Projection	\$3,371,450

*Note: safekeeping revenue is forecast higher due to the pending deposit of wills from a deceased

FY2016 CHALLENGES/GOALS

*This office will continue to provide state-mandated services and collect \$3,375,150 in delinquent and current probate fees by June 30, 2015. Delinquent fees are expected to total at least \$200,000, and will be attributable to Operation Backlog.

*Provide superior service to the public during the probate process.

*Educate the constituents of New Castle County about the Register of Wills office and the probate

process through seminars, outreach, and our website.

*Continue to proactively pursue delinquent estates and collect old revenue where applicable.

*Improve and streamline the file and serve process.

*Develop and complete the best practices procedure for electronic filing.

*Continue to maintain the proper security and management of legal documents recorded in the

Register of Wills office.

*Continue our ongoing commitment to the constituents of New Castle County by completing

development of a Policies and Procedures manual to unify office procedures.

*Continue to pursue our ongoing project of converting older estate images to new electronic filing

medium in order to keep full record of estate files in one place. At present, the cost for this is unknown.

**REGISTER OF WILLS
FY 2016 NEW/DELETED PROGRAMS/SERVICES/OTHER**

FY2016 TECHNOLOGY ENHANCEMENTS

*The microfilm/microfiche conversion project, started on 7/1/2013, will continue to be an ongoing project into FY2016.
*Continue searching for a new case management software package to replace the current Wills program. The desired software will have the capability to function as a financial program as well as a database and forms-creation program. This is a very intricate and time-consuming process,

FY2016 RECLASSIFICATIONS

*The FY2016 Recommended Budget includes a salary and benefits increase due to the reclassification of two Chief Deputy positions totaling \$22,724.

I. CONTRACTUAL SERVICES

**REGISTER OF WILLS
FY2016 CONTRACTUAL SERVICES DETAILS**

Item #	OCA	OCA Title	Object Level	Object Level 3 Title	FY2016 Budgeted Amount	Explanation
1	250100	Contractual Services	5101	Equipment Repairs	\$ 865	Repairs to office equipment not under contract
2			5200	Service Contracts	\$ 2,200	Maintenance agreement for office equipment
3			5300	Printing	\$ 3,500	Includes printing business cards, ledger sheets, estate folders, and brochures and pamphlets for distribution during Register of Wills-led workshops and to funeral homes, DMV, and other organizations as requested
4			5301	Micrographics	\$ 2,000	Converting microfiche and microfilm to imaged documents
5			5406	Other Professional Services	\$ 3,000	
6			5414	Courier	\$ 1,500	\$1,500 daily deposit pickup
7			5810	Food Services	\$ 350	
				Subtotal Contractual Services	\$ 13,415	
8		IGS Costs	5900	IS Contract - Data Processing	\$ 66,354	
9			5901	IS Contract - Photocopies	\$ 7,700	
10			5902	IS Contract - Printing/Duplication	\$ 2,500	
				Subtotal IGS Costs	\$ 76,554	
Total Contractual Services					\$ 76,554	

II. BUDGET BY OBJECT CODE