# Beneficiary Support Toolkit for Trust Professionals



# Chapter 1 Resource

**Accessibility Advice and Checklist**

There are several things you can do to help make sure your prospective and current beneficiaries feel welcomed during meetings and in their work with you. Below, we have shared some general advice as well as a checklist you can use to think through steps you can take to ensure your beneficiaries feel welcomed.

**Think about what your beneficiaries may need ahead of time.** The checklist below identifies several things that you can consider incorporating into meetings and communications with beneficiaries. The checklist is broken down by ways to:

* Make sure physical space is accessible
* Ensure the environment is sensory-friendly
* Communicate well with your guests
* Ensure that all guests can understand the information provided

**Be flexible and open to requests.** The checklist is meant to be comprehensive, so it is likely that you may not be able to do all the things on the checklist. The most important thing that you can do is be open, flexible, and encourage your beneficiaries to share any requests or concerns that they have ahead of time or as you work together.

**Ask what is needed – and listen to suggestions from supporters.** Make sure to ask prior to a meeting about any accommodation requests. The beneficiary and their supporters may often be able to recommend the types of accommodations that are needed and offer ways this can be provided.Encourage your beneficiary and friends, family, or supporters to request help or assistance, and work with them to address any challenges that arise.

**Have questions? Connect with a disability professional.** If you get a request that you don’t know how to support, or if you have questions, ask! Consider connecting with disability groups in your area, like [chapters of The Arc](http://www.thearc.org/find-a-chapter/), to learn how to provide support, identify vendors who may be able to provide quality services, and receive other referrals and guidance.

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### Accessibility Checklist



**Physical Accessibility**

* **Public/private transportation and paratransit available nearby:** Identify public transit and private transportation options, including paratransit systems, to get to/from your office.
* **Accessible parking:** Public transportation can be a challenge for some beneficiaries with mobility challenges, so share information about accessible parking.
* **Length of travel by foot:** Some people may not be able to travel long distances, so let beneficiaries know how long it takes to get from a car/public transit to your office.
* **Step-free entries and routes and level terrain**: In anticipation of serving beneficiaries who use wheelchairs and who have other mobility limitations, try to locate offices and/or meeting spaces with entries and routes that do not include steps.
* **Ramp availability**: If your office uses a portable ramp or a lift, make sure it is working in advance and will be available for your beneficiary.
* **Turning space for wheelchair users or users of mobility devices:** A small or cramped meeting space may make it harder for beneficiaries who use mobility devices to get around, so try to make 3 to 5 feet available for turns, when possible.
* **Accessible toilets:** It’s important for beneficiaries to know whether there is an accessible toilet in your office. This includes a restroom large enough for a wheelchair, with turning space. Some beneficiaries may need support to use a restroom. A best practice is to have both accessible toilets as well as a companion or family toilet that people can use as needed.
* **Seating available:** Make sure to have a variety of seating options available for beneficiaries. This may include chairs with different types or heights of seat backs.
* **Length of sitting/standing:** Some beneficiaries may struggle with prolonged sitting/standing, so let people know if they will need to sit or stand for extended periods of time.
* **Good lighting for vision support:** Beneficiaries who are legally blind or who have low vision can more safely navigate the spaces they are in with good lighting.



* **Service and emotional support animals:** Many people with different types of disabilities use support animals, so make sure to share your policies around appropriate use of support animals in your office and identify an animal relief area.
* **Refrigerated spaces for medications:** Some beneficiaries may need to take medications during or around a meeting time, and these medications may require refrigeration.
* **Specialized equipment:** If you provide any adapted or modified equipment, tell your beneficiaries ahead of the meeting so that they know they can use these.

**Sensory Accessibility**

* **Quiet meeting spaces:** Loud background noises can be distracting to beneficiaries with sensory challenges, so try to identify quiet spaces to meet that are not prone to loud background noise.
* **Sensory retreat areas:** Beneficiaries with sensory challenges may find it helpful to have a sensory retreat room or area for if they become over-stimulated or overwhelmed. At minimum, a sensory retreat room or area should use soft, low light and be in a quiet location. **Note:**  Some beneficiaries with autism may bolt or wander away from a meeting if it becomes overwhelming or overstimulating. Beneficiaries with autism and their supporters may use GPS tracking devices in case this happens. If this occurs, respond as soon as possible, and do your best to understand that supporters may be extremely upset and afraid for the person.
* **Disposable earplugs and noise-reducing headphones:**  For beneficiaries who are hyper-sensitive to sound, maintain a supply of disposable earplugs and allow and encourage beneficiaries with noise-reducing headphones to wear them as needed.
* **Scent-free office space:** Perfumes and other strongly scented products like shampoos or lotions can cause sensory overload for beneficiaries with sensory challenges, so consider making your office space scent-free.
* **No flash-photography zones:** Flash photography can cause seizures for people with epilepsy or autism, so avoid using a flash if you need to take pictures of your beneficiaries.



* **Natural, soft non-florescent lighting**: Beneficiaries with sensory issues may have trouble with florescent lighting, which can cause balance issues, dizziness, and communication issues.
* **Wayfinders:** For beneficiaries who are blind or have low vision, consider identifying a staff person to guide them around the office, identifying any steps, uneven terrain, and barriers. Wayfinders can also help orient beneficiaries to items in the space they are in and identify fire exits nearby.
* **Dining options:** Many people with disabilities have food allergies, sensitivities, special diets, or aversions to certain textures in food, so if you are providing food, make sure to ask beneficiaries about food restrictions and preferences and share what will be served ahead of time.
* **Touch and texture awareness:** Beneficiaries with autism may find that touching others or touching certain textures can be painful or distressing, especially if it is unplanned. Make sure that beneficiaries are aware beforehand if they will need to touch or be touched by others. If it is possible, allow them to make any adjustments by themselves. If they will be required to hold documents, remove shoes, or wear name tags, please tell them ahead of time and give them extra time.

**Communication Accessibility**

* **Agendas and other print materials:** Providing easy-to-read and clear information in advance can help beneficiaries understand what is going to happen. Step-by-step directions, written at a 4th to 8th grade reading level, are particularly helpful for beneficiaries with autism and other disabilities who keep to strict routines. Avoid giving unnecessary information or using abstract language or jargon. Large print materials in 18- or 20-point font in sans serif fonts (e.g., Arial or Trebuchet) are easiest to read. Consider including visual symbols for people who prefer symbols instead of text. Make sure these documents also have a high color contrast (e.g., black text on white paper or vice versa) for people with low vision or who are legally blind.



* **Alternative formats:**
  + Beneficiaries who are blind or have low vision may want to access materials on a screen reader, which can help them better view materials. Make sure to send any schedules, materials, or documents ahead of time so they have time to download them and access them.
  + You may also want to provide information in Braille or on audio.
* **Transportation information:** Beneficiaries may be new to using various types of public or private transportation, so provide guidance ahead of time on how to get to/from your office.
* **Interpretation and accommodations:**
  + **Sign language interpretation:** People who are Deaf or hard of hearing may use sign language. If requested, provide a sign language interpreter that the beneficiary can clearly see.
  + **Assistive Listening Devices (ALDs)**: These devices can help people separate the sounds they want to hear from background noise. There are ALDs for personal and group use and available for people who use hearing aids or cochlear implants. Many people who are hard of hearing may have these already, but you may want to consider having devices available upon request.
  + **C-Print:** C-Print is a speech-to-text system where a typist listens and simultaneously types an interpretation of what is being said on a laptop computer, which is then transmitted to a consumer’s laptop.
  + **Foreign language interpretation:** If the beneficiary’s and supporters’ primary language is not English, make sure that there is an interpreter available who can translate information during a meeting.
* **Verbal directions:** Many people with disabilities find it hard to follow complex directions. Give clear, one-step directions so your beneficiaries can take part in the meeting.
* **Clear, concrete language use:** People with autism tend to take things literally and struggle with complex language. People with intellectual disabilities may struggle to understand technical or complex language. Make sure to speak clearly and concretely.
* **Extra response time:** Some beneficiaries may have trouble processing what you are saying or may use communication devices. Give people extra time to consider what you are saying and plan out what they want to say, form a response, and ask questions. Ask critical questions ahead of the meeting, if possible.
* **Questions:**



* + Some people may struggle to understand when is an appropriate time to ask questions. They may be intimidated by others or unsure of what is socially appropriate, so make sure to explain how and when you want beneficiaries to ask questions.
  + Beneficiaries with communication challenges may talk with you in several ways. Some may ask questions verbally, some may write questions down, some may type into a device that speaks words, and some may use devices that translate pictures into sentences. Do your best to respond to these questions, and make sure you ask the person if that answered the question they were asking. If you are not sure how a person likes to be responded to, ask their supporters for guidance.
* **Stim-friendly space:** Beneficiaries with autism and other disabilitiesmay “stim” during a meeting. This means they may rock back and forth, flap their hands, play with a toy, doodle, or move around the room during an experience or while others are talking. This does not mean that a person is not paying attention. Often, these behaviors are tools people are using to help better focus on what is going on around them, and this behavior should be welcomed.

**Cognitive Accessibility**

* **Flexibility:** Beneficiaries and supporters may ask many questions or get confused during a meeting. Make sure to answer questions as clearly as you can. Try to be flexible if the guest provides information in a different format than what you need and help them to adjust this into the correct format.
* **Breaks:** Many people with intellectual or developmental disabilities need frequent breaks to process what is going on and decompress.
* **Extra Time to Move:** People with mobility, sensory, and cognitive challenges may need a few extra minutes to get to/from different areas.
* **Keep Agenda:** Changes to schedules can cause additional stress or anxiety to guests who are used to routines.
* **Avoid Waits:** People with disabilities may struggle when waiting for a meeting to occur. Limit the amount of time your beneficiaries may need to spend waiting, and make sure people know ahead of time if they will need to wait.



**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)!

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