

**OPG Commission meeting  
Director Report  
03.25.2020**

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.

**I. Discussion of COVID-19 Policies.**

- a. SCAO/Judicial/Denver Probate Policies – 30-day delay to hear guardianship petitions (reassess Mid-April)
- b. CO OPG Policy 7. COVID-19 Services Standards – see attached
- c. **Phase 1: Accept referrals**
  - i. Web site and CMS: I am meeting with Revisions after OPG Commission meeting. I hope that both can be completed “enough” within 2 weeks
  - ii. No pro se/in-person ability to assist with referrals
  - iii. Representative Payee/Colorado Fund for People with Disabilities – Steve Allen recommended to not spend money
  - iv. Considerations/barriers
    1. Accept individuals who have a Rep Payee in place
    2. Accept individuals who can be placed in a facility and facility agrees to be Rep Payee
    3. Incomplete referrals – OPG will only have remote ability to confirm information
    4. Main office phone line needs to be set up/connected
    5. Denver Probate Court 30-day delay to hear guardianship petitions (reassess Mid-April)
- d. **Phase 2: Appointment and initial 30 days**
  - i. Public Guardian to attend court appointment hearing

- ii. Public Guardian to complete Initial client investigation and meeting/visit
- iii. Public Guardian to complete Provider/IP investigation and meetings
- iv. Considerations/barriers
  - 1. What policies will be in place regarding attending court hearings?
  - 2. Public Guardian access to personal protective equipment (PPE) & Public Guardian safety
  - 3. Access to client for initial client investigation and meeting – city policies, CDC recommendations, and facility policies
  - 4. Facetime/Video conferencing/phone capabilities for facilities and/or clients, ability of client to communicate that way, possible refusal from client

**e. Phase 3: Ongoing maintenance**

- i. Public Guardian completes monthly client visits
- ii. Public Guardian completes regular Provider/IP meetings
- iii. Considerations/barriers
  - 1. See Phase 2 Considerations/barriers
  - 2. Can alternate between in-person and remote access to clients

**f. Potential referrals to begin in April**

- i. APS – self-neglect, mental health cases with placement secured or availability of in-home services
- ii. Denver Health – discharge/placement secured by SW
- iii. Rocky Mountain Human Services – secured group home placements
- iv. Considerations/barriers
  - 1. See Phase 2 Considerations/barriers

- 2. Discharge and Placement issues – are facilities accepting new patients/clients?
    - 3. In-home services issues – are services available?
  - v. Will not accept homeless individuals or individuals from jail due to placement issue
- g. 1 case/Public Guardian for safety/health reasons as well as ability to act as back up for ill or unavailable Public Guardian; potential for partner approach
- h. Is in-person client contact required? What if there is a time period when a client can't be visited, or health/safety confirmed by a Public Guardian due to city policies, CDC recommendations or facility policies or no access to PPE?
  - i. APS: issues with obtaining PPE and no longer conducting face-to-face client visits/meetings

**II. Administrative Infrastructure Update.**

- a. CO OPG web site
- b. Case Management System

**III. Budget and MOU Update.**

- a. Discussions with SCAO Budget Manager Hugh Wilson and JBC Steve Allen for updated Budget Proposal to include funds for training, travel, Center for Guardianship Certification (CGC) National and Master certification for Public Guardians and Director.
- b. At the last Commission meeting, I was asked about oversight by the CGC. A certified guardian can be denied, suspended, or revoked by the CGC. This page describes the Complaint Process against a CGC certified guardian: <https://guardianshipcert.org/make-a-complaint/>

c. 03.23.2020: Discussion with Steve Allen regarding FY21 funding and need to be cautious with budget.

IV. **Stakeholder Engagement Plan** – no updates.

V. **Colorado OPG Personnel Policies** – no updates and will be removed from future Director Reports.

VI. **Colorado OPG Fiscal Policies draft.** At the 03.05.2020 OPG Commission Emergency Meeting, I was asked to update the Fiscal Policies. Commissioner Deb Bennett-Woods indicated she will draft Fiscal Policies related to the duties required by the Commission for oversight. Once updated policies are submitted and reviewed, the Fiscal Policies will be incorporated into the Operating Policies.

VII. **Colorado OPG Pilot Program Operating Policies.** Operating Policies were ratified at the 03.05.2020 OPG Commission Emergency Meeting. I am still working on some of the edits that were requested. Once completed, I will submit to the Commission for review.

i. I completed the Colorado Department of Personnel and Administration provided on-line modules:

- a. Preventing discrimination and harassment in the workplace
- b. Ethics and conflicts of interest
- c. Preventing sexual harassment in the workplace
- d. Preventing violence in the workplace

2. Series with Tracy L. Hutchinson, MS Community Counseling, licensed Professional Counselor, Master Addictions Counselor, Colorado Addictions Counselor (CAC) III, <https://mindfulalchemist.org/>

a. 03.09.2020: Trauma informed care. Completed

- b. 03.23.2020: Vicarious trauma.
  - c. 04.15.2020: Decision-making and self-care
  - d. 05.20.2020: Verbal de-escalation
  - e. The last 3 sessions will be rescheduled due to the COVID-19 Policies
- 3. 04.01.2020: Cross-training with Center for Trauma and Resilience – will be rescheduled due to the COVID-19 Policies
- 4. Cross-training in process with Rocky Mountain Human Services: Successful communication with individuals with intellectual and/or developmental disabilities - be rescheduled due to the COVID-19 Policies
- 5. Training in process with Lifelong, Inc.: Successful communication with individuals with cognitive impairments <http://lifelonginc.com/>. Scheduled for 04.24.2020.
- 6. Training in process with Colorado Cross Disability Coalition [www.ccdonline.org](http://www.ccdonline.org)
- 7. We completed Mental Health First Aid training on 03.06.2020. Certified for 3 years.
- b. Introduction of HB 20-1032 “A Bill for an Act Concerning Changes to Improve the Protections of At-Risk Adults,” pages 13 – 14 address OPG as an employer and mandatory CAPS check for employees – under consideration. General Assembly is temporarily adjourned until March 30, 2020 due to COVID-19.

- c. **Representative Payee, etc. issue.** Ongoing. AG Enck will update us.
  - i. I had a preliminary conference with Megan Brand - Director of Colorado Fund for People with Disabilities, and Natalie DeVille - Director Lutheran Family Services Older Adult & Caregiver Services, to apply for Next 50 Initiative Collective Impact Challenge Grant for Rep Payee program. The deadline to apply is in late August.
  
- d. **Intake Eligibility, Prioritization and Referral Process.** I continue to meet with Revisions to finalize the web site, referral process, court forms, and the Case Management System.
  - i. Pro se Center: We are in the process of creating a “How to Make a Referral to the OPG” Handout. In discussions with the AG and IT, we cannot place an OPG computer in the Pro Se Center for individuals to use. However, we can have Public Guardians or volunteers or interns hold clinics and/or assist individuals as needed in the Pro Se Center. The use of volunteers or interns at this point is likely not possible for some time due to the COVID-19 policies.
  
- e. Data gathering and CMS coding issues. Ongoing.
  - i. 03.12.2020: DHS – Policy Unit and Office of Community Access & Independence. Meeting to discuss barriers and placement issues for individuals in state mental health hospitals. Rescheduled to 04.07.2020 due to COVID-19 policies.
  
  - ii. 02.06.2020: I was invited by Janice Blanchard, Governor’s Senior Policy Analyst with Aging, to attend and join the Governor’s Financial Security Coalition. At that meeting, I met Dr. Eric Chess and Jodi Waterhouse. Both have potential

for a research project, such as OPG data gathering. The Coalition is also willing to set the OPG as a priority to gather the data needed for the 2023 Director Report – no update.

- iii. 02.10.2020: Dr. Lotta Granholm-Bentley – University of Denver, Knoebel Institute for Healthy Aging, Executive Director – no update.
- iv. 02.06.2020: Jodi Waterhouse, University of Colorado Anschutz Medical Campus, Program Leader – Center on Aging Department – no update.
  - 1. I postponed giving an OPG Presentation to the Alzheimer’s Task Force on 03.18.2020 due to illness and COVID-19 policies.
- v. 02.10.2020: Dr. Eric Chess – University of Denver, Knoebel Institute for Healthy Aging, Director of Financial Security and Cognitive Health Association – no update.
- vi. I reached out to Lynn Taussig, but he indicated he cannot assist with data or research.
- vii. 03.02.2020. meeting with CDHS & Denver Health. Discussed referral process and intend to meet again once our process is finalized.

VIII. **Human Resource Update** – no update.

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

X. **Stakeholder Meeting Update** since 02.26.2020

- a. 03.02.2020: Meeting with CDHS-APS – Whitney Nettleson, Dave Bernhardt, Liz Mascarenas and Denver Health – Megan Leppke – DH Manager Care Management, Sara Cope – DH NP with Oasis, Amanda Thompson- DH Director Care Management
- b. 03.04.2020: Meeting with Program Directors at Rocky Mountain Human Services
- c. 03.05.2020: Meeting with Social Worker and Director at Veterans Administration
- d. 03.11.2020: I presented at the Denver Forensic Collaborative for At-risk Adults
- e. 03.18.2020: Dr. Robin Yasui – Denver Health, Director of Geriatrics
- f. 03.18.2020: Colorado Coalition for Elder Rights and Abuse Prevention – Carrie Diehl, Program Coordinator
- g. 03.23.2020: Representative Marc Snyder