

Utah Working Interdisciplinary Network of Guardianship Stakeholders (WINGS)

Thursday, June 18, 2026 - 12:00 to 2:00 p.m.

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

Agenda

	Topic	Presenter	Materials
12:00	Meeting begins		
	- Housekeeping, minutes - Welcome guests and new members	Judge Sanchez	April 2026 – Minutes (draft)
12:10	WINGS Updates		
	- GRAMP - - WINGS Rule 3-421 revisions - GSP/CVP Funding - Training series recap & next steps - New attorney recruitment options	Keri Sargent Shonna Thomas	
	- Disability Law Center (DLC) - - Supported Decision Making resource	Andrew Riggle	
	- Workgroups - - G/C Manual & Test - Forms - Background Disclosure	Shonna Thomas	Exam – Guardian or Conservator of an Adult Exam – Guardian or Conservator of a Minor
12:45	WINGS Projects		
	- Judicial Training – - Bench cards / bench books - LMS training modules - Workgroup, seeking volunteers	Judge Sanchez	Adult GC Bench Card
	- Guardianship and Alternatives training – - Partnering with the Utah Parent Center - Workgroup, seeking volunteers	Judge Sanchez Shonna Thomas Natasha Burningham	
	Attorney mentors list – how to proceed	Shonna Thomas	
1:45	Other Business		
	Indian Child Welfare Act (ICWA) and minor guardianships	Keri Sargent	
	Veterans Guardianship Initiative	Shonna Thomas	
		Stakeholders	
2:00	Meeting adjourned		

Housekeeping

- Judge Sanchez called the meeting to order at 12:05.
- The committee reviewed the April 2026 minutes. Katie Cox moved to approve, Rob Denton seconded, and the minutes were approved.
- Guest Jan McCosh, a new Guardianship Signature Program (GSP) attorney, was introduced.
- Meeting adjourned at 1:32pm.

WINGS Updates

GRAMP

- **WINGS Rule 3-421 Revisions:** Keri Sargent reported that the rule change was adopted by Policy and Planning with minor stylistic updates. The rule now includes a provision allowing the WINGS chair to remove community stakeholders with no set term, and allows individual members to bypass traditional term limits to retain institutional knowledge.
- **Funding Updates:** The Judicial Council will be voting on Monday (June 22) on the GRAMP funding request. This is the final step in the process to obtain funding from within the courts. The request would fund one extra Court Visitor Program specialist and a one-year pilot program to pay GSP attorneys. This pilot targets the roughly 130 annual cases that statutorily cannot be referred to court visitors when volunteer attorneys are unavailable.
- **Attorney Training & Recruitment:** The four-part CLE training series for GSP attorneys was highly successful, with over 120 sign-ups. The recorded sessions are now available online to replace outdated trainings. Shonna Thomas is also in discussions with the Bar's Access to Justice director about alternate paths for new attorneys to join the GSP for CLE credit.

Disability Law Center (DLC) – Supported Decision Making

- Andrew Riggle presented the DLC's new web-based Supported Decision Making (SDM) agreement template, which is now available on their website as an alternative to guardianship. The online tool guides users step-by-step with instructions and requires all mandatory fields to be completed before generating a PDF. It also generates a page for supporters to sign acknowledging their responsibilities. The DLC is actively developing a broader informational and training curriculum around SDM, drawing on models from other states, Canada, and Europe.

WINGS Workgroups

- **G/C Manual & Test:** The new Minor Guardianship Handbook has been drafted and is headed to the Judicial Council for approval in July. Additionally, to meet a late-June deadline for integrating guardianship paperwork into the "MyPaperwork" platform, the workgroup compromised by updating the existing True/False tests to align with the newly updated adult and minor manuals. (Copies of these true/false exams and answer keys are provided in the meeting materials). The workgroup ultimately aims to replace these tests with interactive, educational training modules in the future.
- **Forms:** The workgroup has been prolific, submitting numerous revised documents for review over the past 2 months. Many of these drafts are still in progress, as they are required to be reviewed by the

Stylistics group before going to the full committee for approval. The workgroup agreed to cancel their meeting in June to allow Stylistics time to catch up. The workgroup will reconvene in July to look at updates to the Notice/Declaration of Rights form, and the complicated forms needed to transfer guardianships into and out of Utah. The workgroup also intends to tackle the clinical evaluation form to address legislation passed in the last session. The workgroup will reach out to Dr. Baraldi for additional input and medical expertise on this document once a draft is ready.

- **Background Disclosure:** This workgroup is temporarily paused, but Shonna Thomas will be scheduling a meeting in the next month to move forward with this project.

WINGS Projects

Judicial Training and Guardianship and Alternatives Training

- **Bench Cards:** Keri Sargent is working to ensure updated bench cards are ready for the district court judges by the October judicial conference. The group discussed the need to create separate bench cards for Minor Guardianships and Severe Intellectual Disability (SID) cases, and to add a section outlining Supported Decision Making.
- **Judicial LMS Modules (New Judges):** The committee discussed the influx of new, young judges who have zero probate experience and are struggling with basic guardianship questions (e.g., contested hearings, how to process accounting reports). The committee agreed to convert the previously recorded "Brown Bag" pitfalls training into an introductory LMS module.
- **Community/Public Education:** The committee opted to create two separate training workgroups - one focused on judicial education and one on community education. Judge Sanchez offered to assist with community education for Spanish-speaking populations, noting they often seek guardianship interventions much later in their children's lives due to a lack of available resources. Wendy Naylor stressed the need to educate the aging population and medical providers on fiduciary responsibilities and exploitation, as most current resources focus heavily on minors. Rob Denton recalled a Bar Journal article by Dr. Foster on billing for medical evaluations that could serve as a starting point.

Attorney Mentor List:

- Attorneys frequently ask for a list of experienced practitioners to consult on guardianship cases. Shonna Thomas noted the courts cannot host this due to neutrality concerns. Brant Christiansen suggested the Elder Law Section and the Bar's Access to Justice group would be better suited to host it.

Other Business

- **Indian Child Welfare Act (ICWA):** Keri Sargent discussed whether ICWA applies to minor guardianships following a query from the Guardian ad Litem. Juvenile court representatives indicated ICWA primarily applies to government-initiated removals, not private petitions, but Keri is confirming this.
- **Veterans Guardianship Initiative:** Shonna Thomas alerted the committee to a national pilot program regarding veterans and guardianships. There are concerns about attorneys initiating guardianship proceedings for veterans without other family. No action is required right now, but the committee will monitor it.

Action Items	
– Send a PDF of the completed Supported Decision Making template and instructions to Shonna to distribute to the committee.	Andrew Riggle
– Finalize updates to the Adult Guardianship Bench Card and send it to Judge Sanchez for review prior to the October judicial conference.	Keri Sargent Shonna Thomas
– Distribute a survey to the committee to recruit volunteers for two newly proposed workgroups: Judicial Education and Community Education.	Shonna Thomas
– Check if the Utah Parent Center's newly updated guardianship guidebook is available in Spanish.	Katie Cox
– Locate and send Dr. Foster's old Bar Journal article regarding medical evaluation billing and send to Shonna to distribute to the committee.	Rob Denton
– Contact Megan Connelly to coordinate having the Elder Law Section / Bar host the requested Attorney Mentor List.	Brant Christiansen Shonna Thomas
– Follow up with the GAL director regarding whether private minor guardianship petitions trigger ICWA compliance, and report back.	Keri Sargent

Deferred / Continuing Items
– Funding updates – Judicial training and bench card updates – Workgroup status – Update from Kaye Lynn Wootten on National Conversation re: Medicaid Fraud Control – Right to Association and cell phones – LTC Ombudsman Office

Next Meeting(s):	August 20, 2026 October 15, 2026 December 17, 2026 February 18, 2027 April 15, 2027 June 17, 2027
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