

**OPG Commission meeting  
Director Report  
12.20.2023**

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 regarding any questions in between meetings.

- Attachment 1: SCAO/Judicial provided a FY 2024 Budget Summary as of 12.14.2023
- Attachment 2: COPG JBC Hearing materials

**I. Budget and Administrative Update.**

- a. I previously provided the monthly budget summary report as of 12.14.2023 provided to me from Mike Henthorn, Judicial Budget Analyst II. **See Attachment 1.**
- b. Update: I previously provided the initial FY24-25 Budget Request and JBC Common Questions. Attached are the COPG JBC Hearing materials submitted to the Joint Budget Committee on 12.14.2023. **See Attachment 2.**
  1. The COPG's JBC hearing is scheduled for 12.18.2023 from 2:15 – 2:30 p.m.
  2. The hearing went well. There were no questions. Senator Zenzinger offered her thanks to the Office and for serving our clients. She has family members that work in nursing homes and facilities and knows that it is difficult serving clients and especially those who do not have guardians.
- c. Renegotiation for Judicial MOU: Update from Attorney General's Office
- d. Meeting with State Auditor, Michelle Colin 12.07.2023: While not scheduled until 2027 – 2030, I met with Ms. Colin to ensure that I understand the process and can lay the groundwork for a successful audit. Ms. Colin suggested some examples of audits for me to review and walked me through the audit process that can take 10 – 12 months. She expects

the audit to start no later than June 2026, depending on her office's workload at that time. Generally speaking, the audit focuses on whether the COPG is meeting/complying with its statutory requirements. The Auditor works collaboratively with the agency, makes Findings and submits a report, and there is a hearing before the legislative Audit Committee.

- e. Office of Administrative Services for Independent Agencies (ASIA) updates.
  - i. Through June 30, 2024, the Administrative Board is chaired by the Director of the Office of Child Protection Ombudsman.
  - ii. After some discussion, the Board is established as the included agencies of "Child Protection Ombudsman, Independent Ethics Commission, Colorado Commission on Judicial Discipline, COPG, and Office of the Statewide Behavioral Health Court Liaison."
  - iii. The Board is holding second round interviews with two candidates during the week of December 18, 2023.
  
- f. Human Resources Update
  - iv. We continue case coverage, transfers and had to limit accepting new clients. Our 7<sup>th</sup> JD guardian is covering cases while the Director, Deputy Director, and Case Management Aid conduct client visits and additional support as needed.
  - v. We continue to post for 2<sup>nd</sup> JD guardians and will interview as we receive qualified applicants. We interviewed three applicants. One lived too far and unwilling to relocate, and one was offered a position and I'm waiting to on his decision. We have several additional candidates that Ms. Paz Pastrana is gathering their information.
  - vi. The staff attorney position has been filled. Josh Murphy will start on February 1, 2024. He is currently a staff attorney for the Jackson County Public Administrator in Kansas City, Missouri. He has prior experience at Legal Aid of Western Missouri and is licensed in Colorado and Missouri.
  
  - vii. State compliance courses - Update: I received access to a temporary COTRAIN account to access compliance courses. However, the courses are still being written, so it will still be a few months as once the courses are written they need to be reviewed by the AG's office.

- g. UGCOPAA – Uniform Guardianship Conservatorship and Other Protective Arrangements Act. I am reviewing a bill draft. There are many parties opposed to sections of the draft.
- h. Updates: The Attorney General’s Office has been assisting our office with several matters:
  - viii. Various Motions to Intervene in client criminal matters and mental health matters.
  - ix. Motion for Placement for a client.

II. **Colorado OPG Pilot Program Commission and Operating Policies Updates – No updates.** Please note that Commission and Operating Polices 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. Janelle Cantu and I met with Allison Villegas on 03.16.2023 to discuss creating training modules for our office. Ms. Villegas is a Physician Assistant with Longevity Health Plan, a specialized Medicare Advantage health plan serving people living in skilled nursing facilities. We discussed a program to discuss collaborative communication with the interdisciplinary team at nursing facilities and common medical and behavioral conditions that affect patients and how guardians can identify and follow up on treatment, etc. We will be following up with the guardians for input and scheduling of training. I will be following with Ms. Villegas on a contract for the training.
    - 1. Our first training was on 04.19.2023 entitled Communication and Collaboration and focused on working with healthcare professionals as an interdisciplinary team.
    - 2. Our second training was on 06.21.2023 entitled UTIs and focused on identifying symptoms of all types of bacteria in the urine, identifying symptoms and evaluate medical evidence and ask questions to identify if a client has a UTI or other medical issue.
    - 3. We completed training on 08.16.2023 Advance Planning: Code Status/Hospice/Palliative Care.
    - 4. We completed training on 10.18.2023 on Acute and Chronic Respiratory Failure.
    - 5. Upcoming session on 12.20.2023 on Client Falls.

- ii. Internal trainings/Procedures:
  1. Ft. Logan Process – Transition/Discharge Planning Procedure – in flux as the Ft. Logan Director has transitioned to a new role
  2. Code Status and Hospice Procedure - completed
  3. Fax Training - completed
  4. Naxolene Policy
  5. Update Client Visit Protocol
  6. Update Modification/Termination of Guardianship Protocol
  7. Strategic Planning – Workforce Wellness and Development
  
- iii. Articles with Chair Bennett-Woods and Research Assistant Grant Yoder. We met on 06.15.2023 to brainstorm articles we could publish from our experiences establishing the COPG Pilot through the 2023 Final Report.
  1. We meet monthly and have reached out to certain NGA Public Guardian Special Interest Group members for review and guidance.

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

- i. Update on number of registered users, referrals, accepted cases, etc. as of **12.06.2023**
  1. 82 Active guardianships
  2. 0 referral pending in court proceedings
  3. 8 Complete
  4. 6 Partial referrals
  5. 5 Registered
  6. 23 clients passed away since COPG appointment
  7. 25 Hold status (now includes OBH/CHMI-Ft. Logan/Pueblo referrals that are non-OBH/Momentum contract referrals)
  8. The OBH/Momentum dedicated caseload for one guardian is full and all 12 guardianships are active
  9. 7<sup>th</sup> Judicial District
    - a. Partial 1 - Delta
    - b. Complete 3
  10. Declined referrals – pre-Hold status
    1. 113 Denver declined referrals (some declined were prior to establishing the Hold status)
      - a. 9 - Family available to serve
      - b. 49 - Expired/Incomplete information



- c. 12 – Not appropriate referral
  - d. 5 - Not adult
  - e. 4 - Withdrawn by Ft. Logan
  - f. 4 - No OPG Capacity
  - g. 4 - Withdrawn Death
  - h. 8 - Withdrawn, not incapacitated
  - i. 19 -Withdrawn, other Guardian Available non-Family member
- 2. Texas inquiry - 1
  - 3. Nebraska referral - 1
  - 4. Alaska inquiries – 2
  - 5. Colorado inquiries – 13
11. 123 streamlined referrals (Non-Denver County) – Declined
- 1. Adams County – 8
  - 2. Alamosa County - 1
  - 3. Arapahoe County – 20
  - 4. Boulder County – 8
  - 5. Broomfield County – 1
  - 6. Crowley - 2
  - 7. “Denver County” – 2
  - 8. El Paso County – 26
  - 9. Fremont - 1
  - 10. Garfield County – 1
  - 11. Gunnison County – 1
  - 12. Huerfano County - 3
  - 13. Jefferson County – 11
  - 14. Lake County - 1
  - 15. La Plata County – 2
  - 16. Larimer County - 7
  - 17. Las Animas County - 2
  - 18. Mesa County – 1
  - 19. Montrose County – 3 \*
  - 20. Otero County – 6
  - 21. Pueblo County – 10
  - 22. Weld County – 7

\*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 – Ongoing.** A list can be provided if requested.
- a. I attended the Office of Civil and Forensic Mental Health (CDHS) Colorado delegation to NYC. The purpose of this trip is to learn more about the development, launch, and implementation of Mayor Eric Adam’s Mental Health Involuntary Removals directive from fall 2022. I will report back after our debriefing meeting on 12.20.2023.
  - i. I met Tamara Daley on 12.14.2023. Ms. Daley is with Abt Associates, the contractor conducting the feasibility study for the Office of Civil and Forensic Mental Health. We met to discuss my takeaways from the NYC trip and impacts on HB23-1153. We also discussed the guardianship requirements of HB23-1153 and I provided Ms. Daley with our 2022 Final Report to the Legislature and offered further assistance.

# Attachment 1. FY24 Budget Summary as of 12.14.2023

Budget Type	Budget	YTD + Projected Exp	Surplus / (Deficit)
Personal Services	\$1,323,341	\$ 1,110,633	\$212,707 YTD
Operating	\$582,162	\$ 194,175	\$387,987 Balance remaining for operating
<b>Total Appropriation</b>	<b>\$1,905,503</b>	<b>\$1,304,808</b>	<b>\$600,695</b> Total remaining in program line

Cash Fund Balance		
	PRIOR YEAR (FY 2023)	Projected Revenue less YTD Expenses
Total Revenue	\$1,318,638	\$1,318,638
Total Expenditures	\$1,244,279	\$1,304,808
Net Change	\$74,360	\$13,830
Beg Fund Balance	\$1,645,409	\$1,719,769
<b>= Fund Balance</b>	<b>\$1,719,769</b>	<b>\$1,733,599</b>

Salaries	Pos. #	Current Salaries	Projection											
			Actual July	Actual August	Actual September	Actual October	Actual November	Actual December	Projection January	Projection February	Projection March	Projection April	Projection May	Projection June
Director	87001	\$ 10,675	\$ 10,675	\$ 10,675	\$ 10,675	\$ 10,675	\$ 10,675	\$ 10,675	\$ 10,675	\$ 10,675	\$ 10,675	\$ 10,675	\$ 10,675	\$ 10,675
Staff Assistant	87002	\$ 4,954	\$ 4,954	\$ 4,954	\$ 4,954	\$ 4,954	\$ 4,954	\$ 4,954	\$ 4,954	\$ 4,954	\$ 4,954	\$ 4,954	\$ 4,954	\$ 4,954
Public Guardian	87003	\$ 5,250	\$ 5,250	\$ 5,250	\$ 5,250	\$ 5,250	\$ 5,250	\$ 5,250	\$ 5,250	\$ 5,250	\$ 5,250	\$ 5,250	\$ 5,250	\$ 5,250
Vacant, Public Guardian	87004	\$ 5,384	\$ 5,384	\$ 5,384	\$ 5,384	\$ 1,713	\$ -	\$ -	\$ 5,384	\$ 5,384	\$ 5,384	\$ 5,384	\$ 5,384	\$ 5,384
Public Guardian	87005	\$ 5,384	\$ 11,641	\$ -	\$ 3,679	\$ 5,150	\$ 5,150	\$ 5,150	\$ 5,150	\$ 5,150	\$ 5,150	\$ 5,150	\$ 5,150	\$ 5,150
Vacant, Public Guardian	87006	\$ 4,852	\$ 4,039	\$ -	\$ 2,526	\$ -	\$ -	\$ 4,852	\$ 4,852	\$ 4,852	\$ 4,852	\$ 4,852	\$ 4,852	\$ 4,852
Vacant, Public Guardian	87007	\$ 5,408	\$ 5,408	\$ 759	\$ 258	\$ -	\$ -	\$ -	\$ 5,408	\$ 5,408	\$ 5,408	\$ 5,408	\$ 5,408	\$ 5,408
Deputy Director	87008	\$ 9,275	\$ 9,275	\$ 9,275	\$ 9,275	\$ 9,275	\$ 9,275	\$ 9,275	\$ 9,275	\$ 9,275	\$ 9,275	\$ 9,275	\$ 9,275	\$ 9,275
Vacant, Public Guardian	87009	\$ 5,232	\$ 5,232	\$ 5,232	\$ 6,541	\$ -	\$ -	\$ 5,232	\$ 5,232	\$ 5,232	\$ 5,232	\$ 5,232	\$ 5,232	\$ 5,232
Vacant, Public Guardian (Hold)	87010	\$ 5,000	\$ -	\$ -	\$ -	\$ -	\$ -	\$ 5,000	\$ 5,000	\$ 5,000	\$ 5,000	\$ 5,000	\$ 5,000	\$ 5,000
Teresa Esquibel - Case Management Aide	87011	\$ 4,725	\$ 4,725	\$ 4,725	\$ 4,725	\$ 4,725	\$ 4,725	\$ 4,725	\$ 4,725	\$ 4,725	\$ 4,725	\$ 4,725	\$ 4,725	\$ 4,725
Public Guardian	87012	\$ 5,232	\$ 5,232	\$ 5,232	\$ 5,232	\$ 5,232	\$ 5,232	\$ 5,232	\$ 5,232	\$ 5,232	\$ 5,232	\$ 5,232	\$ 5,232	\$ 5,232
Public Guardian	87013	\$ 5,150	\$ -	\$ -	\$ 2,452	\$ 5,150	\$ 5,150	\$ 5,150	\$ 5,150	\$ 5,150	\$ 5,150	\$ 5,150	\$ 5,150	\$ 5,150
Vacant, Public Guardian (Hold)	870XX	\$ 5,000	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
<b>Total Salaries</b>		<b>\$ 81,521</b>	<b>\$ 71,815</b>	<b>\$ 51,486</b>	<b>\$ 60,951</b>	<b>\$ 52,124</b>	<b>\$ 50,411</b>	<b>\$ 65,495</b>	<b>\$ 76,287</b>	<b>\$ 76,287</b>	<b>\$ 76,287</b>	<b>\$ 76,287</b>	<b>\$ 76,287</b>	<b>\$ 76,287</b>
<b>Employee Benefits</b>		<b>\$ 28,758</b>	<b>\$ 26,616</b>	<b>\$ 22,706</b>	<b>\$ 25,040</b>	<b>\$ 35,652</b>	<b>\$ 23,827</b>	<b>\$ 23,827</b>	<b>\$ 23,827</b>	<b>\$ 23,827</b>	<b>\$ 23,827</b>	<b>\$ 23,827</b>	<b>\$ 23,827</b>	<b>\$ 23,827</b>
<b>Total Personal Services</b>		<b>\$ 1,323,341</b>	<b>\$ 98,430</b>	<b>\$ 74,192</b>	<b>\$ 85,991</b>	<b>\$ 87,776</b>	<b>\$ 74,238</b>	<b>\$ 89,322</b>	<b>\$ 100,114</b>	<b>\$ 100,114</b>	<b>\$ 100,114</b>	<b>\$ 100,114</b>	<b>\$ 100,114</b>	<b>\$ 100,114</b>

	Actuals	Actuals	Actuals	Actuals	Actuals	Actuals	Projections	Projections	Projections	Projections	Projections	Projections	Projections
1920 -Other Professional Services	416	436	468	1,463	9,918	936							
1935 - Attorneys		35		51	289	43							
1940 -Medical Services			495	495	495	495							
1950 -Professional Services from Other Colorado Departments													
1960 -Professional IT Services		495	495		495	495							
2250 -Miscellaneous Rentals													
2255 -Rental of Meeting Rooms & Leased Space	1,900	4,500		10,100	8,450								
2510 -General Travel (Employee)	5	22	209	1,204	1,330								
2511 -Common Carrier Fares													
2512 -Meals (Employee)	40	65			26								
2513 -Mileage Reimbursement (Employee)	306	995	303	518	979	589							
2530 -General Travel													
2531 -Common Carrier Fares					417								
2532 -Meals													
2610 -Advertising Services		164		410	873								
2631 -Communication Services from Outside Sources		1,010	1,009	1,009	1,010								
2641 -ADP Services from Outside Sources	3,613	4,700	6,186	6,005									
2680 -Printing & Reproduction Services - Vendors	37	8	12	212		182							
3113 -Clothing & Uniforms													
3118 -Food & Food Services Supplies		240	17	316	28								
2820 -Monitoring Services		156	156	156	388								
3110 -Identification & Safety Supplies				47	147								
3120 -Books / Periodicals / Subscriptions													
3121 -Case Jackets	357	458		110	345								
3123 -Postage	4	7	198	8		66							
3140 -Noncapitalized IT Software		871	161	4,344	122								
3145 -Noncapitalized IT Purchases		517	367		368	443							
4100 -Other Operating Expenditures													
4140 -Dues & Memberships													
4170 -Miscellaneous Fees & Fines		10	20										
4220 -Registration Fees		45	150	620	315								
4256 -Other Employee Benefits - Eco Pass		260											
<b>Total</b>	<b>\$ 6,678</b>	<b>\$ 14,928</b>	<b>\$ 9,816</b>	<b>\$ 26,572</b>	<b>\$ 17,023</b>	<b>\$ 17,023</b>	<b>\$ 17,023</b>	<b>\$ 17,023</b>	<b>\$ 17,023</b>	<b>\$ 17,023</b>	<b>\$ 17,023</b>	<b>\$ 17,023</b>	<b>\$ 17,023</b>

<b>Total - YTD + Projections Program Line</b>	<b>\$ 105,108</b>	<b>\$ 89,120</b>	<b>\$ 95,807</b>	<b>\$ 114,348</b>	<b>\$ 91,261</b>	<b>\$ 106,345</b>	<b>\$ 117,137</b>	<b>\$ 117,137</b>	<b>\$ 117,137</b>	<b>\$ 117,137</b>	<b>\$ 117,137</b>	<b>\$ 117,137</b>	<b>\$ 117,137</b>
													<b>Over/(under) Program Line</b>

JUDICIAL DEPARTMENT  
FY 2024-25 JOINT BUDGET COMMITTEE HEARING AGENDA

**Monday, December 18, 2023**

**2:15-2:30 Office of Public Guardianship (OPG)**

Main Presenters:

- Sophia M. Alvarez, Executive Director

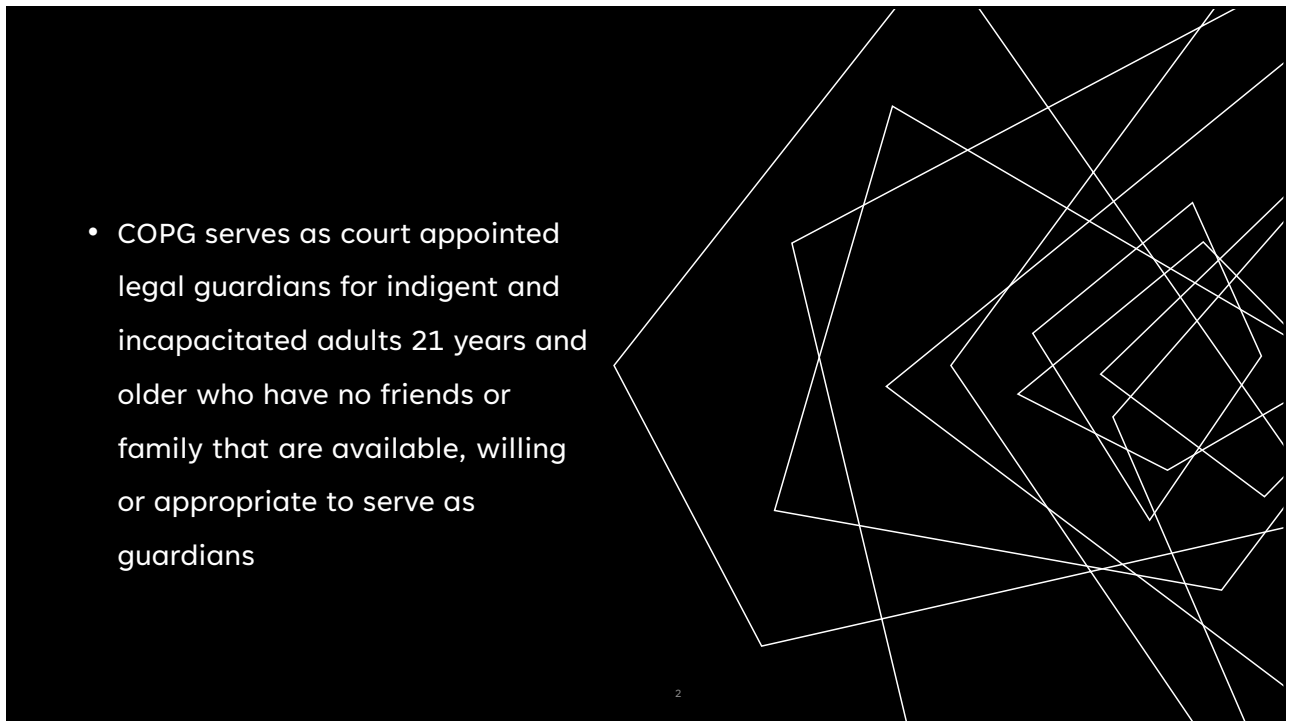
Topics:

- Introduction and Opening Comments: Pages 2 - 8
- Common Questions: Pages 6 - 12
- Requests: Pates 13 - 40; R-01 p17; R-02 p21



**COLORADO OFFICE OF  
PUBLIC GUARDIANSHIP**  
SOPHIA M. ALVAREZ, EXECUTIVE DIRECTOR

1



- COPG serves as court appointed legal guardians for indigent and incapacitated adults 21 years and older who have no friends or family that are available, willing or appropriate to serve as guardians

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**FINAL REPORT TO THE LEGISLATURE**  
[HTTPS://COLORADO-OPG.ORG/](https://colorado-opg.org/)

**SB23-064**

**EXPANSION INTO THE 7<sup>TH</sup> JD**

**EXPANSION INTO THE 16<sup>TH</sup> JD**

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**SB23-064, CONCERNING THE  
COPG**

- Signed May 2023
- COPG permanent independent agency under the Judicial Branch
- Statewide by December 31, 2023
- Expansion begins July 1, 2025

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**COPG STAFFING**

**SERVING 2<sup>ND</sup>, 7<sup>TH</sup>, 16<sup>TH</sup>: 82 CLIENTS**  
 COUNTIES: DENVER, DELTA, GUNNISON, HINSDALE, MONTROSE, SAN MIGUEL, OURAY, BENT, CROWLEY, OTERO

<p><b>Administration</b></p> <ul style="list-style-type: none"> <li>• Director</li> <li>• Deputy Director</li> <li>• Staff Assistant</li> <li>• Case Management Aid</li> </ul>	<p><b>Guardians</b></p> <ul style="list-style-type: none"> <li>• 2<sup>nd</sup> JD: 2 filled, 4 Vacant {2 for other funding}</li> <li>• 7<sup>th</sup> JD: 1</li> <li>• 16<sup>th</sup> JD: 1</li> </ul>
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5

Most impactful services the COPG provides are assisting clients with:

**COPG SERVICES**

- *Establishing the appropriate level of housing/placement*
- *Securing needed and appropriate medical and health care*
- *Securing needed and appropriate mental health care*

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**HIGHLIGHTS OF COPG TOTAL 105 CLIENTS SERVED**

- 82 active guardianships
- 42 identified as female, 63 identified as male
- Client ages range from 20s to 90s
- Median age 63; 46% of clients over age 65
- Primary diagnoses: Alzheimer’s disease, dementia disorder, or other neurocognitive disorder (31%)
- Secondary diagnoses: Mental illness or psychiatric conditions (30%)
- 86% of clients have additional medical conditions, with 44% suffering from multiple medical conditions

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## COPG BUDGET REQUESTS

- **Workforce Development Manager and Employee Wellness Pilot Program** - \$152,104 cash fund spending authority.
  - A current need for recruitment and retention and assist with FY2026 expansion
  - Recommendations #3 and #4 in 2022 Final Report to Legislature
  
- **Staff Attorney** - \$155,485 cash fund spending authority
  - A current need to address COPG client individual advocacy on a range of issues that can transpire at a moment's notice, including during overnight hours and weekends.
  - Recommendation #3 in 2022 Final Report to Legislature

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JUDICIAL DEPARTMENT – OFFICE OF PUBLIC GUARDIANSHIP  
 FY 2024-25 JOINT BUDGET COMMITTEE HEARING

Monday, December 18, 2023

2:15 pm – 2:30 pm

COMMON QUESTIONS FOR DISCUSSION AT DEPARTMENT HEARINGS

Please describe one-time state and federal stimulus funds that have been allocated to the Department but are not expended as of September, 30, 2023, by bill, budget action, executive action, or other source that allocated funds. The description should include but is not limited to funds that originate from one-time or term-limited General Fund or federal funds originating from the American Rescue Plan Act (ARPA)/State and Local Fiscal Recovery Funds/Revenue Loss Restoration Cash Fund. Please describe the Department’s plan to obligate or expend all allocated funds that originate from ARPA by December 2024. *Not applicable.*

Please further describe any budget requests that replace one-time General Fund or ARPA funded programs with ongoing appropriations, including the following information:

- a. Original fund source (General Fund, ARPA, other), amount, and FTE;
- b. Original program time frame;
- c. Original authorization (budget decision, legislation, other);
- d. Requested ongoing fund source, amount, and FTE; and
- e. Requested time frame (one-time extension or ongoing).

Please provide a description, calculation, and the assumptions for the fiscal impact of implementing compensation provisions of the Partnership Agreement, as well as a qualitative description of any changes to paid annual, medical, holiday or family leave as a result of the Agreement. Please describe any compensation and leave changes for employees exempt from the Agreement if applicable. *Not applicable.*

Provide a prioritized list of budget reductions the Department would propose if 10.0 percent General Fund appropriation reductions were required of every Department. *The COPG is currently funded by its CASH FUND only. This year’s request is our first General Fund request for a total of \$307,589.*

## REQUESTS

*[Staff]* Please briefly describe each of the OPG request items, R1 and R2.

- **Budget Request 1: Workforce Development Manager to create and maintain an Employee Wellness Pilot Project.** This request was recommended in the COPG 2022 Final Report to the Legislature. Clients may experience a mental health or medical crisis at any time. Guardians are in the business of crisis management and parallel other public and private employees such as first responders and healthcare workers. Guardians are on-call 24/7 for their own clients during the week and alternate on-call weekends for all COPG clients. Guardians experience stress, secondary trauma and compassion fatigue. Fortunately, the COPG did not experience turnover until 2023. While it has always been clear that this position is stressful, this year has highlighted the immediate need to focus on employee wellness for recruitment and retention purposes.  
The Office also experienced difficulty in locating and hiring qualified individuals in the rural and frontier areas when expanding to the 7<sup>th</sup> and 16<sup>th</sup> Judicial Districts and we had to change our recruitment efforts. This position is a great deal of responsibility as well. Guardians must be trustworthy, consistent and reliable decision-makers. Fulfilling this request will enhance our readiness for intense expansion beginning July 1, 2025.
- **Budget Request 2: Staff Attorney.** A staff attorney has been needed since the inception of the Office to meet our statutory mandate in providing guardianship services. A staff attorney will address individual client advocacy on a range of post-guardianship issues that can transpire at a moment's notice, including during overnight hours and weekends. The staff attorney will also join the 24/7 weekly on-call duties with the Director and the Deputy Director, giving Administration some assistance stress, wellness and retention. There are many times that the Office has needed legal counsel to intervene on behalf of a client to prevent an unsafe discharge from a hospital or facility, or to intervene into a mental health case. Much to our frustration, facilities and providers regularly disregard the guardian's authority and despite following the chain of command or grievances, legal counsel is needed in order for guardians to fully act and provide services for our clients.

## FY 2024-25 JOINT BUDGET COMMITTEE COMMON HEARING QUESTIONS

### COMMON QUESTIONS FOR DISCUSSION AT DEPARTMENT HEARINGS

- 1 Please describe one-time state and federal stimulus funds that have been allocated to the Department but are not expended as of September, 30, 2023, by bill, budget action, executive action, or other source that allocated funds. The description should include but are not limited to funds that originate from one-time or term-limited General Fund or federal funds originating from the American Rescue Plan Act (ARPA)/State and Local Fiscal Recovery Funds/Revenue Loss Restoration Cash Fund. Please describe the Department's plan to obligate or expend all allocated funds that originate from ARPA by December 2024. *Not applicable.*

Please further describe any budget requests that replace one-time General Fund or ARPA funded programs with ongoing appropriations, including the following information:

- a. Original fund source (General Fund, ARPA, other), amount, and FTE;
  - b. Original program time frame;
  - c. Original authorization (budget decision, legislation, other);
  - d. Requested ongoing fund source, amount, and FTE; and
  - e. Requested time frame (one-time extension or ongoing).
- 2 Please provide a description, calculation, and the assumptions for the fiscal impact of implementing the provisions of the Partnership Agreement, including but not limited to changes in compensation, annual leave accrual, holiday pay, and paid family and medical leave. Please describe any compensation and leave changes for employees exempt from the Agreement if applicable. *Not applicable.*

### WRITTEN-ONLY COMMON QUESTIONS

*(Please retain numbering for consistency across departments)*

- 1 Please describe any budgetary or administrative impacts from the implementation of H.B. 21-1110 (Laws for Persons with Disabilities) as it pertains to IT accessibility. Please describe any budget requests that include components related to the implementation of IT accessibility requirements. *None at this time.*
- 2 Please identify rules the Department promulgated in FY 2022-23. With respect to these rules, has the Department done any cost-benefit analyses pursuant to Section 24-4-103 (2.5), C.R.S., regulatory analyses pursuant to Section 24-4-103 (4.5), C.R.S., or any other similar analysis? Has the Department conducted a cost-benefit analysis of Department rules as a whole? If so, please provide an overview of each analysis. *Not applicable.*

- 3 Provide a list of any legislation with a fiscal impact that the Department has: (a) not implemented, (b) partially implemented, or (c) missed statutory deadlines. Please specifically describe the implementation of ongoing funding established through legislation in the last two legislative sessions. Explain why the Department has not implemented, has only partially implemented, or has missed deadlines for the legislation on this list. Please explain any problems the Department is having implementing any legislation and any suggestions you have to modify legislation. *Not applicable.*
- 4 State revenues are projected to exceed the TABOR limit in each of the next two fiscal years. Thus, increases in cash fund revenues that are subject to TABOR will require an equivalent amount of General Fund for taxpayer refunds. Using the attached Excel Template A, please:
- List each source of non-tax revenue (e.g., fees, fines, parking revenue, etc.) collected by the Department that is subject to TABOR and that exceeds \$100,000 annually. Describe the nature of the revenue, what drives the amount collected each year, and the associated fund where these revenues are deposited. *Please see attached TABOR spreadsheet.*
  - For each source, list actual revenues collected in FY 2021-22, and projected revenue collections for FY 2022-23 and FY 2023-24. *Please see attached TABOR spreadsheet.*
  - List each decision item that the Department has submitted that, if approved, would increase revenues subject to TABOR collected in FY 2024-25. *None, there are no decision items that would increase the revenues of the COPG cash fund.*
- 5 Please use the attached Excel Template B to summarize the Department's funded and actual FTE for the last three fiscal years and identify the origin of changes in funded FTE. If positions have not been filled, please describe challenges in preventing positions from being filled and how vacancy savings are being utilized.
- We have six vacant positions. 2 positions we anticipate being funded by hospital partnerships and Olmstead Act Consent Decree funding. Until and unless those arrangements are finalized, they will not be filled. We have four 2<sup>nd</sup> Judicial District guardian positions vacant, and we have been consistently recruiting, interviewing and in some instances hiring. In some cases, new hires moved on explaining that this position was not a good fit after all and one hire experienced a death in the family and decided to not accept the position after all. As other state agencies, the COPG experienced hiring challenges such as a lack of qualified candidates applying for guardian positions in the 7<sup>th</sup> and 16<sup>th</sup> Judicial Districts, causing multiple rounds of extending posting for applications, offers to applicants being declined due to accepting another offer and due to the rate of compensation. We had to change our posting and hiring strategy, including a Meet & Greet in the 16<sup>th</sup> Judicial District. We were able to hire the 7<sup>th</sup> Judicial District guardian in December 2022 after the second round of posting. We were able to hire the 16<sup>th</sup> Judicial District guardian after the Meet & Greet and second round of posting. The guardian position is a stressful and difficult position that I liken to first responders, and we have experienced turnover in 2023. This position*

*also requires a trustworthy person as a guardian. Hence, the budget request for a Workforce Development Manager and Employee Wellness Pilot Program.*

Common Question 4: Data related to TABOR revenue-related common question

Non-Tax Revenues Collected by Department That Are Subject to TABOR (excluding sources that amount to less than \$100,000/year)				
		Revenues Collected Annually		
Revenue Source	Associated Cash Fund	FY 2022-23 Actual	FY 2023-24 Projection	FY 2024-25 Projection
Probate & Other Civil Filing Fees*	Office of Public Guardian Cash Fund	\$1,119,689	\$1,120,000	\$1,120,000
Reappropriated from DHS**	Office of Public Guardian Cash Fund	\$198,949	\$197,393	\$203,315
<b>TOTALS</b>		<b>\$1,318,638</b>	<b>\$1,317,393</b>	<b>\$1,323,315</b>

\*A portion of certain civil filing fees are deposited into the fund. The fee amount is statutory and cannot be set by the COPG. The revenue will fluctuate up or down depending on civil filing volume.

\*\*This line accounts for reappropriated funds from DHS' Office of Behavioral Health, Integrated Health Services, Community Transition Services line item. This amount is based on salary costs for 2.0 FTE that the funding supports. The amount deposited in the OPG fund is based on current salaries and statewide common policy adjustments.

Common Question 5: Data related to FTE-related common question

Part A: Please summarize the Department's funded and actual FTE for the last three fiscal years.

Trend Information: Funded FTE and Actual FTE				
Fiscal Year	Funded FTE*	Actual FTE	Actual Above/(Below) Funded FTE	% Difference
2020-21	6.0	6.0	0.0	0.0%
2021-22	7.0	7.0	0.0	0.0%
2022-23	14.0	9.0	(5.0)	-35.7%
FTE Change over 3 years	8.0			
% Change over 3 years	133%			

\* "Funded FTE" equals the number of full time equivalent positions specified in the annual Long Bill or in appropriation clauses in other acts. These FTE figures reflect the number of positions that correspond to the amounts appropriated.

Part B: Please identify the origin of changes in funded FTE for FY 2022-23, including the number of new positions the Department has been able to fill.

FY 2022-23: Status of New Funded FTE				
Fiscal Year	Funded FTE	Actual FTE	Actual Above/(Below) Funded FTE	% Difference
<b>TOTAL BASE: 2021-22</b>	<b>7.0</b>	<b>7.0</b>	<b>0.0</b>	<b>0%</b>
<i>Decision Items:</i>				
OPG R1/BA1 Staff Request	7.0	4.0	(3.0)	-43%
<i>Bills:</i>				
N/A	0.0	0.0	0.0	0%
<i>FTE changes unrelated to decision items or bills -</i>				
N/A	0.0	0.0	0.0	0%
<b>TOTAL: 2022-23</b>	<b>14.0</b>	<b>11.0</b>	<b>(3.0)</b>	<b>-21%</b>

# Colorado Office of Public Guardianship

## FY 2025 Budget Request



Sophia M. Alvarez,  
Director of the Office of Public Guardianship





**OFFICE OF PUBLIC GUARDIANSHIP - BUDGET REQUEST  
FISCAL YEAR 2025**

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## OFFICE OF PUBLIC GUARDIANSHIP

**Department Priority: R-01**

**FY25 “Workforce Development Mgr and Employee Wellness Program”**

Summary of Funding Change for FY 2024-25			
		Incremental Change	
	FY 2023-24 Appropriation	FY 2024-25 Request	FY 2025-26 Request
Total Funds	\$1,903,288	\$152,104	\$145,304
FTE	14.0	1.0	1.0
General Fund	\$1,903,288	\$152,104	\$145,304
Cash Funds	0	0	0
Reappropriated Funds	0	0	0
Federal Funds	0	0	0

### Summary of Request

The Colorado Office of Public Guardianship (COPG) requests \$152,104 in cash fund spending authority and 1.0 FTE in FY25, annualizing to \$145,304 in FY26. This request includes one full-time Workforce Development Manager and funding to create an employee wellness pilot program.

### Current Program

Currently, the COPG employs guardians, administrative staff and a case management aid. Guardians are on-call 24/7 for their clients and alternate weekends for all COPG clients. The Director and Deputy Director are on-call 24/7 for supervision and back up of the guardians and alternate weekly with each other. As evidenced in the COPG Final Report to the Legislature, the COPG intersects many systems while serving clients. Clients may experience a mental health or

medical crisis at any time. Guardians are in the business of crisis management and parallel other public and private employees such as first responders and healthcare workers. While there are tools available such as EAP, Administrative Leave, Flex Time schedules, etc. this usually requires shifting duties and responsibilities to other team members, which can often lead to more crisis and stress. The COPG felt the effects of guardian burnout and labor shortages throughout 2022 and 2023 with resignations and difficulty in hiring, especially in rural and frontier locations. Secondary trauma and compassion fatigue also impacts administrative staff as they provide daily support to guardians and the case management aid. The COPG has been unable to serve clients on the Hold list due to being short-staffed.

In addition to the day-to-day challenges that guardians face, COPG administrative staff needs a dedicated individual to enhance and specialize the COPG's standardized training program to ensure compliance with statutory, state, federal, regulatory, ethical, rules, standards, policies, and procedures. While focusing on the daily supervision and oversight of the guardians and client matters, it is difficult for the administrative staff to consistently identify, develop, create, and integrate specialized in-house training and modeling.

### ***Problem or Opportunity***

Due to the passage of SB23-064, the COPG will be expanding statewide into all 23 Judicial Districts with a multi-year rollout, beginning in FY26. The COPG is likely to add different levels of staffing beyond the current model and will require multiple levels of training to ensure compliance with all statutory and program regulations. Further, recruitment and retention will be critical as COPG will double in size by the time the expansion is complete by December 31, 2030, going from a total of 14.0 FTE to an estimated 28.0 FTE. Addressing employee wellbeing will be a focal point in COPG's strategic planning as research shows that employees in good health, have a better quality of life, increased work productivity and a greater likelihood of contributing to their communities. Seeking the resources for in-house training programs and employee wellness in FY25 will ensure that COPG will be in a better position to successfully implement SB23-064.

### ***Proposed Solution and Anticipated Outcomes***

COPG requests \$152,104 cash fund spending authority to build a statewide training program and create an employee wellness program to improve recruitment and retention. A portion of this funding will be used to hire a Workforce Development Manager. This position will be responsible for creating and maintaining a multi-level training program for COPG non-administrative employees. The Workforce Development Manager will incorporate outside community partners and programming, as needed. Ultimately, this funding will allow COPG to create and maintain its own statewide training programs and reduce the need for paying to send employees to third-party conferences and training.

In addition to creating a statewide training program, the Workforce Development Manager will be responsible for designing and maintaining an employee wellness pilot program. As the COPG begins expansion, it is imperative that it address employee recruitment and retention to ensure consistent and quality services to Coloradans.

### ***Assumptions and Calculations***

		<b>Workforce Develop. Mgr FY25 Total</b>	<b>Year 2 Total (FY26)</b>
<b>PERSONAL SERVICES</b>			
Number of FTE per class title		<b>1.00</b>	<b>1.00</b>
Monthly base salary		\$ -	\$ -
Number of months charged in FY23-24		<b>12</b>	<b>12</b>
Salary		\$ 86,916	\$ 86,916
PERA (Staff, GF)	<b>11.57%</b>	\$ 10,056	\$ 10,056
Medicare (Staff, GF)	<b>1.45%</b>	\$ 1,260	\$ 1,260
<b>Subtotal Base Salary/PERA/Medicare</b>		\$ 98,232	\$ 98,232
<b>SUBTOTAL PERSONAL SERVICES</b>		\$ 98,232	\$ 98,232
<b>FTE</b>		<b>1.0</b>	<b>1.0</b>
<b>OPERATING</b>			
Phone (staff)	\$ 450	\$ 450	\$ 450
Supplies (staff)	\$ 500	\$ 500	\$ 500
<b>SUBTOTAL OPERATING</b>		\$ 950	\$ 950
<b>CAPITAL OUTLAY</b>			
Office Furniture (staff)	\$ 5,000	\$ 5,000	
Computer/Software (staff)	\$ 2,200	\$ 2,200	\$ 400
<b>SUBTOTAL CAPITAL OUTLAY:</b>		\$ 7,200	\$ 400
<b>EMPLOYEE WELLNESS</b>			
Employee wellness pilot program costs		\$ 25,000	\$ 25,000
		\$ 25,000	\$ 25,000
<b>TOTAL REQUEST:</b>		<b>\$ 131,382</b>	<b>\$ 124,582</b>
<b>CENTRAL APPROPRIATIONS (non-add)</b>			
Health/Life/Dental	\$ 11,500	\$ 11,500	\$ 11,500
Short-Term Disability	0.16%	\$ 139	\$ 139
Family Medical Leave	0.45%	\$ 391	\$ 391
AED*	5.00%	\$ 4,346	\$ 4,346
SAED*	5.00%	\$ 4,346	\$ 4,346
<b>Central Appropriations Subtotal:</b>		\$ 20,722	\$ 20,722
<b>GRAND TOTAL ALL COSTS:</b>		<b>\$ 152,104</b>	<b>\$ 145,304</b>

FTE based on min of Human Resources Specialist H4G5 in Exec pay plan





## OFFICE OF PUBLIC GUARDIANSHIP

**Department Priority: R-02  
FY25 “Staff Attorney”**

Summary of Funding Change for FY 2024-25			
		Incremental Change	
	FY 2023-24 Appropriation	FY 2024-25 Request	FY 2025-26 Request
Total Funds	\$1,903,288	\$155,485	\$148,685
FTE	14.0	1.0	1.0
General Fund	\$1,903,288	\$155,485	\$148,685
Cash Funds	0	0	0
Reappropriated Funds	0	0	0
Federal Funds	0	0	0

### Summary of Request

The Office of Public Guardianship (COPG) requests \$155,485 in cash fund spending authority and 1.0 FTE in FY25, annualizing to \$148,685 in FY26. This request includes one full-time Staff Attorney.

### Current Program

COPG clients often require individual advocacy to preserve their rights related to a range of issues, including but not limited to housing/placement, medical, public benefits, mental health, criminal, social services, and family matters. These needs can transpire at a moment’s notice, including during overnight hours and weekends. As a state agency, the COPG is served by the Colorado Attorney General’s Office and has also contracted with local attorneys. However, this has not solved the need for legal urgency for overnight and weekend matters.



### ***Problem or Opportunity***

Having a staff attorney available to advocate for COPG client matters has been a need for the Office since its inception. The COPG is focused on providing a high level of guardianship services, which requires a Staff Attorney's advocacy on a myriad of guardianship and client issues and mental health law issues. The Staff attorney would also assist with the Director and Deputy Director 24/7 on-call duties for supervision and oversight of the guardians.

### ***Proposed Solution and Anticipated Outcomes***

COPG requests \$155,485 cash fund spending authority to hire a 1.0 Staff Attorney FTE. This position will be responsible for all aspects of legal consultation and analysis for all post guardianship appointment matters. The Staff Attorney will provide guidance regarding the administration of guardianships to the Director, Deputy Director, guardians, case management aid, staff assistant, and other staff as needed on topics including fiduciary responsibility, accounting, public benefits, probate claims, criminal matters, housing matters, mental health intervention matters, and other civil litigation on behalf of such COPG clients. The position requires significant time in a courtroom setting as part of the administration of guardianships for COPG clients and provides other opportunities for advocacy to medical, social work, and legal professionals.

### ***Assumptions and Calculations***

		Staff Attorney FY25 Total	Year 2 Total (FY26)
<b>PERSONAL SERVICES</b>			
Number of FTE per class title		<b>1.00</b>	<b>1.00</b>
Monthly base salary		\$ -	\$ -
Number of months charged in FY23-24		<b>12</b>	<b>12</b>
Salary		\$ 109,872	\$ 109,872
PERA (Staff, GF)	<b>11.57%</b>	\$ 12,712	\$ 12,712
Medicare (Staff, GF)	<b>1.45%</b>	\$ 1,593	\$ 1,593
<b>Subtotal Base Salary/PERA/Medicare</b>		\$ 124,177	\$ 124,177
<b>SUBTOTAL PERSONAL SERVICES</b>		\$ 124,177	\$ 124,177
<b>FTE</b>		<b>1.0</b>	<b>1.0</b>
<b>OPERATING</b>			
Phone (staff)	\$ 450	\$ 450	\$ 450
Supplies (staff)	\$ 500	\$ 500	\$ 500
<b>SUBTOTAL OPERATING</b>		\$ 950	\$ 950
<b>CAPITAL OUTLAY</b>			
Office Furniture (staff)	\$ 5,000	\$ 5,000	
Computer/Software (staff)	\$ 2,200	\$ 2,200	\$ 400
<b>SUBTOTAL CAPITAL OUTLAY:</b>		\$ 7,200	\$ 400
<b>SUBTOTAL REQUEST</b>		<b>\$ 132,327</b>	<b>\$ 125,527</b>
<b>CENTRAL APPROPRIATIONS</b>			
Health/Life/Dental	\$ 11,500	\$ 11,500	\$ 11,500
Short-Term Disability	0.16%	\$ 176	\$ 176
Family Medical Leave	0.45%	\$ 494	\$ 494
AED*	5.00%	\$ 5,494	\$ 5,494
SAED*	5.00%	\$ 5,494	\$ 5,494
<b>Central Appropriations Subtotal:</b>		\$ 23,157	\$ 23,157
<b>GRAND TOTAL ALL COSTS:</b>		<b>\$ 155,485</b>	<b>\$ 148,685</b>

\*Postion based on midpoint of Judicial job class R43020



**FY 2024-25 Summary of Change Requests**

**Schedule 10**

Request Name	Interagency Review	Requires Legislation	Total Funds	FTE	General Fund	Cash Funds	Reappropriation	Federal
<b>Non-Prioritized Request</b>								
None	N/A	N/A	\$0	0.0	\$0	\$0	\$0	\$0
<b>Prioritized Request</b>								
OPG R-01 Workforce Development FTE & Employee Wellness	No Other Agency Impact	No	\$152,104	1.0	\$0	\$152,104	\$0	\$0
OPG R-02 Staff Attorney FTE	No Other Agency Impact	No	\$155,485	1.0	\$0	\$155,485	\$0	\$0
<b>Subtotal Prioritized Request</b>			<b>\$307,589</b>	<b>2.0</b>	<b>\$0</b>	<b>\$307,589</b>	<b>\$0</b>	<b>\$0</b>
<b>Total for Office of Public Guardianship</b>			<b>\$307,589</b>	<b>2.0</b>	<b>\$0</b>	<b>\$307,589</b>	<b>\$0</b>	<b>\$0</b>

## FY 2024-25 Budget Request - 11. Office of Public Guardianship

## Schedule 02

	Total Funds	FTE	General Fund	Cash Funds	Reappr	Federal
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### FY 2021-22 Actual Expenditures

11. Office of Public Guardianship	\$780,315	7.0	\$0	\$690,631	\$89,684	\$0
<b>Total For: FY 2021-22 Actual Expenditures</b>	<b>\$780,315</b>	<b>7.0</b>	<b>\$0</b>	<b>\$690,631</b>	<b>\$89,684</b>	<b>\$0</b>

### FY 2022-23 Actual Expenditures

11. Office of Public Guardianship	\$1,243,327	14.0	\$0	\$1,044,517	\$198,810	\$0
<b>Total For: FY 2021-22 Actual Expenditures</b>	<b>\$1,243,327</b>	<b>14.0</b>	<b>\$0</b>	<b>\$1,044,517</b>	<b>\$198,810</b>	<b>\$0</b>

### 2023-24 Initial Appropriation

11. Office of Public Guardianship	\$1,903,288	14.0	\$0	\$1,705,895	\$197,393	\$0
<b>Total For: FY 2023-24 Actual Expenditures</b>	<b>\$1,903,288</b>	<b>14.0</b>	<b>\$0</b>	<b>\$1,705,895</b>	<b>\$197,393</b>	<b>\$0</b>

### FY 2024-25 Governor's Budget Request

11. Office of Public Guardianship	\$2,275,232	16.0	\$0	\$2,055,742	\$219,490	\$0
<b>Total For: FY 2024-25 Elected Official Request</b>	<b>\$2,275,232</b>	<b>16.0</b>	<b>\$0</b>	<b>\$2,055,742</b>	<b>\$219,490</b>	<b>\$0</b>

<b>11. Office of Public Guardianship</b>						<b>Schedule 3A</b>	
<b>FY 2021-22 Actual Expenditures</b>	<b>Total Funds</b>	<b>FTE</b>	<b>General Fund</b>	<b>Cash Funds</b>	<b>Reappropriated Funds</b>	<b>Federal Funds</b>	
<b>11. Office of Public Guardianship, Program Costs</b>							
SB 21-205 Long Appropriations Bill	\$841,253	7.0	\$0	\$751,569	\$89,684	\$0	
<b>FY 2021-22 Final Appropriation</b>	<b>\$841,253</b>	<b>7.0</b>	<b>\$0</b>	<b>\$751,569</b>	<b>\$89,684</b>	<b>\$0</b>	
<b>FY 2021-22 Final Expenditure Authority</b>	<b>\$841,253</b>	<b>7.0</b>	<b>\$0</b>	<b>\$751,569</b>	<b>\$89,684</b>	<b>\$0</b>	
<b>FY 2021-22 Actual Expenditures</b>	<b>\$780,315</b>	<b>7.0</b>	<b>\$0</b>	<b>\$690,631</b>	<b>\$89,684</b>	<b>\$0</b>	
<b>FY 2021-22 Reversion (Overexpenditure)</b>	<b>\$60,938</b>	<b>0.0</b>	<b>\$0</b>	<b>\$60,938</b>	<b>\$0</b>	<b>\$0</b>	
<b>FY 2021-22 Personal Services Allocation</b>	<b>\$710,648</b>	<b>7.0</b>	<b>\$0</b>	<b>\$620,964</b>	<b>\$89,684</b>	<b>\$0</b>	
<b>FY 2021-22 Total All Other Operating Allocation</b>	<b>\$69,668</b>	<b>0.0</b>	<b>\$0</b>	<b>\$69,668</b>	<b>\$0</b>	<b>\$0</b>	

<b>11. Office of Public Guardianship</b>					<b>Schedule 3B</b>	
<b>FY 2022-23 Actual Expenditures</b>	<b>Total Funds</b>	<b>FTE</b>	<b>General Fund</b>	<b>Cash Funds</b>	<b>Reappropriated Funds</b>	<b>Federal Funds</b>
<b>11. Office of Public Guardianship, Program Costs</b>						
HB22-1329 Long Bill	\$1,720,586	14.0	\$0	\$1,521,637	\$198,949	\$0
HB22-1133 Family And Medical Leave Insurance Fund	(\$1,100)	0.0	\$0	(\$961)	(\$139)	\$0
<b>FY 2022-23 Final Appropriation</b>	<b>\$1,719,486</b>	<b>14.0</b>	<b>\$0</b>	<b>\$1,520,676</b>	<b>\$198,810</b>	<b>\$0</b>
<b>FY 2022-23 Final Expenditure Authority</b>	<b>\$1,719,486</b>	<b>14.0</b>	<b>\$0</b>	<b>\$1,520,676</b>	<b>\$198,810</b>	<b>\$0</b>
<b>FY 2022-23 Actual Expenditures</b>	<b>\$1,243,327</b>	<b>14.0</b>	<b>\$0</b>	<b>\$1,044,517</b>	<b>\$198,810</b>	<b>\$0</b>
<b>FY 2022-23 Reversion (Overexpenditure)</b>	<b>\$476,159</b>	<b>0.0</b>	<b>\$0</b>	<b>\$476,159</b>	<b>\$0</b>	<b>\$0</b>
<b><i>FY 2022-23 Personal Services Allocation</i></b>	<b><i>\$1,061,024</i></b>	<b><i>14.0</i></b>	<b><i>\$0</i></b>	<b><i>\$862,214</i></b>	<b><i>\$198,810</i></b>	<b><i>\$0</i></b>
<b><i>FY 2022-23 Total All Other Operating Allocation</i></b>	<b><i>\$182,302</i></b>	<b><i>0.0</i></b>	<b><i>\$0</i></b>	<b><i>\$182,302</i></b>	<b><i>\$0</i></b>	<b><i>\$0</i></b>

<b>11. Office of Public Guardianship</b>					<b>Schedule 3C</b>	
	<b>Total Funds</b>	<b>FTE</b>	<b>General Fund</b>	<b>Cash Funds</b>	<b>Reappropriated Funds</b>	<b>Federal</b>

**11. Office of Public Guardianship,  
Program Costs**

SB23-214 Long Bill	\$1,903,288	14.0	\$0	\$1,705,895	\$197,393	\$0
<b>FY 2023-24 Initial Appropriation</b>	<b>\$1,903,288</b>	<b>14.0</b>	<b>\$0</b>	<b>\$1,705,895</b>	<b>\$197,393</b>	<b>\$0</b>

<b>FY 2023-24 Personal Services Allocation</b>	<b>\$1,592,214</b>	<b>14.0</b>	<b>\$0</b>	<b>\$1,394,821</b>	<b>\$197,393</b>	<b>\$0</b>
<b>FY 2023-24 Total All Other Operating Allocation</b>	<b>\$311,074</b>	<b>0.0</b>	<b>\$0</b>	<b>\$311,074</b>	<b>\$0</b>	<b>\$0</b>



11. Office of Public Guardianship						Schedule 3D	
FY 2024-25 Budget Request	Total Funds	FTE	General Fund	Cash Funds	Reappropriated Funds	Federal Funds	

## 11. Office of Public Guardianship

### Office of Public Guardianship

<b>FY 2024-25 Starting Base</b>	<b>\$1,903,288</b>	<b>14.0</b>	<b>\$0</b>	<b>\$1,705,895</b>	<b>\$197,393</b>	<b>\$0</b>
OPG TA-02 Statewide Total Compensation Request	\$45,828	0.0	\$0	\$23,731	\$22,097	\$0
<b>FY 2024-25 Base Request</b>	<b>\$1,949,116</b>	<b>14.0</b>	<b>\$0</b>	<b>\$1,729,626</b>	<b>\$219,490</b>	<b>\$0</b>
OPG R-01 Workforce Development FTE & Employee Wellness	\$152,104	1.0	\$0	\$152,104	\$0	\$0
OPG R-02 Staff Attorney FTE	\$155,485	1.0	\$0	\$155,485	\$0	\$0
<b>FY 2024-25 Elected Official Request</b>	<b>\$2,256,705</b>	<b>16.0</b>	<b>\$0</b>	<b>\$2,037,215</b>	<b>\$219,490</b>	<b>\$0</b>
<b>Personal Services Allocation</b>	<b>\$1,904,331</b>	<b>16.0</b>	<b>\$0</b>	<b>\$1,684,841</b>	<b>\$219,490</b>	<b>\$0</b>
<b>Total All Other Operating Allocation</b>	<b>\$352,374</b>	<b>0.0</b>	<b>\$0</b>	<b>\$352,374</b>	<b>\$0</b>	<b>\$0</b>

### Indirect Cost Assessment

<b>Starting Base</b>	<b>\$0</b>	<b>0.0</b>	<b>\$0</b>	<b>\$0</b>	<b>\$0</b>	<b>\$0</b>
OPG TA-01 Indirect Cost Assessment	\$18,527	0.0	\$0	\$18,527	\$0	\$0
<b>FY 2024-25 Base Request</b>	<b>\$18,527</b>	<b>0.0</b>	<b>\$0</b>	<b>\$18,527</b>	<b>\$0</b>	<b>\$0</b>
<b>FY 2024-25 Elected Official Request</b>	<b>\$18,527</b>	<b>0.0</b>	<b>\$0</b>	<b>\$18,527</b>	<b>\$0</b>	<b>\$0</b>
<b>Total All Other Operating Allocation</b>	<b>\$18,527</b>	<b>0.0</b>	<b>\$0</b>	<b>\$18,527</b>	<b>\$0</b>	<b>\$0</b>

<b>11. Office of Public Guardianship</b>						<b>Schedule 3D</b>	
<b>FY 2024-25 Budget Request</b>	<b>Total Funds</b>	<b>FTE</b>	<b>General Fund</b>	<b>Cash Funds</b>	<b>Reappropriated Funds</b>	<b>Federal Funds</b>	
<b>Total For: 11. Office of Public Guardianship - (A) Office of Public Guardianship -</b>							
<b>FY 2024-25 Starting Base</b>	<b>\$1,903,288</b>	<b>14.0</b>	<b>\$0</b>	<b>\$1,705,895</b>	<b>\$197,393</b>	<b>\$0</b>	
OPG TA-01 Indirect Cost Assessment	\$18,527	0.0	\$0	\$18,527	\$0	\$0	
OPG TA-02 Statewide Total Compensation Request	\$45,828	0.0	\$0	\$23,731	\$22,097	\$0	
<b>FY 2024-25 Base Request</b>	<b>\$1,967,643</b>	<b>14.0</b>	<b>\$0</b>	<b>\$1,748,153</b>	<b>\$219,490</b>	<b>\$0</b>	
OPG R-01 Workforce Development FTE & Employee Wellness	\$152,104	1.0	\$0	\$152,104	\$0	\$0	
OPG R-02 Staff Attorney FTE	\$155,485	1.0	\$0	\$155,485	\$0	\$0	
<b>FY 2024-25 Elected Official Request</b>	<b>\$2,275,232</b>	<b>16.0</b>	<b>\$0</b>	<b>\$2,055,742</b>	<b>\$219,490</b>	<b>\$0</b>	
<b>Personal Services Allocation</b>	<b>\$1,904,331</b>	<b>16.0</b>	<b>\$0</b>	<b>\$1,684,841</b>	<b>\$219,490</b>	<b>\$0</b>	
<b>Total All Other Operating Allocation</b>	<b>\$370,901</b>	<b>0.0</b>	<b>\$0</b>	<b>\$370,901</b>	<b>\$0</b>	<b>\$0</b>	

## Schedule 14B

Line Item	Object Code	Detail	FY 2021-22		FY 2022-23		FY 2023-24		FY 2024-25	
			Actual Expenditure	FTE	Actual Expenditure	FTE	Appropriation Budget	FTE	Gov Request Budget	FTE

## 11. Office of Public Guardianship,

**Personal Services - Employees****Object Group    Object Group Name**

FTE	Total FTE		7.0	14.0	14.0	16.0
1000	Total Employee Wages and Benefits	\$659,433	\$969,627	\$1,592,214	\$1,904,331	

**Object Code    Object Name**

1000	Personal Services	\$0	\$0	\$1,592,214	\$1,904,331
1110	Regular Full-Time Wages	\$3,409	\$3,064	\$0	\$0
1210	Contractual Employee Regular Full-Time Wages	\$469,435	\$674,135	\$0	\$0
1240	Contractual Employee Annual Leave Payments	\$0	\$6,258	\$0	\$0
1360	Non-Base Building Performance Pay	\$10,500	\$15,000	\$0	\$0
1510	Dental Insurance	\$2,740	\$5,156	\$0	\$0
1511	Health Insurance	\$64,154	\$104,025	\$0	\$0
1512	Life Insurance	\$690	\$1,022	\$0	\$0
1513	Short-Term Disability	\$709	\$997	\$0	\$0
1514	Statutory Personnel & Payroll System Vision Insurance	\$0	\$507	\$0	\$0
1520	FICA-Medicare Contribution	\$6,870	\$9,881	\$0	\$0
1522	PERA	\$52,685	\$79,999	\$0	\$0
1524	PERA - AED	\$24,001	\$34,672	\$0	\$0
1525	PERA - SAED	\$24,001	\$34,672	\$0	\$0
1630	Contractual Employee Other Employee Benefits	\$240	\$240	\$0	\$0

## Schedule 14B

Line Item	Object Code	Detail	FY 2021-22		FY 2022-23		FY 2023-24		FY 2024-25	
			Actual Expenditure	FTE	Actual Expenditure	FTE	Appropriation Budget	FTE	Gov Request Budget	FTE

**Personal Services - Contract Services**

Object Group	Object Group Name						
1100	Total Contract Services (Purchased Personal Services)	\$51,215		\$91,397		\$0	\$0
<b>Object Code    Object Name</b>							
1920	Personal Services - Professional	\$14,100		\$62,385		\$0	\$0
1935	Personal Services - Legal Services	\$1,190		\$1,339		\$0	\$0
1950	Personal Services - Other State Departments	\$35		\$0		\$0	\$0
1960	Personal Services - Information Technology	\$35,890		\$27,673		\$0	\$0
<b>Subtotal All Personal Services</b>		<b>\$710,648</b>	<b>7.0</b>	<b>\$1,061,024</b>	<b>14.0</b>	<b>\$1,592,214</b>	<b>14.0</b>

**All Other Operating Expenditures**

Object Group	Object Group Name						
2000	Total Operating Expenses	\$62,821		\$155,537		\$311,074	\$352,374
3000	Total Travel Expenses	\$6,847		\$12,384		\$0	\$0
7000	Total Transfers	\$0		\$14,382		\$0	\$0
<b>Object Code    Object Name</b>							
2000	Operating Expense	\$0		\$0		\$311,074	\$352,374
2250	Miscellaneous Rentals	\$162		\$0		\$0	\$0
2255	Rental of Buildings	\$22,002		\$24,829		\$0	\$0

## Schedule 14B

Line Item	Object Code Detail	FY 2021-22		FY 2022-23		FY 2023-24		FY 2024-25	
		Actual Expenditure	FTE	Actual Expenditure	FTE	Appropriation Budget	FTE	Gov Request Budget	FTE
2510	In-State Travel	\$425		\$3,359		\$0		\$0	
2511	In-State Common Carrier Fares	\$110		\$0		\$0		\$0	
2512	In-State Personal Travel Per Diem	\$149		\$351		\$0		\$0	
2513	In-State Personal Vehicle Reimbursement	\$4,709		\$7,578		\$0		\$0	
2530	Out-Of-State Travel	\$1,022		\$747		\$0		\$0	
2531	Out-Of-State Common Carrier Fares	\$432		\$221		\$0		\$0	
2532	Out-Of-State Personal Travel Per Diem	\$0		\$127		\$0		\$0	
2610	Advertising And Marketing	\$0		\$3,308		\$0		\$0	
2631	Communication Charges - Office Of Information Technology	\$6,142		\$10,667		\$0		\$0	
2641	Other Automated Data Processing Billings-Purchased Services	\$0		\$47,668		\$0		\$0	
2680	Printing And Reproduction Services	\$146		\$17,117		\$0		\$0	
2820	Purchased Services	\$900		\$6,811		\$0		\$0	
3110	Supplies & Materials	\$121		\$166		\$0		\$0	
3113	Clothing and Uniform Allowance	\$36		\$0		\$0		\$0	
3118	Food and Food Service Supplies	\$112		\$1,244		\$0		\$0	
3120	Books/Periodicals/Subscriptions	\$0		\$35		\$0		\$0	
3121	Office Supplies	\$3,806		\$4,484		\$0		\$0	
3123	Postage	\$814		\$364		\$0		\$0	
3140	Noncapitalizable Information Technology	\$3,224		\$9,098		\$0		\$0	
3145	Software Subscription	\$21,798		\$23,411		\$0		\$0	
4100	Other Operating Expenses	\$0		\$173		\$0		\$0	
4140	Dues And Memberships	\$1,170		\$3,615		\$0		\$0	
4170	Miscellaneous Fees And Fines	\$573		\$221		\$0		\$0	

Schedule 14B

Line Item	Object Code	Detail	FY 2021-22		FY 2022-23		FY 2023-24		FY 2024-25	
			Actual Expenditure	FTE	Actual Expenditure	FTE	Appropriation Budget	FTE	Gov Request Budget	FTE
4220		Registration Fees	\$1,813		\$2,327		\$0		\$0	
7200		Transfers Out For Indirect Costs	\$0		\$14,382		\$0		\$0	
<b>Subtotal All Other Operating</b>			<b>\$69,668</b>		<b>\$182,302</b>		<b>\$311,074</b>		<b>\$352,374</b>	
<b>Total Line Item Expenditures</b>			<b>\$780,315</b>	<b>7.0</b>	<b>\$1,243,327</b>	<b>14.0</b>	<b>\$1,903,288</b>	<b>14.0</b>	<b>\$2,256,705</b>	<b>16.0</b>

Indirect Cost Assessment - 11. Office of Public Guardianship, (A) Office of Public Guardianship,

**Personal Services - Employees**

**Object Group Object Group Name**

FTE	Total FTE		0.0		0.0		0.0		0.0
1000	Total Employee Wages and Benefits		\$0		\$0		\$0		\$0

**Object Code Object Name**

**Personal Services - Contract Services**

**Object Group Object Group Name**

**Object Code Object Name**

<b>Subtotal All Personal Services</b>			<b>\$0</b>	<b>0.0</b>	<b>\$0</b>	<b>0.0</b>	<b>\$0</b>	<b>0.0</b>	<b>\$0</b>	<b>0.0</b>
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**All Other Operating Expenditures**

**Object Group Object Group Name**

2000	Total Operating Expenses		\$0		\$0		\$0		\$18,527
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**Object Code Object Name**

2000	Operating Expense		\$0		\$0		\$0		\$18,527
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<b>Subtotal All Other Operating</b>			<b>\$0</b>		<b>\$0</b>		<b>\$0</b>		<b>\$18,527</b>
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<b>Total Line Item Expenditures</b>			<b>\$0</b>	<b>0.0</b>	<b>\$0</b>	<b>0.0</b>	<b>\$0</b>	<b>0.0</b>	<b>\$18,527</b>	<b>0.0</b>
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<b>FY 2024-25 Budget Request Office of Public Guardianship</b>	<b>Schedule 06</b>			
	Total Funds	FTE	General Fund	Cash Funds Reapprop.

**FY 2021-22 Special Bill Line Item Appropriations (Excludes Reg Supplemental Bills & LB Appr.)**

None

**FY 2022-23 Special Bill Line Item Appropriations (Excludes Long Bill Appropriations)**

**HB22-1133 Family And Medical Leave Insurance Fund**

11. Office of Public Guardianship	(1,100)	-	-	(\$961)	(\$139)
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<b>Total -- HB22-1133 Family And Medical Leave Insurance Fund</b>	<b>(1,100)</b>	<b>-</b>	<b>-</b>	<b>(\$961)</b>	<b>(\$139)</b>
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**FY 2023-24 Special Bill Line Item Appropriations (Excludes Reg Supplemental Bills & LB Appr.)**

None

Salary Pots Request Template

	TOTAL FUNDS/FTE FY 2024-25	GENERAL FUND	CASH FUNDS	REAPPROPRIATED FUNDS	FEDERAL FUNDS
<b>FUND SPLITS - From Position-by-Position Tab</b>					
<b>I. Continuation Salary Base</b>					
Sum of Filled FTE as of July 27, 2023	14.00	0.000%	86.746%	13.254%	0.0000%
Salary X 12	\$991,769	\$0	\$860,320	\$131,449	\$0
PERA (Standard, Trooper, and Judicial Rates) at FY 2024-25 PERA Rates	\$114,747	\$0	\$99,538	\$15,209	\$0
Medicare @ 1.45%	\$14,381	\$0	\$12,475	\$1,906	\$0
Subtotal Continuation Salary Base =	\$1,120,897	\$0	\$972,333	\$148,564	\$0
<b>II. Salary Survey Adjustments</b>					
System Maintenance Studies	\$0	\$0	\$0	\$0	\$0
Across the Board - Base Adjustment	\$29,752	\$0	\$25,809	\$3,943	\$0
Across the Board - Non-Base Adjustment	\$0	\$0	\$0	\$0	\$0
Movement to Statewide Minimum Wage - Base Adjustment	\$0	\$0	\$0	\$0	\$0
Step Increase - Base Adjustment	\$0	\$0	\$0	\$0	\$0
<b>Subtotal - Salary Survey Adjustments</b>	<b>\$29,752</b>	<b>\$0</b>	<b>\$25,809</b>	<b>\$3,943</b>	<b>\$0</b>
PERA (Standard, Trooper, and Judicial Rates) at FY 2024-25 PERA Rates	\$ 3,442.00	\$0	\$2,986	\$456	\$0
Medicare @ 1.45%	\$ 431.00	\$0	\$374	\$57	\$0
Request Subtotal =	\$33,625	\$0	\$29,169	\$4,456	\$0
<b>III. Merit Pay Adjustments</b>					
Merit Pay - Base Adjustments	\$0	\$0	\$0	\$0	\$0
Merit Pay - Non-Base Adjustments	\$0	\$0	\$0	\$0	\$0
<b>Subtotal - Merit Pay Adjustments</b>	<b>\$0</b>	<b>\$0</b>	<b>\$0</b>	<b>\$0</b>	<b>\$0</b>
PERA (Standard, Trooper, and Judicial Rates) at FY 2024-25 PERA Rates	\$0	\$0	\$0	\$0	\$0
Medicare @ 1.45%	\$0	\$0	\$0	\$0	\$0
Request Subtotal =	\$0	\$0	\$0	\$0	\$0
<b>IV. Shift Differential</b>					
FY 2022-23 ACTUAL EXPENDITURES for All Occupational Groups	\$0	\$0	\$0	\$0	\$0
Total Actual and Adjustments @ 100%	\$0	\$0	\$0	\$0	\$0
PERA (Standard, Trooper, and Judicial Rates) at Current PERA Rates	\$0	\$0	\$0	\$0	\$0
Medicare @ 1.45%	\$0	\$0	\$0	\$0	\$0
Request Subtotal =	\$0	\$0	\$0	\$0	\$0
<b>V. Revised Salary Basis for Remaining Request Subtotals</b>					
Total Continuation Salary Base, Adjustments, Performance Pay & Shift	\$1,021,521	\$0	\$886,129	\$135,392	\$0
<b>VI. Amortization Equalization Disbursement (AED)</b>					
Revised Salary Basis * 5.00%	\$51,076	-	44,306	6,770	-
<b>VII. Supplemental AED (SAED)</b>					
Revised Salary Basis * 5.00%	\$51,076	-	44,306	6,770	-
<b>VIII. Short-term Disability</b>					
Revised Salary Basis * 0.15%	\$1,532	-	1,329	203	-
<b>IX. Health, Life, and Dental</b>					
Funding Request	\$217,676	-	199,310	18,366	-
<b>X. Paid Family and Medical Leave Insurance Program Premiums</b>					
	\$4,597	\$0	\$3,988	\$609	\$0
		0.0%	91.6%	8.4%	0.0%



<b>Common Policy Line Item</b>	<b>FY 2023-24 Appropriation</b>	<b>GF</b>	<b>CF</b>	<b>RF</b>	<b>FF</b>
Salary Survey	\$63,613		\$60,017	\$3,596	
Merit Pay	\$0				
PERA Direct Distribution	\$0				
Paid Family and Medical Leave Insurance Program	\$0				
Shift	\$0				
AED	\$57,402		\$54,158	\$3,244	
SAED	\$57,402		\$54,158	\$3,244	
Short-term Disability	\$0				
Health, Life and Dental	\$198,950		\$190,361	\$8,589	
<b>TOTAL</b>	<b>\$377,367</b>	<b>\$0</b>	<b>\$358,694</b>	<b>\$18,673</b>	<b>\$0</b>
<b>Common Policy Line Item</b>	<b>FY 2024-25 Total Request</b>	<b>GF</b>	<b>CF</b>	<b>RF</b>	<b>FF</b>
Salary Survey	\$33,625	\$0	\$29,169	\$4,456	\$0
Merit Pay	\$0	\$0	\$0	\$0	\$0
PERA Direct Distribution	\$0	\$0	\$0	\$0	\$0
Paid Family and Medical Leave Insurance Program	\$4,597	\$0	\$3,988	\$609	\$0
Shift	\$0	\$0	\$0	\$0	\$0
AED	\$51,076	\$0	\$44,306	\$6,770	\$0
SAED	\$51,076	\$0	\$44,306	\$6,770	\$0
Short-term Disability	\$1,532	\$0	\$1,329	\$203	\$0
Health, Life and Dental	\$217,676	\$0	\$199,310	\$18,366	\$0
<b>TOTAL</b>	<b>\$359,582</b>	<b>\$0</b>	<b>\$322,408</b>	<b>\$37,174</b>	<b>\$0</b>
<b>Common Policy Line Item</b>	<b>FY 2024-25 Incremental</b>	<b>GF</b>	<b>CF</b>	<b>RF</b>	<b>FF</b>
Salary Survey	\$33,625	\$0	\$29,169	\$4,456	\$0
Merit Pay	\$0	\$0	\$0	\$0	\$0
PERA Direct Distribution	\$0	\$0	\$0	\$0	\$0
Paid Family and Medical Leave Insurance Program	\$4,597	\$0	\$3,988	\$609	\$0
Shift	\$0	\$0	\$0	\$0	\$0
AED	-\$6,326	\$0	-\$9,852	\$3,526	\$0
SAED	-\$6,326	\$0	-\$9,852	\$3,526	\$0
Short-term Disability	\$1,532	\$0	\$1,329	\$203	\$0
Health, Life and Dental	\$18,726	\$0	\$8,949	\$9,777	\$0
<b>TOTAL</b>	<b>\$45,828</b>	<b>\$0</b>	<b>\$23,731</b>	<b>\$22,097</b>	<b>\$0</b>

<b>Office of Public Guardianship FTE Detail</b>				
<b>Object Code 1210</b>	<b>FY2021-22</b>		<b>FY2022-23</b>	
	<b>Total Funds</b>	<b>FTE</b>	<b>Total Funds</b>	<b>FTE</b>
<b>Position Detail:</b>				
Director (pos. # 87001)	118,450	1.0	122,004	1.0
Staff Assistant (pos. # 87002)	54,965	1.0	56,614	1.0
Public Guardian (pos. # 87003)	61,800	1.0	32,309	1.0
Public Guardian (pos. # 87004)	59,740	1.0	61,532	1.0
Public Guardian (pos. # 87005)	59,740	1.0	61,532	1.0
Public Guardian (pos. # 87006)	59,740	1.0	48,713	1.0
Public Guardian (pos. # 87007)	58,409	1.0	55,480	1.0
Deputy Director (pos. # 87008)	-	0.0	105,159	1.0
Public Guardian (pos. # 87009)	-	0.0	42,949	1.0
Public Guardian (pos. # 87010)	-	0.0	29,095	1.0
Case Management Aide (pos. # 87011)	-	0.0	36,857	1.0
Public Guardian (pos. # 87012)	-	0.0	26,501	1.0
Public Guardian	-	0.0	-	1.0
Public Guardian	-	0.0	-	1.0
<b>Total Full-Time/Part-Time Wages</b>	<b>472,844</b>	<b>7.0</b>	<b>678,744</b>	<b>14.0</b>

**Schedule 9  
Cash Fund Report**

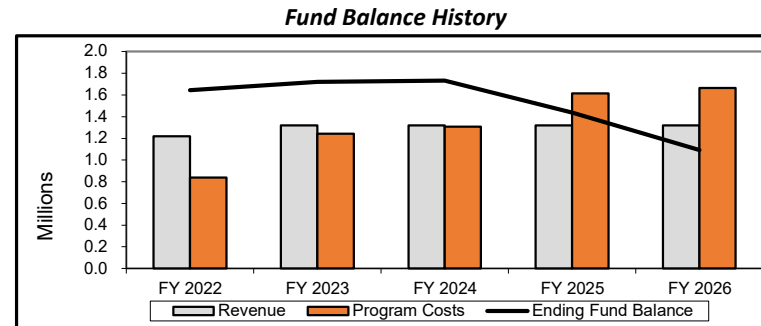
**Office of Public Guardianship Fund #OPGF  
Section 13-98-108, C.R.S. (2024)**

HB17-1087 established the Office of Public Guardianship to provide guardianship services to indigent and incapacitated adults who have no family members or friends available to serve as guardian.

**Fund Information**

Revenue Sources:	Fees charged in relation to probate case filings and other civil filings.	Expenditures:	The money in this fund is for OPG personnel and program related expenses.
Non-Fee Sources:	Interest, gifts grants and donations	Expenditure Drivers:	Personnel costs, case numbers.
Revenue Drivers:	Number of probate and other civil filings	Long Bill Groups:	Office of Public Guardianship, Program Costs

<b>Revenue and Expenditure Trend Information</b>					
	Actual FY 2022	Actual FY 2023	Projected FY 2024	Projected FY 2025	Projected FY 2026
<b><u>Beginning Fund Balance</u></b>	<u>1,261,765</u>	<u>1,645,409</u>	<u>1,719,768</u>	<u>1,731,914</u>	<u>1,436,471</u>
<b>Revenue</b>	1,220,753	1,318,638	1,318,638	1,318,638	1,318,638
<b>Program Costs</b>	837,109	1,244,279	1,306,493	1,614,082	1,662,504
<b>Ending Fund Balance</b>	<b>1,645,409</b>	<b>1,719,768</b>	<b>1,731,914</b>	<b>1,436,471</b>	<b>1,092,605</b>
<i>Fund Balance as a % of Expenditures</i>	<i>n/a</i>	<i>n/a</i>	<i>139.2%</i>	<i>109.9%</i>	<i>67.7%</i>
Reserve increase/(decrease)	383,644	74,360	12,146	(295,443)	(343,866)



Pursuant to Section 24-75-402 (2) (e) (V), C.R.S. (2024), fees do not include “any monies received from charges or assessments, the amount of which are established in law and over which the entity has no authority to change or are otherwise not determined by the entity.”

# Attachment 1. FY24 OPG Budget Summary as of 12.14.2023

OPG Personal Services and Operating - FY 2024 - Through 12/14/2023

Budget Type	Budget	YTD + Projected Exp	Surplus / (Deficit)
Personal Services	\$1,323,341	\$ 1,110,633	\$212,707 YTD
Operating	\$582,162	\$ 194,175	\$387,987 Balance remaining for operating
<b>Total Appropriation</b>	<b>\$1,905,503</b>	<b>\$1,304,808</b>	<b>\$600,695</b> Total remaining in program line

	Cash Fund Balance	
	PRIOR YEAR (FY 2023)	Projected Revenue less YTD Expenses
Total Revenue	\$1,318,638	\$1,318,638
Total Expenditures	\$1,244,279	\$1,304,808
Net Change	\$74,360	\$13,830
Beg Fund Balance	\$1,645,409	\$1,719,769
<b>= Fund Balance</b>	<b>\$1,719,769</b>	<b>\$1,733,599</b>

Salaries	Pos. #	Current Salaries	Actual					Projection							
			July	August	September	October	November	December	January	February	March	April	May	June	
Director	87001	\$ 10,675	\$ 10,675	\$ 10,675	\$ 10,675	\$ 10,675	\$ 10,675	\$ 10,675	\$ 10,675	\$ 10,675	\$ 10,675	\$ 10,675	\$ 10,675	\$ 10,675	\$ 10,675
Staff Assistant	87002	\$ 4,954	\$ 4,954	\$ 4,954	\$ 4,954	\$ 4,954	\$ 4,954	\$ 4,954	\$ 4,954	\$ 4,954	\$ 4,954	\$ 4,954	\$ 4,954	\$ 4,954	\$ 4,954
Public Guardian	87003	\$ 5,250	\$ 5,250	\$ 5,250	\$ 5,250	\$ 5,250	\$ 5,250	\$ 5,250	\$ 5,250	\$ 5,250	\$ 5,250	\$ 5,250	\$ 5,250	\$ 5,250	\$ 5,250
Vacant, Public Guardian	87004	\$ 5,384	\$ 5,384	\$ 5,384	\$ 5,384	\$ 1,713	\$ -	\$ -	\$ 5,384	\$ 5,384	\$ 5,384	\$ 5,384	\$ 5,384	\$ 5,384	\$ 5,384
Public Guardian	87005	\$ 5,384	\$ 11,641	\$ -	\$ 3,679	\$ 5,150	\$ 5,150	\$ 5,150	\$ 5,150	\$ 5,150	\$ 5,150	\$ 5,150	\$ 5,150	\$ 5,150	\$ 5,150
Vacant, Public Guardian	87006	\$ 4,852	\$ 4,039	\$ -	\$ 2,526	\$ -	\$ -	\$ 4,852	\$ 4,852	\$ 4,852	\$ 4,852	\$ 4,852	\$ 4,852	\$ 4,852	\$ 4,852
Vacant, Public Guardian	87007	\$ 5,408	\$ 5,408	\$ 759	\$ 258	\$ -	\$ -	\$ -	\$ 5,408	\$ 5,408	\$ 5,408	\$ 5,408	\$ 5,408	\$ 5,408	\$ 5,408
Deputy Director	87008	\$ 9,275	\$ 9,275	\$ 9,275	\$ 9,275	\$ 9,275	\$ 9,275	\$ 9,275	\$ 9,275	\$ 9,275	\$ 9,275	\$ 9,275	\$ 9,275	\$ 9,275	\$ 9,275
Vacant, Public Guardian	87009	\$ 5,232	\$ 5,232	\$ 5,232	\$ 6,541	\$ -	\$ -	\$ 5,232	\$ 5,232	\$ 5,232	\$ 5,232	\$ 5,232	\$ 5,232	\$ 5,232	\$ 5,232
Vacant, Public Guardian (Hold)	87010	\$ 5,000	\$ -	\$ -	\$ -	\$ -	\$ -	\$ 5,000	\$ 5,000	\$ 5,000	\$ 5,000	\$ 5,000	\$ 5,000	\$ 5,000	\$ 5,000
Teresa Esquibel - Case Management Aide	87011	\$ 4,725	\$ 4,725	\$ 4,725	\$ 4,725	\$ 4,725	\$ 4,725	\$ 4,725	\$ 4,725	\$ 4,725	\$ 4,725	\$ 4,725	\$ 4,725	\$ 4,725	\$ 4,725
Public Guardian	87012	\$ 5,232	\$ 5,232	\$ 5,232	\$ 5,232	\$ 5,232	\$ 5,232	\$ 5,232	\$ 5,232	\$ 5,232	\$ 5,232	\$ 5,232	\$ 5,232	\$ 5,232	\$ 5,232
Public Guardian	87013	\$ 5,150	\$ -	\$ -	\$ 2,452	\$ 5,150	\$ 5,150	\$ 5,150	\$ 5,150	\$ 5,150	\$ 5,150	\$ 5,150	\$ 5,150	\$ 5,150	\$ 5,150
Vacant, Public Guardian (Hold)	87XXX	\$ 5,000	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
<b>Total Salaries</b>		<b>\$ 81,521</b>	<b>\$ 71,815</b>	<b>\$ 51,486</b>	<b>\$ 60,951</b>	<b>\$ 52,124</b>	<b>\$ 50,411</b>	<b>\$ 65,495</b>	<b>\$ 76,287</b>	<b>\$ 76,287</b>	<b>\$ 76,287</b>	<b>\$ 76,287</b>	<b>\$ 76,287</b>	<b>\$ 76,287</b>	<b>\$ 76,287</b>
<b>Employee Benefits</b>		<b>\$ 28,758</b>	<b>\$ 26,616</b>	<b>\$ 22,706</b>	<b>\$ 25,040</b>	<b>\$ 35,652</b>	<b>\$ 23,827</b>	<b>\$ 23,827</b>	<b>\$ 23,827</b>	<b>\$ 23,827</b>	<b>\$ 23,827</b>	<b>\$ 23,827</b>	<b>\$ 23,827</b>	<b>\$ 23,827</b>	<b>\$ 23,827</b>
<b>Total Personal Services</b>		<b>\$ 1,323,341</b>	<b>\$ 98,430</b>	<b>\$ 74,192</b>	<b>\$ 85,991</b>	<b>\$ 87,776</b>	<b>\$ 74,238</b>	<b>\$ 89,322</b>	<b>\$ 100,114</b>	<b>\$ 100,114</b>	<b>\$ 100,114</b>	<b>\$ 100,114</b>	<b>\$ 100,114</b>	<b>\$ 100,114</b>	<b>\$ 100,114</b>

	Actuals	Actuals	Actuals	Actuals	Actuals	Actuals	Projections	Projections	Projections	Projections	Projections	Projections	Projections
1920 -Other Professional Services	416	436	468	1,463	9,918	936							
1935 - Attorneys		35		51	289	43							
1940 -Medical Services			495	495	495	495							
1950 -Professional Services from Other Colorado Departments													
1960 -Professional IT Services													
2250 -Miscellaneous Rentals													
2255 -Rental of Meeting Rooms & Leased Space	1,900	4,500		10,100	8,450								
2510 -General Travel (Employee)	5	22	209	1,204	1,330								
2511 -Common Carrier Fares													
2512 -Meals (Employee)	40		65		26								
2513 -Mileage Reimbursement (Employee)	306	995	303	518	979	589							
2530 -General Travel													
2531 -Common Carrier Fares					417								
2532 -Meals													
2610 -Advertising Services		164		410	873								
2631 -Communication Services from Outside Sources		1,010	1,009	1,009	1,010								
2641 -ADP Services from Outside Sources	3,613	4,700	6,186	6,005									
2680 -Printing & Reproduction Services - Vendors	37	8	12	212		182							
3113 -Clothing & Uniforms													
3118 -Food & Food Services Supplies		240	17	316	28								
2820 -Monitoring Services		156	156	156	388								
3110 -Identification & Safety Supplies				47	147								
3120 -Books / Periodicals / Subscriptions													
3121 -Case Jackets	357	458		110	345								
3123 -Postage	4	7	198	8		66							
3140 -Noncapitalized IT Software		871	161	4,344	122								
3145 -Noncapitalized IT Purchases		517	367		368	443							
4100 -Other Operating Expenditures													
4140 -Dues & Memberships													
4170 -Miscellaneous Fees & Fines		10	20										
4220 -Registration Fees		45	150	620	315								
4256 -Other Employee Benefits - Eco Pass		260											
<b>Total</b>	<b>\$ 6,678</b>	<b>\$ 14,928</b>	<b>\$ 9,816</b>	<b>\$ 26,572</b>	<b>\$ 17,023</b>	<b>\$ 17,023</b>	<b>\$ 17,023</b>	<b>\$ 17,023</b>	<b>\$ 17,023</b>	<b>\$ 17,023</b>	<b>\$ 17,023</b>	<b>\$ 17,023</b>	<b>\$ 17,023</b>

**Total - YTD + Projections Program Line**      \$ 105,108    \$ 89,120    \$ 95,807    \$ 114,348    \$ 91,261    \$ 106,345    \$ 117,137    \$ 117,137    \$ 117,137    \$ 117,137    \$ 117,137    \$ 117,137    \$ 117,137    \$ 117,137

Over/(under) Program Line

**JUDICIAL DEPARTMENT**  
**FY 2024-25 JOINT BUDGET COMMITTEE HEARING AGENDA**

**Monday, December 18, 2023**

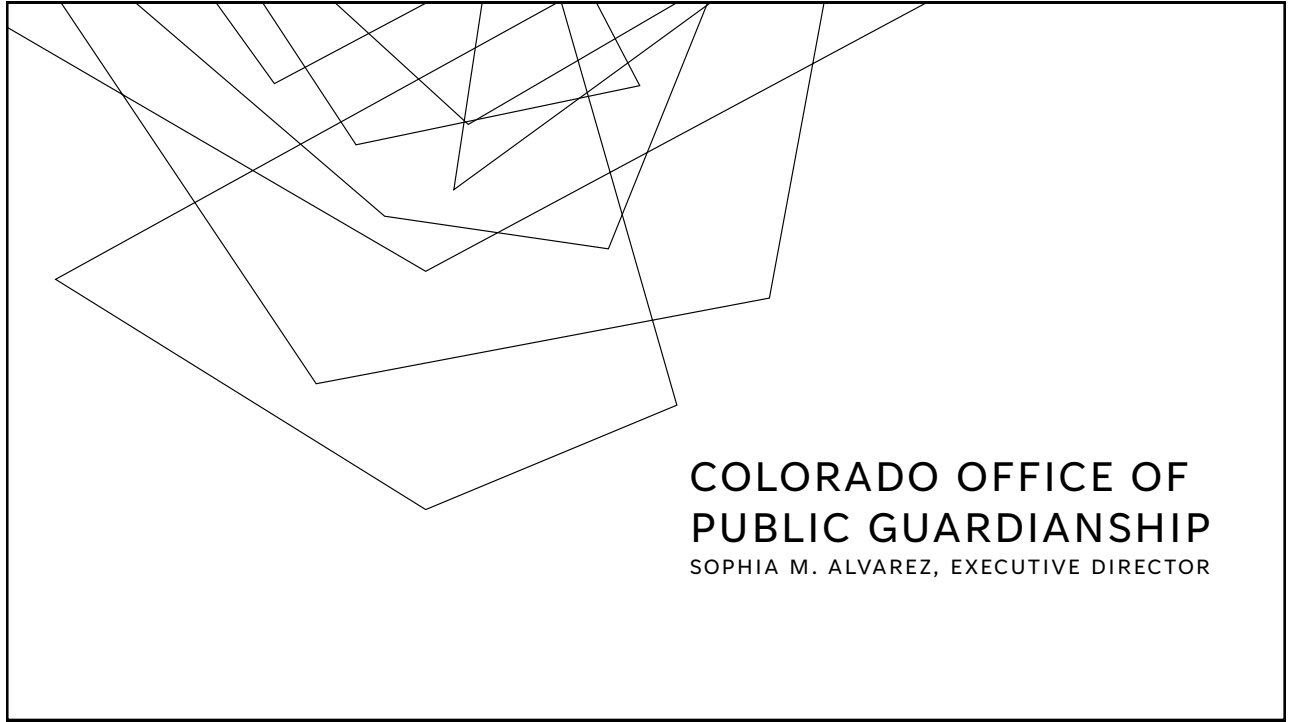
**2:15-2:30      Office of Public Guardianship (OPG)**

Main Presenters:

- Sophia M. Alvarez, Executive Director

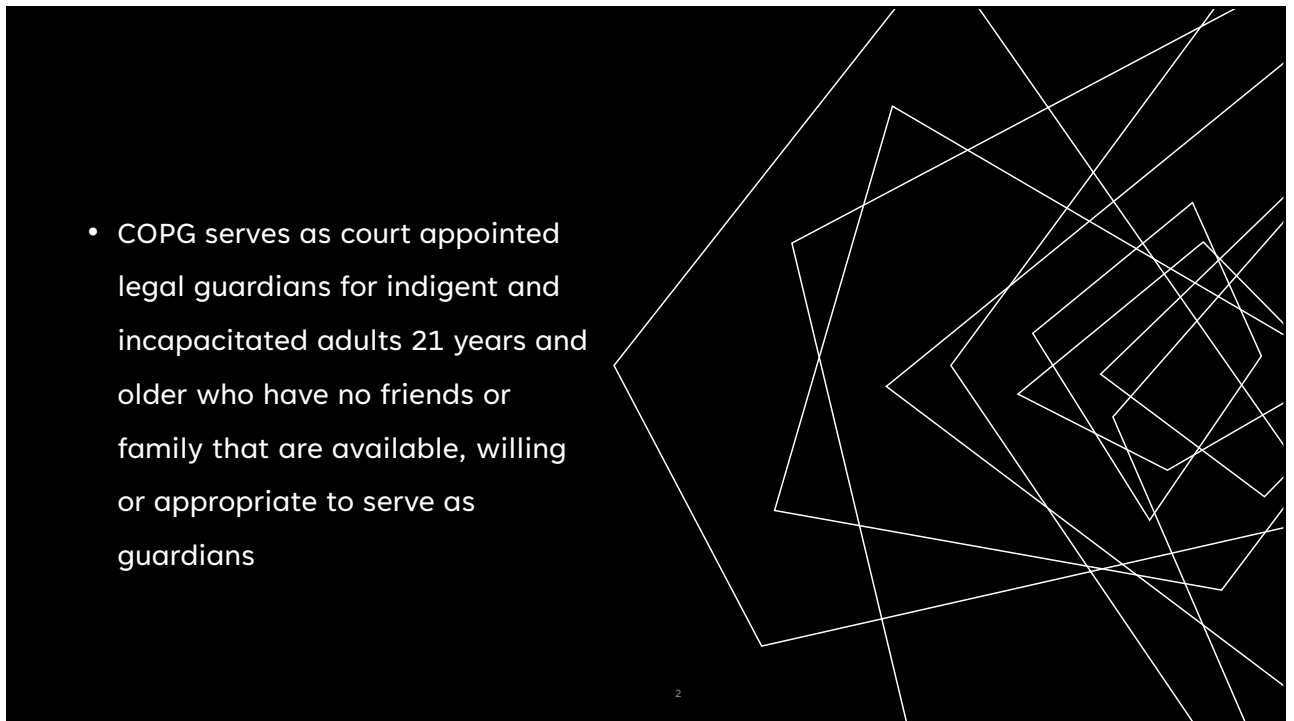
Topics:

- Introduction and Opening Comments: Pages 2 - 8
- Common Questions: Pages 6 - 12
- Requests: Pates 13 - 40; R-01 p17; R-02 p21



**COLORADO OFFICE OF  
PUBLIC GUARDIANSHIP**  
SOPHIA M. ALVAREZ, EXECUTIVE DIRECTOR

1



- COPG serves as court appointed legal guardians for indigent and incapacitated adults 21 years and older who have no friends or family that are available, willing or appropriate to serve as guardians

2

2

**FINAL REPORT TO THE LEGISLATURE**  
[HTTPS://COLORADO-OPG.ORG/](https://colorado-opg.org/)

**SB23-064**

**EXPANSION INTO THE 7<sup>TH</sup> JD**

**EXPANSION INTO THE 16<sup>TH</sup> JD**

3

**SB23-064, CONCERNING THE  
COPG**

- Signed May 2023
- COPG permanent independent agency under the Judicial Branch
- Statewide by December 31, 2023
- Expansion begins July 1, 2025

4

**COPG STAFFING**

**SERVING 2<sup>ND</sup>, 7<sup>TH</sup>, 16<sup>TH</sup>: 82 CLIENTS**  
 COUNTIES: DENVER, DELTA, GUNNISON, HINSDALE, MONTROSE, SAN MIGUEL, OURAY, BENT, CROWLEY, OTERO

<p><b>Administration</b></p> <ul style="list-style-type: none"> <li>• Director</li> <li>• Deputy Director</li> <li>• Staff Assistant</li> <li>• Case Management Aid</li> </ul>	<p><b>Guardians</b></p> <ul style="list-style-type: none"> <li>• 2<sup>nd</sup> JD: 2 filled, 4 Vacant {2 for other funding}</li> <li>• 7<sup>th</sup> JD: 1</li> <li>• 16<sup>th</sup> JD: 1</li> </ul>
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5

Most impactful services the COPG provides are assisting clients with:

**COPG SERVICES**

- *Establishing the appropriate level of housing/placement*
- *Securing needed and appropriate medical and health care*
- *Securing needed and appropriate mental health care*

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**HIGHLIGHTS OF COPG TOTAL 105 CLIENTS SERVED**

- 82 active guardianships
- 42 identified as female, 63 identified as male
- Client ages range from 20s to 90s
- Median age 63; 46% of clients over age 65
- Primary diagnoses: Alzheimer’s disease, dementia disorder, or other neurocognitive disorder (31%)
- Secondary diagnoses: Mental illness or psychiatric conditions (30%)
- 86% of clients have additional medical conditions, with 44% suffering from multiple medical conditions

6



## COPG BUDGET REQUESTS

- **Workforce Development Manager and Employee Wellness Pilot Program** - \$152,104 cash fund spending authority.
  - A current need for recruitment and retention and assist with FY2026 expansion
  - Recommendations #3 and #4 in 2022 Final Report to Legislature
- **Staff Attorney** - \$155,485 cash fund spending authority
  - A current need to address COPG client individual advocacy on a range of issues that can transpire at a moment's notice, including during overnight hours and weekends.
  - Recommendation #3 in 2022 Final Report to Legislature

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JUDICIAL DEPARTMENT – OFFICE OF PUBLIC GUARDIANSHIP  
FY 2024-25 JOINT BUDGET COMMITTEE HEARING

Monday, December 18, 2023

2:15 pm – 2:30 pm

COMMON QUESTIONS FOR DISCUSSION AT DEPARTMENT HEARINGS

Please describe one-time state and federal stimulus funds that have been allocated to the Department but are not expended as of September, 30, 2023, by bill, budget action, executive action, or other source that allocated funds. The description should include but is not limited to funds that originate from one-time or term-limited General Fund or federal funds originating from the American Rescue Plan Act (ARPA)/State and Local Fiscal Recovery Funds/Revenue Loss Restoration Cash Fund. Please describe the Department's plan to obligate or expend all allocated funds that originate from ARPA by December 2024. *Not applicable.*

Please further describe any budget requests that replace one-time General Fund or ARPA funded programs with ongoing appropriations, including the following information:

- a. Original fund source (General Fund, ARPA, other), amount, and FTE;
- b. Original program time frame;
- c. Original authorization (budget decision, legislation, other);
- d. Requested ongoing fund source, amount, and FTE; and
- e. Requested time frame (one-time extension or ongoing).

Please provide a description, calculation, and the assumptions for the fiscal impact of implementing compensation provisions of the Partnership Agreement, as well as a qualitative description of any changes to paid annual, medical, holiday or family leave as a result of the Agreement. Please describe any compensation and leave changes for employees exempt from the Agreement if applicable. *Not applicable.*

Provide a prioritized list of budget reductions the Department would propose if 10.0 percent General Fund appropriation reductions were required of every Department. *The COPG is currently funded by its CASH FUND only. This year's request is our first General Fund request for a total of \$307,589.*

## REQUESTS

*[Staff]* Please briefly describe each of the OPG request items, R1 and R2.

- Budget Request 1: Workforce Development Manager to create and maintain an Employee Wellness Pilot Project. This request was recommended in the COPG 2022 Final Report to the Legislature. Clients may experience a mental health or medical crisis at any time. Guardians are in the business of crisis management and parallel other public and private employees such as first responders and healthcare workers. Guardians are on-call 24/7 for their own clients during the week and alternate on-call weekends for all COPG clients. Guardians experience stress, secondary trauma and compassion fatigue. Fortunately, the COPG did not experience turnover until 2023. While it has always been clear that this position is stressful, this year has highlighted the immediate need to focus on employee wellness for recruitment and retention purposes.  
The Office also experienced difficulty in locating and hiring qualified individuals in the rural and frontier areas when expanding to the 7<sup>th</sup> and 16<sup>th</sup> Judicial Districts and we had to change our recruitment efforts. This position is a great deal of responsibility as well. Guardians must be trustworthy, consistent and reliable decision-makers. Fulfilling this request will enhance our readiness for intense expansion beginning July 1, 2025.
- Budget Request 2: Staff Attorney. A staff attorney has been needed since the inception of the Office to meet out statutory mandate in providing guardianship services. A staff attorney will address individual client advocacy on a range of post-guardianship issues that can transpire at a moment's notice, including during overnight hours and weekends. The staff attorney will also join the 24/7 weekly on-call duties with the Director and the Deputy Director, giving Administration some assistance stress, wellness and retention. There are many times that the Office has needed legal counsel to intervene on behalf of a client to prevent an unsafe discharge from a hospital or facility, or to intervene into a mental health case. Much to our frustration, facilities and providers regularly disregard the guardian's authority and despite following the chain of command or grievances, legal counsel is needed in order for guardians to fully act and provide services for our clients.

## FY 2024-25 JOINT BUDGET COMMITTEE COMMON HEARING QUESTIONS

### COMMON QUESTIONS FOR DISCUSSION AT DEPARTMENT HEARINGS

- 1 Please describe one-time state and federal stimulus funds that have been allocated to the Department but are not expended as of September, 30, 2023, by bill, budget action, executive action, or other source that allocated funds. The description should include but are not limited to funds that originate from one-time or term-limited General Fund or federal funds originating from the American Rescue Plan Act (ARPA)/State and Local Fiscal Recovery Funds/Revenue Loss Restoration Cash Fund. Please describe the Department's plan to obligate or expend all allocated funds that originate from ARPA by December 2024. *Not applicable.*

Please further describe any budget requests that replace one-time General Fund or ARPA funded programs with ongoing appropriations, including the following information:

- a. Original fund source (General Fund, ARPA, other), amount, and FTE;
  - b. Original program time frame;
  - c. Original authorization (budget decision, legislation, other);
  - d. Requested ongoing fund source, amount, and FTE; and
  - e. Requested time frame (one-time extension or ongoing).
- 2 Please provide a description, calculation, and the assumptions for the fiscal impact of implementing the provisions of the Partnership Agreement, including but not limited to changes in compensation, annual leave accrual, holiday pay, and paid family and medical leave. Please describe any compensation and leave changes for employees exempt from the Agreement if applicable. *Not applicable.*

### WRITTEN-ONLY COMMON QUESTIONS

*(Please retain numbering for consistency across departments)*

- 1 Please describe any budgetary or administrative impacts from the implementation of H.B. 21-1110 (Laws for Persons with Disabilities) as it pertains to IT accessibility. Please describe any budget requests that include components related to the implementation of IT accessibility requirements. *None at this time.*
- 2 Please identify rules the Department promulgated in FY 2022-23. With respect to these rules, has the Department done any cost-benefit analyses pursuant to Section 24-4-103 (2.5), C.R.S., regulatory analyses pursuant to Section 24-4-103 (4.5), C.R.S., or any other similar analysis? Has the Department conducted a cost-benefit analysis of Department rules as a whole? If so, please provide an overview of each analysis. *Not applicable.*

- 3 Provide a list of any legislation with a fiscal impact that the Department has: (a) not implemented, (b) partially implemented, or (c) missed statutory deadlines. Please specifically describe the implementation of ongoing funding established through legislation in the last two legislative sessions. Explain why the Department has not implemented, has only partially implemented, or has missed deadlines for the legislation on this list. Please explain any problems the Department is having implementing any legislation and any suggestions you have to modify legislation. *Not applicable.*
- 4 State revenues are projected to exceed the TABOR limit in each of the next two fiscal years. Thus, increases in cash fund revenues that are subject to TABOR will require an equivalent amount of General Fund for taxpayer refunds. Using the attached Excel Template A, please:
- List each source of non-tax revenue (e.g., fees, fines, parking revenue, etc.) collected by the Department that is subject to TABOR and that exceeds \$100,000 annually. Describe the nature of the revenue, what drives the amount collected each year, and the associated fund where these revenues are deposited. *Please see attached TABOR spreadsheet.*
  - For each source, list actual revenues collected in FY 2021-22, and projected revenue collections for FY 2022-23 and FY 2023-24. *Please see attached TABOR spreadsheet.*
  - List each decision item that the Department has submitted that, if approved, would increase revenues subject to TABOR collected in FY 2024-25. *None, there are no decision items that would increase the revenues of the COPG cash fund.*
- 5 Please use the attached Excel Template B to summarize the Department's funded and actual FTE for the last three fiscal years and identify the origin of changes in funded FTE. If positions have not been filled, please describe challenges in preventing positions from being filled and how vacancy savings are being utilized.
- We have six vacant positions. 2 positions we anticipate being funded by hospital partnerships and Olmstead Act Consent Decree funding. Until and unless those arrangements are finalized, they will not be filled. We have four 2<sup>nd</sup> Judicial District guardian positions vacant, and we have been consistently recruiting, interviewing and in some instances hiring. In some cases, new hires moved on explaining that this position was not a good fit after all and one hire experienced a death in the family and decided to not accept the position after all. As other state agencies, the COPG experienced hiring challenges such as a lack of qualified candidates applying for guardian positions in the 7<sup>th</sup> and 16<sup>th</sup> Judicial Districts, causing multiple rounds of extending posting for applications, offers to applicants being declined due to accepting another offer and due to the rate of compensation. We had to change our posting and hiring strategy, including a Meet & Greet in the 16<sup>th</sup> Judicial District. We were able to hire the 7<sup>th</sup> Judicial District guardian in December 2022 after the second round of posting. We were able to hire the 16<sup>th</sup> Judicial District guardian after the Meet & Greet and second round of posting. The guardian position is a stressful and difficult position that I liken to first responders, and we have experienced turnover in 2023. This position*

*also requires a trustworthy person as a guardian. Hence, the budget request for a Workforce Development Manager and Employee Wellness Pilot Program.*

Common Question 4: Data related to TABOR revenue-related common question

Non-Tax Revenues Collected by Department That Are Subject to TABOR (excluding sources that amount to less than \$100,000/year)				
		Revenues Collected Annually		
Revenue Source	Associated Cash Fund	FY 2022-23 Actual	FY 2023-24 Projection	FY 2024-25 Projection
Probate & Other Civil Filing Fees*	Office of Public Guardian Cash Fund	\$1,119,689	\$1,120,000	\$1,120,000
Reappropriated from DHS**	Office of Public Guardian Cash Fund	\$198,949	\$197,393	\$203,315
<b>TOTALS</b>		<b>\$1,318,638</b>	<b>\$1,317,393</b>	<b>\$1,323,315</b>
*A portion of certain civil filing fees are deposited into the fund. The fee amount is statutory and cannot be set by the COPG. The revenue will fluctuate up or down depending on civil filing volume.				
**This line accounts for reappropriated funds from DHS' Office of Behavioral Health, Integrated Health Services, Community Transition Services line item. This amount is based on salary costs for 2.0 FTE that the funding supports. The amount deposited in the OPG fund is based on current salaries and statewide common policy adjustments.				

Common Question 5: Data related to FTE-related common question

Part A: Please summarize the Department's funded and actual FTE for the last three fiscal years.

Trend Information: Funded FTE and Actual FTE				
Fiscal Year	Funded FTE*	Actual FTE	Actual Above/(Below) Funded FTE	% Difference
2020-21	6.0	6.0	0.0	0.0%
2021-22	7.0	7.0	0.0	0.0%
2022-23	14.0	9.0	(5.0)	-35.7%
FTE Change over 3 years	8.0			
% Change over 3 years	133%			

\* "Funded FTE" equals the number of full time equivalent positions specified in the annual Long Bill or in appropriation clauses in other acts. These FTE figures reflect the number of positions that correspond to the amounts appropriated.

Part B: Please identify the origin of changes in funded FTE for FY 2022-23, including the number of new positions the Department has been able to fill.

FY 2022-23: Status of New Funded FTE				
Fiscal Year	Funded FTE	Actual FTE	Actual Above/(Below) Funded FTE	% Difference
<b>TOTAL BASE: 2021-22</b>	<b>7.0</b>	<b>7.0</b>	<b>0.0</b>	<b>0%</b>
<i>Decision Items:</i>				
OPG R1/BA1 Staff Request	7.0	4.0	(3.0)	-43%
<i>Bills:</i>				
N/A	0.0	0.0	0.0	0%
<i>FTE changes unrelated to decision items or bills -</i>				
N/A	0.0	0.0	0.0	0%
<b>TOTAL: 2022-23</b>	<b>14.0</b>	<b>11.0</b>	<b>(3.0)</b>	<b>-21%</b>



# Colorado Office of Public Guardianship

## FY 2025 Budget Request



Sophia M. Alvarez,  
Director of the Office of Public Guardianship



**OFFICE OF PUBLIC GUARDIANSHIP - BUDGET REQUEST  
FISCAL YEAR 2025**

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## OFFICE OF PUBLIC GUARDIANSHIP

**Department Priority: R-01**

**FY25 “Workforce Development Mgr and Employee Wellness Program”**

Summary of Funding Change for FY 2024-25			
		Incremental Change	
	FY 2023-24 Appropriation	FY 2024-25 Request	FY 2025-26 Request
Total Funds	\$1,903,288	\$152,104	\$145,304
FTE	14.0	1.0	1.0
General Fund	\$1,903,288	\$152,104	\$145,304
Cash Funds	0	0	0
Reappropriated Funds	0	0	0
Federal Funds	0	0	0

### Summary of Request

The Colorado Office of Public Guardianship (COPG) requests \$152,104 in cash fund spending authority and 1.0 FTE in FY25, annualizing to \$145,304 in FY26. This request includes one full-time Workforce Development Manager and funding to create an employee wellness pilot program.

### Current Program

Currently, the COPG employs guardians, administrative staff and a case management aid. Guardians are on-call 24/7 for their clients and alternate weekends for all COPG clients. The Director and Deputy Director are on-call 24/7 for supervision and back up of the guardians and alternate weekly with each other. As evidenced in the COPG Final Report to the Legislature, the COPG intersects many systems while serving clients. Clients may experience a mental health or

medical crisis at any time. Guardians are in the business of crisis management and parallel other public and private employees such as first responders and healthcare workers. While there are tools available such as EAP, Administrative Leave, Flex Time schedules, etc. this usually requires shifting duties and responsibilities to other team members, which can often lead to more crisis and stress. The COPG felt the effects of guardian burnout and labor shortages throughout 2022 and 2023 with resignations and difficulty in hiring, especially in rural and frontier locations. Secondary trauma and compassion fatigue also impacts administrative staff as they provide daily support to guardians and the case management aid. The COPG has been unable to serve clients on the Hold list due to being short-staffed.

In addition to the day-to-day challenges that guardians face, COPG administrative staff needs a dedicated individual to enhance and specialize the COPG's standardized training program to ensure compliance with statutory, state, federal, regulatory, ethical, rules, standards, policies, and procedures. While focusing on the daily supervision and oversight of the guardians and client matters, it is difficult for the administrative staff to consistently identify, develop, create, and integrate specialized in-house training and modeling.

### ***Problem or Opportunity***

Due to the passage of SB23-064, the COPG will be expanding statewide into all 23 Judicial Districts with a multi-year rollout, beginning in FY26. The COPG is likely to add different levels of staffing beyond the current model and will require multiple levels of training to ensure compliance with all statutory and program regulations. Further, recruitment and retention will be critical as COPG will double in size by the time the expansion is complete by December 31, 2030, going from a total of 14.0 FTE to an estimated 28.0 FTE. Addressing employee wellbeing will be a focal point in COPG's strategic planning as research shows that employees in good health, have a better quality of life, increased work productivity and a greater likelihood of contributing to their communities. Seeking the resources for in-house training programs and employee wellness in FY25 will ensure that COPG will be in a better position to successfully implement SB23-064.

### ***Proposed Solution and Anticipated Outcomes***

COPG requests \$152,104 cash fund spending authority to build a statewide training program and create an employee wellness program to improve recruitment and retention. A portion of this funding will be used to hire a Workforce Development Manager. This position will be responsible for creating and maintaining a multi-level training program for COPG non-administrative employees. The Workforce Development Manager will incorporate outside community partners and programming, as needed. Ultimately, this funding will allow COPG to create and maintain its own statewide training programs and reduce the need for paying to send employees to third-party conferences and training.

In addition to creating a statewide training program, the Workforce Development Manager will be responsible for designing and maintaining an employee wellness pilot program. As the COPG begins expansion, it is imperative that it address employee recruitment and retention to ensure consistent and quality services to Coloradans.

### ***Assumptions and Calculations***

		<b>Workforce Develop. Mgr FY25 Total</b>	<b>Year 2 Total (FY26)</b>
<b>PERSONAL SERVICES</b>			
Number of FTE per class title		<b>1.00</b>	<b>1.00</b>
Monthly base salary		\$ -	\$ -
Number of months charged in FY23-24		<b>12</b>	<b>12</b>
Salary		\$ 86,916	\$ 86,916
PERA (Staff, GF)	<b>11.57%</b>	\$ 10,056	\$ 10,056
Medicare (Staff, GF)	<b>1.45%</b>	\$ 1,260	\$ 1,260
<b>Subtotal Base Salary/PERA/Medicare</b>		\$ 98,232	\$ 98,232
<b>SUBTOTAL PERSONAL SERVICES</b>		\$ 98,232	\$ 98,232
<b>FTE</b>		<b>1.0</b>	<b>1.0</b>
<b>OPERATING</b>			
Phone (staff)	\$ 450	\$ 450	\$ 450
Supplies (staff)	\$ 500	\$ 500	\$ 500
<b>SUBTOTAL OPERATING</b>		\$ 950	\$ 950
<b>CAPITAL OUTLAY</b>			
Office Furniture (staff)	\$ 5,000	\$ 5,000	
Computer/Software (staff)	\$ 2,200	\$ 2,200	\$ 400
<b>SUBTOTAL CAPITAL OUTLAY:</b>		\$ 7,200	\$ 400
<b>EMPLOYEE WELLNESS</b>			
Employee wellness pilot program costs		\$ 25,000	\$ 25,000
		\$ 25,000	\$ 25,000
<b>TOTAL REQUEST:</b>		<b>\$ 131,382</b>	<b>\$ 124,582</b>
<b>CENTRAL APPROPRIATIONS (non-add)</b>			
Health/Life/Dental	\$ 11,500	\$ 11,500	\$ 11,500
Short-Term Disability	0.16%	\$ 139	\$ 139
Family Medical Leave	0.45%	\$ 391	\$ 391
AED*	5.00%	\$ 4,346	\$ 4,346
SAED*	5.00%	\$ 4,346	\$ 4,346
<b>Central Appropriations Subtotal:</b>		\$ 20,722	\$ 20,722
<b>GRAND TOTAL ALL COSTS:</b>		<b>\$ 152,104</b>	<b>\$ 145,304</b>

FTE based on min of Human Resources Specialist H4G5 in Exec pay plan







## OFFICE OF PUBLIC GUARDIANSHIP

**Department Priority: R-02  
FY25 “Staff Attorney”**

Summary of Funding Change for FY 2024-25			
		Incremental Change	
	FY 2023-24 Appropriation	FY 2024-25 Request	FY 2025-26 Request
Total Funds	\$1,903,288	\$155,485	\$148,685
FTE	14.0	1.0	1.0
General Fund	\$1,903,288	\$155,485	\$148,685
Cash Funds	0	0	0
Reappropriated Funds	0	0	0
Federal Funds	0	0	0

### Summary of Request

The Office of Public Guardianship (COPG) requests \$155,485 in cash fund spending authority and 1.0 FTE in FY25, annualizing to \$148,685 in FY26. This request includes one full-time Staff Attorney.

### Current Program

COPG clients often require individual advocacy to preserve their rights related to a range of issues, including but not limited to housing/placement, medical, public benefits, mental health, criminal, social services, and family matters. These needs can transpire at a moment’s notice, including during overnight hours and weekends. As a state agency, the COPG is served by the Colorado Attorney General’s Office and has also contracted with local attorneys. However, this has not solved the need for legal urgency for overnight and weekend matters.

### ***Problem or Opportunity***

Having a staff attorney available to advocate for COPG client matters has been a need for the Office since its inception. The COPG is focused on providing a high level of guardianship services, which requires a Staff Attorney's advocacy on a myriad of guardianship and client issues and mental health law issues. The Staff attorney would also assist with the Director and Deputy Director 24/7 on-call duties for supervision and oversight of the guardians.

### ***Proposed Solution and Anticipated Outcomes***

COPG requests \$155,485 cash fund spending authority to hire a 1.0 Staff Attorney FTE. This position will be responsible for all aspects of legal consultation and analysis for all post guardianship appointment matters. The Staff Attorney will provide guidance regarding the administration of guardianships to the Director, Deputy Director, guardians, case management aid, staff assistant, and other staff as needed on topics including fiduciary responsibility, accounting, public benefits, probate claims, criminal matters, housing matters, mental health intervention matters, and other civil litigation on behalf of such COPG clients. The position requires significant time in a courtroom setting as part of the administration of guardianships for COPG clients and provides other opportunities for advocacy to medical, social work, and legal professionals.

### ***Assumptions and Calculations***

		Staff Attorney FY25 Total	Year 2 Total (FY26)
<b>PERSONAL SERVICES</b>			
Number of FTE per class title		1.00	1.00
Monthly base salary		\$ -	\$ -
Number of months charged in FY23-24		12	12
Salary		\$ 109,872	\$ 109,872
PERA (Staff, GF)	11.57%	\$ 12,712	\$ 12,712
Medicare (Staff, GF)	1.45%	\$ 1,593	\$ 1,593
<b>Subtotal Base Salary/PERA/Medicare</b>		\$ 124,177	\$ 124,177
<b>SUBTOTAL PERSONAL SERVICES</b>		\$ 124,177	\$ 124,177
<b>FTE</b>		<b>1.0</b>	<b>1.0</b>
<b>OPERATING</b>			
Phone (staff)	\$ 450	\$ 450	\$ 450
Supplies (staff)	\$ 500	\$ 500	\$ 500
<b>SUBTOTAL OPERATING</b>		\$ 950	\$ 950
<b>CAPITAL OUTLAY</b>			
Office Furniture (staff)	\$ 5,000	\$ 5,000	
Computer/Software (staff)	\$ 2,200	\$ 2,200	\$ 400
<b>SUBTOTAL CAPITAL OUTLAY:</b>		\$ 7,200	\$ 400
<b>SUBTOTAL REQUEST</b>		<b>\$ 132,327</b>	<b>\$ 125,527</b>
<b>CENTRAL APPROPRIATIONS</b>			
Health/Life/Dental	\$ 11,500	\$ 11,500	\$ 11,500
Short-Term Disability	0.16%	\$ 176	\$ 176
Family Medical Leave	0.45%	\$ 494	\$ 494
AED*	5.00%	\$ 5,494	\$ 5,494
SAED*	5.00%	\$ 5,494	\$ 5,494
<b>Central Appropriations Subtotal:</b>		\$ 23,157	\$ 23,157
<b>GRAND TOTAL ALL COSTS:</b>		<b>\$ 155,485</b>	<b>\$ 148,685</b>

\*Postion based on midpoint of Judicial job class R43020



**FY 2024-25 Summary of Change Requests**

**Schedule 10**

Request Name	Interagency Review	Requires Legislation	Total Funds	FTE	General Fund	Cash Funds	Reappropriation	Fed
<b>Non-Prioritized Request</b>								
None	N/A	N/A	\$0	0.0	\$0	\$0	\$0	\$0
<b>Prioritized Request</b>								
OPG R-01 Workforce Development FTE & Employee Wellness	No Other Agency Impact	No	\$152,104	1.0	\$0	\$152,104	\$0	\$0
OPG R-02 Staff Attorney FTE	No Other Agency Impact	No	\$155,485	1.0	\$0	\$155,485	\$0	\$0
<b>Subtotal Prioritized Request</b>			<b>\$307,589</b>	<b>2.0</b>	<b>\$0</b>	<b>\$307,589</b>	<b>\$0</b>	<b>\$0</b>
<b>Total for Office of Public Guardianship</b>			<b>\$307,589</b>	<b>2.0</b>	<b>\$0</b>	<b>\$307,589</b>	<b>\$0</b>	<b>\$0</b>

**FY 2024-25 Budget Request - 11. Office of Public Guardianship**
**Schedule 02**

	Total Funds	FTE	General Fund	Cash Funds	Reappr	Federal
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**FY 2021-22 Actual Expenditures**

11. Office of Public Guardianship	\$780,315	7.0	\$0	\$690,631	\$89,684	\$0
<b>Total For: FY 2021-22 Actual Expenditures</b>	<b>\$780,315</b>	<b>7.0</b>	<b>\$0</b>	<b>\$690,631</b>	<b>\$89,684</b>	<b>\$0</b>

**FY 2022-23 Actual Expenditures**

11. Office of Public Guardianship	\$1,243,327	14.0	\$0	\$1,044,517	\$198,810	\$0
<b>Total For: FY 2021-22 Actual Expenditures</b>	<b>\$1,243,327</b>	<b>14.0</b>	<b>\$0</b>	<b>\$1,044,517</b>	<b>\$198,810</b>	<b>\$0</b>

**2023-24 Initial Appropriation**

11. Office of Public Guardianship	\$1,903,288	14.0	\$0	\$1,705,895	\$197,393	\$0
<b>Total For: FY 2023-24 Actual Expenditures</b>	<b>\$1,903,288</b>	<b>14.0</b>	<b>\$0</b>	<b>\$1,705,895</b>	<b>\$197,393</b>	<b>\$0</b>

**FY 2024-25 Governor's Budget Request**

11. Office of Public Guardianship	\$2,275,232	16.0	\$0	\$2,055,742	\$219,490	\$0
<b>Total For: FY 2024-25 Elected Official Request</b>	<b>\$2,275,232</b>	<b>16.0</b>	<b>\$0</b>	<b>\$2,055,742</b>	<b>\$219,490</b>	<b>\$0</b>

<b>11. Office of Public Guardianship</b>						<b>Schedule 3A</b>	
<b>FY 2021-22 Actual Expenditures</b>	<b>Total Funds</b>	<b>FTE</b>	<b>General Fund</b>	<b>Cash Funds</b>	<b>Reappropriated Funds</b>	<b>Federal Funds</b>	
<b>11. Office of Public Guardianship, Program Costs</b>							
SB 21-205 Long Appropriations Bill	\$841,253	7.0	\$0	\$751,569	\$89,684	\$0	
<b>FY 2021-22 Final Appropriation</b>	<b>\$841,253</b>	<b>7.0</b>	<b>\$0</b>	<b>\$751,569</b>	<b>\$89,684</b>	<b>\$0</b>	
<b>FY 2021-22 Final Expenditure Authority</b>	<b>\$841,253</b>	<b>7.0</b>	<b>\$0</b>	<b>\$751,569</b>	<b>\$89,684</b>	<b>\$0</b>	
<b>FY 2021-22 Actual Expenditures</b>	<b>\$780,315</b>	<b>7.0</b>	<b>\$0</b>	<b>\$690,631</b>	<b>\$89,684</b>	<b>\$0</b>	
<b>FY 2021-22 Reversion (Overexpenditure)</b>	<b>\$60,938</b>	<b>0.0</b>	<b>\$0</b>	<b>\$60,938</b>	<b>\$0</b>	<b>\$0</b>	
<b>FY 2021-22 Personal Services Allocation</b>	<b>\$710,648</b>	<b>7.0</b>	<b>\$0</b>	<b>\$620,964</b>	<b>\$89,684</b>	<b>\$0</b>	
<b>FY 2021-22 Total All Other Operating Allocation</b>	<b>\$69,668</b>	<b>0.0</b>	<b>\$0</b>	<b>\$69,668</b>	<b>\$0</b>	<b>\$0</b>	

<b>11. Office of Public Guardianship</b>					<b>Schedule 3B</b>	
<b>FY 2022-23 Actual Expenditures</b>	<b>Total Funds</b>	<b>FTE</b>	<b>General Fund</b>	<b>Cash Funds</b>	<b>Reappropriated Funds</b>	<b>Federal Funds</b>
<b>11. Office of Public Guardianship, Program Costs</b>						
HB22-1329 Long Bill	\$1,720,586	14.0	\$0	\$1,521,637	\$198,949	\$0
HB22-1133 Family And Medical Leave Insurance Fund	(\$1,100)	0.0	\$0	(\$961)	(\$139)	\$0
<b>FY 2022-23 Final Appropriation</b>	<b>\$1,719,486</b>	<b>14.0</b>	<b>\$0</b>	<b>\$1,520,676</b>	<b>\$198,810</b>	<b>\$0</b>
<b>FY 2022-23 Final Expenditure Authority</b>	<b>\$1,719,486</b>	<b>14.0</b>	<b>\$0</b>	<b>\$1,520,676</b>	<b>\$198,810</b>	<b>\$0</b>
<b>FY 2022-23 Actual Expenditures</b>	<b>\$1,243,327</b>	<b>14.0</b>	<b>\$0</b>	<b>\$1,044,517</b>	<b>\$198,810</b>	<b>\$0</b>
<b>FY 2022-23 Reversion (Overexpenditure)</b>	<b>\$476,159</b>	<b>0.0</b>	<b>\$0</b>	<b>\$476,159</b>	<b>\$0</b>	<b>\$0</b>
<b><i>FY 2022-23 Personal Services Allocation</i></b>	<b><i>\$1,061,024</i></b>	<b><i>14.0</i></b>	<b><i>\$0</i></b>	<b><i>\$862,214</i></b>	<b><i>\$198,810</i></b>	<b><i>\$0</i></b>
<b><i>FY 2022-23 Total All Other Operating Allocation</i></b>	<b><i>\$182,302</i></b>	<b><i>0.0</i></b>	<b><i>\$0</i></b>	<b><i>\$182,302</i></b>	<b><i>\$0</i></b>	<b><i>\$0</i></b>



11. Office of Public Guardianship					Schedule 3C	
	Total Funds	FTE	General Fund	Cash Funds	Reappropriated Funds	Federal

**11. Office of Public Guardianship,  
Program Costs**

SB23-214 Long Bill	\$1,903,288	14.0	\$0	\$1,705,895	\$197,393	\$0
<b>FY 2023-24 Initial Appropriation</b>	<b>\$1,903,288</b>	<b>14.0</b>	<b>\$0</b>	<b>\$1,705,895</b>	<b>\$197,393</b>	<b>\$0</b>

<b>FY 2023-24 Personal Services Allocation</b>	<b>\$1,592,214</b>	<b>14.0</b>	<b>\$0</b>	<b>\$1,394,821</b>	<b>\$197,393</b>	<b>\$0</b>
<b>FY 2023-24 Total All Other Operating Allocation</b>	<b>\$311,074</b>	<b>0.0</b>	<b>\$0</b>	<b>\$311,074</b>	<b>\$0</b>	<b>\$0</b>

11. Office of Public Guardianship						Schedule 3D	
FY 2024-25 Budget Request	Total Funds	FTE	General Fund	Cash Funds	Reappropriated Funds	Federal Funds	

## 11. Office of Public Guardianship

### Office of Public Guardianship

<b>FY 2024-25 Starting Base</b>	<b>\$1,903,288</b>	<b>14.0</b>	<b>\$0</b>	<b>\$1,705,895</b>	<b>\$197,393</b>	<b>\$0</b>
OPG TA-02 Statewide Total Compensation Request	\$45,828	0.0	\$0	\$23,731	\$22,097	\$0
<b>FY 2024-25 Base Request</b>	<b>\$1,949,116</b>	<b>14.0</b>	<b>\$0</b>	<b>\$1,729,626</b>	<b>\$219,490</b>	<b>\$0</b>
OPG R-01 Workforce Development FTE & Employee Wellness	\$152,104	1.0	\$0	\$152,104	\$0	\$0
OPG R-02 Staff Attorney FTE	\$155,485	1.0	\$0	\$155,485	\$0	\$0
<b>FY 2024-25 Elected Official Request</b>	<b>\$2,256,705</b>	<b>16.0</b>	<b>\$0</b>	<b>\$2,037,215</b>	<b>\$219,490</b>	<b>\$0</b>
<b>Personal Services Allocation</b>	<b>\$1,904,331</b>	<b>16.0</b>	<b>\$0</b>	<b>\$1,684,841</b>	<b>\$219,490</b>	<b>\$0</b>
<b>Total All Other Operating Allocation</b>	<b>\$352,374</b>	<b>0.0</b>	<b>\$0</b>	<b>\$352,374</b>	<b>\$0</b>	<b>\$0</b>

### Indirect Cost Assessment

<b>Starting Base</b>	<b>\$0</b>	<b>0.0</b>	<b>\$0</b>	<b>\$0</b>	<b>\$0</b>	<b>\$0</b>
OPG TA-01 Indirect Cost Assessment	\$18,527	0.0	\$0	\$18,527	\$0	\$0
<b>FY 2024-25 Base Request</b>	<b>\$18,527</b>	<b>0.0</b>	<b>\$0</b>	<b>\$18,527</b>	<b>\$0</b>	<b>\$0</b>
<b>FY 2024-25 Elected Official Request</b>	<b>\$18,527</b>	<b>0.0</b>	<b>\$0</b>	<b>\$18,527</b>	<b>\$0</b>	<b>\$0</b>
<b>Total All Other Operating Allocation</b>	<b>\$18,527</b>	<b>0.0</b>	<b>\$0</b>	<b>\$18,527</b>	<b>\$0</b>	<b>\$0</b>

<b>11. Office of Public Guardianship</b>						<b>Schedule 3D</b>	
<b>FY 2024-25 Budget Request</b>	<b>Total Funds</b>	<b>FTE</b>	<b>General Fund</b>	<b>Cash Funds</b>	<b>Reappropriated Funds</b>	<b>Federal Funds</b>	
<b>Total For: 11. Office of Public Guardianship - (A) Office of Public Guardianship -</b>							
<b>FY 2024-25 Starting Base</b>	<b>\$1,903,288</b>	<b>14.0</b>	<b>\$0</b>	<b>\$1,705,895</b>	<b>\$197,393</b>	<b>\$0</b>	
OPG TA-01 Indirect Cost Assessment	\$18,527	0.0	\$0	\$18,527	\$0	\$0	
OPG TA-02 Statewide Total Compensation Request	\$45,828	0.0	\$0	\$23,731	\$22,097	\$0	
<b>FY 2024-25 Base Request</b>	<b>\$1,967,643</b>	<b>14.0</b>	<b>\$0</b>	<b>\$1,748,153</b>	<b>\$219,490</b>	<b>\$0</b>	
OPG R-01 Workforce Development FTE & Employee Wellness	\$152,104	1.0	\$0	\$152,104	\$0	\$0	
OPG R-02 Staff Attorney FTE	\$155,485	1.0	\$0	\$155,485	\$0	\$0	
<b>FY 2024-25 Elected Official Request</b>	<b>\$2,275,232</b>	<b>16.0</b>	<b>\$0</b>	<b>\$2,055,742</b>	<b>\$219,490</b>	<b>\$0</b>	
<b>Personal Services Allocation</b>	<b>\$1,904,331</b>	<b>16.0</b>	<b>\$0</b>	<b>\$1,684,841</b>	<b>\$219,490</b>	<b>\$0</b>	
<b>Total All Other Operating Allocation</b>	<b>\$370,901</b>	<b>0.0</b>	<b>\$0</b>	<b>\$370,901</b>	<b>\$0</b>	<b>\$0</b>	

## Schedule 14B

Line Item	Object Code	Detail	FY 2021-22		FY 2022-23		FY 2023-24		FY 2024-25	
			Actual Expenditure	FTE	Actual Expenditure	FTE	Appropriation Budget	FTE	Gov Request Budget	FTE

## 11. Office of Public Guardianship,

**Personal Services - Employees****Object Group    Object Group Name**

FTE	Total FTE		7.0	14.0	14.0	16.0
1000	Total Employee Wages and Benefits	\$659,433	\$969,627	\$1,592,214	\$1,904,331	

**Object Code    Object Name**

1000	Personal Services	\$0	\$0	\$1,592,214	\$1,904,331
1110	Regular Full-Time Wages	\$3,409	\$3,064	\$0	\$0
1210	Contractual Employee Regular Full-Time Wages	\$469,435	\$674,135	\$0	\$0
1240	Contractual Employee Annual Leave Payments	\$0	\$6,258	\$0	\$0
1360	Non-Base Building Performance Pay	\$10,500	\$15,000	\$0	\$0
1510	Dental Insurance	\$2,740	\$5,156	\$0	\$0
1511	Health Insurance	\$64,154	\$104,025	\$0	\$0
1512	Life Insurance	\$690	\$1,022	\$0	\$0
1513	Short-Term Disability	\$709	\$997	\$0	\$0
1514	Statutory Personnel & Payroll System Vision Insurance	\$0	\$507	\$0	\$0
1520	FICA-Medicare Contribution	\$6,870	\$9,881	\$0	\$0
1522	PERA	\$52,685	\$79,999	\$0	\$0
1524	PERA - AED	\$24,001	\$34,672	\$0	\$0
1525	PERA - SAED	\$24,001	\$34,672	\$0	\$0
1630	Contractual Employee Other Employee Benefits	\$240	\$240	\$0	\$0

## Schedule 14B

Line Item	Object Code	Detail	FY 2021-22		FY 2022-23		FY 2023-24		FY 2024-25	
			Actual Expenditure	FTE	Actual Expenditure	FTE	Appropriation Budget	FTE	Gov Request Budget	FTE

**Personal Services - Contract Services**

Object Group	Object Group Name								
1100	Total Contract Services (Purchased Personal Services)	\$51,215		\$91,397		\$0	\$0		
<b>Object Code    Object Name</b>									
1920	Personal Services - Professional	\$14,100		\$62,385		\$0	\$0		
1935	Personal Services - Legal Services	\$1,190		\$1,339		\$0	\$0		
1950	Personal Services - Other State Departments	\$35		\$0		\$0	\$0		
1960	Personal Services - Information Technology	\$35,890		\$27,673		\$0	\$0		
<b>Subtotal All Personal Services</b>		<b>\$710,648</b>	<b>7.0</b>	<b>\$1,061,024</b>	<b>14.0</b>	<b>\$1,592,214</b>	<b>14.0</b>	<b>\$1,904,331</b>	<b>16.0</b>

**All Other Operating Expenditures**

Object Group	Object Group Name						
2000	Total Operating Expenses	\$62,821		\$155,537		\$311,074	\$352,374
3000	Total Travel Expenses	\$6,847		\$12,384		\$0	\$0
7000	Total Transfers	\$0		\$14,382		\$0	\$0
<b>Object Code    Object Name</b>							
2000	Operating Expense	\$0		\$0		\$311,074	\$352,374
2250	Miscellaneous Rentals	\$162		\$0		\$0	\$0
2255	Rental of Buildings	\$22,002		\$24,829		\$0	\$0

## Schedule 14B

Line Item	Object Code Detail	FY 2021-22		FY 2022-23		FY 2023-24		FY 2024-25	
		Actual Expenditure	FTE	Actual Expenditure	FTE	Appropriation Budget	FTE	Gov Request Budget	FTE
2510	In-State Travel	\$425		\$3,359		\$0		\$0	
2511	In-State Common Carrier Fares	\$110		\$0		\$0		\$0	
2512	In-State Personal Travel Per Diem	\$149		\$351		\$0		\$0	
2513	In-State Personal Vehicle Reimbursement	\$4,709		\$7,578		\$0		\$0	
2530	Out-Of-State Travel	\$1,022		\$747		\$0		\$0	
2531	Out-Of-State Common Carrier Fares	\$432		\$221		\$0		\$0	
2532	Out-Of-State Personal Travel Per Diem	\$0		\$127		\$0		\$0	
2610	Advertising And Marketing	\$0		\$3,308		\$0		\$0	
2631	Communication Charges - Office Of Information Technology	\$6,142		\$10,667		\$0		\$0	
2641	Other Automated Data Processing Billings-Purchased Services	\$0		\$47,668		\$0		\$0	
2680	Printing And Reproduction Services	\$146		\$17,117		\$0		\$0	
2820	Purchased Services	\$900		\$6,811		\$0		\$0	
3110	Supplies & Materials	\$121		\$166		\$0		\$0	
3113	Clothing and Uniform Allowance	\$36		\$0		\$0		\$0	
3118	Food and Food Service Supplies	\$112		\$1,244		\$0		\$0	
3120	Books/Periodicals/Subscriptions	\$0		\$35		\$0		\$0	
3121	Office Supplies	\$3,806		\$4,484		\$0		\$0	
3123	Postage	\$814		\$364		\$0		\$0	
3140	Noncapitalizable Information Technology	\$3,224		\$9,098		\$0		\$0	
3145	Software Subscription	\$21,798		\$23,411		\$0		\$0	
4100	Other Operating Expenses	\$0		\$173		\$0		\$0	
4140	Dues And Memberships	\$1,170		\$3,615		\$0		\$0	
4170	Miscellaneous Fees And Fines	\$573		\$221		\$0		\$0	

Schedule 14B

Line Item	Object Code	Detail	FY 2021-22		FY 2022-23		FY 2023-24		FY 2024-25	
			Actual Expenditure	FTE	Actual Expenditure	FTE	Appropriation Budget	FTE	Gov Request Budget	FTE
4220		Registration Fees	\$1,813		\$2,327		\$0		\$0	
7200		Transfers Out For Indirect Costs	\$0		\$14,382		\$0		\$0	
<b>Subtotal All Other Operating</b>			<b>\$69,668</b>		<b>\$182,302</b>		<b>\$311,074</b>		<b>\$352,374</b>	
<b>Total Line Item Expenditures</b>			<b>\$780,315</b>	<b>7.0</b>	<b>\$1,243,327</b>	<b>14.0</b>	<b>\$1,903,288</b>	<b>14.0</b>	<b>\$2,256,705</b>	<b>16.0</b>

Indirect Cost Assessment - 11. Office of Public Guardianship, (A) Office of Public Guardianship,

**Personal Services - Employees**

**Object Group Object Group Name**

FTE	Total FTE		0.0		0.0		0.0		0.0
1000	Total Employee Wages and Benefits		\$0		\$0		\$0		\$0

**Object Code Object Name**

**Personal Services - Contract Services**

**Object Group Object Group Name**

**Object Code Object Name**

<b>Subtotal All Personal Services</b>			<b>\$0</b>	<b>0.0</b>	<b>\$0</b>	<b>0.0</b>	<b>\$0</b>	<b>0.0</b>	<b>\$0</b>	<b>0.0</b>
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**All Other Operating Expenditures**

**Object Group Object Group Name**

2000	Total Operating Expenses		\$0		\$0		\$0		\$18,527
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**Object Code Object Name**

2000	Operating Expense		\$0		\$0		\$0		\$18,527
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<b>Subtotal All Other Operating</b>			<b>\$0</b>		<b>\$0</b>		<b>\$0</b>		<b>\$18,527</b>
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<b>Total Line Item Expenditures</b>			<b>\$0</b>	<b>0.0</b>	<b>\$0</b>	<b>0.0</b>	<b>\$0</b>	<b>0.0</b>	<b>\$18,527</b>	<b>0.0</b>
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<b>FY 2024-25 Budget Request Office of Public Guardianship</b>	<b>Schedule 06</b>			
	Total Funds	FTE	General Fund	Cash Funds Reapprop.

**FY 2021-22 Special Bill Line Item Appropriations (Excludes Reg Supplemental Bills & LB Appr.)**

None

**FY 2022-23 Special Bill Line Item Appropriations (Excludes Long Bill Appropriations)**

**HB22-1133 Family And Medical Leave Insurance Fund**

11. Office of Public Guardianship	(1,100)	-	-	(\$961)	(\$139)
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<b>Total -- HB22-1133 Family And Medical Leave Insurance Fund</b>	<b>(1,100)</b>	<b>-</b>	<b>-</b>	<b>(\$961)</b>	<b>(\$139)</b>
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**FY 2023-24 Special Bill Line Item Appropriations (Excludes Reg Supplemental Bills & LB Appr.)**

None



Salary Pots Request Template

	TOTAL FUNDS/FTE FY 2024-25	GENERAL FUND	CASH FUNDS	REAPPROPRIATED FUNDS	FEDERAL FUNDS
<b>FUND SPLITS - From Position-by-Position Tab</b>					
<b>I. Continuation Salary Base</b>					
Sum of Filled FTE as of July 27, 2023	14.00	0.000%	86.746%	13.254%	0.0000%
Salary X 12	\$991,769	\$0	\$860,320	\$131,449	\$0
PERA (Standard, Trooper, and Judicial Rates) at FY 2024-25 PERA Rates	\$114,747	\$0	\$99,538	\$15,209	\$0
Medicare @ 1.45%	\$14,381	\$0	\$12,475	\$1,906	\$0
Subtotal Continuation Salary Base =	\$1,120,897	\$0	\$972,333	\$148,564	\$0
<b>II. Salary Survey Adjustments</b>					
System Maintenance Studies	\$0	\$0	\$0	\$0	\$0
Across the Board - Base Adjustment	\$29,752	\$0	\$25,809	\$3,943	\$0
Across the Board - Non-Base Adjustment	\$0	\$0	\$0	\$0	\$0
Movement to Statewide Minimum Wage - Base Adjustment	\$0	\$0	\$0	\$0	\$0
Step Increase - Base Adjustment	\$0	\$0	\$0	\$0	\$0
<b>Subtotal - Salary Survey Adjustments</b>	<b>\$29,752</b>	<b>\$0</b>	<b>\$25,809</b>	<b>\$3,943</b>	<b>\$0</b>
PERA (Standard, Trooper, and Judicial Rates) at FY 2024-25 PERA Rates	\$ 3,442.00	\$0	\$2,986	\$456	\$0
Medicare @ 1.45%	\$ 431.00	\$0	\$374	\$57	\$0
Request Subtotal =	\$33,625	\$0	\$29,169	\$4,456	\$0
<b>III. Merit Pay Adjustments</b>					
Merit Pay - Base Adjustments	\$0	\$0	\$0	\$0	\$0
Merit Pay - Non-Base Adjustments	\$0	\$0	\$0	\$0	\$0
<b>Subtotal - Merit Pay Adjustments</b>	<b>\$0</b>	<b>\$0</b>	<b>\$0</b>	<b>\$0</b>	<b>\$0</b>
PERA (Standard, Trooper, and Judicial Rates) at FY 2024-25 PERA Rates	\$0	\$0	\$0	\$0	\$0
Medicare @ 1.45%	\$0	\$0	\$0	\$0	\$0
Request Subtotal =	\$0	\$0	\$0	\$0	\$0
<b>IV. Shift Differential</b>					
FY 2022-23 ACTUAL EXPENDITURES for All Occupational Groups	\$0	\$0	\$0	\$0	\$0
Total Actual and Adjustments @ 100%	\$0	\$0	\$0	\$0	\$0
PERA (Standard, Trooper, and Judicial Rates) at Current PERA Rates	\$0	\$0	\$0	\$0	\$0
Medicare @ 1.45%	\$0	\$0	\$0	\$0	\$0
Request Subtotal =	\$0	\$0	\$0	\$0	\$0
<b>V. Revised Salary Basis for Remaining Request Subtotals</b>					
Total Continuation Salary Base, Adjustments, Performance Pay & Shift	\$1,021,521	\$0	\$886,129	\$135,392	\$0
<b>VI. Amortization Equalization Disbursement (AED)</b>					
Revised Salary Basis * 5.00%	\$51,076	-	44,306	6,770	-
<b>VII. Supplemental AED (SAED)</b>					
Revised Salary Basis * 5.00%	\$51,076	-	44,306	6,770	-
<b>VIII. Short-term Disability</b>					
Revised Salary Basis * 0.15%	\$1,532	-	1,329	203	-
<b>IX. Health, Life, and Dental</b>					
Funding Request	\$217,676	-	199,310	18,366	-
<b>X. Paid Family and Medical Leave Insurance Program Premiums</b>					
	\$4,597	\$0	\$3,988	\$609	\$0
		0.0%	91.6%	8.4%	0.0%

	<b>FY 2023-24</b>				
<b>Common Policy Line Item</b>	<b>Appropriation</b>	<b>GF</b>	<b>CF</b>	<b>RF</b>	<b>FF</b>
Salary Survey	\$63,613		\$60,017	\$3,596	
Merit Pay	\$0				
PERA Direct Distribution	\$0				
Paid Family and Medical Leave Insurance Program	\$0				
Shift	\$0				
AED	\$57,402		\$54,158	\$3,244	
SAED	\$57,402		\$54,158	\$3,244	
Short-term Disability	\$0				
Health, Life and Dental	\$198,950		\$190,361	\$8,589	
<b>TOTAL</b>	<b>\$377,367</b>	<b>\$0</b>	<b>\$358,694</b>	<b>\$18,673</b>	<b>\$0</b>
	<b>FY 2024-25</b>				
<b>Common Policy Line Item</b>	<b>Total Request</b>	<b>GF</b>	<b>CF</b>	<b>RF</b>	<b>FF</b>
Salary Survey	\$33,625	\$0	\$29,169	\$4,456	\$0
Merit Pay	\$0	\$0	\$0	\$0	\$0
PERA Direct Distribution	\$0	\$0	\$0	\$0	\$0
Paid Family and Medical Leave Insurance Program	\$4,597	\$0	\$3,988	\$609	\$0
Shift	\$0	\$0	\$0	\$0	\$0
AED	\$51,076	\$0	\$44,306	\$6,770	\$0
SAED	\$51,076	\$0	\$44,306	\$6,770	\$0
Short-term Disability	\$1,532	\$0	\$1,329	\$203	\$0
Health, Life and Dental	\$217,676	\$0	\$199,310	\$18,366	\$0
<b>TOTAL</b>	<b>\$359,582</b>	<b>\$0</b>	<b>\$322,408</b>	<b>\$37,174</b>	<b>\$0</b>
	<b>FY 2024-25</b>				
<b>Common Policy Line Item</b>	<b>Incremental</b>	<b>GF</b>	<b>CF</b>	<b>RF</b>	<b>FF</b>
Salary Survey	\$33,625	\$0	\$29,169	\$4,456	\$0
Merit Pay	\$0	\$0	\$0	\$0	\$0
PERA Direct Distribution	\$0	\$0	\$0	\$0	\$0
Paid Family and Medical Leave Insurance Program	\$4,597	\$0	\$3,988	\$609	\$0
Shift	\$0	\$0	\$0	\$0	\$0
AED	-\$6,326	\$0	-\$9,852	\$3,526	\$0
SAED	-\$6,326	\$0	-\$9,852	\$3,526	\$0
Short-term Disability	\$1,532	\$0	\$1,329	\$203	\$0
Health, Life and Dental	\$18,726	\$0	\$8,949	\$9,777	\$0
<b>TOTAL</b>	<b>\$45,828</b>	<b>\$0</b>	<b>\$23,731</b>	<b>\$22,097</b>	<b>\$0</b>

<b>Office of Public Guardianship FTE Detail</b>				
<b>Object Code 1210</b>	<b>FY2021-22</b>		<b>FY2022-23</b>	
	<b>Total Funds</b>	<b>FTE</b>	<b>Total Funds</b>	<b>FTE</b>
<b>Position Detail:</b>				
Director (pos. # 87001)	118,450	1.0	122,004	1.0
Staff Assistant (pos. # 87002)	54,965	1.0	56,614	1.0
Public Guardian (pos. # 87003)	61,800	1.0	32,309	1.0
Public Guardian (pos. # 87004)	59,740	1.0	61,532	1.0
Public Guardian (pos. # 87005)	59,740	1.0	61,532	1.0
Public Guardian (pos. # 87006)	59,740	1.0	48,713	1.0
Public Guardian (pos. # 87007)	58,409	1.0	55,480	1.0
Deputy Director (pos. # 87008)	-	0.0	105,159	1.0
Public Guardian (pos. # 87009)	-	0.0	42,949	1.0
Public Guardian (pos. # 87010)	-	0.0	29,095	1.0
Case Management Aide (pos. # 87011)	-	0.0	36,857	1.0
Public Guardian (pos. # 87012)	-	0.0	26,501	1.0
Public Guardian	-	0.0	-	1.0
Public Guardian	-	0.0	-	1.0
<b>Total Full-Time/Part-Time Wages</b>	<b>472,844</b>	<b>7.0</b>	<b>678,744</b>	<b>14.0</b>

**Schedule 9  
Cash Fund Report**

**Office of Public Guardianship Fund #OPGF  
Section 13-98-108, C.R.S. (2024)**

HB17-1087 established the Office of Public Guardianship to provide guardianship services to indigent and incapacitated adults who have no family members or friends available to serve as guardian.

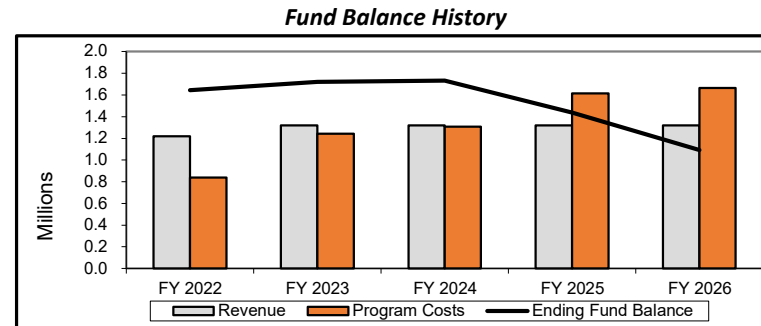
**Fund Information**

Revenue Sources: Fees charged in relation to probate case filings and other civil filings. Expenditures: The money in this fund is for OPG personnel and program related expenses.

Non-Fee Sources: Interest, gifts grants and donations. Expenditure Drivers: Personnel costs, case numbers.

Revenue Drivers: Number of probate and other civil filings. Long Bill Groups: Office of Public Guardianship, Program Costs

<b>Revenue and Expenditure Trend Information</b>					
	Actual FY 2022	Actual FY 2023	Projected FY 2024	Projected FY 2025	Projected FY 2026
<b><u>Beginning Fund Balance</u></b>	<u>1,261,765</u>	<u>1,645,409</u>	<u>1,719,768</u>	<u>1,731,914</u>	<u>1,436,471</u>
<b>Revenue</b>	1,220,753	1,318,638	1,318,638	1,318,638	1,318,638
<b>Program Costs</b>	837,109	1,244,279	1,306,493	1,614,082	1,662,504
<b>Ending Fund Balance</b>	<b>1,645,409</b>	<b>1,719,768</b>	<b>1,731,914</b>	<b>1,436,471</b>	<b>1,092,605</b>
<i>Fund Balance as a % of Expenditures</i>	<i>n/a</i>	<i>n/a</i>	<i>139.2%</i>	<i>109.9%</i>	<i>67.7%</i>
Reserve increase/(decrease)	383,644	74,360	12,146	(295,443)	(343,866)



Pursuant to Section 24-75-402 (2) (e) (V), C.R.S. (2024), fees do not include “any monies received from charges or assessments, the amount of which are established in law and over which the entity has no authority to change or are otherwise not determined by the entity.”