

**OPG Commission meeting
Director Report
08.24.2022**

Purpose: The Director Report will provide 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. Commissioners are encouraged to reach out to the Director directly for any questions in between meetings.

Attachments for the 08.24.2022 meeting:

- Attachment 1: SCAO/Judicial provided a FY 2022 Final Budget Summary as of 08.19.2022
- Attachment 2: Demographics List

I. Budget and Administrative Update.

- a. I previously provided the monthly budget reports for February that are provided to me from Hugh Wilson, Judicial Budget Manager. **See Attachment 1.**
- b. Client Visit Verification System - project is ready to move forward. System is a site verification system (not an ongoing cell phone tracking system) that is linked to the existing Case Management System.
- c. Positions have been posted by Judicial Branch, on Indeed, local newspapers, etc. Extended the closing date to August 22. To date we received applications for all positions.
 - i. Public Guardian – 2nd Judicial District
 - ii. Public Guardian – 2nd Judicial District/Colorado Mental Health Institute
 - iii. Public Guardian – 7th Judicial District
 - iv. Public Guardian – 16th Judicial District

v. Case Management Aid – 2nd Judicial District

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

III. **Colorado OPG Pilot Program Operating Policies Updates – No updates.** Please note that Operating Policies are available on the OPG website: <https://colorado-opg.org/opg-in-depth/>

a. **OPG Email Policy – Completed.** To be posted on OPG website.

b. **Policy 5. Colorado OPG Fiscal Policy – Client Emergency Fund – In Progress.** Will be considered with Final Report.

c. Reviewing and updating protocols as part of the Spring meetings to assess the procedures, caseloads, etc. of the office. Chair Bennett-Woods and AAG Kidd-Aaron and I are also identifying policies that need updating as issues arise. It is likely that policies will need updating as the office grows.

d. **Trainings and Projects – Ongoing.** A list will be provided quarterly.

e. **Intake Eligibility, Prioritization and Referral Process.**

i. Update on number of registered users, referrals, accepted cases, etc. as of **08.19.2022**

1. 79 Active guardianships

2. 2 referrals pending in court proceedings (accepted 2 Hold referrals)

3. 9 Partial referrals

4. 16 clients passed away since CO OPG appointment (1 possibly Covid related death)

5. 18 Hold status for 6 months (now includes OBH/CHMI-Ft. Logan/Pueblo referrals that are non-OBH/Momentum contract referrals)
6. OBH/Momentum dedicated caseload:
 1. 8 Active guardianships
 2. 4 referrals pending in court proceedings
7. 33 Declined referrals
 1. 25 Denver declined referrals
 - a. 5 - Family available to serve
 - b. 15 - Expired/Incomplete information
 - c. 1 – Not appropriate referral
 - d. 1 - Not adult
 - e. 1 - Withdrawn by Ft. Logan
 - f. 4 - No OPG Capacity
 2. Not incapacitated – 2
 3. Texas referral - 1
 4. Nebraska referral - 1
 5. Alaska referral – 2
8. 78 streamlined referrals (Non-Denver County) – Declined
 1. Adams County – 4
 2. Alamosa County - 1
 3. Arapahoe County – 11
 4. Boulder County – 4
 5. Broomfield County - 1
 6. “Denver County” - 2
 7. El Paso County – 17
 8. Garfield County – 1
 9. Gunnison County – 1
 10. Huerfano County - 3
 11. Jefferson County – 7

12. Lake County - 1
13. La Plata County – 2
14. Larimer County - 4
15. Las Animas County - 2
16. Mesa County – 1
17. Montrose County – 2
18. Otero County – 3
19. Pueblo County - 3
20. Washington County - 1
21. Weld County – 7

- IV. **Colorado OPG Strategic Plan.** Draft previously provided – no updates.
- V. **Stakeholder Outreach – Ongoing.** A list can be provided if requested.
- VI. **Data gathering and Final Report - In progress.**
 - a. See **Attachment 2.** Demographics List

Attachment 1. FY23 Initial OPG Budget Summary as of 08.19.2022

OPG Personal Services and Operating Summary - FY 2023

Budget Type	Budget	YTD + Projected Exp	Surplus / (Deficit)	YTD
Personal Services	\$1,360,000	\$ 1,124,325	\$235,675	Balance remaining for operating Total remaining in program line
Operating	\$360,586	\$ 130,000	\$230,586	
Total Appropriation	\$1,720,586	\$1,254,325	\$466,261	

	Cash Fund Balance	
	PRIOR YEAR (FY 2022)	Projected Revenue less YTD Expenses
Total Revenue	\$1,220,753	\$1,220,753
Total Expenditures	\$780,395	\$1,254,325
Net Change	\$440,358	-\$33,572
Beg Fund Balance	\$1,294,174	\$1,734,532
= Fund Balance	\$1,734,532	\$1,700,960

Salaries	Pos. #	Current Salaries	Actuals	Projections											
				July	August	September	October	November	December	January	February	March	April	May	June
Director	87001	\$ 10,167	\$ 10,167	\$ 10,167	\$ 10,167	\$ 10,167	\$ 10,167	\$ 10,167	\$ 10,167	\$ 10,167	\$ 10,167	\$ 10,167	\$ 10,167	\$ 10,167	\$ 10,167
Staff Assistant	87002	\$ 4,718	\$ 4,718	\$ 4,718	\$ 4,718	\$ 4,718	\$ 4,718	\$ 4,718	\$ 4,718	\$ 4,718	\$ 4,718	\$ 4,718	\$ 4,718	\$ 4,718	\$ 4,718
Public Guardian	87003	\$ 5,305	\$ 5,305	\$ 5,305	\$ 5,305	\$ 5,305	\$ 5,305	\$ 5,305	\$ 5,305	\$ 5,305	\$ 5,305	\$ 5,305	\$ 5,305	\$ 5,305	\$ 5,305
Public Guardian	87004	\$ 5,128	\$ 5,128	\$ 5,128	\$ 5,128	\$ 5,128	\$ 5,128	\$ 5,128	\$ 5,128	\$ 5,128	\$ 5,128	\$ 5,128	\$ 5,128	\$ 5,128	\$ 5,128
Public Guardian	87005	\$ 5,128	\$ 5,128	\$ 5,128	\$ 5,128	\$ 5,128	\$ 5,128	\$ 5,128	\$ 5,128	\$ 5,128	\$ 5,128	\$ 5,128	\$ 5,128	\$ 5,128	\$ 5,128
Public Guardian	87006	\$ 5,128	\$ 5,128	\$ 5,128	\$ 5,128	\$ 5,128	\$ 5,128	\$ 5,128	\$ 5,128	\$ 5,128	\$ 5,128	\$ 5,128	\$ 5,128	\$ 5,128	\$ 5,128
Public Guardian	87007	\$ 5,150	\$ 5,150	\$ 5,150	\$ 5,150	\$ 5,150	\$ 5,150	\$ 5,150	\$ 5,150	\$ 5,150	\$ 5,150	\$ 5,150	\$ 5,150	\$ 5,150	\$ 5,150
Deputy Director	87008	\$ 8,833	\$ 7,992	\$ 8,833	\$ 8,833	\$ 8,833	\$ 8,833	\$ 8,833	\$ 8,833	\$ 8,833	\$ 8,833	\$ 8,833	\$ 8,833	\$ 8,833	\$ 8,833
Vacant, Public Guardian	87XXX	\$ 5,714	\$ -	\$ -	\$ 5,714	\$ 5,714	\$ 5,714	\$ 5,714	\$ 5,714	\$ 5,714	\$ 5,714	\$ 5,714	\$ 5,714	\$ 5,714	\$ 5,714
Vacant, Public Guardian	87XXX	\$ 5,714	\$ -	\$ -	\$ 5,714	\$ 5,714	\$ 5,714	\$ 5,714	\$ 5,714	\$ 5,714	\$ 5,714	\$ 5,714	\$ 5,714	\$ 5,714	\$ 5,714
Vacant, Public Guardian	87XXX	\$ 5,714	\$ -	\$ -	\$ 5,714	\$ 5,714	\$ 5,714	\$ 5,714	\$ 5,714	\$ 5,714	\$ 5,714	\$ 5,714	\$ 5,714	\$ 5,714	\$ 5,714
Vacant, Public Guardian	87XXX	\$ 5,714	\$ -	\$ -	\$ 5,714	\$ 5,714	\$ 5,714	\$ 5,714	\$ 5,714	\$ 5,714	\$ 5,714	\$ 5,714	\$ 5,714	\$ 5,714	\$ 5,714
Vacant, Public Guardian	87XXX	\$ 5,714	\$ -	\$ -	\$ 5,714	\$ 5,714	\$ 5,714	\$ 5,714	\$ 5,714	\$ 5,714	\$ 5,714	\$ 5,714	\$ 5,714	\$ 5,714	\$ 5,714
Vacant, Case Management Aide	87XXX	\$ 4,092	\$ -	\$ -	\$ 4,092	\$ 4,092	\$ 4,092	\$ 4,092	\$ 4,092	\$ 4,092	\$ 4,092	\$ 4,092	\$ 4,092	\$ 4,092	\$ 4,092
Total Salaries			\$ 48,714	\$ 49,556	\$ 82,218	\$ 82,218	\$ 82,218	\$ 82,218	\$ 82,218	\$ 82,218	\$ 82,218	\$ 82,218	\$ 82,218	\$ 82,218	\$ 82,218
Employee Benefits			\$ 16,878	\$ 17,000	\$ 17,000	\$ 17,000	\$ 17,000	\$ 17,000	\$ 17,000	\$ 17,000	\$ 17,000	\$ 17,000	\$ 17,000	\$ 17,000	\$ 17,000
Total Personal Services			\$ 65,592	\$ 66,556	\$ 99,218	\$ 99,218	\$ 99,218	\$ 99,218	\$ 99,218	\$ 99,218	\$ 99,218	\$ 99,218	\$ 99,218	\$ 99,218	\$ 99,218

	Actuals	Projections													
		July	August	September	October	November	December	January	February	March	April	May	June		
1920 -Other Professional Services	\$ 6,872														\$ 6,872
1935 - Attorneys	\$ 202	\$ 342													\$ 544
1940 -Medical Services															\$ -
1950 -Professional Services from Other Colorado Departments															\$ -
1960 -Professional IT Services	\$ 890	\$ 1,200													\$ 2,090
2250 -Miscellaneous Rentals															\$ -
2255 -Rental of Meeting Rooms & Leased Space	\$ 2,000														\$ 2,000
2510 -General Travel (Employee)															\$ -
2511 -Common Carrier Fares															\$ -
2512 -Meals (Employee)															\$ -
2513 -Mileage Reimbursement (Employee)	\$ 928														\$ 928
2530 -General Travel															\$ -
2531 -Common Carrier Fares															\$ -
2631 -Communication Services from Outside Sources															\$ -
2680 -Printing & Reproduction Services - Vendors															\$ -
3113 -Clothing & Uniforms															\$ -
3118 -Food & Food Services Supplies															\$ -
2820 -Monitoring Services															\$ -
3110 -Identification & Safety Supplies	\$ 3														\$ 3
3120 -Books / Periodicals / Subscriptions															\$ -
3121 -Case Jackets															\$ -
3123 -Postage	\$ 6														\$ 6
3140 -Noncapitalized IT Software															\$ -
3145 -Noncapitalized IT Purchases															\$ -
4140 -Dues & Memberships															\$ -
4170 -Miscellaneous Fees & Fines															\$ -
4220 -Registration Fees															\$ -
4256 -Other Employee Benefits - Eco Pass															\$ -
Total	\$ 10,901	\$ 1,542	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ 12,443
Total - YTD + Projections Program Line	\$ 76,493	\$ 68,098	\$ 99,218	\$ 99,218	\$ 99,218	\$ 99,218	\$ 99,218	\$ 99,218	\$ 99,218	\$ 99,218	\$ 99,218	\$ 99,218	\$ 99,218	\$ 99,218	\$ 1,136,768
															Over/(under) Program Line \$583,818

Attachment 2. Demographics List

Demographics

Characteristics of the COPG Clients

The total number of clients served by the Colorado OPG since April of 2022 through August 15, 2022 [September 30, 2022], is 99. The following section provides the clients' demographic characteristics and their health and functional abilities.

Figure X. Distribution of OPG Guardianship Types

Emergency

Unlimited

Limited

Figure X. Distribution of Guardianship Types in Colorado FY 2020

Conservator/Guardian – Adult

Guardianship -Adult

Must make a specific data request to Judicial – do they track

of emergency filings; # of actively monitored limited guardianships; # of actively monitored unlimited guardianships

Figure X. Distribution of Gender Identities
(OPG Distribution v. Colorado Census 2020 data)

OPG Distribution:

Female

Male

Non-binary

Transgender

Intersex

Prefer not to say

Colorado Census 2020 data:

Female 49.3%

Male 50.7%

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Figure X. Race and Ethnicity

(OPG Distribution v. Colorado Census 2020 data)

OPG Distribution:

White alone

Black alone

Hispanic

Asian alone

America Indian and Alaska Native alone

Native Hawaiian and Pacific Islander alone

Some Other Race

Two or More Races

Colorado Census 2020 data:

White alone 61.6%

Black alone 12.4%

Hispanic 18.7%

Asian alone 6%

America Indian and Alaska Native alone 1.1%

Native Hawaiian and Pacific Islander alone 0.2%

Some Other Race alone 8.4%

Two or More Races 10.2%

Figure X. Marital Status (by Heterosexual Identity)
(OPG Distribution v. Colorado Census 2020 data)

OPG Distribution:

Single/Never Married

Married

Divorced

Widowed

Colorado Census 2020 data:

Single/Never Married	Male 36%	Female 29%
Married	Male 51%	Female 51%
Divorced	Male 11%	Female 13%
Widowed	Male 2%	Female 7%

Figure X. Education Attainment

(OPG Distribution v. Colorado Census 2020 data)

OPG Distribution:

No High School

Some High School

High School Graduate

Some College

College Graduate

Colorado Census 2020 data

No High School 1.1%

Some High School 2.4%

High School Graduate 21.2%

Some College 10.4%

College Graduate 26.1%

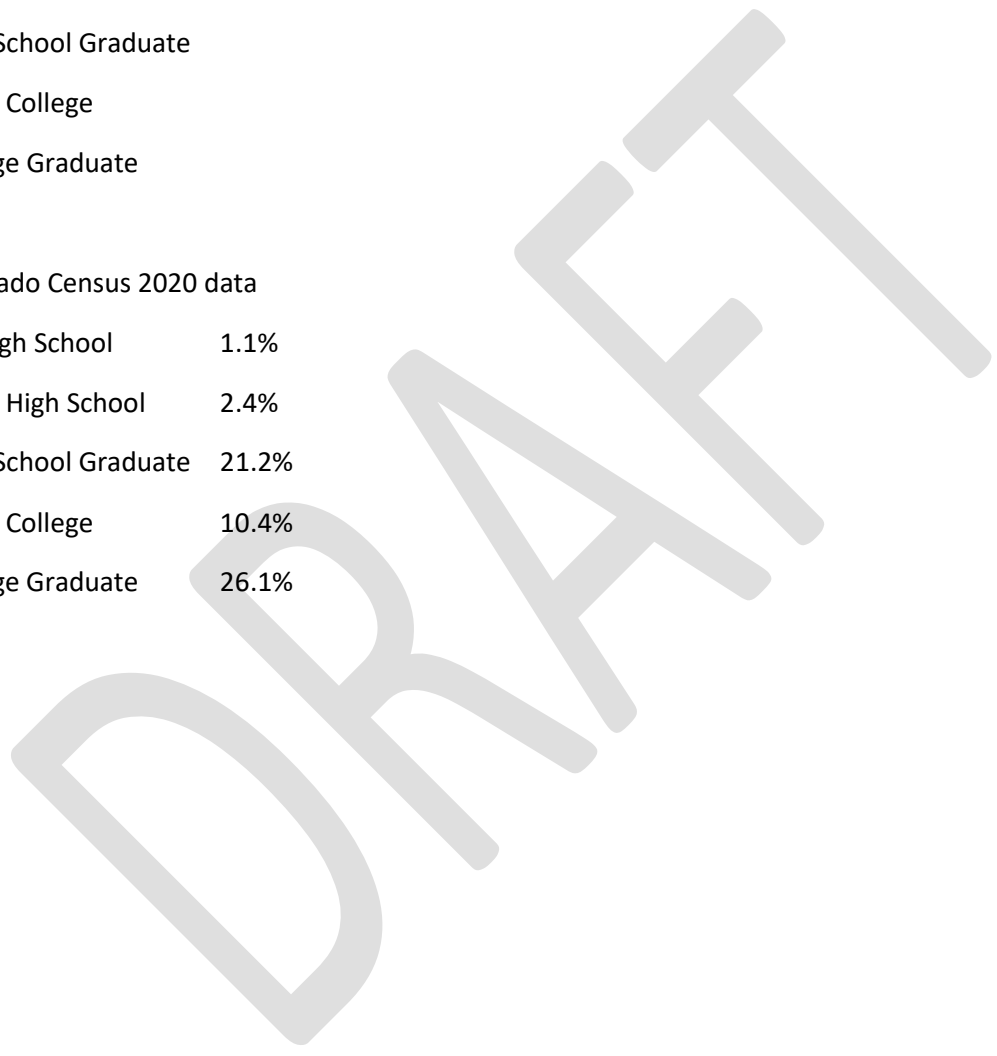


Figure X. Annual Income Before Taxes or Median Household Income?
(OPG Distribution v. Colorado Census 2020 data)

OPG Distribution:

Average Annual Income Before Taxes

Colorado Census 2020 data:

Median Household Income \$75,231

Per Capita Income \$39,545

Include in discussion: Persons Below Poverty Line 9.8%; Seniors 65 and over Below Poverty Line 7%

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Figure X. Types of Income

OPG Distribution

SSI

SSDI

VA

Pension

Other

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Figure X. Veteran Status

(OPG Distribution v. Colorado Census 2020 data)

OPG Distribution:

Colorado Census 2020 data:

Population with Veteran Status 8.4%

Veteran population in CO 370,677

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Figure X. Ages of OPG Clients

21 – 30

31 - 45

45 – 60

60 - 75

75 - 90

91 - 100

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Figure X. Residence Type at Time of Referral

Homelessness

Hospital

Skilled Nursing Home

Nursing Home

Assisted Living Facility

Private

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Figure X. Incapacities of OPG Clients

Number of clients with Intellectual or Developmental Disability as a Primary Diagnosis

Number of clients with a Neurological Condition as a Primary Diagnoses

Number of clients with a Psychiatric Condition as a Primary Diagnoses

Number of clients with a Substance Abuse Diagnoses as a Primary Diagnoses

Number of clients with a Psychiatric Condition and a Co-Occurring Substance Use Disorder

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Figure X. ADLs Needs of OPG Clients

Number of clients that need assistance with at least one ADL

Percentage of clients that need assistance with multiple ADL; Ranking of which ADL needs the most assistance

ADL Eating/Drinking

ADL Dressing/Undressing

ADL Toileting

ADL Bathing

ADL Grooming

ADL Transfer

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Figure X. IADLs Needs of OPG Clients

Number of clients that need assistance with at least one IADL

Percentage of clients that need assistance with multiple IADL; Ranking of which IADL needs the most assistance

IADL Taking Medication

IADL Using Transportation

IADL Communication

IADL Preparing Meals

IADL Shopping

IADL Housecleaning and Laundry

Include in discussion:

Figure X. Colorado Population with a Disability in 2020

Colorado Census 2020 data

Under age 65, 2016-2020: 7.4%