



Administrative Office of the Courts

Chief Justice Matthew B. Durrant
Utah Supreme Court
Chair, Utah Judicial Council

March 4, 2024

Ronald B. Gordon, Jr.
State Court Administrator
Neira Siaperas
Deputy State Court Administrator

MEMORANDUM

TO: Judicial Council
FROM: Judge Keith Kelly, WINGS Chair
Shonna Thomas, District Court Program Administrator - GRAMP
RE: Utah WINGS Annual Report

The Working Interdisciplinary Network of Guardianship Stakeholders (WINGS) committee is a problem-solving body that relies on court-community partnerships to:

- Oversee guardianship practice in the Courts;
- Improve the handling of guardianship cases;
- Engage in outreach/education; and
- Enhance the quality of care and quality of life of vulnerable adults.

WINGS is effective through participation of key stakeholders who understand and are positioned to improve the Courts' guardianship processes.

WINGS Executive Committee:

1.	Keith A. Kelly	Judge, WINGS Chair	3 rd District
2.	Brant Christiansen	Attorney/Partner	Lewis Hansen Law Firm
3.	Nels Holmgren	Director	Division of Adult and Aging Services
4.	Nan Mendenhall	Director	Adult Protective Services
5.	Andrew Riggle	Public Policy Analyst	Disability Law Center
6.	Keri Sargent	Asst. District Court Administrator	Administrative Office of the Courts
7.	Shonna Thomas	Program Administrator - GRAMP	Administrative Office of the Courts
8.	Michelle Wilkes	Court Visitor Program Coordinator	Administrative Office of the Courts

WINGS Steering Committee:

9.	James Brady	Judge	4 th District
10.	Brian Cannell	Judge	1 st District
11.	Coral Sanchez	Judge	3 rd District
12.	Shane Bahr	District Court Administrator	Administrative Office of the Courts

13.	Sarah Box	Attorney	Utah Courts - Self Help Center
14.	Deborah Brown	Professional Guardian	Guardianship & Conservator Services
15.	TantaLisa Clayton	Attorney / Director	Utah Legal Services
16.	Katie Cox	Attorney	Disability Law Center
17.	Rob Denton	Attorney	Attorney at Law
18.	Lindsay Embree	Chief, Division of Neuropsychology	University of Utah School of Medicine
19.	Rob Ence	Director	Utah Commission on Aging
20.	Wendy Fayles	Criminal Justice / Mentor	National Alliance on Mental Illness
21.	Leslie Francis	Attorney	University of Utah Law School
22.	Stacy Haacke	Associate General Counsel	Administrative Office of the Courts
23.	Rachelle Johnson	Probate Clerk	4 th District
24.	Eve Larsen	Case Manager Senior Services	Davis County Health Department
25.	Wendy Naylor	Director (interim)	Office of Public Guardian
26.	Alan Ormsby	State Director	AARP
27.	Alianne Sipes	Long-Term Care Ombudsman	Dept. of Health and Human Services
28.	Katie Thomson	Judicial Case Manager	3 rd District
29.	Holly Thorson	Court Visitor Program Coordinator	Administrative Office of the Courts
30.	James Toledo	Program Manager	Utah Division of Indian Affairs
31.	Todd Weiler	Senator	8 th District
32.	Kaye Lynn Wootton	Assistant Attorney General	Medicaid Fraud Control Unit

Requested Succession Guidance from the Utah Judicial Council:

- WINGS seeks guidance on the process for succession of the WINGS Chair, who is to be a Utah District Court Judge under UCJA 3-421(3). The current Chair has served for more than five years (although WINGS only formally became a Judicial Council standing committee with the amendment of UCJA 1-205 on May 23, 2022).

WINGS Projects:

- In 2023, WINGS focused on identifying solutions to address attorney shortages, primarily the difficulty the Guardianship Signature Program (GSP) has in finding volunteer attorneys to provide representation to vulnerable adults in guardianship cases, in conjunction with Utah Code § 75-5-303. WINGS worked with the Office of Legal Services Innovation to ascertain if a legal “sandbox” project could serve as a possible alternative or supplement to the GSP.
- WINGS also created an Attorney Gaps Subcommittee to further investigate possible resolution of the GSP attorney shortage. The subcommittee includes members from WINGS, as well as stakeholders in the community with knowledge of the problem, and a vested interest in finding solutions. The subcommittee is currently putting together a proposal to fund a 3-year pilot program to replace the GSP with a training academy program, similar to the Domestic Lawyers Academy offered by Utah Legal Services. The proposed academy would provide training, mentorship, CLE credits, and a flat rate fee for volunteer attorneys in exchange for accepting guardianship cases. The subcommittee expects to finish the proposal in 2024.

- WINGS continued its work on improving the language of Utah Code § 75-5-303, which involves the legal process for entering guardianship orders. Proposed revisions include updating the medical criteria to conform with current standards used by the medical community and clarifying language on the requirements for attorneys and court visitors in these proceedings. WINGS provided these suggested amendments to the Liaison committee in October 2023. The Liaison committee approved the suggestions and moved to find a sponsor to present them during the 2024 legislative session – although that effort was not successful.
- WINGS partnered with the Forms committee to create a forms workgroup tasked with updating the multitude of forms used in guardianship and conservatorship proceedings. The workgroup meets monthly to work on this project. In late 2023, the workgroup was tasked with creating new forms that previously only existed on OCAP, in anticipation of OCAP sunsetting in 2024. Drafts were developed by the workgroup, and subsequently reviewed and approved by the WINGS committee at the December 2023 meeting. They have been sent to the Forms Committee for the final review and approval process.
- At the request of the Forms committee, WINGS worked on creating orders for previously approved motions related to reviewing, changing, or terminating adult or minor guardianships. WINGS completed recommendations on these orders in December 2023, and the draft forms were sent to the Forms Committee for the final review and approval process.
- WINGS continued to work alongside the Probate Subcommittee to finalize revisions to UCJA 6-501, regarding the review process for annual guardianship reports. The final revisions were approved by the Judicial Council in October 2023, and went into effect November 1, 2023. This project is now complete.
- WINGS continued to work alongside the Probate Subcommittee to finalize revisions to UCJA 6-507, regarding court visitors. Revisions include adding language to better define a court visitor, clarifying the mechanism for making objections to court visitor investigations, and describing the process required for review of the reports submitted by court visitors. The revisions were approved by the Judicial Council in June 2023, and went into effect November 1, 2023. This project is now complete.
- Additional items of note –
 - Several WINGS stakeholders participated in the New Judge Orientation training in June 2023.
 - In 2024, WINGS plans to continue addressing the attorney shortage problems, reviewing and providing feedback on guardianship forms, updating training materials for judges and court staff, and making needed updates to the Guardianship and Conservatorship manual, training, and required test.