# Beneficiary Support Toolkit for Trust Professionals


# Chapter 1: Communication

**How Will I Communicate With the Beneficiary and Their Family?**

People with disabilities communicate in many ways: people may speak verbally, use a communication device, express themselves through hand gestures or signs, or may communicate predominantly through their behavior. People with disabilities may communicate in ways that look different from how people without disabilities tend to communicate. However, **all people can and do communicate**.

As a trust professional, it is critical to learn not only good practices to administer a trust but also how to effectively communicate with the beneficiaries you support and their families.

This chapter offers recommendations, tips, and tools you can use to ensure you are communicating with your beneficiaries in an effective way.

**BE PROACTIVE: Ensure your trust documents and information are accessible to all.**

The United States is facing an adult literacy crisis. [Twenty-one percent (about 43 million) of U.S. adults are illiterate or functionally illiterate](https://nces.ed.gov/datapoints/2019179.asp), with the average American adult reading at around a 7th or 8th grade reading level. This number includes all Americans – both people with and without disabilities.

Trust documents, like trust agreements, declarations, fee schedules, welcome manuals, and disbursement guidelines, often have highly detailed and complex language. As a result, these documents may not be accessible to either beneficiaries or their family members.

A common challenge that trust professionals face is that families and beneficiaries don’t understand how a trust works before they set one up. When they also don’t understand information in documents shared by the trust, they may become upset with the established process and the trust’s staff. One effective way to avoid this challenge is to ensure that as much of your written information as possible:

* Uses clear, easy-to-understand words
* Is written at an 8th grade reading level or lower
* Is available in multiple formats, including video and writing

Trust documents may require the use of certain complex terms and phrases – and these may not be changeable. When it is not possible to make language clearer, consider creating supplementary resources – like fact sheets or videos, - that explains the document, what it says, and any complex terms or phrases used.

The Toolkit includes [plain language resources](https://thearc.org/wp-content/uploads/2021/12/1.1-Plain-Language-and-Readability-Resources.docx), including an overview and link to plain language checklists and tools, to help you make your trust materials more accessible. In addition, The Arc’s Center for Future Planning has created accessible [videos and documents](https://futureplanning.thearc.org/pages/learn/where-to-start/financing-the-future) to explain financial planning to people with disabilities and their families. Please feel free to share these with beneficiaries or use them as inspiration to create your own, trust-specific videos and resources.

**Make sure accessibility and language supports are available when you need them.**

Good communication is not just verbal but includes the environment you use to connect with beneficiaries and families. So, it is important to make sure the space and format for meetings you have with beneficiaries are accessible and welcoming. The Toolkit includes [advice and a checklist](https://thearc.org/wp-content/uploads/2021/12/1.2-Accessibility-Advice-and-Checklist.docx) that you can use to make sure that your meetings and communication fit the needs of your beneficiary. The checklist includes supports for different physical, sensory, emotional, or cognitive needs a beneficiary may have, as well as reminders about potential accommodations for people who are nonverbal or for whom English is not the primary language.

The Toolkit also includes a link to resources on [respectfully communicating with people with disabilities](https://thearc.org/wp-content/uploads/2021/12/1.3-Respectful-Communication-Tips.docx), including people who may use alternative and augmentative communication (AAC).

**Learn communication preferences from day one.**

From the day you first meet with a beneficiary and their family, prioritize learning how they want to communicate with you and be communicated with. For beneficiaries and their families, they are entrusting you not just with money but often with ensuring a safe future for their family member. Learning how to communicate effectively and well is a critical first step to building a lasting, positive relationship with the beneficiary and their family.

Each beneficiary and family will have different preferences and needs. Some beneficiaries and families may prefer email communications or text messages. Others may not have consistent internet access. A beneficiary and family may have additional people that they would like to receive notices from the trust. Some people with autism and other developmental disabilities struggle with deadlines and timelines, so it is good to learn if they want more reminders when information needs to be reviewed or signed. It is important to understand that communication should and will vary by beneficiary and family and that your trust’s communication policy should permit flexibility to reach out in alternative formats or provide additional reminders.

The Toolkit includes a checklist you can use to learn more about [communication preferences](https://thearc.org/wp-content/uploads/2021/12/1.4-Determining-Communication-Preferences.docx).

**Ask “What’s new?” and “How can we do better?” often.**

Scheduling regular check-ins with beneficiaries and families is an important way to ensure that the trust/beneficiary relationship is positive for both parties. Regular check-ins offer trusts the opportunity to:

* Identify any changes that are going on in a person’s life
* Learn about any changing needs or goals of the beneficiary
* Identify any changes in communication preferences
* Identify any potential future issues that may need addressed
* Ask people how happy they are with the trust services

It is recommended that you schedule an annual in-person check-in once a year, with more regular check-ins made monthly or quarterly by phone. The frequency of these regular check-ins may vary by on beneficiary’s stated preferences and social, emotion, health, and other needs. These check-ins will ensure that the relationship is advancing and that you recognize any changing needs. The Toolkit includes some [sample check-in questions](https://thearc.org/wp-content/uploads/2021/12/1.5-Sample-Check-in-Questions.docx) that you can use.

**Ensure you have an effective communication system and that all staff are communicating with beneficiaries in accordance with the system.**

Clear, consistent and positive communication builds a solid relationship with the beneficiary and their family. It may also help limit calls and complaints that you receive from the beneficiary. The Toolkit includes [a checklist](https://thearc.org/wp-content/uploads/2021/12/1.6-Systems-for-Clear-Consistent-and-Effective-Communication.docx) you can use to evaluate your current communication system/policy to make sure you and your staff are communicating effectively and consistently with your beneficiaries.

Make sure to verbally explain your trust’s communication system/policy to beneficiaries and their families.

**BE PREPARED: Learn how to address challenging communications.**

No matter how hard you try to be proactive, all those in a customer service industry must deal with challenging calls. The Toolkit includes some tips for [dealing with challenging communications](https://thearc.org/wp-content/uploads/2021/12/1.7-Handling-Challenging-Communications.docx), including frequent contactors as well as those reporting ongoing or historic abuse or neglect, potentially life-threatening action, or other crises.

**Reflection Questions**

1. How do you currently communicate with beneficiaries? What can you do better?
2. How does your trust organization currently learn about communication preferences of your beneficiaries? What steps can you take to learn more proactively about your beneficiaries?
3. How well does your trust stay in contact with your beneficiaries? What steps can you take to improve communication frequency?
4. How do you and your staff deal with challenging contacts? Are there steps you can take to learn how to better de-escalate difficult calls or to calm yourself after these calls?
5. What does your trust organization’s policy state about communications? How can you improve your communication policy?

**Linked Resources**

* [Center for Future Planning Financing the Future Webpages](https://futureplanning.thearc.org/pages/learn/where-to-start/financing-the-future)
* [Plain Language and Readability Resources](https://thearc.org/wp-content/uploads/2021/12/1.1-Plain-Language-and-Readability-Resources.docx)
* [Accessibility Advice and Checklist](https://thearc.org/wp-content/uploads/2021/12/1.2-Accessibility-Advice-and-Checklist.docx)
* [Respectful Communication Tips](https://thearc.org/wp-content/uploads/2021/12/1.3-Respectful-Communication-Tips.docx)
* [Determining Communication Preferences](https://thearc.org/wp-content/uploads/2021/12/1.4-Determining-Communication-Preferences.docx)

* [Sample Check-In Questions](https://thearc.org/wp-content/uploads/2021/12/1.5-Sample-Check-in-Questions.docx)
* [Systems for Clear, Consistent, and Effective Communication](https://thearc.org/wp-content/uploads/2021/12/1.6-Systems-for-Clear-Consistent-and-Effective-Communication.docx)
* [Handling Challenging Communications](https://thearc.org/wp-content/uploads/2021/12/1.7-Handling-Challenging-Communications.docx)

**Share With Us**

Did any of these tips and resources spark a memory or story you want to share, or a resource or tool you need? [Complete this form to contact us and share your ideas](https://thearcus.surveymonkey.com/r/7F5N5DC)!

Date Revised: August 4, 2021.