

# Foundation for Senior Services

## SSG Certified Specialist Membership Guide



# Senior Specialists Group

**February 2024**

## Do you want to make a direct impact in helping seniors age well?

### Consider becoming an SSG Certified Specialist!

#### Who We Are and What We Do

We are a 501(c)3 public charity whose mission is to provide seniors and their families and caregivers with education, options and resources so they can choose quality care and support that will help preserve their independence. We deliver our mission through four core programs:

 FIND A <b>Specialist</b>	Connect to one of our 300+ Certified Specialists to explore the types of resources and support available.
 AGE WELL <b>Academy</b>	We offer 15-20 in-person and virtual education programs each month at no cost to community members on a variety of topics from our 10-part curriculum supporting aging well.
 SOCIAL CALL <b>Companion</b>	Sign up to receive, or volunteer to place, regular check-in and companionship calls to help combat isolation and loneliness.
 AGE WELL <b>@Work</b>	Our comprehensive educational program can help employers support both aging employees and caregivers in aging well.

#### Becoming an SSG Certified Specialist

If you are passionate about supporting our mission to help seniors age well, consider joining us! If your Membership is approved, you'll be designated as an SSG Certified Specialist, which will provide access to referrals through our Find a Specialist program, a network of Certified Specialists to help build better solutions for seniors, opportunities to deliver educational programming through Age Well Academy, and a number of other valuable benefits.

All Members must first complete a Membership Application. Upon submission, we will review your application and conduct a standard background check. If approved, Members must agree to pay a non-refundable activation fee of \$90 and annual renewal dues of \$240. In addition, Members are expected to actively engage in FSS programming and must agree to and abide by our Membership Criteria, Membership Expectations and Code of Ethics and Conduct.

#### Are You Ready to Help Seniors Age Well?

Take a look inside to learn more!

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## Introduction to the Foundation for Senior Services

### Our Mission

We are a 501(c)3 public charity whose mission is to provide seniors and their families and caregivers with education, options and resources so they can choose quality care and support that will help preserve their independence. We have first-hand knowledge of the complex and confusing array of issues seniors must navigate to age well, and we're committed to providing this support without consideration of social, cultural or economic differences.

### The Need Has Never Been Greater

In 2020, the US had 56 million people over the age of 65. That number is expected to grow to 70 million by 2030. Similarly, in 2015, California had 7 million people over the age of 65 and that number is expected to grow to 12 million by 2030. This tremendous growth requires more senior services, facilities and qualified health care providers, as well as new solutions to fighting disease, isolation, and poverty among seniors who deserve the right to age with dignity. As a society, we simply aren't prepared for the "silver tsunami."

### Making an Impact

We have four key programs designed to support seniors, their friends and family, and caregivers in all aspects of aging well.



Connect to one of our 300+ Certified Specialists to explore the types of resources and support available.



We offer 15-20 in-person and virtual education programs each month at no cost to community members on a variety of topics from our 10-part curriculum supporting aging well.



Sign up to receive, or volunteer to place, regular check-in and companionship calls to help combat isolation and loneliness.



Our comprehensive educational program can help employers support both aging employees and caregivers in aging well.

## Role of the Senior Specialists Group



Our programs and services are delivered through our Senior Specialists Group (SSG) Chapters – a team of 300+ Certified Specialists throughout Southern and Central California who can help seniors, their friends and family, and their caregivers navigate the wide range of challenges they may face, including in-home care, medical, legal, emotional, financial and placement services, home repairs, meals, transportation, medical supplies and equipment, and more.

Our Certified Specialists belong to one of our Senior Specialists Group (SSG) Chapters across Southern and Central California. Our chapters are active members of their communities and partner with a variety of organizations to help connect local seniors, families and caregivers with the services and resources they need to age well.

Below are the communities currently served by our SSG Chapters.

- Inland Empire
- Los Angeles Gateway Cities
- Orange County
- San Fernando Valley
- San Gabriel Valley
- South Bay
- Verdugo Hills / West San Gabriel Valley
- Westside LA
- Conejo Valley / Ventura County

## Expectations of an SSG Certified Specialist

To become an SSG Certified Specialist, you must agree to and abide by our Membership Criteria, Membership Expectations and Code of Ethics and Conduct. In addition, all prospective Members will undergo a standard background check and be vetted for alignment with our Mission, values and ethics.

### Membership Criteria

1. Members are career professionals in their area of expertise, with the necessary skills, abilities and work experience to provide quality services, products, education and resources to older adults, their caregivers, and the general public.
2. We welcome members regardless of their industry as long as it is dedicated to helping seniors age well. Some membership restrictions may apply to maintain a reasonable balance of senior-related business professions within each chapter. (*See Diversity of Profession section below*)
3. Members must be passionate about supporting our mission to help seniors age well.
4. Members must be in good standing with the community.
5. Members must complete a Membership Application. Upon submission, we will conduct our membership review, which includes a standard background check. All information gathered as part of our vetting process will remain confidential.
6. Once approved as a Member and SSG Certified Specialist, Members must agree to pay a non-refundable activation fee of \$90 and annual renewal dues of \$240 to maintain active Member status. (Note: The cost of dues is discounted for partner alliances, non-profits and multiple members within the same organization. Date of payment establishes start of membership and anniversary date. The one-time, non-refundable activation fee upon initial membership approval covers the cost of administrative setup, website and social updates, business cards, and name tag. (*See SSG Membership Fees below for more details.*)

### Membership Expectations

1. Members must abide by the FSS Code of Ethics & Conduct.
2. At a high level, Members are expected to actively help educate, serve and support seniors, their friends and families, and caregivers in aging well. As part of one of our core programs, Find a Specialist, Members are expected to follow-up on service requests and provide status and outcomes of such requests on a timely basis.
3. Members must participate in at least 4 (i.e., one per quarter) additional Foundation programming or development areas each year, including but not limited to:
  - a. **Fundraising:** Participating in chapter and Foundation fundraising activities.
  - b. **Age Well Academy:** Delivering an existing course, identifying and developing a new content area/course, identifying new community partners for venues, etc.
  - c. **Social Call Companion:** Recruiting new volunteer call companions and senior call recipients, volunteering as a call companion.
  - d. **Age Well @Work:** Identifying client prospects, delivering a course as part of a client curriculum, etc.

- e. **Find a Specialist:** Volunteer to facilitate connections to Certified Specialists that are initiated through our Find a Specialist search / call center.
  - f. **Foundation Development:** Actively participate in one of our Advisory Councils to help advance marketing, fundraising, education and overall Foundation development efforts.
  - g. **Chapter Development:** Actively participate in local Chapter development activities, including managing membership meetings and communications, liaising with the community to raise awareness and expand partnerships, recruit new Certified Specialists and/or volunteers.
4. Members should actively collaborate with each other and share knowledge and resources within their area of specialty to help bring a more holistic and higher-impact solution to seniors.
  5. Members must commit to identifying seniors with no options to stay safe & cared for in their homes and partnering with other members / FSS leadership to direct them to appropriate services for assistance.
  6. Members must be willing to allow their clients to rate their services.
  7. Members agree to abide by our public communications policy and to have any educational, public speaking and other public content delivered on behalf of FSS reviewed prior to release.
  8. Upon membership approval, new Members are required to attend an orientation with FSS chapter leadership to receive additional information and guidelines, learn how to make the most of their membership, ask questions and complete Member Agreement paperwork.
  9. Members must ensure that Member dues and fees are kept current. On-time payment of the non-refundable activation fee and annual renewal dues is required to maintain active Member status with FSS.
  10. Members must ensure that their SSG Certified Specialist profile information is kept current – this is critical to our Find a Specialist program and ensuring we are able to match seniors with the best service.
  11. Members are expected to attend a minimum of 9 out of 12 Chapter meetings per year is to maintain active Member status with FSS. If unable to attend, you're highly encouraged to send a substitute to represent your business category.

## **Code of Ethics and Conduct**

### ***Code of Ethics***

FSS is a non-profit 501 (c)(3) public charity professional organization comprised of small businesses and entrepreneurs who share in the highest standards of business practices to educate, serve and support the senior community. FSS promotes a supportive, inclusive and diverse business environment to enable relationship-building, professional development, education and information sharing among its members and partner alliances to help older adults and their loved ones improve their overall well-being, while also enhancing the business success and publicity of its members through philanthropy. FSS members agree to abide by the following principles:

- **Proprietary and Confidential Information:** You will gain access to information of a confidential or proprietary nature relating to FSS and its members and associates. You agree that you will keep confidential all of electronic and documentary information. You also agree that you will not use or disclose this information to any third party, or use this information to compete with or harm FSS or any of its members or clients without the express written consent of the Foundation for Senior Services.
- **Integrity:** Behave in an ethical and legal manner, and display values of honesty, truthfulness, fairness, objectivity and kindness; to build goodwill and trust among other members, visitors, business associates, partner alliances, the older adult community and the public at large.
- **Performance:** Possess the appropriate licenses, skills and proven professional ability to deliver quality products and services to seniors and their loved ones, and to use “Best Business Practices” in your business, and your participation in FSS.
- **Accountability:** Accept responsibility for your actions and behavior, including interactions with other Members, visitors, business associates, partner alliances, the older adult community and public at large.
- **Confidentiality:** Respect the confidentiality of information provided by FSS, their clients, the public at large, Members, visitors, business associates and partner alliances.
- **Respect:** Treat one another respectfully and with a positive & supportive attitude, avoiding any action that may discriminate or discredit FSS, its Members, visitors, partner alliances, the older adult community and the public at large.
- **Non-Discrimination:** FSS and its Members prohibit discrimination of any visitor, prospective Member, partner alliance or client due to race, color, national or ethnic origin, age, religion, disability, sexual orientation, gender identity/expression, veteran status or any other characteristic protected under applicable federal or state law.
- **Non-Solicitation:** When representing FSS in the public (including but not limited to Age Well Academy presentations/roundtables, community fairs/events, delivering services referred through Find a Specialist, etc.), all Members must follow the appropriate protocols for referring additional services/support/programs/etc. back to FSS (through the Chapter Leader or Executive Director) to ensure proper next steps are taken. No Member shall take it upon themselves to arrange any additional activities themselves. Doing so is a violation of our Code of Ethics and also poses a number of risks to partners, FSS, and seniors we serve.

### **Code of Conduct**

1. Collaborate with other Members and work as a cohesive team to carry out the mission of FSS and build trust and community among our members.
2. Uphold confidentiality, mutual protection and intellectual property rights among Members and clients.
3. Reach out to visitors at SSG Chapter meetings and provide a welcoming/supportive atmosphere.
4. Participate in Foundation programs and development activities as outlined in the Member Expectations.

5. Respond to requests in a timely manner and follow-up as needed to ensure client needs are met.
6. Strive to enhance the professional credibility FSS and its Members. As qualified business professionals, each Member agrees to maintain the highest ethical and objective standard in your business area, produce a quality product or service, and stand behind your work.
7. Maintain current licenses, certifications and insurance for designated professions, and follow relevant federal, state and local laws.
8. Comply with regulatory anti-spam, mass email, social media and online protocols & guidelines (e.g., when you send group mass emails, use Bcc to conform with GDPR guidelines.) and our FSS public communications policy.
9. Notify FSS leadership of conflicts and/or differences with Members, visitors or clients to assist in a timely and successful resolution.
10. Maintain proper professional business attire, manners and etiquette at FSS events and show respect and fairness to other Members, visitors and the public.
11. FSS is an A-Political and A-Religious organization, with no political or religious affiliation. No Member should promote or solicit their personal political or religious leanings.
12. Report violations of this Code of Ethics and Code of Conduct to an FSS leader/SSG chapter leader. Violations of FSS policies and procedures may be grounds for termination of membership with the Foundation for Senior Services.

## **Benefits of Membership**

The previous sections outline the high bar we have set for membership with FSS. We take our SSG Certified Specialist designation very seriously – it’s the foundation of trust that is core to our value proposition and what differentiates us from other similar services in the market.

But with those expectations, we provide significant value in a number of ways, including:

- Designation as an SSG Certified Specialist with FSS
- Referrals for 1:1 services through the Find a Specialist Program
- Access to other Certified Specialists to help build more integrated, more impactful solutions for seniors and caregivers
- Various credentials of your membership, including our online directory of Certified Specialists, business cards, name tag, social media badge, and other materials to designate your membership in our network of Certified Specialists
- Discounted rate to earn your Certified Senior Advisor (CSA) certification
- Opportunity to be featured in impact stories and other spotlights in our website, social media and other marketing materials
- Opportunity to participate in Age Well Academy and/or Age Well @Work education programs to help build greater awareness of the challenges seniors face and, importantly, the solutions
- Being part of a team of professionals committed to the same mission, providing countless opportunities to learn and grow in your career and personal life

## Application Process

Below is an overview of your role and what you can expect from our application process to become a Member of FSS and an SSG Certified Specialist.

### Learn About FSS, Our Mission and Programs

- Review our website to learn about the Foundation, our mission, and the types of services we provide to seniors to determine if your business area is aligned with our mission.
- Review this Member Guide and Agreement to understand our membership process, expectations of our Members, and the value of joining our team.
- Join an Age Well Academy class to see one of our programs in action.
- Join a local Chapter meeting to meet the Chapter Leader and other Members.

### Initiate the Membership Process

- Schedule a 1:1 meeting with your local Chapter Leader to discuss membership in more detail, including a clear discussion on other existing Members providing the same or similar services. *(See Diversity of Profession section below)*
- Complete the application for membership on our website and submit it to the Chapter Leader of your desired Chapter. *(See below for Chapter Membership Considerations)*

### Membership Application Review

- Our membership team will review your application against our membership criteria and in context of our “Diversity by Profession” framework. *(see below)*
- We will conduct a standard background check.
- We will request a follow-up discussion as needed to gather any additional information and complete our vetting process.
- You will receive an email with a decision on your membership application within 2 weeks of your submission.

### Membership Acceptance

- If approved for membership, you will be asked to sign and return the SSG Certified Specialist Membership Agreement. *(See below for the Membership Agreement)*
- Your one-time, non-refundable activation fee of \$90 and first year annual dues of \$240 are due within 14 days of submitting your agreement.

### Onboarding

- You are expected to join the first local Chapter meeting scheduled after you have signed your Membership Agreement. All new Members will be introduced to other Chapter Members at that first meeting.
- You are expected to join a New Member Onboarding training session that will be scheduled by your local Chapter.
- Following onboarding, you should choose the area(s) you want to contribute to as part of the ongoing expectations of Members.

## Additional Membership Considerations

### Membership Review Process: Diversity By Profession

Upon application by a prospective member, FSS may consider a prospective Member's business category as part of the vetting process in deciding whether to approve membership.

FSS prohibits discrimination of any visitor or prospective member due to race, color, national or ethnic origin, age, religion, disability, sex, sexual orientation, gender identity and expression, veteran status or any other characteristic protected under applicable federal or state law.

In addition, FSS believes that "Diversity by Profession" is a positive model for the successful growth of our chapters. FSS is not an "exclusive" membership organization (where there is only one business profession per chapter), nor "open" (where any applicant in any business category may join). The FSS specialist model relies on having experts in each category who bring the best practices in their industry to help seniors address the challenges they face in aging well and preserving their independence. FSS specialists in each industry are attuned to new developments, innovations and watchout areas in their industry, and together, they help FSS remain focused on the practices that best serve the seniors and caregivers in our communities. Our ultimate goal is to provide services that are in the best interests of those seniors and caregivers and to balance our capacity of services we provide with their needs.

Below are the key considerations when evaluating membership from prospective providers who have the same or similar business category of an existing member:

1. A prospective Member needs a complete understanding and agrees to and supports the FSS mission, Member Criteria and Member Expectations.
2. A prospective Member's view on collaboration -- ideas to develop strategic partnerships, share business, educational opportunities and collaborate with one another to make a bigger impact.
3. Each person is different & unique, and it's wise to have two or three qualified/vetted Members in a similar profession, to ensure a good fit and eliminate potential conflict of interests.
4. A prospective Member may offer desired leadership skills or other needed skillsets to the Chapter, which benefits the FSS organization overall.
5. Opinions of existing Member(s) in a similar business category about the prospective Member and a potential exploratory discussion with those member(s).
6. The final decision to approve an applicant for membership is up to the mutual decision of the Chapter Leader(s) and FSS leadership.

Note: Members may offer services within multiple business categories, and FSS does not want to artificially restrict a Member from representing a certain aspect of their business because it's not their "primary" business category. However, certain business categories are very broad in scope, and members may be restricted from offering all services defined within that category.

### **Chapter Membership Considerations**

Prospective Members are encouraged to join the Chapter that best represents the geography they are able to serve. That may or may not be the same community where the Member lives. The most important consideration is aligning to the geographic area where you will have the greatest impact on the seniors and caregivers in that community.

If you wish to join an additional Chapter, you will need to designate a Primary Chapter. You can then pay an additional \$100 membership fee for each Secondary Chapter you choose to join. (*See SSG Membership Fees below for more details.*)

### **SSG Membership Fees**

#### **Annual Initial Membership and Annual Renewal Fee**

- SSG Primary Chapter Single Membership **\$ 240.00**
- SSG Primary Chapter (Single) w/Secondary Chapter **\$ 100.00**

*Note: There is a 25% discount to the Annual Initial Membership and Annual Renewal Fee for:*

- Non-Profit Organization
- 2nd, 3rd, 4th member from same company/multiple chapters

*Note: There is a 35% discount to the Annual Initial Membership and Annual Renewal Fee for:*

- 5<sup>th</sup>+ Member/Multiple Chapters

**One-Time New Member Admin/Activation Fee **\$90.00****

*Note: This fee applies to each Member from same company*

**Additional Business Category Setup for Single Member **\$60.00****

#### **Meeting Attendance Fees**

- Member Primary Member **\$ 0**
- Member from Other Chapter **\$ 0**
- Visitor (1st Visit) **\$ 0**
- Visitor (2 – 4 Visits) **\$ 20 (max 4 visits)**

#### **Example:**

- New Single Membership \$240 + \$90 (admin fee) = \$330
- Additional person from same company or non-profit organization:
  - New Membership: \$180 + \$90 (admin fee) = \$270
  - Renew of Single Membership \$240
- Renewal of additional company Member or non-profit organization = \$180

## Membership Application

Please visit [www.foundationforseniorservices.org](http://www.foundationforseniorservices.org) and navigate to the Membership Application to complete and submit your application online. Below is the information you'll be asked to submit to help you prepare your materials.

### Chapter Selection:

- Chapter You Are Applying To

### Member's Company Information

- Company Name
- Company Website
- Company Phone
- Company Toll-Free Phone
- Company Fax
- Company Address
- Metro Area
- Business Type
- For-profit or Nonprofit?
- Registered Business #
- Date Your Business Started
- Does Your Company Have Business Liability Insurance?

### Member's Information

- Member Name
- Occupation/Title
- Email Address
- Mobile Phone
- Preferred Name for Name Badges
- Referred By

### Additional Information

- Certifications You Hold
- State Business License # (if applicable for your profession)
- Three Business References
- Other Organization Affiliations

## Membership Agreement

Once approved, you are required to sign and complete the Membership Agreement below.

This Membership Agreement ("Agreement") is entered into on this [date] by and between Foundation for Senior Services, a nonprofit organization located at 655 N. Central Ave., Suite 1700, Glendale CA, 91203, hereinafter referred to as "Organization," and the individual member listed below, collectively referred to as "Members".

### **1. Purpose:**

The purpose of this Agreement is to outline the terms and conditions under which Members will offer their services to the Organization for working with seniors. The Members agree to provide their time, skills, and efforts for the betterment of the seniors served by the Organization.

### **2. Confidentiality:**

- a. The Members acknowledge that they may come into contact with sensitive and confidential information related to the senior participants, the Organization, and its operations. This includes, but is not limited to, personal health information, financial records, and any other proprietary or sensitive data.
- b. The Members agree to maintain strict confidentiality and not disclose any confidential information to any third parties without the prior written consent of the Organization. This obligation extends beyond the termination of this Agreement.

### **3. Mutual Respect:**

- a. The Members, the Organization, and senior participants shall treat each other with mutual respect and consideration at all times.
- b. The Members understand and agree that they will be working with seniors who may have varying physical, emotional, or mental conditions. The Members will exercise patience, empathy, and sensitivity while working with seniors and shall refrain from any form of discrimination or disrespectful behavior.

### **4. Duties and Responsibilities:**

- a. The Organization shall provide appropriate training and guidance to the Members to perform their duties effectively.
- b. The Members shall perform their tasks diligently and to the best of their abilities, following the guidelines and instructions provided by the Organization. Specifically, the Members agree to comply with the Organization Code of Ethics and Conduct, Membership Criteria and Membership Expectations.

### **5. Member Rights:**

- a. The Members retain the right to decline any tasks or duties that they are uncomfortable with or feel unqualified to perform.

b. The Organization shall not assign Members to tasks that pose significant risks to their safety and well-being without proper training and consent.

**6. Termination:**

- a. Either party may terminate this Agreement at any time, with or without cause, by providing written notice to the other party.
- b. If a Member chooses to resign from the group, they must first notify their SSG Chapter Leader in writing. There will be a re-activation fee if the member re-applies in the future.
- c. A Member may be terminated from membership in FSS with FSS leadership approval, for the following reasons (but not limited to these):
  - 1. Non-compliance with FSS Mission Statement, Code of Ethics & Conduct, Membership Criteria and Membership Agreement,
  - 2. Conflicts or complaints about a Member that cannot be resolved with all parties involved,
  - 3. Questionable ethics, trust-worthiness and/or business practices.
- d. In the event of termination, the Members shall return any Organization property and materials in their possession.

**7. Arbitration:**

a. The Members and the Organization agree to submit any disputes to binding arbitration to the American Arbitration Association in Los Angeles. The arbitrator shall have the power to determine arbitrability and to award damages, issue injunctive relief, and allocate attorney fees and costs as may be just and equitable.

**8. Governing Law and Venue:**

This Agreement shall be governed by and construed in accordance with the laws of the State of California and venue for any legal proceeding shall be in Los Angeles County, California. Service shall be sufficient if made by personal delivery or certified mail, return receipt requested, to each party at the address stated herein.

IN WITNESS WHEREOF, the Parties hereto have executed this Membership Agreement as of the date first above written.

**Foundation for Senior Services:**

By: \_\_\_\_\_ Date: \_\_\_\_\_

Joyce Robertson, Executive Director

By: \_\_\_\_\_ Date: \_\_\_\_\_

<Name>, SSG Chapter Leader



**Member Name:** \_\_\_\_\_

**Date:** \_\_\_\_\_

**Member Address:** \_\_\_\_\_