# Beneficiary Support Toolkit for Trust Professionals


# Chapter 3: Evaluating Needed Supports and Services

**Updating Support and Service Arrangements and Goals**

The supports and services people use may change throughout their life:

* As capacities, interests, and goals shift
* As staff come and go
* As eligibility and payment for supports and services shift

The checklist below can help you ask questions and recognize changing needs and goals during your regularly scheduled check-ins with beneficiaries and families, regular home visits, and yearly budget-planning meetings.

**NOTE:** Experts from the [Life Passages Project](https://www.stetson.edu/law/academics/elder/home/life-pass-project.php) recommend that you plan to visit your beneficiaries at least twice a year. Home visits are a critical part of ensuring that funds from trusts are supporting the needs of beneficiaries and a key opportunity to identify ways a trust can improve the quality of life of a beneficiary. If you are unable to meet in person, consider using video conferencing technology to connect with the beneficiary. While we know that time and resources are limited, we recommend that – when possible - you schedule one in-person check-in per year, with more regular check-ins by phone, on a monthly or quarterly basis, depending on the beneficiary’s stated preferences, as well as their social, emotional, health, and other needs.

**Before the Check-In, Visit, or Meeting:**

[ ]  Review notes in the beneficiary’s file about support and service arrangements, as well as feedback and notes from previous check-ins and home visits. Flag any items that need to be specifically updated or addressed.

[ ]  Send the beneficiary and any supporters a reminder to think through the beneficiary’s goals and future plans and review their current supports and services. A future plan helps a person and their supporters communicate important aspects of their life now, as well as what they want to occur in the future. You can share [this website](https://futureplanning.thearc.org) with beneficiaries to help them learn more about future planning.

**At the Check-In, Visit, or Meeting:**

[ ]  Confirm the status of support or service arrangements. Sample questions include:

* Right now, we have it down that you receive [these supports and services]. Is that still true?
* [If applicable] We have down that you get support from [these staff]. Is that the same – or has it changed?
* [If applicable] We have down that these are key people in your life that help you [list key contacts]. Is that the same – or has it changed?

[ ]  Ask about any future support or service needs and life goals, including:

[ ]  What they like and don’t like doing each day

[ ]  What they want to do more and less of

[ ]  What help they want but are not getting right now

[ ]  What things they want to do in the future - what their goals and dreams are

[ ]  Observe the beneficiary. Check for any signs of abuse or neglect – this may include a change in appearance or behavior away from the beneficiary’s normal behavior or appearance.

[ ]  During site visits, observe the beneficiary’s surroundings. If you see something that looks neglected, out of place, or concerning, ask about it. Make sure to ask who makes the decisions around the concerning object.

[ ]  During site visits, observe and ask about supports provided to the beneficiary – as this can help identify newly needed services and quality issues with current services or staff. Important activities to observe include:

[ ]  Feeding or nutrition support

[ ]  Bathing and grooming support

[ ]  Mobility support, including state of hospital beds, lifts, wheelchairs, walkers, canes, shower chairs, grab bars, etc.

[ ]  Vision and hearing support

[ ]  Needed medication

[ ]  Support provided around independent living (e.g., cooking and cleaning)

[ ]  Any evidence of hoarding or mental health triggers

[ ]  Other routines, based on goals and previous beneficiary comments

**After the Check-In, Visit, or Meeting:**

[ ]  Record all notes and observations in the beneficiary’s file.

[ ]  Flag any concerns around poor-quality or potentially abusive supports and services and follow your trust’s policies on dealing with these issues.

[ ]  Provide contact information and encourage the beneficiary to work with trusted supporters to apply for additional public benefits for which they may want or need.

[ ]  Look into ways the trust could support a beneficiary’s goals or wants and take steps to incorporate those goals into the beneficiary’s budget, when possible.

**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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