

Utah Working Interdisciplinary Network of Guardianship Stakeholders (WINGS)

Thursday, April 20, 2023 - 12:00 to 2:00 p.m.

Attended				Not Present
Judge Keith Kelly	Rob Denton	Eve Larsen	Katie Thomson	Shane Bahr
Judge James Brady	Lindsay Embree	Nan Mendenhall	Holly Thorson	Nels Holmgren
Deborah Brown	Rob Ence	Wendy Naylor	Michelle Wilkes	Alan Ormsby
Sarah Box	Wendy Fayles	Andrew Riggle	Kaye Lynn Wootton	James Toledo
Brant Christiansen	Leslie Francis	Keri Sargent		Todd Weiler
Tantalisa Clayton	Stacy Haacke	Alianne Sipes	Guest:	
Katie Cox	Rachelle Johnson	Shonna Thomas	Sue Crismon	

Agenda			
	Topic	Presenter	Materials
12:00	Meeting begins		
	<ul style="list-style-type: none"> Housekeeping, minutes Welcome guests & new members: <ul style="list-style-type: none"> Sue Crismon, Office of Legal Services Innovation Alianne Sipes, Long-term Care Ombudsman Judge Brian Cannell, 1st District Court 	Judge Kelly	– <i>WINGS Minutes (February 2023 – draft)</i>
12:10	Highlight: Attorneys for Incapacitated Individuals		
	<ul style="list-style-type: none"> Legal “sandbox” to complement the Guardianship Signature Program 	Sue Crismon	
	<ul style="list-style-type: none"> Legal Aid funding changes 	Wendy Naylor	
12:50	WINGS Membership		
	<ul style="list-style-type: none"> WINGS term limits 	Judge Kelly Shonna Thomas	– <i>Rules 1-205 and 3-421</i> – <i>WINGS Membership List</i>
1:20	New Projects		
	<ul style="list-style-type: none"> Planning the 2023 New Judge Orientation (NJO) 	Group Discussion	– <i>NJO 2021 Materials</i> – <i>Judges’ Conference 2022 Materials</i>
1:50	Other Business		
	<ul style="list-style-type: none"> CJA Rule updates Utah Code 75-5-303 – Deferred to June meeting 	Shonna Thomas	
2:00	Meeting adjourned		

Housekeeping

- Meeting began at 12:03pm.
- The committee welcomed new member Alianne Sipes (Long Term Care Ombudsman) and guest Sue Crismon (Office of Legal Services Innovation).
- A motion was made to approve the minutes from the previous meeting (February 2023). The motion was seconded and approved.
- Meeting adjourned at 2:02pm.

Highlight: Attorneys for Incapacitated Individuals

Legal “Sandbox”

WINGS has been investigating various solutions to address gaps in the services provided by the Guardianship Signature Program, to comply with Utah Code and provide legal representation to respondents in guardianship cases.

Sue Crismon presented to the committee the process that could be used to initiate a project within the legal “sandbox” through the Office of Legal Services Innovation. Items discussed included what type of legal services might be considered within the sandbox, such as assistance by trained volunteers, non-attorney legal professionals, or law students. The committee discussed possible groups who could serve as the initiating entity for this type of project, including the Disability Law Center, university law clinics, community-based organizations (e.g., assisted living, care professionals), or other WINGS stakeholder agencies.

Decisions made:

- Sue offered to put together a draft outline of a proposal for the committee to review, to determine if this is a project WINGS wants to pursue. Shonna Thomas and Keri Sargent will coordinate with Sue on this proposal and share the draft with WINGS members.
- The Executive Committee will review the draft proposal at their next meeting.

Legal Aid Funding

Wendy Naylor, Office of Public Guardian (OPG), shared with stakeholders a recent concern related to the attorney shortage for guardianship cases. Legal Aid will be discontinuing legal representation in OPG cases in 3rd district. This accounts for approximately 30+ cases a year that otherwise would have been sent through the Guardianship Signature Program, which has struggled to fulfill requests.

Decisions made:

- Deborah Brown volunteered to reach out to Sally Hurme for suggestions.
- The Executive Committee will add this to the agenda for the May meeting.

WINGS Membership

In 2022, WINGS was made an official committee of the Judicial Council. It was unclear at that time if term limits being served by stakeholders carried over or started over.

The committee discussed what might be best for stakeholders moving forward to retain institutional knowledge while also bringing in fresh ideas and perspectives. One suggestion is to start term limits over but stagger the terms so that members expire on different timelines (same month/day, but different years). It was also noted that there are a few positions that are currently under term limit restrictions but perhaps

ought not to be, such as the probate clerks in busier districts. The committee may want to review and revise Rule 3-421.

Decisions made:

- The committee placed a hold on any term expirations until further review of the possible options and input from the General Counsel’s office.
- This item will be reviewed by the Executive Committee at a future meeting. The Executive Committee will develop a proposal for the full committee to discuss in the fall.

New Projects – New Judge Orientation

GRAMP/WINGS has presented on an annual basis to new judges during the New Judge Orientation. The next presentation is scheduled for June 14, 2023. This upcoming training offers an opportunity to reframe and update the information shared and improve upon past presentations.

WINGS stakeholders discussed ideas for introducing more relevant and specific content to new judges, along the lines of the “Common Pitfalls” presentation WINGS gave at the District Court Judges’ Conference in 2022.

Decisions made:

- The presentation will build on the Common Pitfalls created in 2022, with a focus on the statutes, limitations and alternatives to guardianship, and the resources available to new judges (e.g., Guardianship Signature Program, Court Visitor Program).
- Stakeholders are encouraged to send additional feedback and presentation ideas to Shonna.
- This item will be reviewed by the Executive Committee during the May meeting.

Other Business

CJA Rule Updates

- CJA Rule 6-501 - The Policy, Planning, and Technology committee approved the final revisions to this rule. This rule has been sent out for an additional comment period, which ends on June 8, 2023.
- CJA Rule 6-507 - The comment period has ended, and no comments were received. It will now go back to the Policy, Planning, and Technology committee for final review.

Utah Code 75-5-303 – deferred until June 2023 meeting.

Action Items

<p>Legal “Sandbox”</p> <ul style="list-style-type: none"> – Coordinate with Sue Crismon to receive a draft outline of a “sandbox” proposal, to share with WINGS. 	<p>Shonna Thomas Keri Sargent</p>
<p>Legal Aid Funding</p> <ul style="list-style-type: none"> – Reach out to Sally Hurme for suggestions. 	<p>Deborah Brown</p>
<p>New Judge Orientation</p> <ul style="list-style-type: none"> – Send to Shonna any additional suggestions or ideas for the presentation. 	<p>WINGS Stakeholders</p>

Deferred / Continuing Items

- Attorney shortages, legal “sandbox” options, and Guardianship Signature Program improvements
- Utah Code 75-5-303
- WINGS membership process
- Project updates: Rule 6-501, Rule 6-507, and guardianship form revisions

Next Meeting(s):

June 15, 2023
August 17, 2023
October 19, 2023
December 21, 2023
February 15, 2024
April 18, 2024