

Utah Working Interdisciplinary Network of Guardianship Stakeholders (WINGS)

Thursday, April 18, 2024 - 12:00 to 2:00 p.m.

Attended			Not Present	
Judge Keith Kelly	Nels Holmgren	Keri Sargent	Judge James Brady	Wendy Fayles
Judge Brian Cannell	Ann Humpherys	Shonna Thomas	Shane Bahr	Leslie Francis
Judge Coral Sanchez	Rachelle Johnson	Katie Thomson	Deborah Brown	Alan Ormsby
Sarah Box	Eve Larsen	Holly Thorson	Rob Ence	Todd Weiler
Brant Christiansen	Nan Mendenhall	James Toledo	Lindsay Embree	
TantaLisa Clayton	Wendy Naylor	Michelle Wilkes		
Katie Cox	Andrew Riggle	Kaye Lynn Wootton		
Rob Denton				

Agenda			
	Topic	Presenter	Materials
12:00	Meeting begins		
	<ul style="list-style-type: none"> Housekeeping, minutes Welcome guests and new members 	Judge Kelly	<ul style="list-style-type: none"> WINGS Minutes (February 2024 – draft)
12:10	WINGS Subcommittee Updates		
	<ul style="list-style-type: none"> Forms G/C Manual & Test Attorney Gaps 	Shonna Thomas	<ul style="list-style-type: none"> GSP – Academy Pilot Program GSP Data – FY2024
12:45	Legislative Updates & Next Steps		
	<ul style="list-style-type: none"> Utah Code 75-5-303 	Shonna Thomas	
	<ul style="list-style-type: none"> HB0197 – Supported Decision-Making 	Andrew Riggle	
1:35	Other Business		
	<ul style="list-style-type: none"> Annual Report to the Judicial Council 	Judge Kelly	
	<ul style="list-style-type: none"> Court Visitor Program – report templates 	Shonna Thomas	
2:00	Meeting adjourned		

Housekeeping
<ul style="list-style-type: none"> Meeting began at 12:02pm. Housekeeping, minutes. No changes were recommended to the minutes. Judge Sanchez motioned to approve; Kaye Lynn Wootton seconded. Minutes approved. Meeting adjourned at 1:33pm.

WINGS Subcommittee Updates

Forms

- The forms workgroup is finishing up the documents related to adult guardianship and intends to have those ready for WINGS and the Forms Committee within the next few months. Once those are in the process of receiving approval, the workgroup will begin work on another category of guardianship forms.
- The Orders that WINGS worked on related to the Motion to Terminate and Motion to Review or Alter a Guardianship went in front of the Stylistics Committee last week and all WINGS recommendations were approved. These will now go in front of the full Forms Committee for final approval.
- The changes WINGS recommended to the Order on Review of Guardianship and Conservatorship Reports form also went in front of the Stylistics committee last week and all changes were approved. This form will be presented to the Forms Committee for final approval.

Concern was raised on how the Order on Review form is processed by the different districts as some attorneys are receiving mixed messages on how to properly complete and file this order.

There are currently two separate processes occurring for the same document, based upon whether it is e-filed by an attorney or submitted by a pro se party. There are further complications based on differences with RTF and PDF file formats. It also appears that some of the inconsistencies are due to individual preference - some judges prefer to have the form pre-filled, and others do not.

Keri Sargent and Judge Kelly will look into getting this matter on the agenda with the Board of District Court Judges for additional insight and review and report back to the committee on that discussion.

G/C Manual & Test

The workgroup met for the first time last week and created a plan of action for tackling this project. They will meet on a monthly basis and work one section at a time. The group plans to incorporate the changes to CJA Rules 6-501 and 6-507, Utah Code 75-5-301.5 (Guardianship Bill of Rights), and any changes from the recodification of the probate code, if applicable. The workgroup also brainstormed ways to improve the qualifying exam and other resources for those who may become guardians, including possibly a webpage dedicated to this target audience.

Attorney Gaps

This subcommittee continues to work on a future proposal to pilot an Attorney Academy program that would function in lieu of the Guardianship Signature Program (GSP).

Shonna and Keri met with Michael Dreschel (Legislative Committee) to discuss the challenges the GSP is experiencing. Michael suggested that there may be enough data to support presenting a proposal to the Judicial Council for funding 1-2 attorneys to take on guardianship cases, through a third-party agency. This option might help fill the gaps in the short term while the Academy is being developed.

Michael recommended that the Attorney Gaps subcommittee discuss this idea with the Office of Public Guardian and other possible agencies. Utah Legal Services is a possible third-party agency. Shonna and Keri will report back to Michael at the end of May the results of that discussion.

Legislative Updates & Next Steps

Utah Code 75-5-303
 Shonna and Keri met with Legislative Liaison, Michael Dreschel, to discuss next steps for getting the changes to the statute recommended by WINGS before the legislature next year. They will follow up with Michael in May to continue the discussion.

HB0197 – Supported Decision-Making
 Despite progress throughout the session, this bill ultimately did not pass before the time expired. The Disability Law Center has already held some preliminary conversations on their next steps and plan to move forward with the bill next year with the same or similar language.

Other Business

Annual report to the Judicial Council
 Judge Kelly and Shonna presented to the Judicial Council in March. In addition to providing the annual report describing WINGS projects, Shonna reported to the Council on the ongoing problem with finding attorneys for guardianship cases and the efforts of WINGS to address this issue, and Judge Kelly asked for the Council guidance on how to move forward with a Chair successor when the time comes. The Council voted to have the succession question brought before the Management team for further discussion.

Court Visitor Program – report templates
 The Court Visitor Program has been working on new templates for the Court Visitor reports that are submitted to judges for each case. The reports have not been updated since they were first created in 2012. The GRAMP team worked on this project throughout 2023, using feedback from Court Visitors and an extensive review of reports used in other states. The updated templates were presented to the Board of District Court Judges last week and received full approval. In addition to updating the templates, the types of cases that the Court Visitor Program covers expanded from 5 case types to 9 types in total. This will allow the program to have more focused investigations, and better utilize the volunteers’ time.

Action Items

<p>Forms – Order on Review</p> <ul style="list-style-type: none"> – Get this matter on the agenda with the Board of District Court Judges. 	<p>Judge Kelly Keri Sargent</p>
<p>Attorney Gaps & Utah Code 75-5-303</p> <ul style="list-style-type: none"> – Meet with Legislative Liaison, Michael Dreschel, to discuss next steps. 	<p>Shonna Thomas Keri Sargent</p>

Deferred / Continuing Items

- WINGS workgroup updates
- Order on Review form

Next Meeting(s):

June 20, 2024
August 15, 2024
October 17, 2024
*December 5, 2024**
February 20, 2025
April 17, 2025