# Beneficiary Support Toolkit for Trust Professionals


# Chapter 3: Evaluating Needed Supports and Services

**Addressing Disagreements About Supports and Services**

Sometimes, beneficiaries and families may request funding for a support or service that does not fit into what the trust can pay for. This may happen either in a planning meeting or, unfortunately, after a beneficiary has already paid for something.

**Important:** Sometimes, the nature of a disagreement or challenge may result from the person’s or family’s desire for a trust to pay for something because they do not want to use public benefits. People still experience internal and external stigma around the use of public benefits – they may themselves have a negative perception of a support or service or may feel that others will judge them for using a support or service. If the issue identified stems from negative perceptions on the use of public benefits, we recommend that trust professionals consider five strategies to reduce this stigma. This includes:

* Discussing how benefits are often earned via work experiences or through taxes
* Sharing details on the structure of the program and its use in the population and area
* Sharing details on the history and intent of the program – and how it can promote independence
* Describing the value of the benefit and how it can help them afford the things that they want
* Aiding or providing referrals to those who can help people enroll and complete forms

More on combatting stigma and specific examples of each of the five strategies above are shared in detail in the 2016 National Council on Aging report, “[An End to Stigma: Challenging the Stigmatization of Public Assistance Among Older Adults and People with Disabilities](https://www.ncoa.org/article/ending-stigma-around-receiving-benefits).”

Below, we provide some strategies you can take to address disagreements and shift discussions to a more productive focus.

**How to Deal With Disagreements in Planning Meetings**

[ ] Thank the beneficiary and family for sharing their idea and the help that they want.

[ ] Remind the beneficiary and family about what the trust can and cannot pay for.

[ ] Reaffirm the trust’s commitment to finding a way to help the beneficiary and family achieve their goals.

[ ] Ask probing questions to better understand the underlying need in the request. Sample questions may include:

* Why do you want this help – what is it that you think is very important about this particular support?
* What is it you hope that [the request] will help you achieve? What is your big goal or dream?
* What are 1-2 other things that we can do to help you achieve this?
* Could we do other things to help you [give examples of another payment, e.g., pay for training, transportation, computer or device, work on a budget plan]?

[ ] Use the questions above as a starting point for a brainstorming session on ways that the trust can provide support to achieve the goal – even if it is not the first choice.

[ ] Once options have been identified, summarize them with the beneficiary and family and ask them if they are okay with this as an alternative support.

[ ] Incorporate this support in the budget plan for the upcoming year.

**How to Deal With Disagreements Once a Reimbursement Request Is Submitted**

[ ] Reach out to the beneficiary in their preferred format. If possible, consider having the meeting face-to-face or where people can see each other’s faces.

[ ] Thank the beneficiary for their time and the request.

[ ] Remind the beneficiary and family about what the trust can and cannot pay for.

[ ] Inform the beneficiary of the status of their disbursement request.

[ ] Reaffirm the trust’s commitment to finding a way to help the beneficiary and family achieve their goals.

[ ] Ask the beneficiary:

[ ] To confirm that they understand what you have said

[ ] If they are okay financially, especially if the rejected disbursement was significant

[ ] Listen and provide emotional support as needed – people may feel angry, upset, or sad at this news

[ ] Ask probing questions to better understand the underlying need in the request. Sample questions may include:

* Why did you make this purchase?
* How were you hoping that this would help you?
* What is it you hope that [the request] will help you achieve? What is your big goal or dream?
* Are there other things that we can do to help you achieve this?
* Could we do other things to help you [give examples of another payment, e.g., pay for training, transportation, computer or device, work on a budget plan]?

[ ] Use the questions above as a starting point for a future brainstorming session on ways that the trust can provide support to achieve the goal – even if it is not the first choice.

[ ]  Identify a date/time for a follow-up brainstorming meeting.

[ ]  Summarize the conversation with the beneficiary and reassure them again that the trust is there to help them.

[ ] Thank them again for their time and end the meeting.

[ ]  Add notes on this communication and meeting to the beneficiary’s file.

[ ]  Take time to de-stress or de-escalate if the communication was difficult.

**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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