

**OPG Commission meeting
Director Report
04.28.2021**

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 04.28.2021 meeting:

- Attachment 1: SCAO/Judicial Provided Monthly Budget Summary as of 03.02.2021
- Attachment 2: MOU with Mental Health Center of Denver
- Attachment 3: Policy 6.10 Internal Ethics Committee (No changes from March meeting)

I. Budget Update.

- a. I previously provided the April 2021 monthly budget report that is provided to me from Hugh Wilson, Judicial Budget Manager. See Attachment 1.
- b. Deb Hutson/OBH Manager of Momentum and Transitional Services Mr. Wilson submitted a Budget Amendment. The JBC approved the Budget Amendment allowing OPG to hire a 1.0 FTE Public Guardian to take on a limited caseload of OBH/Momentum clients. A long bill should be signed around May 1, 2021. I will have a job posting available to publish as soon as the bill is signed. In the meantime, AAG Enck and I are working on an Interagency Purchase Order or MOU with OBH to have in place for July 1, 2021, when the funds will be available.

- c. AAG Enck assisted with establishing a MOU with Mental Health Center of Denver (MHCD). Many OPG clients have mental health needs and mental health certifications that are addressed by MHCD. See Attachment 2.

- d. Discussion with Chair Lesco and AAG Enck regarding the potential need to file motions related to authority to access client financial information to obtain/maintain benefits. Even with the basic authority and language authorizing the OPG to obtain bank statements, etc. financial institutions are not giving OPG information. There is an additional issue regarding the potential need of OPG to request authority to close and transfer client funds (via hand delivery of a check) to Colorado Fund for People with Disabilities once CFPD becomes OPG clients' Representative Payee.
 - i. Medical Legal Partnership is willing to assist in representing the OPG.
 - ii. I am in discussions with Guardians ad Litem and Court Appointed Counsel appointed during the petition process to file motions on behalf of the OPG client.
 - iii. Various email correspondence with Probate Court to address clarifying language in Orders regarding OPG authority for some financial management.

- e. SCAO JBC representative is running a bill to correct technical statutory errors. The JBC is scheduled to hear this bill on April 21, 2021.
 - i. House Bill 19-1045 (May 2019) extended the potential wind-up date if the Pilot Program is not continued/expanded to **12.31.2023**
 - ii. Technical correction requests to match the extension date of **12.31.2023** as identified in C.R.S. 13-94-111:

- iii. C.R.S. 13-94-108(2): this change is required so that the OPG Cash Fund does not revert to the General Fund at the end of FY21, leaving the OPG without funds. The exact request is to change the end date to 06.30.2024, the end of the fiscal year after the potential wind-up date of 12.31.2023
- iv. C.R.S. 13-94-102(2) (II) (b): this change is required so that the OPG can be fully evaluated by the General Assembly in 2023. The exact request is to change the year to 2023, instead of 2021

II. **Stakeholder Engagement Plan – In progress.**

- a. Stakeholder Advisory Panel applications are completed but will wait to disburse and post until the member 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. **Policy 6.10. Internal Ethics Committee (IEC) – In progress.** See Attachment 3 – no changes from March meeting. If there are updates to the written policy, the document will be provided as meeting materials as soon as possible.
- b. **Policy 8. Ensuring Systemic Equality Services Standards – In progress,** no update from last meeting.
- c. **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.

d. 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. Equity, Diversity, and Inclusion Training: received approval from Department of Personnel and Administration (DPA). I completed the training on 03.16.2021. All but one staff has completed the training by April 1, 2021. The one staff is having technical issues with the Modules, which are being addressed with DPA.
- iv. 03.25.2021: Training with Megan Butler and Peggy Roling – Covell Care & Rehabilitation
- v. 04.14.2021: Attend Denver Forensic Collaborative meeting
- vi. Colorado Gerontological Society Aging in Place webinar series:
 - a. 04.15.2021: Using Technology to Stay in Your Home
 - b. 05.20.2021: Living with Someone – Family, Friends of Roommates
 - c. 06.17.2021: Downsizing to a Smaller Home
 - d. 07.15.2021: Bringing Services into the Home
- vii. CU Anschutz Emotional and Mental Health in Older Adults Spring webinar series
 - a. 04.15.2021: Mindfulness: A Practical Approach for Savoring Moments in Each Day

- b. 04.22.2021: Connect & Engage: Understanding Loneliness and Forging Deeper Relationships
 - c. 04.29.2021: Adding Structure to Life with Flexibility and Purpose
 - d. 05.06.2021: Maintaining Healthy Cognitive Living
 - viii. 04.16.2021: Ethical Framework for Medical Decision-Making and Case Examples - Dr. Jackie Glover, CU Anschutz Professor, Department of Pediatrics and the Center for Bioethics and Humanities, Director of of the Humanities, Ethics and Professionalism (HEP) thread in the School of Medicine curriculum
 - ix. Rescheduled to 04.30.2021: Presentation by Jane Barnes – Benefits in Action Executive Director
 - x. TBD: Compassion Fatigue workshop and a Social Justice training through Center for Trauma & Resilience
- e. **Intake Eligibility, Prioritization and Referral Process.**
- i. Update on number of registered users, referrals, accepted cases, etc. as of **04.21.2020**. An update will be provided at the 04.28.2021 meeting.
 - 1. 45 Active guardianships
 - 2. 21 referrals pending in court proceedings [see withdrawn]
 - 3. 7 Partial/Incomplete referrals
 - 4. 5 clients passed away since CO OPG appointment (all non-COVID related)
 - 5. Declined referrals
 - 1. Expired/Incomplete information – 2
 - 2. Withdrawn by Ft. Logan - 1
 - 6. 42 streamlined referrals (Non-Denver County) – Declined

1. Arapahoe County – 8
2. Boulder County – 3
3. El Paso County - 5
4. Garfield County - 1
5. Gunnison County – 1
6. Huerfano County - 3
7. Jefferson County – 2
8. Lake County - 1
9. La Plata County – 2
10. Larimer County - 4
11. Las Animas County - 2
12. Mesa County – 2
13. Montrose County – 2
14. Otero County – 3
15. Pueblo County -1
16. Washington County - 1
17. Weld County - 4

ii. Rocky Mountain Human Services (RMHS) – See I.b.

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. The OPG received and accepted 2 referrals from this relationship so far

f. Data gathering - In progress. Research Assistant.

- i. Grant Yoder, Research Assistant will present at a future meeting. Grant and I meet weekly. 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/Survey to qualify the statewide need for public guardianship services
 4. Creating a Mind Map for data collection partnerships
- ii. 03.09.2021: Meeting with Natalie DeVille, Director - LifeWork Aging Solutions – Lutheran Family Services (LFS), and Flavia Zarcula – Grant Manager - Lutheran Family Services regarding potential research partnership and grant partnership to address data collection required in C.R.S. 13-94-105 (Director Report requirements). LFS directed that I follow up with LFS in Mid-May
- iii. 03.29.2021: Meeting with Paula Henry of the Colorado LTC Community Ethics Committee for data gathering discussion
- iv. 05.05.2021: Meeting with Pikes Peak Elder Abuse Coalition Guardianship Collaboration group regarding data collection in Colorado Springs area
- v. Various dates: Email correspondence with Jessica Brill - SCAO Research & Data Manager regarding statewide data collection

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

- V. **Stakeholder Meeting Update** since 03.24.2021.
 - a. 03.26.2021: Joint live webinar entitled “Legal Guardianship” with Colorado Gerontological Society

 - b. 03.29.2021: Phone conference with Paula Henry, Social Services QIS – Vivage, regarding presentation to Social Workers and assistance with data gathering

 - c. 03.31.2021: I provided Guardianship Training and OPG presentation to OBH CHMI Staff

 - d. 04.01.2021: Attend and provided OPG update at Colorado LTC Community Ethics Committee meeting

 - e. 04.06.2021: Phone conference with Sherry – SkyRidge Medical Center, regarding potential referral

 - f. 04.08.2021: Presentation to Vivage Social Workers

 - g. 04.12.2021: Check-in meeting with Whitney Nettleton – Denver County APS and Dave Bernhart – City Attorney’s Office

 - h. 04.15.2021: Presentation to SkyRidge Medical Center Social Workers and Case Managers

 - i. 04.14.2021: Attend Denver Forensic Collaborative meeting

 - j. 04.21.2021: Email correspondence with Laurie Kullby – Leads Contract Coordinator, CDHS and Deb Hutson - Program Manager, CDHS, regarding Interagency Purchase Order for funding new FTE Public Guardian position

- k. Various dates: Meeting with Pia Dean, Marc Scanlon, Jessica Farnen - Medical Legal Partnership, regarding potential partnership to file motions for OPG as indicated in section II.e.

- l. Various dates: Email correspondence and meetings with Hugh Wilson – Budget Manager, SCAO and Deb Hutson – Program Manager, CDHS regarding funding partnership

