

## Statistics Committee

### Meeting Minutes

February 10, 2017

Office of the Probate Court Administrator  
186 Newington Road  
West Hartford, CT

Meeting convened at 10:35 a.m. by Judge Andre D. Dorval, Chair.

Other members in attendance: Attorney Bonnie Bennet, Attorney Evan Brunetti, Judge John J. McGrath, Jr. (arrived at 11:00 a.m.), Judge Andrea Truppa and Judge Philip A. Wright, Jr.

Members not in attendance: Judge Scott R. Chadwick, Judge Michael M. Darby, Judge Evelyn M. Daly, Judge John A. Keyes, Judge O. James Purnell, III, and Ms. Sondra Waterman

The minutes of the January 13, 2017 meeting were approved.

The committee decided that in the event of inclement weather on a meeting day, an email would be sent to all members by 8:30 a.m. to confirm the meeting status.

The committee reviewed the activities that were selected at the January 13, 2017 meeting for inclusion in the statistics reflecting the work of the court for the public and policy makers. Bonnie Bennet shared a visual diagram of the impact of the decision to include tax returns in the statistics. Since the inclusion of tax returns doubles the number of decedents' estate in a given year, the chart suggests that decedents' estates account for over 50 % of the work of the court. The committee agreed that inclusion of tax returns skews the statistics and gives the wrong impression that courts are spending more time on decedents' estates than on other matters before the court. In fact, judges and court staff are spending the majority of court time on conservatorships, guardianships and civil commitments. The committee decided to remove estate tax and succession tax returns and extensions of time to file a tax return in the count of probate matters. It was recommended, however, that these statistics be listed for informational purposes, similar to the information on passports.

The committee had a general discussion of the process to be followed in analyzing the "Tally Rules" for purposes of calculating the weight afforded to each specific activity. The committee agreed to use a 1 to 10 scale in the initial review and possibly divide each amount by one-half at the conclusion of the process. The focus of the analysis is the time required for all court staff, including the judge, to perform each separate activity. The purpose of the analysis is for allocation of staff resources not judicial compensation, so more weight will be given for staff time.

The committee initial review is as follows:

Fee Waiver: 2 points

Action on Bond: 6 points

Intestate Estate Administration: 6 points

Administrative Closing: 2 points

Admit Will: 6 points

Admit Will / Administration Granted: 4 points

Affidavit of Closing with Hearing: 3 points

In assigning weight to intestate and testate estates, the committee factored in the time required to review the inventory, return of claims and affidavit of closing. The time spent in preparing and sending notices of hearing for an activity is also factored into the assigned weight.

At the next meeting the committee intends to review the remainder of the activities in the decedents' estate sections of the Tally Rules.

The next meeting will be held on Friday, March 10, 2017 at 10 a.m.

The meeting was adjourned at noon.

Submitted by John J. McGrath, Jr. Secretary with assistance from Attorney Bonnie Bennet