

**OPG Board meeting
Interim Director Report
09.18.2025**

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

- **Attachment 1.** COPG Monthly Budget Summary as of 09.17.2025.

I. Budget and Administrative Update.

- a. **COPG Monthly Budget.** Mike Henthorn, ASIA Deputy Director, Budget, and Finance, provided the monthly summary as of 09.17.2025. See **Attachment 1.**
- b. **Human Resources Update.**
 1. Please welcome Juanita Tidwell as the new the 16th judicial guardian. She started on September 2, 2025.
 2. Please welcome Jordan Sutherland as the new 2nd judicial Denver guardian. He started on September 8th, 2025.
 3. OPG is currently recruiting for the executive director, legal counsel, grant specialist, data scientist and community engagement coordinator positions.
 4. The workforce development manager position is vacant.
 5. Employer's Council is helping us with recruiting of the vacant positions.
- c. **Office space.** I viewed new spaces on 09.09.2025 and we are reviewing updated information from the broker to determine which Requests for Proposals (RFP) to send. We will likely send 2-3 RFPs for spaces in DTC area for about 4800-5500 square feet. We plan on negotiations to occur to establish final costs. Once we have established a final space, it can take up to 60 days for the lease to be approved.
- d. **Office of Administrative Services for Independent Agencies (OASIA).**
 1. OASIA is in the beginning phases of incorporating Bamboo HR, to streamline payroll, benefits, and HR systems (i.e., Time sheets and

Requests for Leave). OPG has provided OASIA with leave information to update their system. I have a couple meeting scheduled with OASIA on September 30th. One meeting is scheduled with Mike Henthorn to discuss the 2027 budget year. The due date for budget submission for the 2027 fiscal year is October 8th. Due to the recent state budget shortfalls, it is not recommended to request additional funding. I am working closely with the financial team to determine what is best for expansion. However, we hope to fill the grant position to help with funding for expansion.

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

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

- i. Ms. Villegas is a Physician Assistant with Longevity Health Plan, a specialized Medicare Advantage health plan serving people living in skilled nursing facilities. Next session is scheduled for 09.24.2025.
- ii. OPG staff are scheduled to complete two training courses with Employer's Council by September 30th for Workplace Respect and Harassment prevention.
- iii. We have the Colorado Long-Term Care Ombudsman Program training scheduled on October 15th, 2025.
- iv. New guardians continue to work on their standard new hire training modules.

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

- i. Update on number of registered users, referrals, accepted cases, etc. as of 09.18.2025:
 1. 66 Active guardianships
 2. 0 referrals pending in court proceedings
 3. 0 Complete referrals
 4. 3 Partial referral
 5. 7 Registered referring parties
 6. 37 clients passed away since COPG appointment
 7. 1 Terminated – Successor Guardian
 8. 1 Terminated – Client no longer meets the standard for

continuing guardianship

9. 39 Hold status (now includes OBH/CHMI-Ft. Logan/Pueblo referrals that are non-OBH/Momentum contract referrals)
10. The OBH/Momentum dedicated caseload for one guardian is 12 guardianships; 11 are active (1 client passed and is included in the total passed)
11. 7th Judicial District
 - a. Accepted – 1 Montrose
 - b. Declined Not incapacitated – 1 Delta
 - c. Withdrawn due to AIP death – 1 Delta
 - d. Declined No OPG Capacity – 1 Montrose
 - e. Withdrawn – 2 Montrose
12. Declined referrals – pre-Hold status
 1. 151 Denver declined referrals (some declined were prior to establishing the Hold status)
 - a. 10 - Family available to serve
 - b. 64 - Expired/Incomplete information
 - c. 13 – Not appropriate referral
 - d. 5 - Not adult
 - e. 4 – Not Indigent
 - f. 4 - Withdrawn by Ft. Logan
 - g. 12 - No OPG Capacity
 - h. 5 - Withdrawn Death
 - i. 11 - Withdrawn, not incapacitated
 - j. 21 - Withdrawn, other Guardian Available
non- Family member
 2. Texas inquiry - 1
 3. Nebraska referral - 1
 4. Alaska inquiries – 2
 5. Washington, D.C. inquiry - 1
 6. Colorado inquiries – 30
13. 128 streamlined referrals (Non-Denver County) – Declined
 1. Adams County – 8
 2. Alamosa County - 1
 3. Arapahoe County – 22
 4. Baca County – 1
 5. Boulder County – 9
 6. Broomfield County – 1

7. Crowley – 1
8. Delta County -2
9. Dolores County - 1
10. El Paso County – 27
11. Fremont - 1
12. Garfield County – 1
13. Gunnison County – 1
14. Huerfano County – 3
15. Jefferson County – 15
16. Lake County - 1
17. La Plata County – 2
18. Larimer County - 6
19. Las Animas County - 2
20. Mesa County – 1
21. Montrose County – 8 *
22. Otero County – 5
23. Pueblo County – 10
24. Weld County – 9

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

- III. **Stakeholder Outreach – Ongoing.** A list can be provided if requested.
 - a. 11.18.25: I’m presenting for the Long-Term Ombudsman program on OPG program status – rescheduled TBA.

Attachment #1- OPG Budget

Cash Fund-

OPG Projected FY26 Budget

Cash Fund Budget FY 2026						Cash Fund Balance						
	Budget	Appropriation	Budget	YTD Exp + Projection	Surplus / (Deficit)		FY23 Final	FY24 Final	FY25 Final	FY26 Projected	FY27 Projected	FY28 Projected
YTD	PS	JCIBDOPGF	\$1,752,457	\$ 1,228,966	\$523,491	Revenue	\$1,119,689	\$1,138,411	\$1,145,840	\$1,154,109	\$1,154,109	\$1,154,109
Operating includes Indirect Costs and Legal Services	All Oper	JCIBDOPGF	\$500,000	\$ 379,956	\$120,044	CDHS Transfer	\$198,949	\$197,393	\$224,513	\$232,162	\$237,966	\$243,915
Total remaining in program line	Total Appr		\$2,252,457	\$1,608,922	\$643,535	Total Revenue	\$1,318,638	\$1,335,804	\$1,370,353	\$1,386,271	\$1,392,075	\$1,398,024
						Total Exp	\$1,244,279	\$1,257,718	\$1,620,364	\$1,608,922	\$1,657,190	\$1,706,905
						Net Change	\$74,360	\$78,086	(\$250,011)	(\$222,651)	(\$265,115)	(\$308,881)
						Beg Fund Bal	\$1,645,409	\$1,719,769	\$1,797,854	\$1,547,844	\$1,325,193	\$1,060,078
						= Fund Balance	\$1,719,769	\$1,797,854	\$1,547,844	\$1,325,193	\$1,060,078	\$751,196

Position numbers reflect what is in the payroll system

CASH FUND SALARIES			Actual	Actual	Projection	Projection	Projection	Projection	Projection	Projection	Projection	Projection	Projection	Projection	Total Projected Annual Cost
Salaries	Pos. #	FTE	July	August	September	October	November	December	January	February	March	April	May	June	
Director	87001	1.00	\$ 11,384	\$ 11,384	\$ 11,384	\$ 11,384	\$ 11,384	\$ 11,384	\$ 11,384	\$ 11,384	\$ 11,384	\$ 11,384	\$ 11,384	\$ 11,384	\$ 136,604
Nicholas Piezonka - Staff Assistant	87002	1.00	\$ 5,552	\$ 5,552	\$ 5,552	\$ 5,552	\$ 5,552	\$ 5,552	\$ 5,552	\$ 5,552	\$ 5,552	\$ 5,552	\$ 5,552	\$ 5,552	\$ 66,625
VACANT - Public Guardian - Holding Vacant	87003	1.00	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
Public Guardian	87004	1.00	\$ 5,414	\$ 5,414	\$ 5,414	\$ 5,414	\$ 5,414	\$ 5,414	\$ 5,414	\$ 5,414	\$ 5,414	\$ 5,414	\$ 5,414	\$ 5,414	\$ 64,969
Public Guardian	87005	1.00	\$ 5,658	\$ 5,414	\$ 5,414	\$ 5,414	\$ 5,414	\$ 5,414	\$ 5,414	\$ 5,414	\$ 5,414	\$ 5,414	\$ 5,414	\$ 5,414	\$ 65,212
Public Guardian (CMHI)	87006	1.00	\$ 3,775	\$ 5,414	\$ 5,414	\$ 5,414	\$ 5,414	\$ 5,414	\$ 5,414	\$ 5,414	\$ 5,414	\$ 5,414	\$ 5,414	\$ 5,414	\$ 63,329
Public Guardian	87007	1.00	\$ 5,566	\$ 5,566	\$ 5,566	\$ 5,566	\$ 5,566	\$ 5,566	\$ 5,566	\$ 5,566	\$ 5,566	\$ 5,566	\$ 5,566	\$ 5,566	\$ 66,789
Deputy Director	87008	1.00	\$ 9,890	\$ 9,890	\$ 9,890	\$ 9,890	\$ 9,890	\$ 9,890	\$ 9,890	\$ 9,890	\$ 9,890	\$ 9,890	\$ 9,890	\$ 9,890	\$ 118,683
VACANT - Public Guardian	87009	1.00	\$ -	\$ -	\$ 5,282	\$ 5,282	\$ 5,282	\$ 5,282	\$ 5,282	\$ 5,282	\$ 5,282	\$ 5,282	\$ 5,282	\$ 5,282	\$ 52,820
Public Guardian (CMHI)	87010	1.00	\$ 5,414	\$ 5,414	\$ 5,414	\$ 5,414	\$ 5,414	\$ 5,414	\$ 5,414	\$ 5,414	\$ 5,414	\$ 5,414	\$ 5,414	\$ 5,414	\$ 64,969
Case Management Aide	87011	1.00	\$ 5,038	\$ 5,038	\$ 5,038	\$ 5,038	\$ 5,038	\$ 5,038	\$ 5,038	\$ 5,038	\$ 5,038	\$ 5,038	\$ 5,038	\$ 5,038	\$ 60,455
Public Guardian	87012	1.00	\$ 5,784	\$ 5,535	\$ 5,535	\$ 5,535	\$ 5,535	\$ 5,535	\$ 5,535	\$ 5,535	\$ 5,535	\$ 5,535	\$ 5,535	\$ 5,535	\$ 66,669
VACANT, 16th Judicial	87013	1.00	\$ 2,128	\$ -	\$ 5,438	\$ 5,438	\$ 5,438	\$ 5,438	\$ 5,438	\$ 5,438	\$ 5,438	\$ 5,438	\$ 5,438	\$ 5,438	\$ 56,508
Vacant, Case Management Aide	87XXX	1.00	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
Total		14.00	\$ 65,602	\$ 64,621	\$ 75,341	\$ 75,341	\$ 75,341	\$ 75,341	\$ 75,341	\$ 75,341	\$ 75,341	\$ 75,341	\$ 75,341	\$ 75,341	\$ 883,630
HLD			\$ 13,081	\$ 10,658	\$ 10,658	\$ 10,658	\$ 10,658	\$ 10,658	\$ 10,658	\$ 10,658	\$ 10,658	\$ 10,658	\$ 10,658	\$ 10,658	\$ 130,319
Pera			\$ 7,620	\$ 8,136	\$ 8,747	\$ 8,747	\$ 8,747	\$ 8,747	\$ 8,747	\$ 8,747	\$ 8,747	\$ 8,747	\$ 8,747	\$ 8,747	\$ 103,226
Medicare			\$ 916	\$ 966	\$ 1,092	\$ 1,092	\$ 1,092	\$ 1,092	\$ 1,092	\$ 1,092	\$ 1,092	\$ 1,092	\$ 1,092	\$ 1,092	\$ 12,827
FAMLI			\$ 295	\$ 315	\$ 339	\$ 339	\$ 339	\$ 339	\$ 339	\$ 339	\$ 339	\$ 339	\$ 339	\$ 339	\$ 4,001
STD			\$ 46	\$ 49	\$ 57	\$ 57	\$ 57	\$ 57	\$ 57	\$ 57	\$ 57	\$ 57	\$ 57	\$ 57	\$ 660
ULAED			\$ 6,552	\$ 6,995	\$ 8,075	\$ 8,075	\$ 8,075	\$ 8,075	\$ 8,075	\$ 8,075	\$ 8,075	\$ 8,075	\$ 8,075	\$ 8,075	\$ 94,302
CORE Adj			\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
Total CF Personal Services			\$ 94,112	\$ 91,760	\$ 104,309	\$104,309	\$ 104,309	\$104,309	\$ 104,309	\$104,309	\$ 104,309	\$ 104,309	\$ 104,309	\$ 104,309	\$1,228,966

CASH FUND OPERATING			Actual	Actual	Projection	Projection	Projection	Projection	Projection	Projection	Projection	Projection	Projection	Projection	Projection	YTD Total
Object Code	blank	blank1	July	August	September	October	November	December	January	February	March	April	May	June		
1920 - Other Professional Services			2,500	10,363	378	2,178	3,278	15,518	1,557	11,007	12,864	4,749	8,046	5,600	\$	78,038
1935 - Attorneys			17	-	-	-	-	-	-	-	-	3	32	-	\$	53
1960 - Professional IT Services			1,180	-	-	1,300	650	650	1,158	-	1,300	1,148	1,148	2,328	\$	10,860
2231 - IT Hardware & Software Maintenance & Repair Services						999	448	397	456	424	-	879	-	-	\$	3,603
2255 - Rental of Meeting Rooms & Leased Space			5,083	10,255	10,255	10,255	10,255	10,255	10,255	10,255	10,255	10,255	10,255	10,255	\$	117,892
2510 - General Travel (Employee)			982	-	76	2,285	542	1,431	(150)	-	532	999	-	528	\$	7,035
2511 - Common Carrier Fares			-	267	-	-	108	267	-	-	429	-	-	464	\$	1,535
2512 - Meals (Employee)			268	-	174	134	87	112	-	-	145	-	-	139	\$	1,051
2513 - Mileage Reimbursement (Employee)			1,453	521	49	625	1,348	723	1,348	909	1,580	437	1,076	1,062	\$	11,128
2530 - General Travel			-	-	-	-	1,895	-	48	-	-	-	-	-	\$	1,843
2531 - Common Carrier Fares			-	-	2,185	-	(572)	-	161	-	-	-	-	-	\$	1,774
2532 - Meals			-	-	-	-	-	-	36	-	-	-	-	-	\$	36
2533 - Mileage Reimbursement			-	-	-	-	-	-	56	-	-	-	-	-	\$	56
2610 - Advertising Services			901	-	1,711	745	254	344	300	-	499	1,970	-	2,981	\$	9,705
2631 - Communication Services from Outside Sources			1,256	-	958	1,079	1,041	1,041	1,043	-	921	2,378	-	1,444	\$	11,160
2641 - ADP Services from Outside Sources			2,500	-	-	15,490	6,295	5,135	-	9,775	2,815	5,000	2,500	2,500	\$	32,010
2680 - Printing & Reproduction Services - Vendors			12	-	-	245	-	80	168	-	291	206	-	302	\$	1,283
2820 - Monitoring Services			179	-	179	179	199	179	189	-	199	358	-	179	\$	1,840
3110 - Identification & Safety Supplies			-	-	102	-	-	102	-	-	80	140	240	36	\$	700
3118 - Food & Food Services Supplies			63	-	237	357	495	300	-	-	390	333	71	453	\$	2,699
3121 - Case Jackets			133	-	66	73	44	-	99	5,424	-	120	-	33	\$	5,991
3123 - Postage			-	-	-	51	45	135	24	-	70	2	30	247	\$	605
3140 - Noncapitalized IT Software			-	-	-	1,900	-	-	950	-	1,800	-	1,000	-	\$	5,650
3145 - Noncapitalized IT Purchases			160	-	-	1,007	4,128	508	14,072	-	1,015	300	-	-	\$	21,190
4100 - Other Operating Expenditures			-	-	-	90	-	-	-	-	6	-	-	-	\$	104
4140 - Dues & Memberships			-	-	-	-	-	-	5,495	-	-	300	-	250	\$	6,045
4170 - Miscellaneous Fees & Fines			-	-	28	28	-	-	-	-	-	10	-	-	\$	66
4180 - Employee Appreciation			302	-	-	-	-	-	-	-	-	-	-	-	\$	31
4190 - Patient & Client Care - Excluding Housing			-	-	31	-	-	-	-	-	-	-	-	-	\$	31
4220 - Registration Fees			29	-	258	20	300	56	-	-	-	1,155	-	590	\$	2,408
4256 - Other Employee Benefits - Eco Pass			-	-	-	-	-	-	-	-	-	-	-	-	\$	-
7200 - Indirect Costs			-	-	-	23,154	-	-	-	-	-	-	-	-	\$	23,154
Total			\$ 17,028	\$ 21,140	\$ 16,954	\$ 62,194	\$ 30,641	\$ 37,212	\$ 37,262	\$ 37,793	\$ 35,192	\$ 30,742	\$ 24,398	\$ 29,400	\$	379,956
Total - YTD + Projections Program Line			\$ 111,140	\$ 112,900	\$ 121,263	\$166,504	\$ 134,950	\$141,522	\$ 141,572	\$142,103	\$ 139,501	\$ 135,051	\$ 128,708	\$ 133,709	\$	1,608,922

OPG Projected FY26 General Fund Budget

General Fund FY 2026																	
Budget	Appropriation	Budget	YTD Exp + Projection	Surplus / (Deficit)													
PS	JGIBDOPGF	\$455,057	\$ 353,575	\$101,482													
Part. Svcs	JGIBDOPGF	\$184,536	\$ 184,536	\$0													
Oper	JGIBDOPGF	\$24,295	\$ 1,625	\$22,670													
Total remaining in program line		Total	\$663,888	\$539,736	\$124,152												
Legal Services		JGL16LEGL	\$308,551	\$308,551	\$0												
GENERAL FUND SALARIES																	
Salaries	Pos. #	FTE	Actual July	Actual August	Projection September	Projection October	Projection November	Projection December	Projection January	Projection February	Projection March	Projection April	Projection May	Projection June	Total		
Legal Counsel- Vacant	87014	1.00	\$ 9,818	\$ 9,818	\$ -	\$ 9,818	\$ 9,818	\$ 9,818	\$ 9,818	\$ 9,818	\$ 9,818	\$ 9,818	\$ 9,818	\$ -	\$ 98,181		
VACANT Workforce Development Manager	87015	1.00	\$ -	\$ -	\$ -	\$ 9,890	\$ 9,890	\$ 9,890	\$ 9,890	\$ 9,890	\$ 9,890	\$ 9,890	\$ 9,890	\$ -	\$ 79,120		
Grant FTE	87XXX	1.00	\$ -	\$ -	\$ 4,258	\$ 4,258	\$ 4,258	\$ 4,258	\$ 4,258	\$ 4,258	\$ 4,258	\$ 4,258	\$ 4,258	\$ -	\$ 38,322		
Data Scientist	87XXX	contract	\$ -	\$ -	\$ 3,348	\$ 3,348	\$ 3,348	\$ 3,348	\$ 3,348	\$ 3,348	\$ 3,348	\$ 3,348	\$ 3,348	\$ -	\$ 30,132		
Community Engagement Coordinator	87XXX	contract	\$ -	\$ -	\$ 2,129	\$ 2,129	\$ 2,129	\$ 2,129	\$ 2,129	\$ 2,129	\$ 2,129	\$ 2,129	\$ 2,129	\$ -	\$ 19,161		
Total		3.00	\$ 9,818	\$ 9,818	\$ 9,735	\$ 29,443	\$ 29,443	\$ 29,443	\$ 29,443	\$ 29,443	\$ 29,443	\$ 29,443	\$ 29,443	\$ -	\$ 264,916		
	HLD		\$ 2,538	\$ 811	\$ 2,538	\$ 2,538	\$ 2,538	\$ 2,538	\$ 2,538	\$ 2,538	\$ 2,538	\$ 2,538	\$ 2,538	\$ -	\$ 26,191		
	Pera		\$ 1,140	\$ 1,142	\$ 1,130	\$ 3,418	\$ 3,418	\$ 3,418	\$ 3,418	\$ 3,418	\$ 3,418	\$ 3,418	\$ 3,418	\$ -	\$ 30,759		
	Medicare		\$ 142	\$ 142	\$ 141	\$ 427	\$ 427	\$ 427	\$ 427	\$ 427	\$ 427	\$ 427	\$ 427	\$ -	\$ 3,840		
	FAMU		\$ 44	\$ 44	\$ 44	\$ 132	\$ 132	\$ 132	\$ 132	\$ 132	\$ 132	\$ 132	\$ 132	\$ -	\$ 1,192		
	STD		\$ 7	\$ 7	\$ 7	\$ 21	\$ 21	\$ 21	\$ 21	\$ 21	\$ 21	\$ 21	\$ 21	\$ -	\$ 185		
	UIAED		\$ 982	\$ 982	\$ 974	\$ 2,944	\$ 2,944	\$ 2,944	\$ 2,944	\$ 2,944	\$ 2,944	\$ 2,944	\$ 2,944	\$ -	\$ 26,492		
Total GF Personal Services			\$ 14,872	\$ 12,946	\$ 14,569	\$ 38,924	\$ 38,924	\$ 38,924	\$ 38,924	\$ 38,924	\$ 38,924	\$ 38,924	\$ 38,924	\$ -	\$ 353,575		
General Operating																	
				148	148	148	148	148	148	148	148	148	148	148	\$ 1,625		
Participant Services																	
				16,776	16,776	16,776	16,776	16,776	16,776	16,776	16,776	16,776	16,776	16,776	\$ 184,536		
2690 -Legal Services																	
					308,551										\$ 308,551		