

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

Thursday, February 19, 2026 - 12:00 to 2:00 p.m.

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

Agenda			
	Topic	Presenter	Materials
<b>12:00</b>	<b>Meeting begins</b>		
	<ul style="list-style-type: none"> <li>Housekeeping, minutes</li> <li>Welcome guests</li> </ul>	Judge Sanchez	<ul style="list-style-type: none"> <li>October 2025 – Minutes (draft)</li> </ul>
<b>12:10</b>	<b>Group Discussion</b>		
	<ul style="list-style-type: none"> <li>Legislative Updates</li> </ul>	Andrew Riggle Shonna Thomas Keri Sargent	
	<ul style="list-style-type: none"> <li>WINGS Committee Requirements                             <ul style="list-style-type: none"> <li>Successor judges</li> <li>Performance assessment</li> <li>Update to CJA Rule 3-421</li> <li>Annual report to Judicial Council - April</li> </ul> </li> </ul>	Judge Sanchez Shonna Thomas Keri Sargent	<ul style="list-style-type: none"> <li>CJA Rule 1-205 (excerpt)</li> <li>CJA Rule 3-421 (Redline Draft 1.28.26)</li> </ul>
<b>1:00</b>	<b>WINGS Updates</b>		
	<ul style="list-style-type: none"> <li>GRAMP                             <ul style="list-style-type: none"> <li>Court Visitor Program status</li> <li>CLEs and guardianship training for GSP attorneys</li> </ul> </li> </ul>	Shonna Thomas	
	<ul style="list-style-type: none"> <li>WINGS Subcommittees                             <ul style="list-style-type: none"> <li>Forms workgroup</li> <li>Education subcommittee</li> <li>Background disclosure subcommittee</li> </ul> </li> </ul>	Shonna Thomas	
<b>1:30</b>	<b>Other Business</b>		
	<ul style="list-style-type: none"> <li></li> </ul>		
	<ul style="list-style-type: none"> <li></li> </ul>		
<b>2:00</b>	Meeting adjourned		

## Housekeeping

- Judge Sanchez called the meeting to order at 12:05.
- The meeting minutes from October 16 were unanimously approved following a motion by Rob Ence, which was seconded by Rob Denton.
- Ethan Ramage, who works on probate cases in the Second District, was welcomed as a guest.
- Meeting adjourned at 1:15pm.

## Group Discussion

### Legislative Updates

- **Court Budget Request:** GRAMP has submitted a budget request for \$667,000 to fund two contract attorneys for the Guardianship Signature Program and a third program coordinator for the Court Visitor Program. This request is currently ranked #32 by the Criminal Justice Appropriations Subcommittee. It will go next to the Executive Appropriations Committee.
- **Guardianship Evaluation Standards:** A new bill, SB 161, requires that professional assessments of functional ability and capacity to be based on evidence-based standards. The committee's consensus is that this bill could be an improvement for assessment requirements in guardianship proceedings.
- **Disability Law Center (DLC) Legislation:** Legislation has been introduced aiming to redesignate the state's Protection and Advocacy (P&A) agency, a move the DLC opposes. There may be some misunderstanding amongst legislatures and the public of the DLC's role, with some incorrectly believing that the DLC is intended to represent parents in guardianship proceedings. Some committee members volunteered to write letters in support of the DLC maintaining its status as the state's P&A.

### WINGS Committee Requirements

- **Vice Chair Vacancy:** The committee is actively seeking a Vice Chair and prefers a judge from outside the Third District (such as the Second, Fourth, or a rural district) to ensure broader geographic representation. Keri Sargent and Judge Sanchez will continue to reach out to judges and the Board of District Court Judges to find a volunteer.
- **Performance Assessment:** Under CJA Rule 1-205, the committee must conduct a performance assessment every three years. Shonna Thomas will send out a survey to WINGS members to gather feedback on efficiency, potential redundancies, and overall purpose. The results will be summarized in a memo to the Judicial Council.
- **Rule 3-421 Update:** The committee unanimously approved a change to paragraph 5 of Rule 3-421. This change allows term extensions for committee members who are not attached to a specific agency, preventing the loss of vital historical knowledge. The update will now advance to Policy and Planning.
- **Annual Report:** The WINGS annual report to the Judicial Council is scheduled for late April, tentatively April 27. Judge Sanchez will present. Shonna will draft a report outlining recent projects and circulate it to the committee for review prior to the presentation.

## WINGS Updates

### GRAMP

- **Program Staffing:** The committee acknowledged the unexpected passing last December of long-time WINGS member and Court Visitor Program Coordinator, Michelle Wilkes. Two interns were brought on to help with Court Visitor Program cases while Michelle's position is being filled, which successfully reduced the case backlog from 6-8 months down to 3-4 months. However, the program still requires a third coordinator to maintain this pace.
- **Attorney Volunteers:** Three attorneys from Mayer Brown recently joined the GSP. They have not yet taken cases, but it is surmised they learned of the GSP after Judge Sanchez and Shonna Thomas participated in an Inns of Court meeting in October. Additionally, an attorney has been partnering with Leslie Francis to take several cases in the First and Second Districts.
- **CLEs and Training Overhaul:** The 2015 GSP training video is obsolete, and the Utah State Bar is no longer awarding CLE credit to attorneys for its completion. Attorneys need practical administrative training, guidance on ethical considerations for clients with limited capacity, and mediation procedures. A subcommittee including Rob Denton, Katie Cox, Brant Christiansen, Leslie Francis, and Shonna will collaborate with the Elder Law Section to update the training and secure CLE approval.
- **Interpreter Resources:** Leslie Francis highlighted the need for interpreters for non-English speaking clients. Keri Sargent will contact the court interpreter coordinator to explore resources for volunteer attorneys.

### WINGS Subcommittees

- **Forms:** The workgroup is meeting soon to discuss forms for transferring guardianships to Utah from other states, and from Utah to other states.
- **Education:** The new guardianship manual has been officially approved. The next priority is to update the required exam, with a long-term goal of building an interactive virtual training.
- **Background Disclosure:** The subcommittee is updating a white paper to present to the Board of District Court Judges and is currently reviewing implementation steps from other states. They have not met in recent months, but Shonna will schedule a meeting soon to discuss next steps.

## Other Business

- **Severe Intellectual Disability Cases:** Judge Sanchez noted an increase in these petitions and stated that, in the Third District, they are being referred to assigned judges for a detailed review rather than being rushed through the crowded probate consent calendar.
- **Less Restrictive Alternatives:** The committee discussed the need to educate the public and legal professionals that conservatorships can serve as a less restrictive alternative to guardianship when only financial protection is needed. Shonna will distribute a link to a recent webinar that showcased a practical checklist tool for determining less restrictive alternatives.

Action Items	
– Complete a survey sent by Shonna aimed at gathering feedback on efficiency, potential redundancies, and overall purpose of WINGS.	Stakeholders
– Meet as a subcommittee to discuss GSP training needs and options to help attorneys become certified in guardianship law and procedures.	Rob Denton Katie Cox Brant Christiansen Leslie Francis Shonna Thomas
– Contact the court interpreter coordinator to explore resources for volunteer attorneys.	Keri Sargent
– Send to committee members the link to the recorded webinar, <i>“Before filing: Practical tools to determine less restrictive alternatives to guardianship.”</i>	Shonna Thomas

Deferred / Continuing Items
<ul style="list-style-type: none"> <li>– Guardianship exam and training materials</li> <li>– Attorney resources and training materials</li> <li>– Attorney shortages and funding proposals</li> <li>– WINGS requirements – Vice Chair, Annual Report, Performance Assessment, Rule 3-421</li> </ul>

<b>Next Meeting(s):</b>	April 16, 2026 June 18, 2026 August 20, 2026 October 15, 2026 December 17, 2026
-------------------------	---