

**OPG Commission meeting
Director Report
09.27.2023**

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.

Attachments for the 09.27.2023 meeting:

- Attachment 1: SCAO/Judicial provided a FY 2024 Budget Summary as of 09.15.2023
- Attachment 2: ASIA Director job description
- Attachment 3: Staff Attorney job description

I. Budget and Administrative Update.

- a. I previously provided the monthly budget summary report as of 09.15.2023 provided to me from Mike Henthorn, Judicial Budget Analyst II. **See Attachment 1.**
- b. FY24-25 Budget Requests – due to Judicial Budget Analyst by October 1, 2023. I'm working with the Judicial Budget Office on finalizing our FY24-25 Budget Request to present to the Board as soon as possible. AS mentioned at prior meetings it will include the following outlined below with some additions:
 - i. Lease space
 - ii. Staff attorney
 - iii. Workforce Development Manager
 - iv. Addition: Employee Wellness Program created and maintained by the Workforce Development Manager
 - v. ASIA expenditures

In the last few months, I've attended a few conferences and trainings regarding workforce development, wellbeing, and workplace culture. I decided to request a specific budget for an Employee Wellness Program that is created and maintained by the Workforce Development Manager as it will be a tool for recruitment, training, and retention.

- c. FY23-24 Supplemental Budget Requests – due to JBC by January 2024. I’m working with the Judicial Budget Office to finalize the FY24-25 Budget before working on the Supplemental Budget.
 - i. Lease space
 - ii. Staff attorney
 - iii. Workforce Development Manager
 - iv. ASIA expenditures

- d. I responded to a CORA request from Guardianship Alliance of Colorado. The request was for the most recent contract between the COPG and Denver Health. The COPG does not have a contract with Denver Health.

- e. Case Management System: We are making some updates to make entering items more user-friendly and quicker for guardians
 - i. Critical Incident Report Form – Check-box style and concise follow up action items
 - ii. Weekend On-Call Form/Case Memorandum - Check-box style and concise summary and contact information
 - iii. Consent Category Case Note – Instead of Medication and Treatment Forms

- f. I met with the Behavioral Health Guardianship/Momentum Team on 07.25.2023 and discussed CMHI’s ongoing critical needs for guardianship and to determine if there are other avenues, funding, or partnerships we can explore. We discussed having a strong partnership throughout Colorado to assist with Olmstead and community placements. We are sharing data for their target area needs and how that may fit into our expansion and how to build upon our current infrastructure and our combined FY25 budget requests. We have a tentative follow up meeting on 08.31.2023 and a follow up strategizing meeting on 09.28.2023 on how BHA and COPG can support each other.

- g. Board updates:
 - i. The Governor’s Office: We have one reappointment and three new Board members:
 - 1. Chair Stephanie Garcia, reappointed and representing the 3rd Congressional District
 - 2. Jeffrey Bird, representing the 8th Congressional District

3. Chandra Matthews, representing the 4th Congressional District
 4. Aisha Young, representing the 5th Congressional District
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- ii. The Chief Justice Office: No update – still need to appoint a 3rd nominee. I emailed Ms. Slagle and she is reaching out to the Chief Justice’s Office for an update.
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- h. State Audit: While not scheduled until 2027 – 2030, I reached out to the State Auditor for a meeting to ensure that I understand the process and can lay the groundwork for a successful audit. A meeting is scheduled for 09.05.2023. The State Auditor requested that the meeting be rescheduled, date is TDB.
 - i. Renegotiation for Judicial MOU: AG Finke and I met on July 24, 2023, to strategize for support outlined in SB23-064 and until ASIA is up and running. We have had to reschedule this meeting twice due to AG Finke’s schedule. We do not have a meeting scheduled with SCAO. Update – AG Janna Fischer and I met with SCAO on 09.08.2023. AG Fischer drafted an MOU which I reviewed. I’m waiting for confirmation from the AG’s office that it has been provided to SCAO’s Legal Department.
 - j. 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. An HR Consultant. Kristen Mahlin of Coach Craft, LLC, and the Board finalized the ASIA Director job description, among other things. **See Attachment 2.**
 - k. Human Resources Update
 - i. We continue case coverage, transfers and had to limit accepting new clients. Our 7th JD guardian is covering cases while the Director, Deputy Director, and Case Management Aid conduct client visits and additional support as needed.

- ii. Cynthia Wells returned to the office after an extended leave and resigned the same day on 08.28.2023.
- iii. Erin McGavin resigned on 09.18.2023 effective 10.10.2023.
- iv. Veronica Goujon joined our office on 09.11.2023 as a 2nd JD guardian.
- v. Ginger Geissinger joined our office on 09.18.2023 as a 2nd JD guardian.
- vi. Mary Olguin joined our office on 09.18.2023 as the 16th JD guardian.
- vii. I made an offer for 2nd JD guardian on 09.15.2023 and she has until 09.23.2023 to accept.
- viii. We continue to post for 2nd JD guardians and will interview as we receive qualified applicants. We are in the process of scheduling 3 interviews. We have 2 2nd JD guardian positions to fill (potentially 3 to fill).
- ix. The Staff Attorney position was posted on 09.19.2023 and we have received one application so far. We will schedule interviews as applications are received. **Attachment 3.**

- x. Update: The new Director for the Center for Organizational Effectiveness, through DPA, reached out to me about our training needs. I met with Chelsea Winegar on 08.07.2023. EDI courses are under review so there is no requirement currently. DPA is implementing a statewide Learning Management System (LMS), but this is sometime within the next year. Ms. Winegar is exploring if she can grant me a work-around, but the current compliance courses are not in compliance due to changes in the definition of “harassment.” She expects the courses to be updated next month. We had a follow up meeting on 09.15.2023 and Ms. Winegar confirmed that she can set up the COPG with a temporary COTRAIN account to access compliance courses. However, they 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.

- I. Updates: The Attorney General’s Office has been assisting our office with several matters:
 - i. I am waiting for an update on whether the AG’s Office filed a Motion to Intervene in Mental Health proceedings under CRS §27-65-111(6) for a specific client requested in February 2023.
 - ii. The AG’s Office initially offered to hire an AG specific to the COPG. This AG supports two programs, the COPG and the BRIDGES Program. I was

informed that an AG was hired on 09.18.2023 and should be introduced to me soon.

- iii. Various Motions to Intervene in client criminal matters and mental health matters.
- iv. At the July meeting, the Commission requested several items from the AG's Office, please see Agenda item VI.
 - 1. Follow up from 08.23.2023 meeting: Chair Garcia asked if "The fourth non-attorney member must be an individual who has **not** served directly in an advocacy role for at-risk adults." was a typo. I reached out to Amanda Gall our legislative liaison who responded that the language was included in former Chair Bennett-Woods' original Board composition bill draft. I followed up with Deb Bennett-Woods who advised that the language came from the Public Guardianship model bill from Pam Teaster. I've emailed Pam Teaster for her insight.
 - 2. Board orientation is scheduled for 11.02.2023. AG Finke and I have a plan to prepare materials, etc. AG Finke will reserve a conference room in the Ralph Carr Building and have a hybrid set up.
- m. The NGA Public Guardianship Special Interest Group asked us to present at the 08.28.2023 meeting about our 2022 Final Report. Grant Yoder will present with me.

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. Since the Office is permanent a review and update of Personnel and Operating Policies is needed. AG Alison Kyles, whose focus is Human Resources, met with Chair Garcia and me on 09.08.2023. AG Kyles provided very good insight and advice. AG Kyles sent updated Personnel Policies which I and Chair Garcia are reviewing before providing to the full Board.
- b. Expansion Plan: I am updating this from the proposed plan in the 2023 Final Report to the Legislature. I will prepare a draft and request Board input prior to a retreat, strategic planning, and FY25 Budget Request and planning. This will require thought and exploring conversations in a

number of areas based on our legislative liaisons advice and the need to remain flexible with the changing budgetary and political landscapes.

- c. **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. Upcoming session: Advance Planning (Code Status)/Hospice/Palliative Care on 08.16.2023.
 - 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. Strategic Planning: I received one proposal, but I’ve spoken with two facilitators. Both facilitators recommend that the strategic planning include staff and that our plan is then presented to the Board.

- iv. 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 met on 07.27.2023 and each of us was tasked with creating an outline. We determined that each of us had different enough topics to offer and audiences to reach. We decided to start writing, determine which journals, etc. to submit and meet again on 08.31.2023 and 09.29.2023.

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

- i. Update on number of registered users, referrals, accepted cases, etc. as of **09.20.2023**
 - 1. 81 Active guardianships
 - 2. 1 referral pending in court proceedings
 - 3. 15 Complete
 - 4. 12 Partial referrals
 - 5. 3 Registered
 - 6. 23 clients passed away since COPG appointment
 - 7. 18 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
 - a. Registered 0
 - b. Partial 0
 - c. Waiting for Court Appointment 0
 - d. Complete 1 (waiting review/Decision)
 - 9. 7th Judicial District
 - a. Partial 1 (Delta)
 - b. Pending Appointment 1
 - c. Complete 3
 - 10. Declined referrals – pre-Hold status
 - 1. 90 Denver declined referrals (some declined were prior to establishing the Hold status)
 - a. 6 - Family available to serve
 - b. 41 - Expired/Incomplete information
 - c. 8 – Not appropriate referral
 - d. 4 - Not adult
 - e. 4 - Withdrawn by Ft. Logan

- f. 4 - No OPG Capacity
 - g. 6 - Withdrawn, not incapacitated
 - h. 17 -Withdrawn, other Guardian Available non-Family member
- 2. Texas inquiry - 1
 - 3. Nebraska referral - 1
 - 4. Alaska inquiries – 2
 - 5. Colorado inquiries - 11

11. 117 streamlined referrals (Non-Denver County) – Declined

- 1. Adams County – 7
- 2. Alamosa County - 1
- 3. Arapahoe County – 20
- 4. Boulder County – 6
- 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 - 5
- 17. Las Animas County - 2
- 18. Mesa County – 1
- 19. Montrose County – 3 *
- 20. Otero County – 6
- 21. Pueblo County – 8
- 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. **Colorado OPG Strategic Plan.** Draft previously provided. Once the new Board is created, facilitated Strategic Planning sessions may be optimal.

- IV. **Stakeholder Outreach – Ongoing.** A list can be provided if requested.
- a. I received an invitation from the Office of Civil and Forensic Mental Health (CDHS) to participate in a 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 spoke with Chair Garcia and it she will likely approve this trip once I have details and it meets a reasonable expense.

OPG Personal Services and Operating - FY 2024 - Through 9/15/2023

Budget Type	Budget	YTD + Projected Exp	Surplus / (Deficit)
Personal Services	\$1,321,126	\$ 1,131,816	\$189,311
Operating	\$582,162	\$ 254,476	\$327,686
Total Appropriation	\$1,903,288	\$1,386,291	\$516,997

YTD
Balance remaining for operating
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	\$1,386,291
Net Change	\$74,360	(\$67,653)
Beg Fund Balance	\$1,645,409	\$1,719,769
= Fund Balance	\$1,719,769	\$1,652,115

Salaries	Pos. #	Current	Actual	Projection	Projection	Projection	Projection	Projection	Projection	Projection	Projection	Projection	Projection	Projection
		Salaries	July	August	September	October	November	December	January	February	March	April	May	June
Sophia Alvarez - 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
Public Guardian - will need to be replaced	87004	\$ 5,384	\$ 5,384	\$ 5,384	\$ 5,384	\$ 5,384	\$ 5,384	\$ 5,384	\$ 5,384	\$ 5,384	\$ 5,384	\$ 5,384	\$ 5,384	\$ 5,384
Vacant - Public Guardian - filled	87005	\$ 5,384	\$ 11,641	\$ -	\$ -	\$ 5,384	\$ 5,384	\$ 5,384	\$ 5,384	\$ 5,384	\$ 5,384	\$ 5,384	\$ 5,384	\$ 5,384
Vacant - Public Guardian - filled	87006	\$ 4,852	\$ 4,039	\$ -	\$ -	\$ 4,852	\$ 4,852	\$ 4,852	\$ 4,852	\$ 4,852	\$ 4,852	\$ 4,852	\$ 4,852	\$ 4,852
Cynthia Wells - Public Guardian	87007	\$ 5,408	\$ 5,408	\$ 759	\$ 5,408	\$ 5,408	\$ 5,408	\$ 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
Loretta Vigil - Public Guardian	87009	\$ 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
Vacant - Public Guardian, offer made	87010	\$ 5,000	\$ -	\$ -	\$ -	\$ 5,000	\$ 5,000	\$ 5,000	\$ 5,000	\$ 5,000	\$ 5,000	\$ 5,000	\$ 5,000	\$ 5,000
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	\$ 4,725
Public Guardian, filled with 7th JD 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
Vacant - Public Guardian, filled with 16th JD guardian	87XXX	\$ 5,000	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
Vacant, Public Guardian, will be filled with Staff Attorney	87XXX	\$ 5,000	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
Total Salaries		\$ 81,371	\$ 71,815	\$ 51,486	\$ 56,135	\$ 71,371	\$ 71,371	\$ 71,371	\$ 71,371	\$ 71,371	\$ 71,371	\$ 71,371	\$ 71,371	\$ 71,371
Employee Benefits		\$ 28,723	\$ 26,616	\$ 22,706	\$ 22,917	\$ 26,422	\$ 26,422	\$ 26,422	\$ 26,422	\$ 26,422	\$ 26,422	\$ 26,422	\$ 26,422	\$ 26,422
Total Personal Services		\$ 1,321,126	\$ 98,430	\$ 74,192	\$ 79,052	\$ 97,793	\$ 97,793	\$ 97,793	\$ 97,793	\$ 97,793	\$ 97,793	\$ 97,793	\$ 97,793	\$ 97,793

	Actuals	Projections	Projections	Projections	Projections	Projections	Projections	Projections	Projections	Projections	Projections	Projections	Projections
1920 -Other Professional Services	416.00	435.90											
1935 - Attorneys		35											
1940 -Medical Services													
1950 -Professional Services from Other Colorado Departments			495.00	495									
1960 -Professional IT Services													
2250 -Miscellaneous Rentals													
2255 -Rental of Meeting Rooms & Leased Space	\$ 1,900	\$ 4,500											
2510 -General Travel (Employee)	\$ 5	\$ 22											
2511 -Common Carrier Fares													
2512 -Meals (Employee)	\$ 40	\$ 65											
2513 -Mileage Reimbursement (Employee)	\$ 306	\$ 995		137									
2530 -General Travel													
2531 -Common Carrier Fares													
2532 -Meals													
2610 -Advertising Services		\$ 164											
2631 -Communication Services from Outside Sources		\$ 1,010											
2641 -ADP Services from Outside Sources	\$ 3,613	\$ 4,700											
2680 -Printing & Reproduction Services - Vendors	\$ 37	\$ 8											
3113 -Clothing & Uniforms													
3118 -Food & Food Services Supplies		\$ 240											
2820 -Monitoring Services		\$ 156											
3110 -Identification & Safety Supplies													
3120 -Books / Periodicals / Subscriptions													
3121 -Case Jackets	\$ 357	\$ 458											
3123 -Postage	\$ 4	\$ 7											
3140 -Noncapitalized IT Software		\$ 871											
3145 -Noncapitalized IT Purchases		\$ 517		367									
4100 -Other Operating Expenditures													
4140 -Dues & Memberships													
4170 -Miscellaneous Fees & Fines		\$ 10											
4220 -Registration Fees		\$ 45											
4256 -Other Employee Benefits - Eco Pass		\$ 130											
Total	\$ 6,678	\$ 14,798	\$ 23,300	\$ 23,300	\$ 23,300	\$ 23,300	\$ 23,300	\$ 23,300	\$ 23,300	\$ 23,300	\$ 23,300	\$ 23,300	\$ 23,300

Total - YTD + Projections Program Line	\$ 105,108	\$ 88,990	\$ 102,352	\$ 121,093	\$ 121,093	\$ 121,093	\$ 121,093	\$ 121,093	\$ 121,093	\$ 121,093	\$ 121,093	\$ 121,093	\$ 121,093
													Over/(under) Program Line

DRAFT: Director of Office for Administrative Services for Independent Agencies*Job Description*

Job Title: Director of Office for Administrative Services for Independent Agencies

Job Code:

FLSA Status: Exempt

OCC Group: Executive (EXC)

Annual Salary: (Range) 130-140K

General Statement of Duties:

The Director of the Office for Administrative Services for Independent Agencies (ASIA) is a transformational leader responsible for spearheading the establishment and leadership of this new office. The ASIA Director builds, leads, and directs the office of eight employees to provide centralized administrative and fiscal support services to diverse independent agencies housed within the Colorado Judicial Department.

The ASIA Office provides budget, accounting, payroll, and human resources support services to 5 smaller independent agencies (The Office of the Child Protection Ombudsman, The Independent Ethics Commission, The Office of Public Guardianship, The Commission on Judicial Discipline, and Bridges of Colorado). In addition to these agencies, the ASIA Office provides limited payroll and human resources support services to three larger independent agencies (The Office of Alternate Defense Counsel, The Office of the Child's Representative, and the Office of Respondent Parents' Counsel). According to § 13-100-101, C.R.S., the Colorado Legislature has reserved the ability to add other independent agencies housed within the Judicial Department to the support services provided through the ASIA Office.

The Director has a career history of overseeing the administrative functions of a multifaceted organization or company in either the public or private sector with a comprehensive understanding of independent agency or division/department operations. The Director also demonstrates effectiveness working within compliance systems that include internal controls and legal requirements.

Distinguishing Factors:

The Director of ASIA is tasked with pioneering the office's foundation and operations, requiring visionary guidance, transformative leadership, and adaptability to navigate challenges and opportunities. The role necessitates close collaboration with participating agencies, stakeholders, and the Colorado Legislature.

Essential Functions of the Position:

- **Strategic Vision:** Lead the development of ASIA, creating a blueprint for providing innovative administrative and fiscal support services that meet the unique needs of participating agencies, aligned with the supported agencies' overarching goals.

- **Transformational Leadership:** Champion the establishment of ASIA by creating, inspiring, and supporting a high-performing team, ensuring that the office thrives in its mission of serving diverse agencies.
- **Human Resources Expertise:** Utilize an extensive knowledge of human resources to acquire, manage, lead, and retain staff. Implement best practices in recruitment, training, performance management, and development. Leverage your background in developing and implementing rules, policies, procedures, and programs to ensure efficient operations and provide human resources support to the independent agencies ASIA serves.
- **Financial Oversight:** Oversee financial processes, internal controls, and budget development, justification, and presentations to relevant decision-making bodies. Manage a budget of at least \$1 million to drive office operations and initiatives.
- **Navigating Complexity:** Effectively handle complex matters and administrative functions/issues related to child welfare, adult welfare, mental health, and regulatory systems.
- **Stakeholder Collaboration:** Foster professional relationships with participating agencies, stakeholders, and the Colorado Legislature for the effective operations of the ASIA Office while addressing agency-specific goals and input.
- **Operational Excellence:** Develop and implement fiscal rules, procedures, and internal controls to ensure consistent and efficient administrative services within broader regulatory, statutory, and constitutional requirements. Review and analyze financial reports, trends, and variances to make informed operational decisions.
- **Legislative Engagement:** Leverage practical experience with legislative engagement to advocate to decision-makers, driving policies that support the effective operation of ASIA and the collective perspectives of the supported agencies..

Minimum Education:

- Graduation from an accredited college or university with a bachelor's degree in the liberal arts and sciences, judicial administration, public administration, business administration, human resources development, or related fields.
- Advanced degrees, a background in governmental accounting, and practical experience with legislative engagement are preferred.

Key Qualifications:

- A record of overseeing the administrative functions of a multifaceted organization in either the public or private sector with a comprehensive understanding of independent agency or division operations.

- Proven and demonstrable transformative leadership skills, inspiring teams to achieve exceptional results while building the office from the ground up.
- Keen insight into identifying emerging opportunities, effectively navigating challenges, and adapting with agility and foresight.
- Strong financial management acumen, including budget development, presentation, and oversight of budgets exceeding \$1 million.
- Background in developing fiscal rules, implementing internal financial controls, and enforcing procedures for financial processes.
- Experience with legislative engagement, advocating for initiatives that align with agency needs.
- Effective communication skills for building professional relationships, advocating for the office, and collaborating with stakeholders.
- Expertise in human resources management and advisement, including but not limited to federal and state laws, regulations and policies relating to employment and protections; staff acquisition, talent management and retention; leadership; and staff learning and development.

High-Performance Expectations:

- Spearhead innovative solutions and continuous improvement strategies to enhance administrative and fiscal support services.
- Cultivate a collaborative and empowering work environment, fostering growth and productivity among staff.
- Align strategic objectives with the unique requirements of participating agencies, ensuring seamless operations.
- Expertly navigate complex financial systems, processes, and legal matters with precision and effectiveness.
- Proactively anticipate challenges and opportunities, demonstrating agile leadership in responses.

Key Functions of the Position

- **Strategic Vision**
- **Transformational Leadership**

- **Human Resources Expertise**
- **Financial Oversight**
- **Navigating Complexity**
- **Stakeholder Collaboration**
- **Operational Excellence**
- **Legislative Engagement**

Attachment 3. COPG Staff Attorney Job Description

JOB POSTING - COLORADO OFFICE OF PUBLIC GUARDIANSHIP, STAFF ATTORNEY

Title: Entry-Level Attorney

Job Location: Denver, Colorado

Salary Range: \$8,833.33 - -\$9,583.33 per month*

Employment Type: Full-Time (40 hours/week); benefits and PERA eligible

Apply By: October 6, 2023

*Each position within the Judicial Branch has a certain salary range assigned. Based on experience and other factors, newly hired employees typically begin their employment towards the beginning of the pay range.

Agency Statement:

The Colorado Office of Public Guardianship (COPG) provides guardianship services to eligible indigent and incapacitated adult individuals who have no responsible family members or friends who are available and appropriate to serve as guardian; lack adequate resources to compensate a private guardian and pay the costs associated with an appointment proceeding; and are not subject to a petition for appointment of guardian filed by a county adult protective services unit or otherwise authorized by C.R.S. § 26-3.1-104. The COPG is mandated to be statewide by December 31, 2030.

Position Purpose and Objectives/Definition of Work:

The Colorado Office of Public Guardianship (COPG) is accepting applications for one (1) staff attorney. This position is responsible for all aspects of legal consultation, analysis and of COPG client matters post-appointment in guardianship, financial matters, and other matters as needed for such COPG clients. 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 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. The COPG is focused on providing a high level of guardianship services and requires the Staff Attorneys' advocacy on guardianship issues and mental health law issues. Potential for hybrid work environment and virtual court appearances. This position requires shared weekly and weekend on-call responsibilities.

ESSENTIAL JOB FUNCTIONS

- Serves as counsel for COPG clients, in COPG's fiduciary capacity as a guardian to such clients;
- Provides guidance regarding guardianship decisions involving medical and mental health treatment, including consents for treatment and medical procedures.
- Prepares and files pleadings related to probate, benefits, mental health, and fiduciary issues.
- Investigates liability of former fiduciaries to COPG clients, including determination of asset location, value and ownership.
- Prosecutes petitions for COPG clients to discover assets, petitions to determine liability, and petitions for accounting.
- Coordinates estate administration with conservators, including the Public Administrators, gives instructions on fiduciary duties and provides legal advice regarding the administration of guardianships to guardians, Director, Deputy Director, and other COPG staff.
- Handles administrative hearings to obtain and maintain benefits or other matters for COPG clients.
- Handles intervention matters for COPG clients in criminal matters.

- Provides an analysis of legal issues, with possible suggestions or resolutions; and presents these findings to the Director and the Assistant Attorney General for the COPG.
- Interacts with court personnel on behalf of COPG clients, including filing of pleadings, instructions on notice required to other parties in lawsuits, responding to questions by the court, presentation of ex parte petitions to judges and asking questions on nonroutine requirements of court proceedings.
- Handles cases on behalf of COPG clients that include the restoration or modification of rights of a ward deemed to have regained capacity, a petition to determine liability against a former fiduciary.
- Performs other related duties on behalf of COPG clients as required/assigned.

KNOWLEDGE, SKILLS, AND ABILITIES

- At least 5 years' experience in legal consultation, analysis and representation of a state agency or similar organization in its fiduciary capacity as a guardian or conservator.
- Knowledge of, and at least 5 years, experience in probate law, guardianship law, conservatorship law, mental health law, topics of fiduciary responsibility, public benefits, discharge issues, guardian consent issues, ethics, medical decision-making, advocacy on guardianship issues.
- Knowledge of office procedures, policies and ethical considerations of the COPG.
- Knowledge of laws and regulations governing the administration of guardianship, fiduciary duties, including probate practice and procedure.
- Knowledge of laws and regulations governing benefits, care, services, and placements available to wards whether they be provided to the ward in their homes or in residential or institutional settings.
- Knowledge of mental health systems and services, social service agencies, state developmental disability waiver systems and services, and state systems and services for the aged.
- Skill and knowledge in general matters of law, including criminal law, municipal law, contract law, landlord/tenant law, public benefits law, family law, name changes, etc.
- Skill in oral and written communication as related to appearances in judicial and administrative proceedings, negotiations and instructions to staff.
- Skill in legal research.
- Skill in drafting pleadings, letters, instruction memoranda to office staff, etc.
- Skill in the use of Microsoft Suite and word processing programs.
- Skill in tracking time spent in individual cases, despite interruptions.
- Ability to set priorities and remain organized despite shifting priorities, large caseload, numerous interruptions and high stress work environment.

Minimum Qualifications/Professional Qualifications:

- Juris Doctorate from an accredited law school.
- Licensed in Colorado and member in good standing of the Colorado State Bar.
- Resident of Colorado
- No history or disciplinary action by any state bar licensing authority.
- Ability to communicate effectively, both orally and in writing.
- Ability to maintain confidentiality, establish effective working relationships, and thoroughly document work.
- Must submit to and pass a pre-employment background check.
- To perform this job successfully, an individual must be able to satisfactorily perform each of the above essential functions. The requirements listed are representative of the knowledge, skill, ability, physical and environmental conditions required of the employee on the job. Reasonable accommodations may be made to enable individuals with disabilities to perform the essential functions.

PHYSICAL DEMANDS: While performing the duties of this job, the employee is regularly required to talk or hear. The employee frequently is required to sit and reach with hands and arms and perform repetitive motions with wrists, hands, and fingers. The employee is occasionally required to stand and walk. The employee must occasionally lift and/or move up to 25 pounds. Specific vision abilities required by this job include close vision, and ability to adjust focus. Some time is spent in judicial and quasi-judicial settings, or out the office performing research, making educational presentations, and investigating cases. Extensive travel will be required.

WORK ENVIRONMENT: This position is subject to varying and unpredictable situations; may handle emergency or crisis situations; is subject to many interruptions; may handle multiple calls and inquiries simultaneously; and will be required to maintain an on-call schedule. Position may be open to telecommuting and a flexible work schedule due to the required on-call schedule. The noise level in the work environment is usually moderate. Extensive travel will be required.

EEO/AA/ADA EMPLOYER

NOTICE! Each person employed must present identity and employment eligibility verification.

NOTICE! Employees hired after March 1, 1988, must be on the payroll direct deposit program.

OTHER: No felony conviction or misdemeanor conviction involving moral turpitude. Possess a valid Motor Vehicle Operator's license or alternate means of transportation. Individuals chosen for the position will be subject to an extensive background check and CAPS check.

HOW TO APPLY:

Application packet must include the following:

1. Cover letter
2. Resume
3. Legal writing sample
4. Minimum of three (3) *professional* references

Email application packet to: Info@Colorado-OPG.org

PLEASE NOTE: Applications will be reviewed, and interviews scheduled/conducted as they are received; applications are encouraged to submit their application materials as soon as possible.