

Utah Working Interdisciplinary Network of Guardianship Stakeholders (WINGS)

Thursday, August 20, 2026 - 12:00 to 2:00 p.m.

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

Agenda

	Topic	Presenter	Materials
12:00	Meeting begins		
	- Housekeeping, minutes - Welcome guests and new members	Judge Sanchez	June 2026 – Minutes (draft)
12:10	WINGS Updates		
	Bench cards / bench books	Keri Sargent	
	- Background Disclosure workgroup - Other workgroups	Shonna Thomas	White Paper – Strengthening Oversight of Guardians and Conservators (draft August 2026)
	- GRAMP Pilot Program - Status - Data collection	Shonna Thomas	AOC27001 GRAMP Legal Representation in Guardians RFP RFP Link: https://utah.bonfirehub.com/opportunities/247385 GSP Pilot Program Invoice (draft 8.14.26)
12:45	WINGS Topics		
	Guardianship Stakeholder Meeting w/ Representative Loubet	Group Discussion	FY2026 Guardianship Case Filings & Legal Representation Attorneys for Protected Persons – By State (Aug 2026) Impact Statement – LSO Pilot Project
	Right to Association and Cell Phones – LTCO	Ann Humpherys	
1:45	Other Business		
	NCSC Webinar – Court Visitor Programs (September 30)	Shonna Thomas	
	Stakeholder Agency Updates	Stakeholders	
2:00	Meeting adjourned		

Housekeeping

- Judge Sanchez called the meeting to order at 12:02.
- The committee reviewed the June 2026 minutes. Katie Cox moved to approve, Brant Christiansen seconded, and the minutes were approved.
- Meeting adjourned at 1:32pm.

WINGS Updates

Bench Cards:

- Keri Sargent finished drafts of the Adult Guardianship and Severe Intellectual Disability (SID) bench cards, with the Minor Guardianship card nearing completion. Drafts will be emailed to all WINGS members for review prior to publication for the October Judicial Conference.

Background Disclosure:

- Shonna Thomas presented an updated draft of the white paper “Strengthening Oversight of Guardians and Conservators.” The workgroup is incorporating a section addressing community and parent group concerns. Natasha Burningham has provided to the workgroup feedback from parent organizations, including concerns regarding past youthful offenses, procedures if a parent fails a background check, and privacy of reports. Judge Sanchez recommended that background reports be classified as private court documents, similar to adoption background checks or pre-sentence investigation reports.
- The workgroup plans to reconvene in November. Once the white paper is complete, the proposed redline edits to UCJA Rule 6-501 will go to the Board of District Court Judges for buy-in, then to the Policy and Planning Committee, followed by the Judicial Council, and finally out for public comment.

Other Workgroups:

- The forms workgroup is restructuring the clinical evaluation form. They will send the draft to Dr. Carole Baraldi for medical review, before seeking feedback from the full WINGS committee. The transfer guardianship forms are currently under review by the court’s stylistics committee.
- Shonna created a survey for committee stakeholders to identify interest in participating in the various WINGS workgroups. Stakeholders are encouraged to fill out the survey. Shonna will review responses and share that information at the next WINGS meeting in October.

GRAMP Pilot Program:

- Shonna reported that state funding and RFP approval were finalized for the GRAMP pilot. The RFP was published online and closes mid-September. The pilot allocates \$130,000 to cover cases where respondents lack statutory access to court visitors and have no volunteer attorney. Virtual hearings and court-provided interpreter services are integrated into the RFP to minimize overhead.
- The committee reviewed a monthly invoice draft designed for dual use in the pilot: processing contractor payments and gathering research data on case progression.

WINGS Topics

Stakeholder Meeting with Representative Loubet:

- Shonna Thomas, Andrew Riggle, and Brant Christiansen updated the committee on a recent stakeholder roundtable hosted by Representative Loubet. The discussion at the Capitol was productive and focused on legal representation gaps, including lack of attorneys, extended wait times, and deficits in long-term oversight in guardianship cases, as Utah is just one of 12 states without a dedicated guardianship oversight agency or mandatory reporting for certain family guardianships.

- Andrew Riggle noted that due to a likely Medicaid budget shortfall, upcoming legislative efforts may need to focus on zero-dollar policy/statutory changes.
- The WINGS committee will consider inviting Representative Loubet to attend a future WINGS meeting to engage in further discussions.

Right to Association, Cell Phones, and Technology (LTCO Discussion):

- Ann Humpherys raised emerging concerns regarding guardians restricting protected persons' cell phones, computers, internet access, and specialized devices. Issues cited included guardians confiscating devices over permitted adult media consumption, managing phone and media use of those vulnerable to online financial/romance scams, transitioning minors on restricted Gab phones into adulthood, and internet restrictions involving CSAM concerns.
- The committee discussed the legal implications and statutes that cover right to association issues, noting that this is an area typically outside general guardianship authority (e.g., a guardian cannot unilaterally restrict phone/internet communication unless explicitly requested in the petition, proven by a preponderance of the evidence, and specified in the court order).
- Shonna noted that this may be something the forms workgroup could assist with, by refining the petition and court order for adult guardianships to include explicit prompts requiring petitioners to explain and justify any requested restrictions on communication/association, rather than providing simple checkboxes. Shonna also relayed that Utah statute explicitly authorizes appointing court visitors to conduct targeted right-to-association investigations when communication disputes arise.

Other Business

- **NCSC National Webinar:** Shonna Thomas will present on Utah's Court Visitor Program during a National Center for State Courts (NCSC) webinar on September 30, 2026, alongside program representatives from Ohio and Pennsylvania. Shonna has also asked new Court Visitor Program Specialist, Carrie Poor, to participate and share her experience as a former volunteer Court Visitor.
- **National Medicaid Update:** Kaye Lynn Wootton's tenure as President for the National Association of Medicaid Fraud Control Units concludes in October. She has agreed to present at a future WINGS committee meeting on her experience and topics of discussion that connect with WINGS initiatives.

Action Items

– Email the draft bench cards to all WINGS members for feedback.	Keri Sargent
– Review and finalize medical section edits on the revised Clinical Evaluation Form, then distribute to the full WINGS committee for input.	Shonna Thomas Dr. Carole Baraldi
– Review the Workgroup survey results and share the lists with stakeholders at the October meeting.	Shonna Thomas
– Work on the petition for adult guardianships to address the right to association concerns.	Shonna Thomas Forms workgroup

Deferred / Continuing Items

- GRAMP Pilot Program
- Background Disclosure project
- Update from Kaye Lynn Wootten on National Conversation re: Medicaid Fraud Control Unit
- Legislative updates

Upcoming Meetings:

October 15, 2026
December 17, 2026
February 18, 2027
April 15, 2027
June 17, 2027
August 19, 2027