

**OPG Commission meeting
Director Report
02.24.2021**

Purpose: The Director Report will provide detailed information about new matters, updates about the previous month's matters, and next steps for the following month. The Director will provide the Director Report to all Commission members. Questions about the Director Report will be addressed at the Commission meetings, if necessary.

Attachments for the 02.24.2021 meeting:

- Attachment 1: SCAO/Judicial Provided Monthly Budget Summary as of 02.02.2021

I. Budget Update.

- a. I previously provided the February 2021 monthly budget report that is provided to me from Hugh Wilson, Judicial Budget Manager, See Attachment 1.
- b. The CO OPG FY22 Budget Request Amendments, due to OSPB Budget requests, were approved by the Joint Budget Committee.
- c. Hugh Wilson and I have had multiple meetings with Karen Levine/RMHS Transitions Program Director and Deb Hutson/OBH Manager of Momentum and Transitional Services regarding a contract for referrals for their specific clients. We are still gathering information on how to formulate a contract.

II. Stakeholder Engagement Plan – In progress.

- a. Stakeholder Advisory Panel applications are completed but will wait to disburse and post until the Criteria is established.

- III. **Colorado OPG Pilot Program Operating Policies Updates – In progress.** Operating Policies and Manual will be posted to CO OPG Website once updates are complete.
- a. **Internal Ethics Committee (IEC) – In progress.** AG Enck and I continue to research. I have not received any formalized policies but had conversations regarding the processes used. Generally speaking, they do not use formalized Committees. The process uses an internal interdisciplinary team. Rather than a separate standing Committee, the team includes the appropriate hospital ethics committee and specialists.
 - i. 02.01.2021: Meeting with AG Enck, Emily McDonnell - Guardian Social Worker, CU Anschutz
 - ii. 02.03.2021: Meeting with Charles Golbert – Director, Cook County Illinois Public Guardian
 - iii. 02.12.2021: Meeting scheduled with Jackie Glover - Professor, Department of Pediatrics and the Center for Bioethics and Humanities CU Anschutz for additional discussion of an IEC
 - iv. I am in the process of scheduling meetings with Colorado LTC Community Ethics Committee members
 - b. **Policy 8. Ensuring Systemic Equality Services Standards – In progress,** no update from last meeting.
 - c. **Policy 4. Personnel Policies – No update.** This item will be removed from future Director Reports.
 - d. **Policy 5. Colorado OPG Fiscal Policy – Client Emergency Fund – In Progress, no updates.** I am drafting an addition to Policy 5 to allow for a Client Emergency Fund. The intent of this policy is to address true emergency needs for clients, such as funds for

housing/placement and only after all community services have been pursued and exhausted.

e. Trainings and Projects

- i. Resource Project - Ongoing. Team review of other organization's online resources, etc. for creation of targeted and organized resources for CO OPG internal purposes and CO OPG website purposes
- ii. Individual Director and guardian training for CGC National certification: In progress.
- iii. 01.29.2021: Training with Innovage-PACE
- iv. 03.02.2021: Disability Cultural Competency training by Julie Reiskin – Director, Colorado Cross Disability Coalition
- v. 03.09.2021: Colorado Guardianship Association webinar – Creating Resilience in the Age of COVID
- vi. 03.12.2021: Presentation by Katie Donohue – Denver City Mental Health Attorney
- vii. 03.25.2021: Training with Megan Butler and Peggy Roling – Covell Care & Rehabilitation
- viii. TBD: Compassion Fatigue workshop and a Social Justice training through Center for Trauma & Resilience

f. Intake Eligibility, Prioritization and Referral Process.

i. Update on number of registered users, referrals, accepted cases, etc. as of **02.10.2020**. An update will be provided at the 02.24.2021 meeting.

1. 37 Active guardianships
2. 20 referrals pending in court proceedings
3. 5 Partial/Incomplete referrals
4. 2 clients passed away since CO OPG appointment
5. Declined referrals
 1. Expired/Incomplete information – 2
6. 37 streamlined referrals (Non-Denver County) – Declined
 1. Arapahoe County – 8
 2. Boulder County - 2
 3. El Paso County - 5
 4. Gunnison County – 1
 5. Huerfano County - 3
 6. Jefferson County – 2
 7. Lake County - 1
 8. La Plata County – 2
 9. Las Animas County - 2
 10. Larimer County - 3
 11. Montrose County – 1
 12. Otero County – 1
 13. Pueblo County -1
 14. Washington County - 1
 15. Weld County - 4

ii. Rocky Mountain Human Services (RMHS) – See Update in I - Budget.

1. Momentum/Community Transition clients. This program is considering funding additional OPG FTE to primarily serve this clientele.

2. Mill Levy Program clients. I'm in discussions with the Program Director for referrals. RMHS established a relationship with Chris Brock – Colorado Cross-Disability Coalition, Managing Attorney of Probate Power, to make referrals and serve as legal counsel for Mill Levy eligible clients.

g. Data gathering - In progress. Research Assistant.

- i. Grant Yoder, Research Assistant will present at a future meeting. Some preliminary key items to Phase I:
 1. National and local literature review
 2. Adding some data collection during the referral process and as we begin servicing clients, such as: Public Safety, Housing, Hospital expenses and Medicaid/Medicare reimbursement, CMHI expenses and costs
 3. Creating a Needs Assessment plan to qualify the statewide need for public guardianship services
- ii. 02.09.2021: Record a webinar with SCAO for Judges and Court staff on OPG update, referrals and data gathering needs
- iii. Various dates: Discussions with Silver Key Senior Services on data collection
- iv. Various dates: Discussions with Chris Richardson – Program Manager - Director of Co-Responder Program, Sam Rabins - Co-Responder Program, Mental Health Center of Denver, regarding data gathering
- v. 02.16.2021: Meeting with Jeff Linville – Assistant Chief, and Marc Wiederrich – Assistant Chief, Denver Fire Department, regarding data gathering

- vi. 02.17.2021: Meeting with AJ Diamontopoulos – Data Collections, DRCOG
- vii. I've made a request to the Colorado LTC Community Ethics Committee for data gathering discussion
- viii. I'm attempting to schedule a meeting with Blake Christenson – Senior Statistical Researcher, Denver Department of Public Safety

IV. **Colorado OPG Strategic Plan.** Draft previously provided – no updates.

V. **Stakeholder Meeting Update** since 01.27.2021.

- a. 01.26.2021 and 01.28.2021: OPG presentation to Mental Health Center of Denver Case Management Teams
- b. 01.29.2021: Training with Innovage regarding PACE services
- c. 02.01.2021: Meeting with Denver Health Adult Psychiatric Unit Team regarding OPG processes
- d. 02.04.2021: Colorado LTC Community Ethics Committee
- e. 02.09.2021: Brief OPG Intro to 1st Judicial District Bar Association meeting
- f. 02.10.2021: Denver Forensic Collaborative
- g. 02.26.2021: Training with Atlantis Community, Inc.

- h. Various dates: Email correspondence and meetings with Hugh Wilson – Budget Manager, SCAO and Deb Hutson – Program Manager, CDHS regarding funding partnership
- i. Various dates: Email correspondence and meetings with Chris Richardson, Sam Rabins, Katie Pierce of Mental Health Center of Denver regarding potential referrals
- j. Various dates: Email correspondence and meetings with Denver Fire Department
- k. Various dates: Email correspondence and meetings with Department of Public Safety
- l. 02.08.2021: Recorded podcast entitled “Legal Guardianship” with Colorado Gerontological Society
- m. 02.29.2021: Attend the Vulnerable Elder Services, Protection, and Advocacy Team (VESPA) through the CU Anschutz Multidisciplinary Center on Aging at the University of Colorado Community Stakeholder Meeting
- n. 03.26.2021: Live webinar entitled “Legal Guardianship” with Colorado Gerontological Society

Attachment 1. OPG Personal Services and Operating Summary - FY21 - as of 02.02.2021

OPG Personal Services and Operating Summary - FY 2021

As of 2/2/2021

Budget Type	Budget	YTD + Projected Exp	Surplus / (Deficit)
Personal Services	\$560,000	\$ 551,049	\$8,951
Operating	\$173,844	\$ 85,359	\$88,485
Total Appropriation	\$733,844	\$636,409	\$97,435

YTD + projected expenditures
Balance remaining for operating
Total remaining in program line

	Cash Fund Balance		
	PRIOR YEAR (FY 2020)	YTD Revenue less YTD Expenses	Projected Revenue less Projected Expenses
Total Revenue	1,038,857	456,483	1,093,896
Total Expenditures	220,886	274,229	733,844
Net Change	\$ 817,971	\$ 182,253	\$ 360,052
Beg Fund Balance	-	817,971	817,971
= Fund Balance	817,971	1,000,224	1,178,023

Salaries	Pos. #	Actuals												Projections				
		July	August	September	October	November	December	January	February	March	April	May	June	Year-to-Date				
Sophia Alvarez	87001	\$ 9,583	\$ 9,583	\$ 9,583	\$ 9,583	\$ 9,583	\$ 9,583	\$ 9,583	\$ 9,583	\$ 9,583	\$ 9,583	\$ 9,583	\$ 9,583	\$ 9,583	\$ 115,000			
America Paz Pastrana	87002	\$ 4,447	\$ 4,447	\$ 4,467	\$ 4,467	\$ 4,467	\$ 4,467	\$ 4,467	\$ 4,467	\$ 4,467	\$ 4,467	\$ 4,467	\$ 4,467	\$ 4,467	\$ 53,684			
Jacquelyn Beal	87003	\$ 5,000	\$ 5,000	\$ 5,000	\$ 5,000	\$ 5,000	\$ 5,000	\$ 5,000	\$ 5,000	\$ 5,000	\$ 5,000	\$ 5,000	\$ 5,000	\$ 5,000	\$ 60,000			
Erin McGavin	87004	\$ 4,833	\$ 4,833	\$ 4,833	\$ 4,833	\$ 4,833	\$ 4,833	\$ 4,833	\$ 4,833	\$ 4,833	\$ 4,833	\$ 4,833	\$ 4,833	\$ 4,833	\$ 58,000			
Camille Price	87005	\$ 4,833	\$ 4,833	\$ 4,833	\$ 4,833	\$ 4,833	\$ 4,833	\$ 4,833	\$ 4,833	\$ 4,833	\$ 4,833	\$ 4,833	\$ 4,833	\$ 4,833	\$ 58,000			
Rhonda Sanchez	87006	\$ 4,833	\$ 4,833	\$ 4,833	\$ 4,833	\$ 4,833	\$ 4,833	\$ 4,833	\$ 4,833	\$ 4,833	\$ 4,833	\$ 4,833	\$ 4,833	\$ 4,833	\$ 58,000			
Total Salaries		\$ 33,530	\$ 33,530	\$ 33,670	\$ 33,550	\$ 33,550	\$ 33,550	\$ 33,550	\$ 33,550	\$ 33,550	\$ 33,550	\$ 33,550	\$ 33,550	\$ 33,550	\$ 402,684			
Employee Benefits		\$ 12,415	\$ 12,343	\$ 12,375	\$ 12,348	\$ 12,348	\$ 12,348	\$ 12,348	\$ 12,365	\$ 12,365	\$ 12,365	\$ 12,365	\$ 12,365	\$ 12,365	\$ 148,365			
Total Personal Services		\$ 45,945	\$ 45,874	\$ 46,045	\$ 45,898	\$ 45,898	\$ 45,898	\$ 45,915	\$ 45,915	\$ 45,915	\$ 45,915	\$ 45,915	\$ 45,915	\$ 45,915	\$ 551,049			
		Actuals																
1920 -Other Professional Services		\$ 1,200	\$ 10,684	\$ -	\$ 7,678	\$ 2,821	\$ 2,960	\$ -							\$ 25,343			
1940 -Medical Services		\$ -	\$ -	\$ -	\$ -	\$ -	\$ 388	\$ -										
1960 -Professional IT Services		\$ -	\$ -	\$ -	\$ -	\$ 2,960	\$ 3,525	\$ 300							\$ 6,785			
2255 -Rental of Meeting Rooms & Leased Space		\$ -	\$ -	\$ -	\$ 4,761	\$ 1,800	\$ -	\$ 3,616							\$ 10,177			
2513 -Mileage Reimbursement (Employee)		\$ -	\$ -	\$ -	\$ 16	\$ 81	\$ 80	\$ 187							\$ 364			
2631 -Communication Services from Outside Sources		\$ -	\$ 529	\$ 522	\$ 256	\$ -	\$ 646	\$ 256							\$ 2,211			
2680 -Printing & Reproduction Services - Vendors		\$ -	\$ -	\$ -	\$ -	\$ 18	\$ -	\$ -							\$ 18			
3110 -Identification & Safety Supplies		\$ -	\$ -	\$ -	\$ -	\$ -	\$ 12	\$ -							\$ 12			
3121 -Case Jackets		\$ -	\$ -	\$ 1,128	\$ 267	\$ 254	\$ 93	\$ 233							\$ 1,974			
3123 -Postage		\$ -	\$ -	\$ -	\$ -	\$ -	\$ 225	\$ -							\$ 225			
3140 -Noncapitalized IT Software		\$ -	\$ -	\$ -	\$ 180	\$ -	\$ -	\$ -							\$ 180			
3145 -Noncapitalized IT Purchases		\$ -	\$ -	\$ -	\$ -	\$ 1,276	\$ (363)	\$ 134							\$ 1,047			
4220 -Registration Fees		\$ -	\$ -	\$ 535	\$ 1,965	\$ -	\$ -	\$ 1,500							\$ 4,000			
4256 -Other Employee Benefits - Eco Pass		\$ 1,509	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -							\$ 1,509			
Total		\$ 2,709	\$ 11,213	\$ 2,185	\$ 15,123	\$ 9,211	\$ 7,566	\$ 6,225	\$ 6,225	\$ 6,225	\$ 6,225	\$ 6,225	\$ 6,225	\$ 6,225	\$ 85,359			
		avg monthly operating expenses																
Total - YTD + Projections Program Line		\$ 48,654	\$ 57,087	\$ 48,230	\$ 61,021	\$ 55,109	\$ 53,464	\$ 52,141	\$ 52,141	\$ 52,141	\$ 52,141	\$ 52,141	\$ 52,141	\$ 52,141	\$ 636,409			
		Over/(under) Program Line																
		\$97,435																