

**OPG Commission meeting  
Director Report  
01.27.2021**

Purpose: The Director Report will provide detailed 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.

Attachments for the 01.27.2021 meeting:

- Attachment 1: SCAO/Judicial Provided Monthly Budget Summary as of 01.11.2021

**I. Budget and MOU Update.**

- a. I previously provided the January 2020 monthly budget report that is provided to me from Hugh Wilson/Judicial, See Attachment 1.
- b. Joint Budget Committee (JBC) Process and CO OPG FY22 Budget Request, See Attachment 2.
  - i. I presented at the JBC budget request hearing on 12.17.2020. The JBC did not have any questions.
- c. **MOU Update – No updates**, I am waiting for Judicial to execute the updated MOU.

- II. SMART Act hearing.** I will attend and present at the CO OPG SMART Act hearing tentatively scheduled 01.25.2020 at 11:30 a.m. I will provide an update at the 01.27.2020 Commission meeting.

- III. **Stakeholder Engagement Plan – In progress.**
  - a. Applications for individuals to complete to request membership on the Stakeholder Advisory Panel should be available by the end of January 2021. Applications will be available on the website, emailed to various stakeholders, and available upon request.
  
- IV. **Colorado OPG Pilot Program Operating Policies Updates – In progress.** Operating Policies and Manual will be posted to CO OPG Website once updates are complete.
  - a. **Internal Ethics Committee – In progress.** AG Enck and I continue to research the creation of the Committee for discussion at an upcoming CO OPG Commission meeting. I am in the process of requesting and reviewing IEC policies from other OPG programs and Denver Health and CU Anschutz.
  
  - b. **Policy 8. Ensuring Systemic Equality Services Standards – In progress,** no update from last meeting.
  
  - c. **Policy 7. COVID-19 Pandemic Policy update – No update.**
  
  - d. **Policy 5. Colorado OPG Fiscal Policy – Client Emergency Fund – In Progress, no updates.** I am drafting an addition to Policy 5 to allow for a Client Emergency Fund. The intent of this policy is to address true emergency needs for clients, such as funds for housing/placement and only after all community services have been pursued and exhausted.
  
  - e. **Trainings and Projects**
    - i. Resource Project - Ongoing. Team review of other organization’s online resources, etc. for creation of targeted and organized resources for CO OPG internal purposes and CO OPG website purposes

- ii. Individual Director and guardian training for CGC National certification: In progress
  - iii. Various dates, January – February 2021: Emotional and Mental Health in Older Adults, UC Anschutz Multidisciplinary Center on Aging
  - iv. Various dates: Older Adult Services series, Denver Public Library
  - v. 01.29.2021: Training with Innovage regarding PACE services.
  - vi. 01.12.2021: Serving as Fiduciary for Individuals Experiencing Homelessness/IDDEAS Program, Colorado Guardianship Association
  - vii. 01.13.2021: Denver Forensic Collaborative
  - viii. TBD: Data Collections Project. Team review of policies and research to assist in Director Report research needs
  - ix. TBD: Cross-training session with Colorado Cross Disability Coalition
- f. Annual performance reviews of staff will be completed in February 2021. It will involve a self-evaluation and evaluation by the Director. Individual performance review meetings will be completed in February 2021.

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

i. Update on number of registered users, referrals, accepted cases, etc. as of **01.11.2021**. An update will be provided at the 01.27.2021 meeting.

1. 51 total accepted cases:

a) 23 Active guardianships

b) 28 accepted cases, pending court proceedings

2. 13 Partial/Incomplete referrals, waiting for more information to determine whether to accept or decline

3. 23 total declined referrals

a) Expired/Incomplete information – 2

b) Inappropriate referral - 1

c) 20 streamlined referrals (Non-Denver County) – Declined

i. Arapahoe County - 6

ii. El Paso - 2

iii. Gunnison County – 1

iv. Jefferson County - 2

v. Larimer County - 3

vi. Montrose County - 1

vii. Washington County - 1

viii. Weld County - 4

4. Withdrawn by referring party – 4

5. Terminated due to ward death – 2

6. Closed prior to appointment due to ward death - 3

ii. Rocky Mountain Human Services – No Update

1. Momentum/Community Transition clients. This program is considering funding additional OPG FTE to primarily serve this clientele.

2. Mill Levy Program clients. I'm in discussions with the Program Director for referrals. They have approximately 50 – 60 clients they can refer to the OPG.

- iii. Denver Bar Association Metro Volunteer Lawyer (MVL) Program is unable to form a partnership at this time due to not having resources to add more pro bono work to their program.

**h. Data gathering - In progress.**

- i. The Research Assistant (RA) and I executed a contract for Phase I. RA will draft a Scope of Work. Phase II: Implementation of the Scope of Work. The particular RA is a first year PhD student in Health and Behavioral Sciences at CU Anschutz and has a experience in data implementation and collection for different communities (aging, youth, etc.).
- ii. 01.11.2021: Meeting with Sam Rabins and Chris Richardson - Mental Health Center of Denver regarding potential referrals and data gathering partnership.
- iii. 03.22.2021: Joint presentation about OPG and guardianship with Colorado Gerontological Society.
- iv. TBD: Joint podcast about OPG and guardianship with Colorado Gerontological Society.
- v. Scheduled to record webinar for Judges and Court staff on February 2, 2020.
- vi. Working with Silver Key Senior Services on data collection

**V. Colorado OPG Strategic Plan.** Draft previously provided – no updates.

**VI. Stakeholder Meeting Update** since 12.15.2020.

- a. 12.15.2020: Meeting with AG Ann Pogue, Michael Graetz – Attorney, Daniel Godsparek, Social Worker – Ft. Logan, and Dr. Salbenblatt – Ft. Logan, regarding a referral
- b. 12.16.2021: Meeting with Leslie Mader, Strategic Accounts Executive - Innovage
- c. 12.18.2021: Meeting with Aaron Carpenter - Fiscal Analyst, Colorado Legislative Council, regarding FY2021 bill introductions, process, etc.
- d. 01.11.2021: Meeting with Sam Rabins and Chris Richardson - Mental Health Center of Denver regarding potential referrals and data gathering partnership.
- e. 01.13.2021: Attend Denver Forensic Collaborative meeting
- f. 01.13.2021: Phone conference with attorney and CBA MVL Board member, Steve Cook, to give a presentation at the February 2021 1<sup>st</sup> Judicial District Bar Association meeting
- g. 01.14.2021: Meeting with Chris Brock – Colorado Cross Disability Coalition regarding a referral
- h. Various dates: Email correspondence with Maria Madrid – Director of Latino Services, Colorado Gerontological Society, regarding joint presentation and podcast
- i. Various dates: Email correspondence with Christine Biesel – JBC Staff, Colorado General Assembly, regarding statutory corrections of dates in the Public Guardianship Act

- j. Various dates: Email correspondence and meetings with Deb Hutson/OBH Manager of Momentum and Transitional Services regarding contract for referrals
- k. Various dates: Phone conference with Megan Leppke/Denver Health regarding potential referrals and discharge process for OPG clients and various meetings with Oasis Team

# Attachment 1. OPG Personal Services and Operating Summary - FY21 - as of 01.11.2021

OPG Personal Services and Operating Summary - FY 2021

As of 1/11/2021

Budget Type	Budget	YTD + Projected Exp	Surplus / (Deficit)
Personal Services	\$560,000	\$ 550,948	\$9,052
Operating	\$173,844	\$ 88,969	\$84,875
<b>Total Appropriation</b>	<b>\$733,844</b>	<b>\$639,917</b>	<b>\$93,927</b>

YTD + projected expenditures  
Balance remaining for operating  
Total remaining in program line

	Cash Fund Balance		
	PRIOR YEAR (FY 2020)	YTD Revenue less YTD Expenses	Projected Revenue less Projected Expenses
Total Revenue	1,038,857	456,483	1,093,896
Total Expenditures	220,886	274,229	733,844
Net Change	\$ 817,971	\$ 182,253	\$ 360,052
Beg Fund Balance	-	817,971	817,971
<b>= Fund Balance</b>	<b>817,971</b>	<b>1,000,224</b>	<b>1,178,023</b>

Salaries	Pos. #	Actuals						Projections						Year-to-Date
		July	August	September	October	November	December	January	February	March	April	May	June	
Sophia Alvarez	87001	\$ 9,583	\$ 9,583	\$ 9,583	\$ 9,583	\$ 9,583	\$ 9,583	\$ 9,583	\$ 9,583	\$ 9,583	\$ 9,583	\$ 9,583	\$ 9,583	\$ 115,000
America Paz Pastrana	87002	\$ 4,447	\$ 4,447	\$ 4,587	\$ 4,467	\$ 4,467	\$ 4,467	\$ 4,467	\$ 4,467	\$ 4,467	\$ 4,467	\$ 4,467	\$ 4,467	\$ 53,684
Jacquelyn Beal	87003	\$ 5,000	\$ 5,000	\$ 5,000	\$ 5,000	\$ 5,000	\$ 5,000	\$ 5,000	\$ 5,000	\$ 5,000	\$ 5,000	\$ 5,000	\$ 5,000	\$ 60,000
Erin McGavin	87004	\$ 4,833	\$ 4,833	\$ 4,833	\$ 4,833	\$ 4,833	\$ 4,833	\$ 4,833	\$ 4,833	\$ 4,833	\$ 4,833	\$ 4,833	\$ 4,833	\$ 58,000
Camille Price	87005	\$ 4,833	\$ 4,833	\$ 4,833	\$ 4,833	\$ 4,833	\$ 4,833	\$ 4,833	\$ 4,833	\$ 4,833	\$ 4,833	\$ 4,833	\$ 4,833	\$ 58,000
Rhonda Sanchez	87006	\$ 4,833	\$ 4,833	\$ 4,833	\$ 4,833	\$ 4,833	\$ 4,833	\$ 4,833	\$ 4,833	\$ 4,833	\$ 4,833	\$ 4,833	\$ 4,833	\$ 58,000
<b>Total Salaries</b>		<b>\$ 33,530</b>	<b>\$ 33,530</b>	<b>\$ 33,670</b>	<b>\$ 33,550</b>	<b>\$ 33,550</b>	<b>\$ 33,550</b>	<b>\$ 33,550</b>	<b>\$ 33,550</b>	<b>\$ 33,550</b>	<b>\$ 33,550</b>	<b>\$ 33,550</b>	<b>\$ 33,550</b>	<b>\$ 402,684</b>
<b>Employee Benefits</b>		<b>\$ 12,415</b>	<b>\$ 12,343</b>	<b>\$ 12,375</b>	<b>\$ 12,348</b>	<b>\$ 12,348</b>	<b>\$ 12,348</b>	<b>\$ 12,348</b>	<b>\$ 12,348</b>	<b>\$ 12,348</b>	<b>\$ 12,348</b>	<b>\$ 12,348</b>	<b>\$ 12,348</b>	<b>\$ 148,264</b>
<b>Total Personal Services</b>		<b>\$ 45,945</b>	<b>\$ 45,874</b>	<b>\$ 46,045</b>	<b>\$ 45,898</b>	<b>\$ 45,898</b>	<b>\$ 45,898</b>	<b>\$ 45,898</b>	<b>\$ 45,898</b>	<b>\$ 45,898</b>	<b>\$ 45,898</b>	<b>\$ 45,898</b>	<b>\$ 45,898</b>	<b>\$ 550,948</b>
		<b>Actuals</b>												
1920 -Other Professional Services		\$ 1,200	\$ 10,684	\$ -	\$ 7,678	\$ 2,821	\$ 350							\$ 22,733
1960 -Professional IT Services						\$ 2,960	\$ 3,525							\$ 6,485
2255 -Rental of Meeting Rooms & Leased Space		\$ -	\$ -	\$ -	\$ 4,761	\$ 1,800	\$ -							\$ 6,561
2513 -Mileage Reimbursement (Employee)		\$ -	\$ -	\$ -	\$ 16	\$ 81	\$ -							\$ 97
2631 -Communication Services from Outside Sources		\$ -	\$ 529	\$ 522	\$ 256	\$ -	\$ 75							\$ 1,383
2680 -Printing & Reproduction Services - Vendors						\$ 18								\$ 18
3110 -Identification & Safety Supplies							\$ 12							\$ 12
3121 -Case Jackets				\$ 1,128	\$ 267	\$ 254	\$ 51							\$ 1,700
3123 -Postage							\$ 115							\$ 115
3140 -Noncapitalized IT Software		\$ -	\$ -	\$ -	\$ 180	\$ -	\$ -							\$ 180
3145 -Noncapitalized IT Purchases						\$ 1,276	\$ -							\$ 1,276
4220 -Registration Fees		\$ -	\$ -	\$ 535	\$ 1,965	\$ -	\$ -							\$ 2,500
4256 -Other Employee Benefits - Eco Pass		\$ 1,509	\$ -	\$ -	\$ -	\$ -	\$ -							\$ 1,509
<b>Total</b>		<b>\$ 2,709</b>	<b>\$ 11,213</b>	<b>\$ 2,185</b>	<b>\$ 15,123</b>	<b>\$ 9,211</b>	<b>\$ 4,128</b>	<b>\$ 7,400</b>	<b>\$ 7,400</b>	<b>\$ 7,400</b>	<b>\$ 7,400</b>	<b>\$ 7,400</b>	<b>\$ 7,400</b>	<b>\$ 88,969</b>
		avg monthly operating expenses												
<b>Total - YTD + Projections Program Line</b>		<b>\$ 48,654</b>	<b>\$ 57,087</b>	<b>\$ 48,230</b>	<b>\$ 61,021</b>	<b>\$ 55,109</b>	<b>\$ 50,027</b>	<b>\$ 53,298</b>	<b>\$ 53,298</b>	<b>\$ 53,298</b>	<b>\$ 53,298</b>	<b>\$ 53,298</b>	<b>\$ 53,298</b>	<b>\$ 639,917</b>
													<b>Over/(under) Program Line</b>	<b>\$93,927</b>