PRACTITIONER RESOURCE

ASSOCIATION OF PROFESSIONAL BEHAVIOR ANALYSTS

Tips for Developing Positive Funder Relationships

March, 2025

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Practicing behavior analysts working with funders should view their payor contacts as colleagues who are part of the client's treatment team. These colleagues are valuable resources and can help you actively manage your client's treatment programming. Placing your client's needs and interests first means actively developing positive relationships with your payor contact. This document includes some helpful tips.

Be proactive and communicative!

- Make sure you know who your payor contacts are for each funder. Set up an introductory meeting to get to know each other. In the meeting, find out the scope of their role and the department in which they work. Ask for a brief description of other departments you might need to access and for contacts in those departments.
- Consider asking for regularly scheduled meetings (e.g., monthly or quarterly) with your payor contact to review cases, recurring issues, and strategies for improvement.
- Reach out to your payor contact as soon as you have a concern, or an issue is identified with an email or phone call and request a meeting if needed. Don't wait for issues to worsen.
- Ask if there are any trends the funder is seeing in ABA-based services and unmet patient needs at your organization or in general. Use this information to determine if there are areas you may better support within your own clinical work or identify if there are opportunities to collaborate on meeting unmet needs (e.g., teen social skills groups, support for rural families).
- Ask for feedback. This demonstrates bi-directional feedback and allows you to be proactive in ensuring you are meeting your payor's requirements. Here are some specific questions you could ask:
    - What are the top 1-3 things I am doing well in my treatment plans?
    - What is at least one thing in my treatment plans that could be improved?
    - After reading my goals, what suggestions do you have for me improving the quality?
    - What aspects of my graphs are clear and helpful?
    - What aspects of my graphs are unclear or missing?

Be professional and prepared!

- Ensure that you are familiar with the relevant funder requirements and service-specific policy, and if you have a question-ask!
- Have a goal for your communications and meetings and clearly articulate it (e.g., sharing information, asking for clarification, alerting the payor contact about an issue you need help resolving, asking for support identifying additional resources for the client or caregivers).
- Prepare and share (ahead of time, if possible) a clear rationale and supporting data that can help your payor contact collaborate with you in the best interest of the client.
- Following phone or video-conference meetings, follow up with an email thanking your payor contact for their time, summarizing the main points from the discussion, outlining any follow-up tasks and due dates, and asking them to clarify anything you might have mischaracterized in your summary.

Be collaborative and receptive!

- Work to identify common goals that center client needs and interests.
- Assume good intent and the desire to work collaboratively with you toward the shared goals.
- Engage in active listening that functions to increase your knowledge and understanding.
- Ask clarifying questions and restate shared information to ensure your understanding.

Be realistic and flexible!

- Ensure that you understand the difference between what you are recommending or asking for and what is within the ability of the funder to authorize.
- Focus on the ultimate client-focused goal or desired outcome, working backward with your payor contact to identify a reasonable path that will lead to that goal or outcome. Ask them to help you think creatively in addressing the goal or desired outcome.

Be kind!

- Remember, everyone makes mistakes, everyone is learning, and everyone has a complicated life. Stay focused on collaborative problem solving toward the common goal(s).
- If needed, calmly and politely follow the escalation process (e.g., peer review). If you don't know what that is, ask your payor contact to please outline the next steps and provide you with the contact information for the correct person.

We hope these tips are useful as you actively work to develop and maintain a positive, collaborative relationship with funders in service of your clients.