

**OPG Board meeting
Interim Director Report
10.14.2025**

Purpose: The Interim Director Report will provide information about new matters, updates about the previous month's matters, and next steps for the following month. The Interim Director will provide the Interim Director Report to all Board members. Questions about the Interim Director Report will be addressed at the Board meetings, if necessary. Board members are encouraged to reach out to the Interim Director directly regarding any questions in between meetings.

I. Administrative Update.

a. Work Anniversaries:

1. Teresa Esquibel Angel (Case management Aid) has a 3-year work anniversary on October 23rd, 2025.
2. Michelle Trejo (Guardian) had her 1-year anniversary on September 8th, 2025.

b. Human Resources Update.

1. OPG is currently recruiting for the executive director, legal counsel, grant specialist, data scientist, People and Culture Leader, and community engagement coordinator positions.
2. Employer's Council is helping us with recruiting of the vacant positions.
3. We have a vacant case aid position that I would like to turn into a floater guardian position. This position has not been filled in the past, and I would like to fill this to help support vacant positions. Traditionally, the Executive Director and Deputy Director have stepped in and helped to carry caseloads for the last three years. This guardian would be responsible for stepping into any vacant position and temporarily covering this caseload until it is permanently filled. If OPG remains fully staffed, this guardian will help to apply for benefits, assist with renewals, and any other tasks the guardians require assistance with. If needed, they could carry a permanent smaller caseload as well.

- c. Office space.** I viewed new spaces on 09.09.2025 and we are reviewing updated information from the broker to determine which Requests for Proposals (RFP) to send. We will send 2 RFPs for spaces in DTC area for about 4800-5800 square feet. Two negotiations are occurring to establish

final costs. Once we have established a final space, it can take up to 60 days for the lease to be approved. Our current lease expires January 31, 2026.

d. **Office of Administrative Services for Independent Agencies (OASIA).**

1. OASIA is incorporating Bamboo HR, to streamline payroll, benefits, and HR systems (i.e., Time sheets and Requests for Leave). OPG has provided OASIA with leave information to update their system. OASIA continues to transition services from Judicial. Currently, OPG is still processing time sheets, leave requested, and PTO balance sheets. OPG is eager for OASIA to get fully up and running.
2. I had a meeting with OASIA on September 30th with Mike Henthorn to discuss the 2027 budget year. The due date for budget submission for the 2027 fiscal year was October 8th. Due to the recent state budget shortfalls, it is not recommended to request additional funding. We are requesting general funds for two new guardians to expand into two new judicial districts. OPG is aware that these two new guardian positions will likely be declined, but hopefully we can get spending authority for these two positions. We hope to fill the grant position to help with funding for expansion.

II. **Colorado OPG board and Operating Policies Updates.** Please note that board and Operating Policies are available on the OPG website: <https://colorado-opg.org/opg-in-depth/>

a. **Trainings and Projects – Ongoing.** A list can be provided quarterly.

- i. Ms. Villegas is a Physician Assistant with Longevity Health Plan, a specialized Medicare Advantage health plan serving people living in skilled nursing facilities. She provided OPG with a training on death and dying on 09.24.2025. Unfortunately, Ms. Villegas has decided to change job positions and is no longer willing to provide these trainings for OPG. OPG will try to find another clinician that is willing to take on this responsibility.
- ii. OPG staff completed two training courses with Employer's Council on Workplace Respect and Harassment prevention.
- iii. Colorado Long-Term Care Ombudsman Program provided a training on October 15th, 2025, to OPG.
- iv. The two new guardians continue to work on their standard new hire training modules.

- v. The Interim Executive Director plans on attending the NGA conference in Oklahoma October 25th to October 28th.

b. Intake Eligibility, Prioritization and Referral Process.

- i. Update on number of registered users, referrals, accepted cases, etc. as of 10.14.2025:
 - 1. 65 Active guardianships
 - 2. 0 referrals pending in court proceedings
 - 3. 0 Complete referrals
 - 4. 2 Partial referral
 - 5. 2 Registered referring parties
 - 6. 38 clients passed away since COPG appointment
 - 7. 1 Terminated – Successor Guardian
 - 8. 1 Terminated – Client no longer meets the standard for continuing guardianship
 - 9. 27 Hold status (now includes OBH/CHMI-Ft. Logan/Pueblo referrals that are non-OBH/Momentum contract referrals)
 - 10. The OBH/Momentum dedicated caseload for one guardian is 12 guardianships; 10 are active (1 client passed and is included in the total passed)
 - 11. 7th Judicial District
 - a. Accepted – 1 Montrose
 - b. Declined Not incapacitated – 1 Delta & 1 Montrose
 - c. Withdrawn due to AIP death – 1 Delta
 - d. Declined No OPG Capacity – 1 Montrose
 - e. Withdrawn – 3 Montrose
 - 12. Declined referrals – pre-Hold status
 - 1. 169 Denver declined referrals (some declined were prior to establishing the Hold status)
 - a. 11-Declined- Inappropriate referral
 - b. 65 -Declined-Incomplete referral
 - c. 10-Declined no OPG capacity
 - d. 4- Declined not indigent
 - e. 5-Declined not an adult
 - f. 2- Declined not incapacitated
 - g. 10-Declined family, friend, guardian available willing to serve

- h. 5- Withdrawn passed away
- i. 2 -Withdrawn- non-Denver
- j. 8 -Withdrawn-Inappropriate referral
- k. 6-Withdrawn-Incomplete
- l. 2-Withdrawn No OPG Capacity
- m. 11- Withdrawn not incapacitated
- n. 28 -Withdrawn-Family, Friend, guardian willing to serve
- o. 4- Withdrawn by Fort Logan
- 2. Texas inquiry - 1
- 3. Nebraska referral - 1
- 4. Alaska inquiries – 2
- 5. Washington, D.C. inquiry - 1
- 6. Colorado inquiries – 30
- 13. 133 streamlined referrals (Non-Denver County) – Declined
 - 1. Adams County – 8
 - 2. Alamosa County - 1
 - 3. Arapahoe County – 23
 - 4. Baca County – 1
 - 5. Boulder County – 9
 - 6. Broomfield County – 1
 - 7. Chaffee-2
 - 8. Crowley – 1
 - 9. Delta County -2
 - 10. Dolores County - 1
 - 11. El Paso County – 27
 - 12. Fremont - 1
 - 13. Garfield County – 1
 - 14. Gunnison County – 1
 - 15. Huerfano County – 3
 - 16. Jefferson County – 15
 - 17. Lake County - 1
 - 18. La Plata County – 2
 - 19. Larimer County - 6
 - 20. Las Animas County - 2
 - 21. Mesa County – 2
 - 22. Montrose County – 8 *
 - 23. Otero County – 8

24. Pueblo County – 11

25. Weld County – 9

*Montrose County: Two referrals were declined prior to April 2023. 1 referral was declined in May 2023 due to the AIP residing in Otero County

III. **Stakeholder Outreach –**

- a. 11.18.25: I'm presenting for the Long-Term Ombudsman program on OPG program status.

