



2023 Public Guardian Executive Summary

		Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	Monthly Average	2023 Actual through March
Case Information															
	Total Proposed Cases	25	15	18										19	58
	Appointed Cases	20	9	5										11	34
1	Pending Appointment Not Appointed	1	3	10				-	-	-	-	-	-		14
	Total Processed Guardianship Cases	661	669	670										3	10
2	Ongoing Guardianship Person & Estate (P & E) Cases	624	634	635										631	
	Ongoing Guardianship Estate Only & Special Cases	37	35	35										36	
	Deceased/Terminated Guardianship Cases in Month	8	10	12										10	30
	Total Processed Representative Payee Cases	77	77	78											82
	Representative Payee Wait List	12	15	13											11
	# of Representative Payee Visits/Contact	31	25	41										32	97
Monthly Contacts															
	Actual Guardianship Monthly Contacts	595	606	609										603	1,810
	Expected Guardianship Monthly Contacts	591	599	600										597	1,790
3	% of Monthly Contacts Made	100.68%	101.17%	101.50%											
	Special, Estate & Person Only Monthly Contacts	10	8	16										11	34
Legal Activity															
	Total Accountings Processed	45	25	10										27	80
	# of Court Appearances by PG on behalf of PP	68	102	464										211	634
Asset Management															
4	Cases with Assets Over \$10,000	592	612	608										604	
	Cash Assets Managed for PP by Office (Internal)	\$10,140,031	\$11,146,571	\$11,440,955										\$10,909,186	
	Value of Assets Invested on behalf of PP (External)	\$6,489,718	\$6,595,602	\$6,415,613										\$6,500,311	
	PG Total Billable Hours Worked	1,400	1,401	1,703										1,502	4,505
	PG Total Billable Hours Charged	\$145,081	\$149,782	\$181,759										\$158,874	476,622
	PG Fees Contributed to the General Fund		\$85,952												\$85,952
	# of Invoices Processed on behalf of PP	1568	1799	2196										1,854	5,563
	Total Value of Invoices Processed	\$1,552,950	\$1,104,849	\$1,624,630										\$1,427,476	\$4,282,429
Customer Service Activity															
	# of Telephone Calls Presented	2,770	2,859	2,992										2,874	8,621
5	% of Call Response Time	91.00%	87.55%	87.72%											

1. These numbers will fluctuate month to month as appointments are not made on all cases at the first hearing or within the month received.

2. Ongoing person & estate guardianship vs. special/estate only/person only:
 Person & Estate - The individual requires assistance with medical decisions and financial decisions; contact is made monthly with the pp.
 Special - Limited time or limited purpose such as applying for benefits; Estate only - Financial decisions only; Person only - Medical decisions only; contact may be monthly or quarterly with the pp.

3. Percentage may be over 100% if a visit was made in the month a pp dies.

4. Fluctuations in assets are due to new cases and case closures.

5. To attain a 100% response rating, staff must answer 70% of the calls within 5 seconds. (We are training new employees on the front desk, therefore the response time is slower)

6. The increase in February and March is due to the Rule 11 Hearings which are done on all Summary cases every 3 years.

Please note: PP within this spreadsheet references protected person.