

**OPG Commission meeting
Director Report
08.25.2021**

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 08.25.2021 meeting:

- Attachment 1: SCAO/Judicial provided FY 2021 Final Budget Summary and Monthly Budget Summary as of 08.17.2021
- Attachment 2: Finalized Policy 6.10 Internal Ethics Committee

I. Budget Update.

- a. I previously provided the FY 21 final budget summary and the monthly budget report that is provided to me from Hugh Wilson, Judicial Budget Manager. **See Attachment 1.**
- b. AAG Enck finished her review of the MOU with OBH for the new FTE 1.0 Public Guardian position. I am waiting to receive a fully executed version.
 - i. Public Guardian Jackie Beal will be transferring her caseload to the new Public Guardian, Cynthia Wells. PG Beal will be responsible for the CHMI/OBH client caseload

II. Stakeholder Engagement Plan – In progress.

- a. 08.16.2021: Stakeholder Advisory Panel materials were posted on the website and emailed to stakeholders. The Short Form is available for clients and vulnerable populations and can be

completed in person or via telephone with applicants. OPG staff is also presenting materials to clients.

III. **Colorado OPG Pilot Program Operating Policies Updates – In progress.** All Operating Policies and Manual were posted to CO OPG Website, including Policy 6.10. Internal Ethics Committee (IEC) as updated and approved with Commissioner Zinn (see Attachment 2).

a. **Policy 8. Ensuring Systemic Equality Services Standards – Completed.** No update from last meeting.

b. **Policy 5. Colorado OPG Fiscal Policy – Client Emergency Fund – In Progress, no updates.**

c. **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.

a. I am waiting for background check clearance to be allowed to schedule my CGC exam Background clearance was received, can schedule my CGC exam before the end of September 2021.

iii. 07.14.2021: Attend Denver Forensic Collaborative meeting

iv. 07.30.2021: Presentation by DRCOG Community Transition & Options Program

- v. 08.27.2201: Presentation by Alison Joucovksy – Executive Director, Sunshine Home Share Colorado
- vi. 10.2021: National Guardianship Association Annual Conference. Staff will attend virtually.
- vii. TBD: Compassion Fatigue workshop and a Social Justice training through Center for Trauma & Resilience

d. Intake Eligibility, Prioritization and Referral Process.

- i. Update on number of registered users, referrals, accepted cases, etc. as of **08.17.2021**. An update will be provided at the 08.25.2021 meeting.
 - 1. 61 Active guardianships
 - 2. 16 referrals pending in court proceedings
 - 3. 8 Partial/Incomplete referral
 - 4. 7 clients passed away since CO OPG appointment (all non-COVID related)
 - 5. 9 “Hold” OBH/CHMI- Ft. Logan/Pueblo referrals
 - 6. Declined referrals
 - 1. Expired/Incomplete information – 4
 - 2. Withdrawn by Ft. Logan – 1
 - 3. Family available to serve – 5
 - 4. Not incapacitated - 1
 - 7. 55 streamlined referrals (Non-Denver County) – Declined
 - 1. Adams County – 2
 - 2. Arapahoe County – 9
 - 3. Boulder County – 4
 - 4. “Denver County” - 2
 - 5. El Paso County – 13
 - 6. Garfield County – 1
 - 7. Gunnison County – 1
 - 8. Huerfano County - 3

9. Jefferson County – 2
10. Lake County - 1
11. La Plata County – 2
12. Larimer County - 4
13. Las Animas County - 2
14. Mesa County – 2
15. Montrose County – 2
16. Otero County – 3
17. Pueblo County - 4
18. Washington County - 1
19. Weld County – 5

e. **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
 1. Grant and I are following up with stakeholders regarding cost analysis data
3. We distributed the Needs Assessment plan/Survey to quantify the statewide need for public guardianship services, etc. starting August 16, 2021. The delay from the August 2 goal was due to the University Review Board taking longer than expected to review the survey.
 1. Grant met with Professor Pamela Teaster of Virginia Tech to discuss the cost analysis data collection (<https://liberalarts.vt.edu/departments-and-schools/department-of-human-development-and-family-science/faculty/pamela-teaster.html>).

Dr. Teaster is known for her work with Public Guardianship programs. Dr. Teaster provided resources for Grant to review for cost analysis data

- ii. Various: Meeting with Pikes Peak Elder Abuse Coalition Guardianship Collaboration group regarding data collection in Colorado Springs area

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

V. **Stakeholder Meeting Update** since 07.28.2021.

- a. 07.28.2021: Email correspondence with Christine Reifenrath – Certified Care Manager, Human Network Services regarding OPG as successor guardian for Department of Corrections clients
- b. 08.11.2021: Attend Denver Forensic Collaborative meeting
- c. 07.28.2021: Email to Colorado Association of Area Agencies on Aging regarding survey & data collection
- d. 07.30.2021: Email correspondence with Lynn Lowe – Senior Resources Navigator – Denver City Attorney’s Office regarding SSA Representative Payee issue
- e. 08.02.2021: Email correspondence and phone conference with Reverend Joseph Dang regarding potential referral
- f. 08.05.2021: Attend Colorado LTC Ethics Committee Meeting
- g. 08.06.2021: Virtual conference with Medical Legal Partnership regarding contracting for petition filings

- h. 08.17.2021: Email correspondence with Deborah Smith – Boulder County District Attorney’s Office and Community Justice Services regarding OPG services and training
- i. 08.19.2021: Attend Summer Health Cabinet Summit hosted by the Colorado Department of Health Care Policy and Financing
- j. 08.20.2021: Phone conference scheduled with Commissioner Chayet regarding convening in rural areas for data collection and relationship building
- k. Various: Email correspondence and virtual conference with Victoria Cardova – Associate Director, Senior Behavioral Health Services Banner Health McKee Medical Center regarding OPG services and training
- l. Various: Email correspondence and virtual conference with Alison Joucovsky – Executive Director of Sunshine Home Share regarding OPG services
- m. Various: Email correspondence and virtual conference with Dr. Randolph Maul – Chief Medical Officer, Department of Corrections and Kara Brown - Department of Corrections, Transitions Program and Christine Reifenrath – Certified Care Manager, Human Network Services regarding OPG referral partnership
- n. Various: Email correspondence and phone conference with Dina Rouff – Colorado Fund for People with Disabilities regarding potential referral
- o. Various: Email correspondence and phone conference with Amy Delo – Administrator of Older Adult Services, Denver Public Library regarding potential referrals
- p. Various: Email correspondence Natalie DeVille – Lutheran Family Services regarding potential referral

- q. Various dates: Email correspondence with Laurie Kullby – Leads Contract Coordinator, CDHS and Deb Hutson - Program Manager, CDHS, regarding MOU for new FTE Public Guardian position

- r. Various: Check-in meetings with Emily Brager – COO and Megan Brand – Executive Director, Colorado Fund for People with Disabilities

Attachment 1. OPG Personal Services and Operating Summary FY21 FINAL

OPG Personal Services and Operating Summary - FY 2021 FINAL

Budget Type	Budget	YTD + Projected Exp	Surplus / (Deficit)
Personal Services	\$560,000	\$ 551,049	\$8,951
Operating	\$173,844	\$ 111,022	\$62,822
Total Appropriation	\$733,844	\$662,072	\$71,772

	Cash Fund Balance	
	PRIOR YEAR (FY 2020)	Final Revenue less Final Expenses
Total Revenue	\$1,038,857	\$1,136,656
Total Expenditures	\$219,267	\$662,072
Net Change	\$819,590	\$474,584
Beg Fund Balance	\$0	\$819,590
= Fund Balance	\$819,590	\$1,294,174

Final FY21 Fund B:

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	9583	\$ 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	4,587	\$ 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	\$ 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	\$ 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	\$ 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	\$ 58,000
Total Salaries		\$ 33,530	\$ 33,530	\$ 33,670	\$ 33,550	\$ 402,684								
Employee Benefits		\$ 12,415	\$ 12,343	\$ 12,375	\$ 12,348	\$ 12,348	\$ 12,348	\$ 12,365	\$ 148,365					
Total Personal Services		\$ 45,945	\$ 45,874	\$ 46,045	\$ 45,898	\$ 45,898	\$ 45,898	\$ 45,915	\$ 551,049					
Actuals														
1920 -Other Professional Services		\$ 1,200	\$ 10,684	\$ -	\$ 7,678	\$ 2,821	\$ 2,960	\$ -	\$ -	\$ 6,108	\$ -	\$ 750	\$ 6,434	\$ 38,634
1940 -Medical Services		\$ -	\$ -	\$ -	\$ -	\$ -	\$ 388	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
1960 -Professional IT Services		\$ -	\$ -	\$ -	\$ -	\$ 2,960	\$ 3,525	\$ 300	\$ 300	\$ 8,394	\$ 3,839	\$ 3,538	\$ 6,035	\$ 28,890
2255 -Rental of Meeting Rooms & Leased Space		\$ -	\$ -	\$ -	\$ 4,761	\$ 1,800	\$ -	\$ 3,616	\$ 1,833	\$ 1,800	\$ 1,800	\$ 1,800	\$ -	\$ 17,410
2513 -Mileage Reimbursement (Employee)		\$ -	\$ -	\$ -	\$ 16	\$ 81	\$ 80	\$ 187	\$ 58	\$ 183	\$ -	\$ 330	\$ 308	\$ 1,243
2631 -Communication Services from Outside Sources		\$ -	\$ 529	\$ 522	\$ 256	\$ -	\$ 646	\$ 256	\$ -	\$ 514	\$ -	\$ -	\$ 515	\$ 3,240
2680 -Printing & Reproduction Services - Vendors		\$ -	\$ -	\$ -	\$ -	\$ 18	\$ -	\$ -	\$ -	\$ -	\$ -	\$ 0.48	\$ -	\$ 18
2820 -Monitoring Services		\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ 46.25	\$ 49	\$ 95
3110 -Identification & Safety Supplies		\$ -	\$ -	\$ -	\$ -	\$ -	\$ 12	\$ -	\$ -	\$ -	\$ -	\$ -	\$ 208	\$ 220
3120 -Books / Periodicals / Subscriptions		\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ 4,098	\$ -	\$ -	\$ -	\$ -	\$ -
3121 -Case Jackets		\$ -	\$ -	\$ 1,128	\$ 267	\$ 254	\$ 93	\$ 233	\$ 261	\$ -	\$ 33	\$ 54	\$ -	\$ 2,323
3123 -Postage		\$ -	\$ -	\$ -	\$ -	\$ -	\$ 225	\$ -	\$ -	\$ -	\$ -	\$ 255	\$ -	\$ 479
3140 -Noncapitalized IT Software		\$ -	\$ -	\$ -	\$ 180	\$ -	\$ -	\$ -	\$ 300	\$ -	\$ -	\$ 44	\$ -	\$ 524
3145 -Noncapitalized IT Purchases		\$ -	\$ -	\$ -	\$ -	\$ 1,276	\$ (363)	\$ 134	\$ 134	\$ 578	\$ 2,400	\$ 134	\$ 134	\$ 4,428
4140 -Dues & Memberships		\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ 750	\$ -	\$ 950	\$ 1,260	\$ 2,960
4170 -Miscellaneous Fees & Fines		\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
4220 -Registration Fees		\$ -	\$ -	\$ 535	\$ 1,965	\$ -	\$ -	\$ 1,500	\$ -	\$ 160	\$ -	\$ 358	\$ 45	\$ 4,564
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	\$ 6,984	\$ 18,487	\$ 8,072	\$ 8,260	\$ 14,987	\$ 111,022
Total - YTD + Projections Program Line		\$ 48,654	\$ 57,087	\$ 48,230	\$ 61,021	\$ 55,109	\$ 53,464	\$ 52,141	\$ 52,899	\$ 64,402	\$ 53,987	\$ 54,175	\$ 60,902	\$ 662,072
Over/(under) Program Line														\$71,772

Attachment 1. OPG Personal Services and Operating Summary as of 08.17.2021

OPG Personal Services and Operating Summary - FY 2021 **Final**

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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	\$ 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	\$ 58,000
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4170 -Miscellaneous Fees & Fines		\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
4220 -Registration Fees		\$ -	\$ -	\$ 535	\$ 1,965	\$ -	\$ -	\$ 1,500	\$ -	\$ 160	\$ -	\$ 358	\$ 45	\$ 4,564
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	\$ 6,984	\$ 18,487	\$ 8,072	\$ 8,260	\$ 14,987	\$ 111,022
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Over/(under) Program Line														\$71,772

Policy 6.10. GUARDIAN SUPERVISION

a. The Colorado Office of Public Guardianship (OPG) shall model the highest standard of practice for guardians. As such, the Colorado OPG will provide experienced supervision and support to all Public Guardians. All Public Guardians will strictly adhere to their duties as set forth in the Colorado Probate Code and they use the National Guardianship Association Standards of Practice for Agencies and Programs Providing Guardianship Services Standards I – III, V, and VI; National Guardianship Association Ethical Principles; and National Guardianship Association Standards of Practice 1 – 16, 23, and 24 for professional guidance as to best practices in the event the Colorado Probate Code does not provide specific mandates or procedures.

b. The Director of the OPG will seek certification from the Center for Guardianship Certification for National and Master Guardianship certifications within five years of employment with the Colorado OPG.

c. OPG training and curriculum for Public Guardians is designed to lay a foundation for each Public Guardian to become certified. Public Guardians are strongly encouraged to pursue National and Master Guardianship certifications within five years of employment.

d. The Director for the OPG shall meet with each Public Guardian for a quarterly case review to ensure that individual goals are being met of both the Public Guardian and the wards whom the Public Guardian serves. These case reviews will be scheduled at a mutually agreed upon time and may take place in person or via an electronic meeting platform.

e. A weekly team meeting is required of all staff members. The meeting may take place in person or via electronic meeting platform. The meeting is intended to serve as a way to touch base with all team members to update about cases that are currently at the forefront of each Public Guardian. The weekly meetings are also designed to be a way in which Public Guardians can problem solve with one another and consult with other members of the team about resources, strategies, and ideas. Finally, the weekly meeting serves as a way to announce information, receive feedback as a group, etc.

The Office of Public Guardian will establish an Internal Ethics committee process for decisions that involve end of life or are ethically complex or controversial. The Ethics committee will establish guidelines for decision-making in such controversial or complex areas.

While the Public Guardians must strictly adhere to the Colorado Probate Code, the Colorado Probate Code does not outline decision-making procedures. When making end of life decisions, complex care or residential decisions, or decisions that could be deemed controversial, the Public Guardian must rely on his or her own expertise and whatever information he or she deems necessary to fully inform these decisions. The Public Guardian is encouraged to rely on best practices, as outlined by the National Guardianship Association, and should, where non-

emergent decisions arise, consult with the Director and/or the OPG ethics committee for further analysis and insight. Nothing about this process shall divest the Public Guardian of his or her authority pursuant to the Colorado Probate Code or pursuant to any Court Order and this process, while strongly encouraged, may vary slightly as ethical concerns are often case specific and emergency circumstances will likely require a different approach within the Public Guardian's discretion to act at all times in the ward's best interest and to exercise reasonable care, diligence, and prudence. General guidelines include:

- i. The Public Guardian will consult with the Director regarding any end of life decision, decisions deemed to be complex, decisions deemed to be high risk, or decisions that may be deemed controversial. If the Director believes more input is necessary to assist with the Public Guardian's decision, the Internal Ethics committee will be consulted in a timely manner where possible.
 - ii. The Public Guardian may handle placement matters unless the ward is to be moved to a more restrictive environment, such as a secured facility or unit. In that circumstance, the Public Guardian will consult with the Director. If the Director believes more input is necessary to assist with the Public Guardian's decision, the Internal Ethics committee will be consulted in a timely manner where possible.
2. For an individual that is hospitalized, the Internal Ethics Committee may consist of the Public Guardian, Director, hospital's Ethics Committee, and appropriate attending physician(s) and specialists.
3. For an individual that is not hospitalized, the Internal Ethics Committee may consist of an outside ethicist, Public Guardian, Director, OPG Commission member, and appropriate attending physician(s) and specialists. The outside ethicist may be a professor of ethics, bioethics and/or humanities from a local university program or Colorado Health Care Ethics Forum.