# Beneficiary Support Toolkit for Trust Professionals

# Chapter 1 Resource

**Handling Challenging Communications**

No matter how hard you try, challenging communications with beneficiaries will occur. Frequent or upset contacts can be problematic for trusts, because supporting these beneficiaries is often time-intensive or can be frustrating for trust staff. Below, we share some tips, strategies, and guidance to help deal with beneficiaries who are upset or call frequently.

**Helping Beneficiaries Who Call Frequently**

Why do they call?

Beneficiaries and families who contact you repeatedly may do so for many reasons:

* They need help resolving a crisis
* They have multiple needs
* They are not satisfied with your response to a disbursement or a request
* They think that there is something you need to do for them
* They are lonely or like talking with you – they need to talk to someone
* And many other reasons!

How can we help the individual caller?

To reduce unnecessary calls from beneficiaries, it is critical to understand the underlying reason why a beneficiary or family is a frequent caller.

For example, a person in crisis needs to be connected with crisis services and have a plan created to support them through a crisis. However, a person calling because they are lonely needs to be connected with peers, social groups, and other agencies or organizations - either in-person or via technology – to reduce isolation.

Below, we have outlined steps staff can take to effectively work through problems and identify next steps with beneficiaries.

*Recommended Steps*

[ ]  Try to address any complaints or challenges one-on-one, without an audience.

[ ]  Expect that any difficult situation may take time to resolve.

[ ]  If the need is complex, identify and establish a specific, later time to connect.

[ ]  Remain calm and objective while providing support – do not take things personally.

[ ]  Take time later to de-stress (e.g., vent to colleagues, meditate, go for a walk).

[ ]  Actively listen to the beneficiary.

 [ ]  Ask questions to clarify the need being expressed.

 [ ]  Let the person talk freely – you may identify multiple or complex needs.

 [ ]  Summarize what is said to ensure you understand the issues.

 [ ]  Empathize with the contactor: reflect on how they feel.

[ ]  Help problem-solve and identify next steps.

 [ ]  Identify what the problem is that you hear.

[ ]  Reframe the problem so that it is not a personal attack or judgment (e.g. beneficiary requests payment that is not allowable by the trust – not that the trust staff is being mean or stealing money from the beneficiary).

[ ]  Focus on one problem at a time.

[ ]  Emphasize current problems, not past problems.

[ ]  Focus on positive steps – what should or can happen, not what should not.

[ ]  Clarify what expectations are reasonable of the trust – how can the trust help practically.

[ ]  Ask what solutions a beneficiary really wants.

 [ ]  Identify next steps that can be taken.

[ ]  Understand that you may not be able to solve all the problems – and it is not your job to take on other people’s problems.

How do we make our communications more effective?

There are always instances where people may call frequently – and that the trust may not be able to control or address ahead of time.

However, it may be possible to help reduce the overall volume of frequent callers. One strategy to doing this is to keep track of and analyze the calls that come in.

* How long are these calls taking?
* How frequently do they come in?
* Are there trends in the needs or solutions identified?

Once you have detailed these trends, you can identify prospective ways to proactively address the trends you find – and track how much time you may save in this approach.

Solutions will typically fall into four areas.

* Beneficiary education and training about the trust
* Trust staff education and training on how to handle challenging calls
* Improvements to the process for routing calls to the correct staff
* Adjustments to the trust’s processes for communicating information with beneficiaries

We recommend that you review your calls periodically to identify ways in which education, training, or changes to business processes may help you address frequency of calls.

**Beneficiaries Who Report Abuse, Neglect, Self-Harm, Substance Use, and Crises**

Trust staff must know how to look for any potential signs of [physical, sexual, and emotional abuse or neglect](https://www.youtube.com/watch?v=tCbsZFa1VRw) and to actively listen for any threats that people may make to harm themselves.

Most states require financial providers to report suspected abuse or neglect of people with disabilities to their state’s adult protective services agency. So, your trust should have a clear policy on how staff report suspected abuse or neglect of a beneficiary in order for staff to comply with mandatory reporting laws.

Threats to self-harm should be transferred to a crisis intervention service in your area, and you may want to consider reaching out to family, providers, and other staff that support the beneficiary to notify them of this concern.

The Association of Information and Referrals Specialists released a [2017 version of their training manual](http://www.airs.org/files/public/AIRS_I%26RTrainingManual_2017.pdf), which includes several examples and specific guidance around cases and ways to practice and train to listen for risky, self-harmful, abusive, or neglectful scenarios. We are sharing this comprehensive manual with you because it gives significant definitions, scripts, and examples to train staff on how to handle these crises. We list page numbers that are particularly helpful below.

* + Self-Harm and Crises – including abuse: page 110 - 138
	+ Substance Use: page 273 – 288

We also recommend you take the following steps to ensure that your trust has a plan to address these challenging issues.

Recommended Steps

[ ]  Provide initial and annual training for all staff on how to identify abuse, neglect, risky behavior, substance use, self-harm threats or evidence, and other crises.

[ ]  Identify one person or a group of staff that other trust staff can go to and share concerns, observations, or reports of crises. This person or group can help assess information provided and support trust staff to report and provide assistance to beneficiaries.

[ ]  Clearly outline the process and steps – as well as organizations or people to contact if crises are reported in the trust’s policies and procedures.

[ ]  Ensure all trust staff know the steps to take and who to contact at the trust and externally if they suspect or know any of these crises.

[ ]  Notify beneficiaries and supporters about trust policies related to these situations ahead of time.

**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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