

SURROGATE

James S. LaCorte

2017 Budget Presentation

SURROGATE 2016 ACCOMPLISHMENTS

Probates	1279		Administrations	428
Adoptions	127		Minor's Guard	109
Incapacities	125		Release of Funds	76
Certificates	10847		Searches	410
Other Superior Matters	214		Digital Imaging Process	26,501

2016 Accomplishments

To give you a better understanding of how many clients we see on a daily basis, these are some of our figures year to date. 1-1-2016 / 11-14-2016

That's over 6,000 clients in a year. These are cases where the clients would be seen in our office or a satellite office and sometimes in a Court Room. The paperwork is generated by my staff and the clerks and we all take the signatures. During 2016 my office handled over 8,000 calls with regard to probate matters.

In Addition:

Evening Hours: 137 Estate matters were handled in local communities.
 Home Appointments: 54 clients who are disabled or mobility challenged.
 Hearings: 66 probate matter were heard by the Surrogate

As of September 1, 2016 the Administrative Office of the Courts has **mandated** that the Surrogate take the lead role in requiring the guardians to report. While we knew this was coming the extended responsibilities to the Surrogates was unexpected.

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2017 GOALS & OBJECTIVES

New Court Rules

The Administrative Office of the Courts has proposed changes to the Guardianship Court Rules which meant changes for us. They have informed us that they are launching a state software program that will monitor all the incapacities in the State. This will put an additional responsibility on the staff in the Superior Court Section.

Constituent Services

The Court House which has a healthy traffic flow of constituents are constantly taking our brochures and inquiring about speaking engagements. I would like to see a bi-annual newsletter for residents (that they could pick up in the libraries or town halls) that showcase the initiatives that county offices offer to the public.

Upgrades to Internet Services

We are desperately in need of updating our system with fiber optics. The current operating system is badly in need of updates and I would hope that communications could make that happen sometime in 2017.

Staffing:

I expect to have a least 1 vacancy this year that will have to be filled and one the beginning of next year. I will one individual who will be able to handle the new mandates from the State for Guardians. This role will be a very sensitive one as they will be dealing with the guardians of incapacitated individuals. It will require a person who has some legal knowledge, organizational skills and the ability to interface with the public in a sympathetic manner.

Communications:

It is always my goal to expand the communications for my office. I feel that the Constitutional Officers should make every effort to support and educate the constituents in this County.

Currently in Union County the number of young adults since 2011 is around 320, which is 62% of our cases (statistical number from 2011-2016). Older cases are being worked in as we speak.

The numbers for Incapacity are climbing. With the new probate software system we have started to identify the number of cases that are considered DDD (Developmentally Disabled; these are usually young adults with autism, cerebral palsy and downs syndrome) and those that are the result of accident, old age, Dementia and Alzheimer's.

New Mandate from NJ Administrative Office of the Courts

Guardians Annual Reports

Explanation

Court appointed legal guardians make decisions for incapacitated people about personal and medical care, meals, transportation, and even where a person lives. Guardians control assets, manage budgets, pay debts, and make all financial and investment decisions for the people they assist.

The New Jersey Judiciary Guardianship Monitoring Program (GMP) is a comprehensive statewide volunteer-based court program established to monitor guardians in their handling of the affairs of incapacitated individuals, including elderly and developmentally disabled adults. The GMP monitors guardianship cases to ensure that guardians of incapacitated persons are performing their duties appropriately. Monitoring and oversight of guardianships helps identify, address, prevent, and deter activities that are harmful to incapacitated individuals.

While in the past year the Court have placed volunteers in our offices to “monitor” the guardians **they have now placed the responsibility of obtaining these reports solely on the Surrogate**. We have been informed that the data entry into the State Court system will take considerable effort on the part of my staff. My office must make contact with every guardian every year (or other year, depending on the judgment) to make sure they file their annual report. It has become a burdensome responsibility on the current staff. The amount of time to make sure all the letters go out in a timely manner that they are returned and documented, any changes are made to the system, and the documents are noted.

Court Rule 4:86

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Description	2016 Adopted Budget	2016 Modified Budget	2016 Expenditures	2017 Budget Request
Salaries	1,012,543	1,012,543	899,882.43	1,045,628
Other Expenses	33,180	33,180	24,963.94	19,680
Total	1,045,723	1,045,723	924,846.37	1,065,308
Request for promotions		6	24,302	County