

**OPG Board meeting  
Deputy Director Report  
08.27.2025**

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

- **Attachment 1.** COPG Monthly Budget Summary as of 08.11.2025.

**I. Budget and Administrative Update.**

- a. **COPG Monthly Budget.** Mike Henthorn, ASIA Deputy Director, Budget, and Finance, provided the monthly summary as of 08.11.2025. See **Attachment 1.**
- b. **Human Resources Update.**
  1. We made a job offer for the 16<sup>th</sup> judicial guardian position, and the new guardian is scheduled to start on September 2, 2025.
  2. We made a job offer for the 2<sup>nd</sup> judicial guardian position which was accepted verbally. Once the required background checks are completed, the guardian is set to start on September 8th, 2025.
  3. OPG is currently recruiting for the legal counsel, grant specialist, data scientist and community engagement coordinator positions.
  4. The workforce development manager position is vacant.
  5. OPG is transitioning from Employer's Council services to OASIA as OASIA's services are becoming more available. Recently they are starting to assist with recruitment of our vacant positions.
- c. **Office space.** Sophia viewed new spaces on 07.07.2024 and we are reviewing updated information from the broker to determine which RFPs to send. We will likely send 3 RFPs for spaces in DTC area for about 4800-5000 square feet.
- d. **Office of Administrative Services for Independent Agencies (OASIA).**
  1. The MOU was finalized on 07.02.2025 as required by statute.
  2. Chair Fields and I met with the OASIA ED and Deputy Director of HR & Administrative Services on August 18<sup>th</sup>, and we have another

meeting scheduled with them on August 25<sup>th</sup>. We are in the beginning phases of incorporating OASIA's HR system, Bamboo HR, to streamline payroll, benefits, and HR systems (i.e., Time sheets and Requests for Leave). We are currently working with OASIA collaboratively to give them OPGs data they need to upload into their systems.

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. We have the Colorado Long-Term Care Ombudsman Program training scheduled on October 15<sup>th</sup>, 2025.

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

- i. Update on number of registered users, referrals, accepted cases, etc. as of 08.22.2025:
  1. 66 Active guardianships
  2. 0 referrals pending in court proceedings
  3. 0 Complete referrals
  4. 2 Partial referral
  5. 12 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. 7<sup>th</sup> 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. 148 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. 4 - 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 – 26
- 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. “Denver County” – 2
  - 9. Dolores County - 1
  - 10. El Paso County – 25
  - 11. Fremont - 1
  - 12. Garfield County – 1
  - 13. Gunnison County – 1
  - 14. Huerfano County – 3
  - 15. Jefferson County – 14

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 – 3 \*
22. Otero County – 5
23. Pueblo County – 9
24. Weld County – 8

\*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

OPG Projected FY26 Budget

Cash Fund Budget FY 2026				
Budget	Appropriation	Budget	YTD Exp + Projection	Surplus / (Deficit)
YTD	PS JCBDOPDF	\$1,702,487	\$ 1,289,243	\$413,244
Operating Includes Indirect Costs and Legal Services	AS Oper JCBDOPDF	\$500,000	\$ 329,691	\$170,309
Total remaining in program line	Total Appl	\$2,202,487	\$1,618,933	\$583,554

Cash Fund Balance						
	FY23 Final	FY24 Final	FY25 Final	FY26 Projected	FY27 Projected	FY28 Projected
Revenue	\$1,139,089	\$1,130,411	\$1,145,940.40	\$1,148,814	\$1,148,814	\$1,148,814
TRANS Transfer	\$190,949	\$197,380	\$224,513	\$232,192	\$237,966	\$243,815
Total Revenue	\$1,329,038	\$1,327,791	\$1,370,453	\$1,380,979	\$1,386,780	\$1,392,629
Total Exp.	\$1,244,279	\$1,217,718	\$1,629,364	\$1,618,933	\$1,627,501	\$1,717,236
Net Change	\$74,759	\$109,073	(\$258,911)	(\$237,967)	(\$239,721)	(\$324,797)
Orig Fund Bal	\$1,645,436	\$1,716,759	\$1,797,054	\$1,567,864	\$1,328,087	\$1,023,166
Fund Balance	\$1,720,195	\$1,825,832	\$1,538,143	\$1,329,897	\$1,088,366	\$698,369

Position numbers reflect what is in the payroll system

CASH FUND SALARIES			Projection	Projection	Projection	Projection	Projection	Projection	Projection	Projection	Projection	Projection	Projection	Projection
Salary	Pos. #	FTE	July	August	September	October	November	December	January	February	March	April	May	June
Director	07001	1.00	\$ 11,264	\$ 11,264	\$ 11,264	\$ 11,264	\$ 11,264	\$ 11,264	\$ 11,264	\$ 11,264	\$ 11,264	\$ 11,264	\$ 11,264	\$ 11,264
Staff Assistant	07002	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
VACANT - Public Guardian - Holding/Vacant	07003	1.00	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
Public Guardian	07004	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
Public Guardian	07005	1.00	\$ 5,658	\$ 5,422	\$ 5,422	\$ 5,422	\$ 5,422	\$ 5,422	\$ 5,422	\$ 5,422	\$ 5,422	\$ 5,422	\$ 5,422	\$ 5,422
Public Guardian (CMH)	07006	1.00	\$ 3,770	\$ 5,607	\$ 5,607	\$ 5,607	\$ 5,607	\$ 5,607	\$ 5,607	\$ 5,607	\$ 5,607	\$ 5,607	\$ 5,607	\$ 5,607
Public Guardian	07007	1.00	\$ 5,596	\$ 5,596	\$ 5,596	\$ 5,596	\$ 5,596	\$ 5,596	\$ 5,596	\$ 5,596	\$ 5,596	\$ 5,596	\$ 5,596	\$ 5,596
Deputy Director	07008	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
VACANT - Public Guardian	07009	1.00	\$ -	\$ -	\$ 5,282	\$ 5,282	\$ 5,282	\$ 5,282	\$ 5,282	\$ 5,282	\$ 5,282	\$ 5,282	\$ 5,282	\$ 5,282
Public Guardian (CMH)	07010	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
Case Management Aide	07011	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
Public Guardian	07012	1.00	\$ 5,764	\$ 5,535	\$ 5,535	\$ 5,535	\$ 5,535	\$ 5,535	\$ 5,535	\$ 5,535	\$ 5,535	\$ 5,535	\$ 5,535	\$ 5,535
VACANT, 36m(Judicial)	07013	1.00	\$ 2,120	\$ -	\$ 5,430	\$ 5,430	\$ 5,430	\$ 5,430	\$ 5,430	\$ 5,430	\$ 5,430	\$ 5,430	\$ 5,430	\$ 5,430
Vacant, Case Management Aide	07000	1.00	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
Total		\$4.00	\$ 68,802	\$ 64,022	\$ 76,542	\$ 76,542	\$ 76,542	\$ 76,542	\$ 76,542	\$ 76,542	\$ 76,542	\$ 76,542	\$ 76,542	\$ 76,542
	HLD		\$ 16,210	\$ 16,210	\$ 16,210	\$ 16,210	\$ 16,210	\$ 16,210	\$ 16,210	\$ 16,210	\$ 16,210	\$ 16,210	\$ 16,210	\$ 16,210
	Pers		\$ 7,616	\$ 7,236	\$ 6,770	\$ 6,770	\$ 6,770	\$ 6,770	\$ 6,770	\$ 6,770	\$ 6,770	\$ 6,770	\$ 6,770	\$ 6,770
	Medicare		\$ 901	\$ 940	\$ 1,095	\$ 1,095	\$ 1,095	\$ 1,095	\$ 1,095	\$ 1,095	\$ 1,095	\$ 1,095	\$ 1,095	\$ 1,095
	FAMLI		\$ 295	\$ 292	\$ 340	\$ 340	\$ 340	\$ 340	\$ 340	\$ 340	\$ 340	\$ 340	\$ 340	\$ 340
	STD		\$ 49	\$ 45	\$ 53	\$ 53	\$ 53	\$ 53	\$ 53	\$ 53	\$ 53	\$ 53	\$ 53	\$ 53
	UNEMP		\$ 6,590	\$ 6,482	\$ 7,554	\$ 7,554	\$ 7,554	\$ 7,554	\$ 7,554	\$ 7,554	\$ 7,554	\$ 7,554	\$ 7,554	\$ 7,554
Total CP Personal Services			\$ 87,283	\$ 96,517	\$ 106,564	\$ 106,564	\$ 106,564	\$ 106,564	\$ 106,564	\$ 106,564	\$ 106,564	\$ 106,564	\$ 106,564	\$ 106,564

CASH FUND OPERATING			Actual	Projection	Projection	Projection	Projection	Projection	Projection	Projection	Projection	Projection	Projection	Projection
Object Code	Blank	blank1	July	August	September	October	November	December	January	February	March	April	May	June
1900-Other Professional Services			2,500	11,291	270	2,178	3,270	15,518	1,537	11,007	12,964	4,749	8,046	5,000
1905 - Attorneys			17	-	-	-	-	-	-	-	-	-	3	32
1940-Professional IT Services			1,190	-	-	1,309	650	650	1,128	-	1,300	1,148	1,148	2,328
2031-IT Hardware & Software Maintenance & Repair Services			-	-	-	-	999	440	397	436	424	-	879	-
2055-Rental of Meeting Rooms & Leased Space			5,083	5,095	5,095	5,095	5,095	5,095	5,095	5,095	5,095	5,095	5,095	5,095
2510-General Travel (Employee)			-	1,206	76	2,085	342	1,431	-	(150)	-	532	999	530
2511-Common Carrier Fares			-	267	267	-	108	267	-	-	429	-	-	494
2512-Meals (Employee)			-	151	174	134	87	112	-	-	345	-	-	139
2513-Mileage Reimbursement (Employee)			901	1,084	49	625	1,348	723	1,348	909	1,500	437	1,076	1,062
2530-General Travel			-	-	-	-	1,095	-	40	-	-	-	-	-
2531-Common Carrier Fares			-	-	2,185	-	(572)	-	181	-	-	-	-	-
2532-Meals			-	-	-	-	-	-	36	-	-	-	-	-
2533-Mileage Reimbursement			-	-	-	-	-	-	36	-	-	-	-	-
2610-Advertising Services			-	750	1,711	745	254	344	300	-	489	1,870	-	2,801
2621-Communication Services from Outside Sources			-	958	958	1,079	1,041	1,041	1,043	-	921	2,378	-	1,444
2641-ADP Services from Outside Sources			2,500	-	-	15,490	6,295	5,135	-	9,775	2,815	5,000	2,500	2,500
2680-Printing & Reproduction Services - Vendors			12	-	-	245	-	60	196	-	291	206	-	302
2820-Monitoring Services			-	179	179	179	199	179	199	-	199	328	-	179
3110-Identification & Safety Supplies			29	6	102	-	102	-	-	-	80	140	240	36
3118-Food & Food Services Supplies			29	249	227	357	495	306	-	-	390	333	71	453
3221-Care Jackets			29	44	66	73	44	126	34	96	5,424	-	120	33
3223-Postage			-	-	-	51	45	135	24	-	70	2	36	247
3540-Noncapitalized IT Software			-	-	-	-	-	-	-	-	-	-	-	-
3545-Noncapitalized IT Purchases			-	160	-	1,007	4,128	508	14,072	-	1,015	300	-	-
4300-Other Operating Expenditures			-	-	-	90	-	-	-	-	-	-	-	9
4340-Dues & Memberships			-	2,722	-	-	-	-	5,495	-	-	300	-	250
4370-Miscellaneous Fees & Fines			-	20	28	28	-	-	-	-	-	10	-	-
4380-Employee Appreciation			34	-	-	-	-	-	-	-	-	-	-	-
4390-Patient & Client Care - Excluding Housing			-	50	31	-	-	-	-	-	-	-	-	-
4200-Registration Fees			-	2,590	29	29	300	96	-	-	-	1,155	-	590
4256-Other Employee Benefits - Eco Pass			-	-	-	-	-	-	-	-	-	-	-	-
7000-Indirect Costs			-	-	-	23,154	-	-	-	-	-	-	-	-
Total			\$ 13,394	\$ 27,340	\$ 13,794	\$ 27,034	\$ 25,460	\$ 32,092	\$ 30,538	\$ 32,833	\$ 30,822	\$ 35,901	\$ 18,338	\$ 24,340

Total - YTD + Projections Program Line			\$ 108,645	\$ 123,457	\$ 121,350	\$ 166,598	\$ 135,045	\$ 141,658	\$ 141,996	\$ 142,190	\$ 138,596	\$ 135,149	\$ 128,802	\$ 133,594
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OPG Projected FY26 General Fund Budget

		General Fund FY 2026														
		Budget	Appropriation	Budget	YTD Exp + Projection	Surplus / (Deficit)										
Operating includes the remainder after PS and Part. Svcs.	PS	JGIBDOPGF		\$455,057	\$ 340,629	\$114,428										
	Part. Svcs	JGIBDOPGF		\$184,536	\$ 184,536	\$0										
	Oper	JGIBDOPGF		\$24,295	\$ 24,295	\$0										
	Total remaining in program line			Total	\$663,888	\$525,165	\$114,428									
		Legal Services	JGL18LEGL	\$308,551	\$308,551	\$0										
GENERAL FUND SALARIES																
Salaries	Pos. #	FTE	Projection July	Projection August	Projection September	Projection October	Projection November	Projection December	Projection January	Projection February	Projection March	Projection April	Projection May	Projection June	Projected	
Legal Counsel	87014	1.00	\$ 9,818	\$ -	\$ -	\$ 9,818	\$ 9,818	\$ 9,818	\$ 9,818	\$ 9,818	\$ 9,818	\$ 9,818	\$ 9,818	\$ -	\$ 88,362	
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	\$ -	\$ 9,735	\$ 29,443	\$ 29,443	\$ 29,443	\$ 29,443	\$ 29,443	\$ 29,443	\$ 29,443	\$ 29,443	\$ -	\$ 255,097	
	HLD		\$ 2,538	\$ -	\$ 2,538	\$ 2,538	\$ 2,538	\$ 2,538	\$ 2,538	\$ 2,538	\$ 2,538	\$ 2,538	\$ 2,538	\$ -	\$ 25,380	
	Pera		\$ 1,140	\$ -	\$ 1,130	\$ 3,418	\$ 3,418	\$ 3,418	\$ 3,418	\$ 3,418	\$ 3,418	\$ 3,418	\$ 3,418	\$ -	\$ 29,617	
	Medicare		\$ 142	\$ -	\$ 141	\$ 427	\$ 427	\$ 427	\$ 427	\$ 427	\$ 427	\$ 427	\$ 427	\$ -	\$ 3,699	
	FAMU		\$ 44	\$ -	\$ 44	\$ 132	\$ 132	\$ 132	\$ 132	\$ 132	\$ 132	\$ 132	\$ 132	\$ -	\$ 1,148	
	STD		\$ 7	\$ -	\$ 7	\$ 21	\$ 21	\$ 21	\$ 21	\$ 21	\$ 21	\$ 21	\$ 21	\$ -	\$ 179	
	ULAED		\$ 982	\$ -	\$ 974	\$ 2,944	\$ 2,944	\$ 2,944	\$ 2,944	\$ 2,944	\$ 2,944	\$ 2,944	\$ 2,944	\$ -	\$ 25,510	
Total GF Personal Services			\$ 14,672	\$ -	\$ 14,569	\$ 38,924	\$ 38,924	\$ 38,924	\$ 38,924	\$ 38,924	\$ 38,924	\$ 38,924	\$ 38,924	\$ -	\$ 340,629	
Participant Services																
				16,776	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