

Utah Working Interdisciplinary Network of Guardianship Stakeholders (WINGS)

Thursday, June 19, 2025 - 12:00 to 2:00 p.m.

Attended				Not Present
Judge Keith Kelly	Wendy Fayles	Andrew Riggle	Todd Weiler	Judge Coral Sanchez
Sarah Box	Nels Holmgren	Keri Sargent	Michelle Wilkes	Judge Brian Cannell
Deborah Brown	Ann Humpherys	Shonna Thomas	Kaye Lynn Wootton	Megan Connelly
Natasha Burningham	Eve Larsen	Katie Thomson		Rob Denton
Brant Christiansen	Nan Mendenhall	Holly Thorson	Guests:	Rob Ence
Katie Cox	Alan Ormsby	James Toledo	Michael Starks	Leslie Francis
				Rachelle Johnson
				Wendy Naylor

Agenda

	Topic	Presenter	Materials
12:00	Meeting begins		
	<ul style="list-style-type: none"> Housekeeping, minutes 	Judge Kelly	<ul style="list-style-type: none"> April 2025 – Minutes (draft)
12:10	Current Topics		
	<ul style="list-style-type: none"> Background Disclosure <ul style="list-style-type: none"> Current plan Committee feedback Next steps 	Judge Kelly Kaye Lynn Wootton Shonna Thomas	<ul style="list-style-type: none"> White Paper Draft – Background Disclosure for Guardianships CJA Rule 6-501 - Background Disclosure Draft (6.5.2025)
	<ul style="list-style-type: none"> Attorney shortages <ul style="list-style-type: none"> Funding request Interim actions 	Shonna Thomas Keri Sargent	<ul style="list-style-type: none"> GSP and CVP Data (5.21.25)
1:30	Other Business		
	<ul style="list-style-type: none"> Guardianship Forms & OCAP sunset 	Shonna Thomas	<ul style="list-style-type: none"> Self-Help Center Monthly Newsletter
	<ul style="list-style-type: none"> Guardianship Manual & Exam workgroup 	Shonna Thomas	
	<ul style="list-style-type: none"> WINGS Stakeholders <ul style="list-style-type: none"> Medical community Utah Legal Services 	Shonna Thomas Andrew Riggle Leslie Francis	
2:00	Meeting adjourned		

Housekeeping

- Meeting began at 12:04pm.
- Judge Kelly welcomes visitor Michael Starks to the meeting. Michael is the new Deputy District Court Administrator, working alongside Keri Sargent in the Administrative Office.

- No changes were recommended to the minutes. Michelle Wilkes motioned to approve; Kaye Lynn Wootton seconded. Minutes approved.
- Meeting adjourned at 1:23pm.

Current Topics

Background Disclosure subcommittee

The Background Disclosure subcommittee created a red line version of CJA Rule 6-501, adding language requiring a background check. The intent is to mimic the requirements similar to those used in adoption cases.

They have also been working on a draft White Paper that outlines the reason and purpose of pursuing this rule change to mandate background checks for prospective guardians and conservators. Rob Ence is working with Adult Protective Services to gather supporting data to include in the White Paper. Shonna Thomas and Kaye Lynn Wootton are adding in case studies showing the harm that can come when bad actors are placed in guardian or fiduciary roles with vulnerable individuals.

In addition to the White Paper and rule redline, the subcommittee will also add updated language to the guardianship petition asking the proposed guardian or conservator to list any other cases where they serve in that role and add questions to the annual reports for current guardians and conservators to disclose any relevant changes in their criminal background since they were appointed.

Should corporate / professional guardians be exempt from the background requirement?

- In these situations, would the individuals serving under the company need background checks for each case, or just the owner of the company? Typically, it is the entity that is appointed, because staff working for the company come and go.
- Background checks for employees are standard in these industries. It might be helpful to add language to the rule that the entity or the corporation of the business is responsible to have those background checks for all their employees.
- A professional guardian service could have those done every year as a matter of internal agency policy and have them ready to submit on individual cases.

Who would have access to the background report once it is filed?

- Some individuals filing to be a guardian may have items in their background that are private but would not necessarily preclude them from serving as a guardian.
- If it is marked Private in the case file, the judge, parties, and attorneys on the case will have access to the contents of the check, but the general public would not.

Attorney shortages

Shonna shared updated data that shows the extent of the attorney shortage problem. This information has been shared with the Clerks of Court and Shonna will be presenting it to the Board of District Court Judges later this month. Last year, GRAMP submitted a funding request for 2 attorneys to help with this ongoing problem. That request did not receive legislative funding. GRAMP is once again seeking funding at the next legislative session. Keri Sargent updated the group on the court's budget process. The group discussed different ways to alleviate the problem while the funding request makes its way through the process.

Other Business

Guardianship forms & OCAP

OCAP will no longer be available starting in July. My Paperwork will be taking the place of OCAP, but it will take time to get everything operational on that platform. In the meantime, the guardianship forms and updated web pages will be added to the court website. The guided interviews for the annual reports will be available in My Paperwork sometime in August. Interviews and forms for guardianship of a minor are expected to be added by the end of the year. The remaining guardianship interviews will be completed in My Paperwork in 2026. Along with this change, pro se filers will be able to e-file documents with the court.

Guardianship Manual & Exam workgroup

This workgroup will begin meeting again after a brief hiatus. The goal of the group is to finish the updates to the guardianship manual, update the required exam proposed guardians must complete, and eventually develop an integrated online training that covers key topics in the manual with test questions interspersed throughout. If anyone on WINGS is interested in participating in the workgroup, reach out to Shonna.

WINGS stakeholders

Judge Kelly's retirement date is September 16th. There is a process to follow to appoint a new Chair to serve on WINGS. Keri Sargent is following up with that process. Judge Kelly has also applied to become a senior judge. It is still to be determined if he will continue to participate in WINGS post-retirement.

WINGS is still looking for successor stakeholders to replace TantaLisa Clayton from Utah Legal Services and Dr. Lindsay Embree with the University of Utah Medical. Andrew Riggle will follow up with Utah Legal Services. WINGS stakeholders are encouraged to share with Shonna the names of any individuals in the geriatric, neuropsychology, or related medical fields who may be interested in participating in WINGS.

Action Items

Stakeholder Successors

- Reach out to Utah Legal Services for a successor representative.
- Contact Shonna with nominations for individuals from the medical community.

Andrew Riggle

Stakeholders

Deferred / Continuing Items

- Criminal background disclosure
- WINGS stakeholder successors
- Attorney shortages and GRAMP funding
- SB 199

Next Meeting(s):

August 21, 2025
 October 15, 2025
 December 18, 2025
 February 19, 2026
 April 16, 2026
 June 18, 2026