



# Trusted Partner Approval Process

## 1. Purpose

The purpose of this document is to outline the standardized process used by **305Senior** to evaluate, approve, and monitor professionals and organizations seeking to become part of the **305Senior Trusted Partner Network**.

This process ensures that all partners meet the highest standards of:

- Professionalism
- Ethical conduct
- Experience serving seniors
- Reliability and trust

## 2. Overview of the Approval Process

Becoming a **305Senior Trusted Partner** involves a multi-step evaluation designed to protect the integrity of the network and ensure quality service delivery.

### **The process includes:**

1. Application Submission
2. Internal Pre-Screening
3. Interview / Discovery Call
4. Credential & Reputation Verification
5. Trial Period (if applicable which will be stated in agreement agreement)
6. Final Approval Decision

### 3. Step 1: Application Submission

All prospective partners must complete the **305Senior Trusted Partner Application Form**, which collects:

- Business and contact information
- Service category and description
- Experience working with seniors
- Licenses, certifications, and insurance
- References
- Alignment with **305Senior** values

#### **Objective:**

To gather essential information and assess initial eligibility.

### 4. Step 2: Internal Pre-Screening

Applications are reviewed internally to evaluate:

- Completeness of submission
- Professional presence (website, online reviews)
- Alignment with **305Senior** mission and standards
- Any potential red flags (complaints, credibility concerns)

#### **Outcome:**

- Move forward to interview
- Disqualify (if criteria not met)

### 5. Step 3: Interview / Discovery Call

Qualified applicants participate in a **20–30-minute discovery call**.

### **Evaluation Focus:**

- Communication style and professionalism
- Experience working with seniors and families
- Client handling approach
- Values and ethical mindset

### **Sample of Some Evaluation Questions:**

- How do you support seniors and their families?
- How do you handle difficult client situations?
- What differentiates your service from others?

### **Objective:**

To verify trust, professionalism, and alignment with **305Senior** brand.

## **6. Step 4: Credential & Reputation Verification**

**305Senior** conducts due diligence, which may include:

- Verification of licenses and certifications
- Confirmation of insurance coverage
- Review of online reputation (Google, Yelp, etc.)
- Contacting references (when necessary)

### **Objective:**

To confirm legitimacy, compliance, and reliability.

## **7. Step 5: Trial Period (If Applicable)**

Some applicants may be given a **Trial Partner Status** for a period of **60–90 days**.

### **During Trial:**

- Partner may receive limited referrals
- Performance is monitored based on:
  - Responsiveness
  - Professional conduct
  - Client feedback

### **Objective:**

To evaluate real-world performance before full approval.

## **8. Step 6: Final Approval**

Following the trial period (or immediately, if waived), a final decision is made.

### **Criteria for Approval:**

- Consistent professionalism
- Positive communication and responsiveness
- Strong client experience
- Alignment with **305Senior** values

### **Outcome:**

- Approved as **305Senior Trusted Partner**
- Not approved or removed from consideration

## **9. Partner Categories**

Approved partners are categorized based on their service type, including (but not limited to):

- Healthcare & Medical Services
- Home Care & Senior Care Services
- Senior Living & Housing

- Legal & Financial Services
- Wellness & Lifestyle Services
- Home & Support Services
- Transportation & Mobility
- Community, Social, & Enrichment Services
- Products & Retail
- Caregiver & Workforce Ecosystem
- Media, Education, & Influencers

## **10. Ongoing Monitoring & Quality Control**

Approval is **not permanent** and is subject to ongoing evaluation.

### **Monitoring Includes:**

- Client feedback
- Responsiveness to referrals
- Professional conduct
- Consistency of service quality

### **Review Frequency:**

- Ongoing
- Periodic internal reviews
- Annual re-evaluation for continuous membership

## **11. Disqualification Criteria**

Partners may be denied approval or removed if they:

- Fail to maintain proper licensing or insurance
- Receive consistent negative feedback
- Display unethical or unprofessional behavior
- Engage in misleading or high-pressure sales practices
- Misrepresent affiliation with **305Senior**

## 12. Important Disclaimer

**305Senior** operates as a **referral and resource network only**.

- **305Senior** does **not provide direct services**
- All services are performed independently by the Partner
- Partners are solely responsible for: Service delivery, Client agreements, Outcomes, and interactions.
- **305Senior does not** guarantee service results and is not liable for any services rendered by partners.

## 13. Commitment to Excellence

This approval process is designed to:

- Protect seniors and their families
- Maintain a high-trust network
- Ensure consistent service standards
- Strengthen community partnerships