

**OPG Commission meeting  
Director Report  
01.24.2024**

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 01.16.2024

**I. Budget and Administrative Update.**

- a. I previously provided the monthly budget summary report as of 01.16.2024 provided to me from Mike Henthorn, Judicial Budget Analyst II. **See Attachment 1.** Please note that it has updates as requested by the Board at the December meeting.
- b. I worked with the Judicial Budget Manager's Office and our legislative liaison and determined that we did not need to submit a supplemental budget request due to our budget having room for anticipated expenditures in FY24-25.
- c. The COPG Annual Report was submitted and received by the legislature. We have not been asked to schedule a hearing.
- d. Renegotiation for Judicial MOU: Judicial responded that there is no legal requirement to enter into a MOU and declines to renegotiate an MOU. The Attorney General's Office is working on a legal memorandum regarding the legal requirement of entering into an updated MOU.
- 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 made an offer for the Director position, which was declined due to salary. The Board submitted a Supplemental Budget Request this month to assist in hiring a qualified candidate. The Board will have to restart the hiring process, which may delay the July 1, 2024 services start date of ASIA to the COPG.
  - iv. Due to the likely delay in ASIA and the MOU, I will be executing a contract with the Employer’s Council for Human Resources assistance. <https://www.employerscouncil.org/>
- f. Human Resources Update
- v. 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.
  - vi. 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 but declined to salary. We are in the process of scheduling three interviews. I am reviewing our job posting to make it more engaging and accurate to attract more qualified candidates.
  - 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 and attending the meetings. 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 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. 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. We completed training on 12.20.2023 on Client Falls.
6. Upcoming session on 02.21.2024 – subject TBD.

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

- 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 **01.11.2024**
  - 1. 82 Active guardianships
  - 2. 0 referral pending in court proceedings
  - 3. 3 Complete
  - 4. 4 Partial referrals
  - 5. 3 Registered
  - 6. 23 clients passed away since COPG appointment
  - 7. 27 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. 123 Denver declined referrals (some declined were prior to establishing the Hold status)
      - a. 9 - Family available to serve
      - b. 55 - 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. 10 - Withdrawn, not incapacitated
      - i. 20 - Withdrawn, other Guardian Available non-Family member
    - 2. Texas inquiry - 1
    - 3. Nebraska referral - 1

4. Alaska inquiries – 2
5. Colorado inquiries – 13

11. 121 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 - 1
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 – 11
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. Debriefing meeting on 12.20.2023: Discussed what NYC was doing well, such as agencies sharing information and data. Some take-aways were that if we do not

have community mental health and supportive housing, nothing we do will work; we need other agencies included such as Medicaid/Waivers programs; and are we going to compel treatment.

# Attachment 1. FY24 OPG Budget Summary as of 01.16.2024

OPG Personal Services and Operating - FY 2024  
Through 1/16/2024

Budget Type	Budget	YTD + Projected Exp	Surplus / (Deficit)	YTD
Personal Services	\$1,323,341	\$ 1,056,744	\$266,597	
Operating	\$582,162	\$ 257,932	\$324,230	Balance remaining for operating
Appropriation	\$1,905,503	\$1,314,676	\$590,827	Total remaining in program line

	Cash Fund Balance	
	(FY 2023)	Revenue less
Total Revenue	\$1,318,638	\$1,318,638
Total Expenditures	\$1,244,279	\$1,314,676
Net Change	\$74,360	\$3,962
Beg Fund Balance	\$1,645,409	\$1,719,769
= Fund Balance	\$1,719,769	\$1,723,731

Salaries	Pos. #	Current Salaries	Actual	Actual	Actual	Actual	Actual	Projection	Projection	Projection	Projection	Projection	Projection	Total Projected Annual Cost
		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	\$ 128,104
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	\$ 59,445
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	\$ 63,000
Vacant, Public Guardian	87004	\$ 5,384	\$ 5,384	\$ 5,384	\$ 5,384	\$ 1,713	\$ -	\$ -	\$ -	\$ 5,384	\$ 5,384	\$ 5,384	\$ 5,384	\$ 44,785
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	\$ 61,669
Vacant, Public Guardian	87006	\$ 4,852	\$ 4,039	\$ -	\$ 2,526	\$ -	\$ -	\$ -	\$ 4,852	\$ 4,852	\$ 4,852	\$ 4,852	\$ 4,852	\$ 35,677
Vacant, Public Guardian	87007	\$ 5,408	\$ 5,408	\$ 759	\$ 258	\$ -	\$ -	\$ -	\$ -	\$ 5,408	\$ 5,408	\$ 5,408	\$ 5,408	\$ 33,464
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	\$ 111,300
Vacant, Public Guardian	87009	\$ 5,232	\$ 5,232	\$ 5,232	\$ 6,541	\$ -	\$ -	\$ -	\$ -	\$ 5,232	\$ 5,232	\$ 5,232	\$ 5,232	\$ 43,165
Vacant, Public Guardian (Hold)	87010	\$ 5,000	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ 5,000	\$ 5,000	\$ 5,000	\$ 5,000	\$ 25,000
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	\$ 56,700
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	\$ 62,786
Public Guardian	87013	\$ 5,150	\$ -	\$ -	\$ 2,452	\$ 5,150	\$ 5,150	\$ 5,150	\$ 5,150	\$ 5,150	\$ 5,150	\$ 5,150	\$ 5,150	\$ 48,802
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>\$ 50,411</b>	<b>\$ 55,263</b>	<b>\$ 76,287</b>	<b>\$ 76,287</b>	<b>\$ 76,287</b>	<b>\$ 76,287</b>	<b>\$ 773,897</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>\$ 21,287</b>	<b>\$ 21,287</b>	<b>\$ 21,287</b>	<b>\$ 21,287</b>	<b>\$ 21,287</b>	<b>\$ 21,287</b>	<b>\$ 282,847</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>\$ 71,698</b>	<b>\$ 76,550</b>	<b>\$ 97,574</b>	<b>\$ 97,574</b>	<b>\$ 97,574</b>	<b>\$ 97,574</b>	<b>\$ 1,056,744</b>

	Actuals	Actuals	Actuals	Actuals	Actuals	Actuals	Actuals	Projections	Projections	Projections	Projections	Projections	Projections	YTD Total	Full Year Projection
1920 -Other Professional Services	416	436	468	1,463	9,918	936	417							\$ 13,636	\$ 27,273
1935 - Attorneys		35		51	289	43								\$ 1,251	\$ -
1940 -Medical Services														\$ -	\$ -
1950 -Professional Services from Other Colorado Departments														\$ -	\$ -
1960 -Professional IT Services		495	495		495	495								\$ 1,980	\$ 5,940
2250 -Miscellaneous Rentals														\$ -	\$ -
2255 -Rental of Meeting Rooms & Leased Space	1,900	4,500		10,100		8,450								\$ 24,950	\$ 74,850
2510 -General Travel (Employee)	5	22	209	1,204	1,330	77								\$ 2,846	\$ 5,692
2511 -Common Carrier Fares														\$ -	\$ -
2512 -Meals (Employee)	40		65			26								\$ 131	\$ 524
2513 -Mileage Reimbursement (Employee)	306	995	303	518	979	1,125								\$ 4,226	\$ 8,451
2530 -General Travel														\$ -	\$ -
2531 -Common Carrier Fares						417		830						\$ 1,246	\$ 7,479
2532 -Meals														\$ -	\$ -
2610 -Advertising Services		164		410	873	127								\$ 1,574	\$ 4,722
2631 -Communication Services from Outside Sources		1,010	1,009	1,009	1,010	959								\$ 4,997	\$ 11,993
2641 -ADP Services from Outside Sources	3,613	4,700	6,186	6,005										\$ 20,504	\$ 61,511
2680 -Printing & Reproduction Services - Vendors	37	8	12	212		182								\$ 450	\$ 1,081
3113 -Clothing & Uniforms														\$ -	\$ -
3118 -Food & Food Services Supplies		240	17	316	28	23								\$ 624	\$ 1,498
2820 -Monitoring Services		156	156	156	388	156								\$ 1,012	\$ 2,428
3110 -Identification & Safety Supplies				47	147									\$ 193	\$ 1,159
3120 -Books / Periodicals / Subscriptions														\$ -	\$ -
3121 -Case Jackets	357	458		110	345	56								\$ 1,326	\$ 3,182
3123 -Postage	4	7	198	8	76									\$ 293	\$ 704
3140 -Noncapitalized IT Software		871	161	4,344	122									\$ 5,498	\$ 16,494
3145 -Noncapitalized IT Purchases		517	367		368	3,758								\$ 5,010	\$ 15,031
4100 -Other Operating Expenditures														\$ -	\$ -
4140 -Dues & Memberships														\$ -	\$ -
4170 -Miscellaneous Fees & Fines		10	20			10								\$ 40	\$ 160
4220 -Registration Fees		45	150	620	315									\$ 1,130	\$ 3,390
4256 -Other Employee Benefits - Eco Pass		260												\$ 260	\$ 3,120
<b>Total</b>		<b>\$ 6,678</b>	<b>\$ 14,928</b>	<b>\$ 9,816</b>	<b>\$ 26,572</b>	<b>\$ 17,023</b>	<b>\$ 17,328</b>							<b>\$ 92,344</b>	<b>\$ 257,932</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>\$ 89,026</b>	<b>\$ 76,550</b>	<b>\$ 97,574</b>	<b>\$ 97,574</b>	<b>\$ 97,574</b>	<b>\$ 97,574</b>	<b>\$ 97,574</b>	<b>\$ 1,149,088</b>	
														<b>Over/(under) Program Line</b>	<b>\$756,415</b>