# Beneficiary Support Toolkit for Trust Professionals



# Chapter 2: Decision-Making

**Keeping Beneficiaries at the Center of a Budget Plan**

Below, we have included some steps you may want to consider to ensure you keep your beneficiaries at the center of your work, budget planning process, and the decisions that the trust makes on how to use money in the trust.

**Before Yearly Planning Starts**

Clearly communicate to the beneficiary and any supporters that you understand and believe that the beneficiary can and should be at the heart of the planning process – and reinforce this before any planning begins.

Review what people have liked or done in the past. People’s interests and hobbies change over time, so make sure to ask in the next step whether people ***want*** to continue or do more of the activities.

Reflect on observations. Consider any observations you have about the beneficiary that you have gleaned from site visits or previous meetings. Review any notes in the beneficiary’s record from other staff about concerns or past communication.

Assess what is important to the beneficiary in a plan. Ask what a person likes and wants, as well as what the person does NOT like or want. Ask about:

Their current home and any roommates

Their job, school, or daily activities

Their friends, family, and relationships

The services they have and their current staff

What they want to do more of in the future and what they want to do less

Any skills or experiences that they want to learn or build on (e.g., make decisions, hobbies)

If there is anything to do to improve their well-being (emotionally, mentally, spiritually, and culturally)

What their hopes and dreams are in the future

Even if people may not use verbal or complex language, people do communicate, so work with the beneficiary and supporters to understand as clearly as possible what people want. Check out [Chapter 1](https://thearc.org/wp-content/uploads/2021/12/1.0-How-Will-I-Communicate-with-the-Beneficiary-and-Their-Family.docx) for more information about communicating with beneficiaries.



**During Planning**

Make sure planning meetings are accessible for the beneficiary. We have included guidance in [Chapter 1](https://thearc.org/wp-content/uploads/2021/12/1.0-How-Will-I-Communicate-with-the-Beneficiary-and-Their-Family.docx) on how to prepare for accessible meetings and communicate clearly with the beneficiary.

Reinforce expectations about the trust and budget process with the beneficiary and supporters at the beginning of the meeting. Depending on the size and scope of money in the trust, you may not be able to support all the goals. Make sure to explain what the trust can and cannot do.

Review what you learned before the meeting and what seemed most important to them.

Ask the beneficiary, if needed, to prioritize what is most important to them and their quality of life. What is the biggest thing they want? While the trust has sole discretion on how to use trust funds, understanding the beneficiary’s priorities can help the trust understand how money can be spent. Even if the trust is used to pay mostly for needs, identify any ways to help support their big goals.

Write a plan in the first person, using clear guiding sentences. Make sure the beneficiary agrees with the statements in the plan.

Take breaks after you discuss a major goal or section of the plan.

Summarize what has been discussed and decisions that were made.

Ask the beneficiary whether they agree with the decision and if they have questions.

Give time for people to process decisions and come back to them.



**After Creating a Plan**

Send the plan to the beneficiaries and any supporters to review and provide feedback.

Assess the plan and reflect. Suggest changes or schedule subsequent meetings as needed until the answer to both questions below are “yes.”

* Does this plan give the beneficiary – regardless of legal status - as much input as possible?
* Does this plan make the beneficiary’s life better in a way that they recognize? If not, how can we make sure that the plan is revised to improve their quality of life?

During check-in meetings throughout the year, ask beneficiaries about how well the plan is working for them, and make sure to note feedback in the beneficiary file.

**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: September 7, 2021.