

**OPG Commission meeting  
Director Report  
07.27.2022**

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 for any questions in between meetings.

Attachments for the 07.27.2022 meeting:

- Attachment 1: SCAO/Judicial provided a FY 2022 Final Budget Summary as of 07.21.2022. This Summary may change once FY22 has been reconciled. If it changes, an updated Summary will be provided at a future meeting.
- Attachment 2: SCAO/Judicial provided an initial FY 2023 Monthly Budget Summary as of 07.01.2022.
- Attachment 3: OPG Email Policy
- Attachment 4. Focus Group Interview Themes Draft

**I. Budget and Administrative Update.**

- a. Deputy Director: Beginning in August, Janelle will take over much of the day-to-day operations such as case management and direct oversight of the guardians. This will allow me to focus on the Final Report and Commissioner relations.
- b. I previously provided the monthly budget reports for February that are provided to me from Hugh Wilson, Judicial Budget Manager. **See Attachments 1 and 2.**
- c. Positions have been posted by Judicial Branch:  
<https://coloradojudicial.recruitmentplatform.com/>
  - i. Public Guardian – 2<sup>nd</sup> Judicial District

- ii. Public Guardian – 2<sup>nd</sup> Judicial District/Colorado Mental Health Institute
  - iii. Public Guardian – 7<sup>th</sup> Judicial District
  - iv. Public Guardian – 16<sup>th</sup> Judicial District
  - v. Case Management Aid – 2<sup>nd</sup> Judicial District
- d. The jobs are also/will be posted on the OPG website. The OPG website was crafted by our Case Management System team and is not user-friendly when addressing issues or easy to maintain. We have been researching cost-effective solutions so we can be more responsive to adding information and making changes to make it more accessible for the public.
- i. We are also in the process of posting the positions in local newspapers in the 7<sup>th</sup> and 16<sup>th</sup> Judicial Districts and on-line job sites as recommended by judges & staff.
- e. July 2-day Staff Training was conducted. Curriculum included review and update of OPG policies, consideration of new OPG policies, a preference assessment which helped with self-awareness and team building, discussions about OPG infrastructure and career tracks which informed the recommendations for statewide rollout, and compassion fatigue/secondary trauma caregiver coaching. The team will provide their thoughts to the Commission about the training in August. I'd like to mention:
- i. The team now has access to a Grief/Bereavement Specialist for support at any time when there is a critical incident or medical decision that may involve traumatic health/medical issues
  - ii. The team indicated that they would benefit from a Benefits Specialist position. This individual would be responsible for obtaining and maintaining all types of state & federal benefits for all OPG clients and monitoring clients' eligibility

for benefits. This allows the guardians to focus on client relations.

- f. The Denver Post interview was completed on 07.21.2022 with Shelly Bradbury. Pre-interview, Ms. Bradbury provided a short list of general questions about guardianship and the OPG. During the interview, Ms. Bradbury asked those questions and sought a general understanding about guardianship and the OPG. It is not clear if/when the information will be published, but I asked her to send me the article if it is published.

**II. Stakeholder Engagement Plan – In progress.**

**III. Colorado OPG Pilot Program Operating Policies Updates – No updates.** Please note that Operating Polices are available on the OPG website: <https://colorado-opg.org/opg-in-depth/>

- a. **OPG Email Policy – see Attachment 3.**
- b. **Policy 5. Colorado OPG Fiscal Policy – Client Emergency Fund – In Progress.** Will be considered with Final Report.
- c. Reviewing and updating protocols as part of the Spring meetings to assess the procedures, caseloads, etc. of the office. Chair Bennett-Woods and AAG Kidd-Aaron and I are also identifying policies that need updating as issues arise. It is likely that policies will need updating as the office grows.
- d. **Trainings and Projects – Ongoing.** A list will be provided quarterly.

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

- i. Update on number of registered users, referrals, accepted cases, etc. as of **07.26.2022**
  1. 79 Active guardianships
  2. 2 referrals pending in court proceedings (accepted 2 Hold referrals)
  3. 9 Partial referrals
  4. 16 clients passed away since CO OPG appointment (1 possibly Covid related death)
  5. 18 New Hold status for 6 months (now includes OBH/CHMI-Ft. Logan/Pueblo referrals that are non-OBH/Momentum contract referrals)
  6. OBH/Momentum dedicated caseload:
    1. 5 Active guardianships (6, but waiting for Order)
    2. 6 referrals pending in court proceedings
  7. 31 Declined referrals
    1. 25 Denver declined referrals
      - a. 5 - Family available to serve
      - b. 13 - Expired/Incomplete information
      - c. 1 – Not appropriate referral
      - d. 1 - Not adult
      - e. 1 - Withdrawn by Ft. Logan
      - f. 4 - No OPG Capacity
    2. Not incapacitated – 2
    3. Texas referral - 1
    4. Nebraska referral - 1
    5. Alaska referral – 2
  8. 76 streamlined referrals (Non-Denver County) – Declined
    1. Adams County – 3
    2. Alamosa County - 1
    3. Arapahoe County – 11

4. Boulder County – 4
5. Broomfield County - 1
6. “Denver County” - 2
7. El Paso County – 17
8. Garfield County – 1
9. Gunnison County – 1
10. Huerfano County - 3
11. Jefferson County – 6
12. Lake County - 1
13. La Plata County – 2
14. Larimer County - 4
15. Las Animas County - 2
16. Mesa County – 1
17. Montrose County – 2
18. Otero County – 3
19. Pueblo County - 3
20. Washington County - 1
21. Weld County – 7

- IV. **Colorado OPG Strategic Plan.** Draft previously provided – no updates.
- V. **Stakeholder Outreach – Ongoing.** A list can be provided if requested.
- VI. **Data gathering and Final Report - In progress.** See **Attachment 4.** Focus Group Interview Themes Draft.

# Attachment 1. "Tentative Final" FY22 OPG Budget Summary as of 07.21.2022

OPG Personal Services and Operating Summary - FY 2022

As of 7/21/2022

Budget Type	Budget	YTD + Projected Exp	Surplus / (Deficit)	YTD
Personal Services	\$653,000	\$ 659,513	-\$6,513	
Operating	\$188,253	\$ 120,882	\$67,371	Balance remaining for operating
<b>Total Appropriation</b>	<b>\$841,253</b>	<b>\$780,395</b>	<b>\$60,858</b>	<b>Total remaining in program line</b>

	Cash Fund Balance	
	PRIOR YEAR (FY 2021)	Projected Revenue less YTD Expenses
Total Revenue	\$1,136,656	\$1,220,753
Total Expenditures	\$662,072	\$780,395
Net Change	\$474,584	\$440,358
Beg Fund Balance	\$819,590	\$1,294,174
<b>= Fund Balance</b>	<b>\$1,294,174</b>	<b>\$1,734,532</b>

Salaries	Pos. #	Actuals												Year-to-Date	
		July	August	September	October	November	December	January	February	March	April	May	June		
Director	87001	\$ 9,871	\$ 9,871	\$ 9,871	\$ 9,871	\$ 9,871	\$ 9,871	\$ 9,871	\$ 9,871	\$ 9,871	\$ 9,871	\$ 9,871	\$ 9,871	\$ 118,450	
Staff Assistant	87002	\$ 4,580	\$ 4,580	\$ 4,580	\$ 4,580	\$ 4,580	\$ 4,580	\$ 4,580	\$ 4,580	\$ 4,580	\$ 4,580	\$ 4,580	\$ 4,580	\$ 54,965	
Public Guardian	87003	\$ 5,150	\$ 5,150	\$ 5,150	\$ 5,150	\$ 5,150	\$ 5,150	\$ 5,150	\$ 5,150	\$ 5,150	\$ 5,150	\$ 5,150	\$ 5,150	\$ 61,800	
Public Guardian	87004	\$ 4,978	\$ 4,978	\$ 4,978	\$ 4,978	\$ 4,978	\$ 4,978	\$ 4,978	\$ 4,978	\$ 4,978	\$ 4,978	\$ 4,978	\$ 4,978	\$ 59,740	
Public Guardian	87005	\$ 4,978	\$ 4,978	\$ 4,978	\$ 4,978	\$ 4,978	\$ 4,978	\$ 4,978	\$ 4,978	\$ 4,978	\$ 4,978	\$ 4,978	\$ 4,978	\$ 59,740	
Public Guardian	87006	\$ 4,978	\$ 4,978	\$ 4,978	\$ 4,978	\$ 4,978	\$ 4,978	\$ 4,978	\$ 4,978	\$ 4,978	\$ 4,978	\$ 4,978	\$ 4,978	\$ 59,740	
Public Guardian	87007	\$ 3,409	\$ 5,000	\$ 5,000	\$ 5,000	\$ 5,000	\$ 5,000	\$ 5,000	\$ 5,000	\$ 5,000	\$ 5,000	\$ 5,000	\$ 5,000	\$ 58,409	
<b>Total Salaries</b>		<b>\$ 37,945</b>	<b>\$ 39,536</b>	<b>\$ 39,536</b>	<b>\$ 39,536</b>	<b>\$ 39,536</b>	<b>\$ 39,536</b>	<b>\$ 39,536</b>	<b>\$ 39,536</b>	<b>\$ 39,536</b>	<b>\$ 39,536</b>	<b>\$ 39,536</b>	<b>\$ 39,536</b>	<b>\$ 472,844</b>	
<b>Employee Benefits</b>		<b>\$ 13,990</b>	<b>\$ 14,529</b>	<b>\$ 14,529</b>	<b>\$ 14,529</b>	<b>\$ 14,509</b>	<b>\$ 14,509</b>	<b>\$ 14,529</b>	<b>\$ 14,529</b>	<b>\$ 14,529</b>	<b>\$ 14,529</b>	<b>\$ 14,529</b>	<b>\$ 14,529</b>	<b>\$ 186,669</b>	
<b>Total Personal Services</b>		<b>\$ 51,936</b>	<b>\$ 54,066</b>	<b>\$ 54,066</b>	<b>\$ 54,066</b>	<b>\$ 54,046</b>	<b>\$ 54,046</b>	<b>\$ 54,065</b>	<b>\$ 54,065</b>	<b>\$ 54,065</b>	<b>\$ 54,065</b>	<b>\$ 54,065</b>	<b>\$ 66,963</b>	<b>\$ 659,513</b>	
		Actuals												Projections	
1920 -Other Professional Services		\$ -	\$ 90	\$ 90	\$ 90	\$ 450	\$ -	\$ 180	\$ 90	\$ -	\$ 1,320	\$ 90	\$ 11,700	\$ 14,100	
1935 - Attorneys		\$ -	\$ -	\$ 198	\$ -	\$ 198	\$ -	\$ 31	\$ 198	\$ 221	\$ 94	\$ 250	\$ -	\$ 1,190	
1940 -Medical Services		\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	
1950 -Professional Services from Other Colorado Departments		\$ -	\$ 10	\$ 25	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ 35	
1960 -Professional IT Services		\$ 600	\$ 5,319	\$ 300	\$ 5,418	\$ 548	\$ -	\$ 910	\$ 8,253	\$ 2,451	\$ 1,409	\$ -	\$ 10,683	\$ 35,890	
2250 -Miscellaneous Rentals		\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ 162	\$ 162	
2255 -Rental of Meeting Rooms & Leased Space		\$ 1,802	\$ -	\$ 3,600	\$ 1,800	\$ -	\$ -	\$ 5,700	\$ 1,800	\$ 1,900	\$ 1,800	\$ 1,800	\$ 1,800	\$ 22,000	
2510 -General Travel (Employee)		\$ 15	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ 125	\$ -	\$ -	\$ -	\$ 285	\$ 425	
2511 -Common Carrier Fares		\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ 110	\$ -	\$ -	\$ -	\$ -	\$ 110	
2512 -Meals (Employee)		\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ 149	\$ -	\$ -	\$ -	\$ -	\$ 149	
2513 -Mileage Reimbursement (Employee)		\$ 72	\$ 140	\$ 717	\$ 94	\$ 797	\$ 163	\$ 428	\$ 753	\$ 388	\$ 564	\$ -	\$ 594	\$ 4,709	
2530 -General Travel		\$ -	\$ -	\$ -	\$ 897	\$ -	\$ 125	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ 1,022	
2531 -Common Carrier Fares		\$ -	\$ -	\$ -	\$ 432	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ 432	
2631 -Communication Services from Outside Sources		\$ -	\$ 257	\$ 257	\$ 383	\$ -	\$ 1,984	\$ -	\$ 498	\$ 499	\$ 591	\$ 550	\$ 1,121	\$ 6,142	
2680 -Printing & Reproduction Services - Vendors		\$ 146	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ 1	\$ 146	
3113 -Clothing & Uniforms		\$ -	\$ -	\$ -	\$ -	\$ -	\$ 36	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ 36	
3118 -Food & Food Services Supplies		\$ -	\$ -	\$ -	\$ -	\$ -	\$ 77	\$ -	\$ -	\$ -	\$ -	\$ -	\$ 35	\$ 112	
2820 -Monitoring Services		\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ 900.00	\$ -	\$ -	\$ 900	
3110 -Identification & Safety Supplies		\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ 76	\$ -	\$ -	\$ -	\$ 45	\$ 121	
3120 -Books / Periodicals / Subscriptions		\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	
3121 -Case Jackets		\$ 933	\$ 333	\$ 178	\$ -	\$ -	\$ 341	\$ 6	\$ 732	\$ -	\$ -	\$ 306	\$ 977	\$ 3,806	
3123 -Postage		\$ -	\$ -	\$ -	\$ -	\$ -	\$ 812	\$ -	\$ -	\$ -	\$ -	\$ -	\$ 2	\$ 814	
3140 -Noncapitalized IT Software		\$ 1,861	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ 1,803	\$ 3,663	
3145 -Noncapitalized IT Purchases		\$ -	\$ 5,940	\$ 155	\$ -	\$ -	\$ 1,496	\$ 10,118	\$ 155	\$ 130	\$ 2,989	\$ -	\$ 376	\$ 21,359	
4140 -Dues & Memberships		\$ -	\$ 110	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ 250	\$ 810	\$ -	\$ -	\$ 1,170	
4170 -Miscellaneous Fees & Fines		\$ -	\$ -	\$ -	\$ -	\$ -	\$ 33	\$ -	\$ -	\$ 20	\$ 224	\$ 296	\$ 296	\$ 573	
4220 -Registration Fees		\$ -	\$ 24	\$ -	\$ 900	\$ -	\$ 550	\$ -	\$ -	\$ -	\$ -	\$ 339	\$ 1,813		
4256 -Other Employee Benefits - Eco Pass		\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	
<b>Total</b>		<b>\$ 5,428</b>	<b>\$ 12,223</b>	<b>\$ 5,520</b>	<b>\$ 10,013</b>	<b>\$ 1,993</b>	<b>\$ 5,616</b>	<b>\$ 17,373</b>	<b>\$ 12,938</b>	<b>\$ 5,590</b>	<b>\$ 9,037</b>	<b>\$ 4,930</b>	<b>\$ 30,220</b>	<b>\$ 120,882</b>	
<b>Total - YTD + Projections Program Line</b>		<b>\$ 57,364</b>	<b>\$ 66,288</b>	<b>\$ 59,586</b>	<b>\$ 64,079</b>	<b>\$ 56,038</b>	<b>\$ 59,662</b>	<b>\$ 71,438</b>	<b>\$ 67,003</b>	<b>\$ 59,655</b>	<b>\$ 63,103</b>	<b>\$ 58,995</b>	<b>\$ 97,183</b>	<b>\$ 780,395</b>	
														<b>Over/(under) Program Line</b>	<b>\$60,858</b>

# Attachment 2. FY23 Initial OPG Budget Summary as of 07.01.2022

## OPG Personal Services and Operating Summary - FY 2023

Budget Type	Budget	YTD + Projected Exp	Surplus / (Deficit)	YTD
Personal Services	\$1,360,000	\$ 1,358,985	\$1,015	Balance remaining for operating
Operating	\$360,586	\$ 130,000	\$230,586	Total remaining in program line
<b>Total Appropriation</b>	<b>\$1,720,586</b>	<b>\$1,488,985</b>	<b>\$231,601</b>	

	Cash Fund Balance	
	PRIOR YEAR (FY 2022)	Projected Revenue less YTD Expenses
Total Revenue	\$1,220,753	\$1,220,753
Total Expenditures	\$780,395	\$1,488,985
Net Change	\$440,358	-\$268,232
Beg Fund Balance	\$1,294,174	\$1,734,532
<b>= Fund Balance</b>	<b>\$1,734,532</b>	<b>\$1,466,300</b>

Salaries	Pos. #	Actuals												Year-to-Date		
		July	August	September	October	November	December	January	February	March	April	May	June			
Director	87001	\$ 10,167	\$ 10,167	\$ 10,167	\$ 10,167	\$ 10,167	\$ 10,167	\$ 10,167	\$ 10,167	\$ 10,167	\$ 10,167	\$ 10,167	\$ 10,167	\$ 122,004		
Staff Assistant	87002	\$ 4,718	\$ 4,718	\$ 4,718	\$ 4,718	\$ 4,718	\$ 4,718	\$ 4,718	\$ 4,718	\$ 4,718	\$ 4,718	\$ 4,718	\$ 4,718	\$ 56,614		
Public Guardian	87003	\$ 5,305	\$ 5,305	\$ 5,305	\$ 5,305	\$ 5,305	\$ 5,305	\$ 5,305	\$ 5,305	\$ 5,305	\$ 5,305	\$ 5,305	\$ 5,305	\$ 63,654		
Public Guardian	87004	\$ 5,128	\$ 5,128	\$ 5,128	\$ 5,128	\$ 5,128	\$ 5,128	\$ 5,128	\$ 5,128	\$ 5,128	\$ 5,128	\$ 5,128	\$ 5,128	\$ 61,532		
Public Guardian	87005	\$ 5,128	\$ 5,128	\$ 5,128	\$ 5,128	\$ 5,128	\$ 5,128	\$ 5,128	\$ 5,128	\$ 5,128	\$ 5,128	\$ 5,128	\$ 5,128	\$ 61,532		
Public Guardian	87006	\$ 5,128	\$ 5,128	\$ 5,128	\$ 5,128	\$ 5,128	\$ 5,128	\$ 5,128	\$ 5,128	\$ 5,128	\$ 5,128	\$ 5,128	\$ 5,128	\$ 61,532		
Public Guardian	87007	\$ 5,150	\$ 5,150	\$ 5,150	\$ 5,150	\$ 5,150	\$ 5,150	\$ 5,150	\$ 5,150	\$ 5,150	\$ 5,150	\$ 5,150	\$ 5,150	\$ 61,800		
Deputy Director	87XXX	\$ 8,898	\$ 8,898	\$ 8,898	\$ 8,898	\$ 8,898	\$ 8,898	\$ 8,898	\$ 8,898	\$ 8,898	\$ 8,898	\$ 8,898	\$ 8,898	\$ 106,776		
Vacant, Public Guardian 2nd	87XXX	\$ 5,714	\$ 5,714	\$ 5,714	\$ 5,714	\$ 5,714	\$ 5,714	\$ 5,714	\$ 5,714	\$ 5,714	\$ 5,714	\$ 5,714	\$ 5,714	\$ 68,568		
Vacant, Public Guardian 2nd CMHI	87XXX	\$ 5,714	\$ 5,714	\$ 5,714	\$ 5,714	\$ 5,714	\$ 5,714	\$ 5,714	\$ 5,714	\$ 5,714	\$ 5,714	\$ 5,714	\$ 5,714	\$ 68,568		
Vacant, Public Guardian 7th	87XXX	\$ 5,714	\$ 5,714	\$ 5,714	\$ 5,714	\$ 5,714	\$ 5,714	\$ 5,714	\$ 5,714	\$ 5,714	\$ 5,714	\$ 5,714	\$ 5,714	\$ 68,568		
Vacant, Public Guardian 16th	87XXX	\$ 5,714	\$ 5,714	\$ 5,714	\$ 5,714	\$ 5,714	\$ 5,714	\$ 5,714	\$ 5,714	\$ 5,714	\$ 5,714	\$ 5,714	\$ 5,714	\$ 68,568		
Vacant, Public Guardian - remove	87XXX	\$ 5,714	\$ 5,714	\$ 5,714	\$ 5,714	\$ 5,714	\$ 5,714	\$ 5,714	\$ 5,714	\$ 5,714	\$ 5,714	\$ 5,714	\$ 5,714	\$ 68,568		
Vacant, Case Management Aide 2nd	87XXX	\$ 4,092	\$ 4,092	\$ 4,092	\$ 4,092	\$ 4,092	\$ 4,092	\$ 4,092	\$ 4,092	\$ 4,092	\$ 4,092	\$ 4,092	\$ 4,092	\$ 49,104		
<b>Total Salaries</b>		<b>\$ 82,282</b>	<b>\$ 82,282</b>	<b>\$ 82,282</b>	<b>\$ 82,282</b>	<b>\$ 82,282</b>	<b>\$ 82,282</b>	<b>\$ 82,282</b>	<b>\$ 82,282</b>	<b>\$ 82,282</b>	<b>\$ 82,282</b>	<b>\$ 82,282</b>	<b>\$ 82,282</b>	<b>\$ 987,388</b>		
<b>Employee Benefits</b>		<b>\$ 30,966</b>	<b>\$ 30,966</b>	<b>\$ 30,966</b>	<b>\$ 30,966</b>	<b>\$ 30,966</b>	<b>\$ 30,966</b>	<b>\$ 30,966</b>	<b>\$ 30,966</b>	<b>\$ 30,966</b>	<b>\$ 30,966</b>	<b>\$ 30,966</b>	<b>\$ 30,966</b>	<b>\$ 371,597</b>		
<b>Total Personal Services</b>		<b>\$ 113,249</b>	<b>\$ 113,249</b>	<b>\$ 113,249</b>	<b>\$ 113,249</b>	<b>\$ 113,249</b>	<b>\$ 113,249</b>	<b>\$ 113,249</b>	<b>\$ 113,249</b>	<b>\$ 113,249</b>	<b>\$ 113,249</b>	<b>\$ 113,249</b>	<b>\$ 113,249</b>	<b>\$ 1,358,985</b>		
		Actuals												Projections		
1920 -Other Professional Services															\$ -	
1935 - Attorneys															\$ -	
1940 -Medical Services															\$ -	
1950 -Professional Services from Other Colorado Departments															\$ -	
1960 -Professional IT Services															\$ -	
2250 -Miscellaneous Rentals															\$ -	
2255 -Rental of Meeting Rooms & Leased Space															\$ -	
2510 -General Travel (Employee)															\$ -	
2511 -Common Carrier Fares															\$ -	
2512 -Meals (Employee)															\$ -	
2513 -Mileage Reimbursement (Employee)															\$ -	
2530 -General Travel															\$ -	
2531 -Common Carrier Fares															\$ -	
2631 -Communication Services from Outside Sources															\$ -	
2680 -Printing & Reproduction Services - Vendors															\$ -	
3113 -Clothing & Uniforms															\$ -	
3118 -Food & Food Services Supplies															\$ -	
2820 -Monitoring Services															\$ -	
3110 -Identification & Safety Supplies															\$ -	
3120 -Books / Periodicals / Subscriptions															\$ -	
3121 -Case Jackets															\$ -	
3123 -Postage															\$ -	
3140 -Noncapitalized IT Software															\$ -	
3145 -Noncapitalized IT Purchases															\$ -	
4140 -Dues & Memberships															\$ -	
4170 -Miscellaneous Fees & Fines															\$ -	
4220 -Registration Fees															\$ -	
4256 -Other Employee Benefits - Eco Pass															\$ -	
<b>Total</b>		<b>\$ 130,000</b>	<b>\$ -</b>	<b>\$ -</b>	<b>\$ -</b>	<b>\$ -</b>	<b>\$ -</b>	<b>\$ -</b>	<b>\$ -</b>	<b>\$ -</b>	<b>\$ -</b>	<b>\$ -</b>	<b>\$ -</b>	<b>\$ -</b>	<b>\$ 130,000</b>	
<b>Total - YTD + Projections Program Line</b>		<b>\$ 243,249</b>	<b>\$ 113,249</b>	<b>\$ 113,249</b>	<b>\$ 113,249</b>	<b>\$ 113,249</b>	<b>\$ 113,249</b>	<b>\$ 113,249</b>	<b>\$ 113,249</b>	<b>\$ 113,249</b>	<b>\$ 113,249</b>	<b>\$ 113,249</b>	<b>\$ 113,249</b>	<b>\$ 113,249</b>	<b>\$ 1,488,985</b>	
															<b>Over/(under) Program Line</b>	<b>\$231,601</b>

## **Policy X. OPG Email Policy**

OPG employees will utilize Colorado OPG Microsoft 365 Outlook email account addresses for OPG work related matters.

The OPG Commission will utilize Colorado OPG Microsoft 365 Outlook email account addresses for OPG Commission related matters.

When a new employee is hired, the Staff Assistant will notify the IT Administrator. The IT Administrator will assign and set up a secure Microsoft 365 Outlook email account address for the employee. The Staff Assistant will immediately notify the IT Administrator when an employee is no longer employed by the OPG. The email account will be immediately inactivated by the IT Administrator.

When a new Commissioner is appointed, the Staff Assistant will notify the IT Administrator. The IT Administrator will assign and set up a secure Microsoft 365 Outlook email account address for the Commissioner. The Staff Assistant will immediately notify the IT Administrator when a Commissioner is no longer on the Commission. The email account will be immediately inactivated by the IT Administrator.

### **Inappropriate use of COPG email**

Our employees and Commission represent COPG whenever they use their corporate email address. They must not:

- Sign up for illegal, unreliable, disreputable or suspect websites and services.
- Send unauthorized marketing content or solicitation emails.
- Send insulting or discriminatory messages and content.
- Intentionally spam other people's emails, including their coworkers.

### **Email security**

- Email passwords should not be shared. If a password is shared because it is determined to be temporarily necessary, then the password should be changed as soon as possible.
- Managers should not ask employees for email passwords.
- Multi-factor authentication should be enabled for each user's email
- Email should not be forwarded to an external email address, except for a one-time purpose.



### **Email access in case of leave of absence or other review**

If email in an employee's or Commissioner's account needs to be reviewed, then an official request from the Director should be opened with the IT Administrator. If the Director's account needs to be reviewed the Commission Chair needs to make the request.

- IT ensures the request is documented then access is given.
- A timeframe of access should be given to IT for the amount of time needed for access, then after that timeframe access needs to be revoked or extended and documented.
- IT should not access email content unless requested to review with the Director or Commission Chair.

### **Email Retention Policy**

COPG employee and Commission Microsoft 365 Outlook email account records are stored and maintained on the COPG Microsoft 365 Outlook Cloud throughout the Pilot Program.

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# Attachment 4. Focus Group Interview Themes Draft

## Focus Group Interviews

One research tool used to assess Colorado's unmet need for public guardianship services as well as challenges and barriers to providing public guardianship services was to conduct focus group interviews. Focus group interviews were conducted virtually with diverse groups across the state to get a broad perspective. Some stakeholders included Adult Protective Services, Veterans Administration, various nonprofits, attorneys, judges, hospitals, etc. [Attachment X. Focus Group Interview Script]

- It was a common occurrence for interview participants to work with OPG-type clients a few times per month.
- When asked generally, if services were available for these clients in their community, answers varied based on location, but generally there are very few services for these clients, even in the major metropolitan areas. No participant indicated that these services were adequate.
- All participants indicated a need for public guardianship services in their communities. Participants further shared why:
  - Clients do not have the financial resources to access adequate service; and
  - There is a lack of pro bono guardians and even private guardians across the state.
- When asked what the potential benefits could be of having an Office of Public Guardianship in Colorado, participants further shared:
  - People can be placed in appropriate living situations;
  - More appropriate allocation of resources i.e. organizations that are not set up for handling guardianship are forced into those roles even when it is not most appropriate;
  - Colorado has an aging population and the need will likely increase; and
  - This will be a resource to refer difficult cases.
- When asked what the potential challenges could be of having an Office of Public Guardianship in Colorado, participants further shared:
  - Funding for the OPG;
  - Lack of political will to support the OPG;
  - Challenging to serve as guardian but not as the SSA Representative Payee;
  - Possible challenges with staffing; and
  - The need to make sure there is adequate training for new guardians, so they know how to appropriately serve their clients.
- When asked about potential cost savings of having an Office of Public Guardianship in Colorado, participants highlighted moving individuals from hospitals to less resource intensive settings.
- When asked what an organization, like the OPG, working in your service area needs to know about your community to successfully provide guardianship services, participants shared:
  - Education would be key. People need to know about the OPG and what they do, and do not, do. The OPG needs to know what services/resources are available, have knowledge of the community, and know legal system and those working in it.

- When asked what an ideal public guardianship program look like in your community, participants shared:
  - An easy referral system for potential clients;
  - The program should reflect the communities in which they are serving (language, culturally);
  - “One stop shop” for connecting to resources; and
  - Outreach and educate the public and service organizations.

## **Conclusions**

Grant is still synthesizing data.

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## **Attachment X. Focus Group Interview Script**

**Introductory script:** Read the introductory script after reading through the consent form with the participant.

*Hello, and thank you for your interest in participating in this interview. My name is (State Name) and I will be conducting the interview with you today. What you tell us today could help determine how public guardianship services are delivered in Colorado, so we really appreciate your insights. This focus group discussion should take around 45 minutes to an hour to complete. You can stop the interview at any time or skip any questions you do not wish to answer. I will record this discussion to make sure I am capturing the really important information you share. If you have any questions, please do not hesitate to stop the interview to ask. Do you have any questions?*

### **Begin recording**

1. To start, can we please have each of you introduce yourself by stating your name, title, and county where you primarily work:

Discussions with a wide range of stakeholders from APS, VA, various nonprofits, attorneys, judges, hospitals, etc.

*Part of the mandate of the Colorado Office of Public Guardianship is to act as legal guardian for those who are indigent (lack the funds), unfriended (have no one to serve as legal guardian) and lack decisional capacity (are unable to make and understand the medical decisions they are making).*

2. Do you have any questions about the office and what we do before we start into the discussion?
3. Do you all work with clients who meet those criteria?
  - a. How often do you come across those types of clients?
  - b. What services are available in your community for clients in that situation?
    - i. Are these services adequate?
4. Do you see a need for public guardianship services in your community?
  - a. If so, why do you think that?
  - b. If no, why not?
5. I would like to gather some of your specific thoughts about having an Office of Public Guardianship in Colorado. What do you see as the...
  - a. Potential benefits?
  - b. Potential challenges?
  - c. Do you envision any potential cost savings?
6. What would an organization working in your service area need to know about your community to successfully provide guardianship services?
7. What would an ideal public guardianship program look like in your community?