

**Utah Working Interdisciplinary Network of Guardianship Stakeholders (WINGS)**

Thursday, April 16, 2026 - 12:00 to 2:00 p.m.

Attended			Not Present	
Judge Coral Sanchez	Wendy Fayles	Tanya Schmidt	Sarah Box	Alan Ormsby
Judge Matthew Hansen	Nels Holmgren	Bree Spaulding	Brant Christiansen	Andrew Riggle
Carole Baraldi	Ann Humpherys	Shonna Thomas	Rob Ence	James Toledo
Deborah Brown	Rachelle Johnson	Katie Thomson	Leslie Francis	Todd Weiler
Natasha Burningham	Eve Larsen	Holly Thorson	Wendy Naylor	Kaye Lynn Wootton
Megan Connelly	Doug LeDoux			
Katie Cox	Keri Sargent	<b>Guests:</b>		
Rob Denton		Pleasy Wayas		

**Agenda**

	Topic	Presenter	Materials
12:00	<b>Meeting begins</b>		
	<ul style="list-style-type: none"> <li>Housekeeping, minutes</li> <li>Welcome new members:                             <ul style="list-style-type: none"> <li>Dr. Carole Baraldi - Geriatrics</li> <li>Doug LeDoux – Court Visitor Program</li> <li>Judge Matthew Hansen – Second District</li> </ul> </li> </ul>	Judge Sanchez	<i>February 2026 – Minutes (draft)</i>
12:15	<b>WINGS Discussion</b>		
	<ul style="list-style-type: none"> <li>WINGS Committee Requirements                             <ul style="list-style-type: none"> <li>Performance assessment</li> <li>Annual report to Judicial Council</li> </ul> </li> </ul>	Judge Sanchez Keri Sargent Shonna Thomas	<i>Performance Review (2026 Draft)</i> <i>Annual Report (2026 Draft)</i>
	<ul style="list-style-type: none"> <li>GRAMP                             <ul style="list-style-type: none"> <li>Attorney training - 4-part series May/June</li> <li>Attorney funding – next steps</li> <li>Court Visitor Program status</li> </ul> </li> </ul>	Shonna Thomas Keri Sargent Holly Thorson	
	<ul style="list-style-type: none"> <li>G/C Manual &amp; Test updates</li> </ul>	Shonna Thomas	<i>DRAFT Exam Answer Key (adult)</i> <i>DRAFT Basic Guidelines (Minor)</i>
1:30	<b>WINGS Updates</b>		
	<ul style="list-style-type: none"> <li>Legislative session recap</li> </ul>	Andrew Riggle Shonna Thomas	
	<ul style="list-style-type: none"> <li>WINGS Subcommittees                             <ul style="list-style-type: none"> <li>Forms workgroup                                     <ul style="list-style-type: none"> <li>Status of approved forms</li> <li>Up next - Clinical Evaluation</li> </ul> </li> <li>Background disclosure subcommittee</li> </ul> </li> </ul>	Shonna Thomas	
1:45	<b>Other Business</b>		
	<ul style="list-style-type: none"> <li>New member request</li> </ul>	Shonna Thomas Natasha Burningham	
	<ul style="list-style-type: none"> <li></li> </ul>		
2:00	<b>Meeting adjourned</b>		

## Housekeeping

- Judge Sanchez called the meeting to order at 12:02.
- The meeting minutes from February 19 were reviewed. Rob Denton motioned to approve, Katie Cox seconded, and the motion passed unanimously.
- Judge Sanchez introduced three new members to the WINGS committee:
  - Dr. Carole Baraldi: Has extensive experience working with older adults, palliative and hospice care, skilled nursing facilities, and is currently serving as a professor of geriatrics at the University of Utah School of Medicine and performing clinical work at the Salt Lake City VA.
  - Doug LeDoux: Joined the Court Visitor Program as an employee after volunteering as a Court Visitor, bringing roughly 15 years of background in fraud investigations and white-collar crime.
  - Judge Matthew Hansen: Joining from the Second District (Ogden), providing a needed and valuable perspective on guardianship cases outside of Salt Lake County.
- Meeting adjourned at 1:25pm.

## WINGS Discussion

### WINGS Committee Requirements

- **Performance Assessment:** Keri Sargent reminded the group that an annual performance review memo must be presented to the Management Committee and Judicial Council to confirm the ongoing need for WINGS. Keri plans to take the memo to the Judicial Council in May. Shonna Thomas added that feedback from a recent survey will be incorporated, including establishing project timelines and adding a representative from the forms committee.
- **Annual Report:** Shonna discussed the annual report, which highlights WINGS' effectiveness and initiatives. The report is scheduled to be presented to the Judicial Council on April 27 at 9:30 AM.

### GRAMP

- **Attorney Training:** Shonna reported that the previous training for volunteer Guardianship Signature Program (GSP) attorneys was outdated and had to be removed. To recruit new attorneys and provide CLE credits before the end of the fiscal year, a new four-part training series will run from mid-May to early June. Topics will cover case overviews, ethics, alternatives/least restrictive options, and an overview of GRAMP featuring a Q&A panel.
- **Attorney Funding:** Keri reported that the legislative budget request for three attorneys was not funded. However, using internal court funds, the AOC plans to request Judicial Council approval for a pilot program to contract an attorney via billable hours, as well as to hire a third full-time Court Visitor Program specialist. This process will take place through May and June.
- **Court Visitor Program Status:** Holly Thorson reported significant progress in reducing case backlogs. Pending attorney waiver cases have dropped from 130–150 cases (with a 6-8 month wait) down to 23 cases (with a 2-3 month wait).

### G/C Manual & Test Updates

- Shonna explained that while a new adult guardianship handbook was approved in December 2025, the old true/false exams are still active and have already been built into the new "My Paperwork" online platform.
- Although they are imperfect, as a compromise to prevent project delays, the old T/F tests will be updated to match the new manual and condensed into a single test to serve as a placeholder. Pleasy Wayas noted this allows interviews for adult, minor, and SID guardianships to launch simultaneously on "My Paperwork" at the end of June.
- Given the time constraints, Shonna used the adult guardianship handbook to draft a new handbook for minor guardianships, as one did not previously exist. Stakeholders are asked to review it over the next week before it is submitted to the Judicial Council for formal approval.
- The Manual and Exam work group will continue the pursuit of creating a comprehensive, interactive training module to fully replace the paper test in the future.

### WINGS Updates

#### Legislative Session Recap

Shonna Thomas read an update provided by Andrew Riggle -

- **SB 161 (Evaluation and Guardianship Amendments):** Clarifies that the guardianship code does not abridge HIPAA rights, requires clinical evaluators to use evidence-based assessment tools, and states that evaluations cannot be predominantly based on a prospective guardian's opinion.
- **Guardianship Representation Fund:** The Disability Law Center (DLC) proposed a funding stream for independent respondents' counsel via small surcharges on items like deeds and permits. The legislature has agreed to convene a stakeholder group to review this model, potentially leading to a bill in the next session.

#### WINGS Subcommittees

- **Forms Workgroup:** Has successfully processed several forms and is currently prioritizing notice of hearing forms and forms for transferring guardianships to and from Utah. The group will next focus on revising the clinical evaluation form to reflect the new SB 161 evidence-based requirements, and will solicit input from Dr. Baraldi when the draft is complete.
- **Background Disclosure:** The subcommittee was paused during the legislative session but plans to resume meetings in the summer.

### Other Business

- **New Member Request:** Gregory Misener requested to join the committee. Gregory primarily represents petitioners in guardianship proceedings. After a brief discussion, stakeholders expressed support, citing his legal expertise and respectful practice. The committee voted and approved his membership. Shonna will reach out to Gregory to extend the invitation.
- **Utah Parent Center (UPC) Partnership:** Shonna mentioned that she and Natasha Burningham are planning a collaboration between the UPC and WINGS to create resources and training for the general public and parents navigating the guardianship process.

- **Severe Intellectual Disability (SID) Challenges:** Rachelle Johnson noted that parents are confused about when their adult children require an attorney in Severe Intellectual Disability (SID) cases.

The committee discussed the lack of a statutory definition for "severe intellectual disability," leading to inconsistent medical documentation and judicial interpretation. Judge Sanchez described her current process for handling SID cases, which includes a review of the SID petitions in closed-hearing slots every other month in the Third District, to maintain consistency and protect medical privacy.

Shonna plans to draft a memo to the Board of District Court Judges for guidance, proposing a specific SID bench card, and integrating SID and medical documentation training into the new judge orientation.

- **Judicial Bench Cards:** Prompted by Judge Hansen, Shonna confirmed that the current judicial bench cards from 2020 have outdated statutory citations and are missing information on SID cases. The committee set a goal to update and distribute new bench cards at the annual judicial conference in October.

Action Items	
– Provide feedback on the Minor Guardianships Handbook.	Stakeholders
– Draft a memo to the Board of District Court Judges for guidance, propose a specific SID bench card, and integrate SID and medical documentation training into the new judge orientation. – Reach out to the Education department to inquire about getting back on the New Judge Orientation schedule.	Shonna Thomas
– Contact the court interpreter coordinator to explore resources for volunteer attorneys.	Keri Sargent

Deferred / Continuing Items
<ul style="list-style-type: none"> <li>– Judicial training and bench card updates</li> <li>– Guardianship exam and training materials</li> <li>– Community training and resource workgroup</li> <li>– Attorney shortages and funding proposals</li> <li>– WINGS Rule 3-421</li> <li>– WINGS member survey feedback and implementation</li> </ul>

<b>Next Meeting(s):</b>	June 18, 2026 August 20, 2026 October 15, 2026 December 17, 2026 February 18, 2027
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