

Pearson Edexcel Level 2 Certificate in Funeral Operations and Services

Specification

NVQ/Competence-based qualification

First registration August 2014

Issue 2

Edexcel, BTEC and LCCI qualifications

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This specification is Issue 2. Key changes are listed in the summary table on the next page. We will inform centres of any changes to this issue. The latest issue can be found on the Pearson website: qualifications.pearson.com

This qualification was previously known as:

Pearson Edexcel Level 2 Certificate in Funeral Operations and Services (QCF)

The QN remains the same.

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Summary of Pearson Edexcel Level 2 Certificate in Funeral Operations and Services specification Issue 2 changes

Summary of changes made between previous issue and this current issue	Section number
All references to QCF have been removed throughout the specification	Throughout
Definition of TQT added	1
Definition of sizes of qualifications aligned to TQT	1
TQT value added	2
GLH range removed and replaced with lowest GLH value for the shortest route through the qualification	2
Reference to credit transfer within the QCF removed	4
Guided learning definition updated	11
QCF references removed from unit titles and unit levels in all units	11

Earlier issue(s) show(s) previous changes.

If you need further information on these changes or what they mean, contact us via our website at: qualifications.pearson.com/en/support/contact-us.html.

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This specification sets out:

- the objectives of the qualification
- any other qualification that a learner must have completed before taking the qualification
- any prior knowledge, skills or understanding which the learner is required to have before taking the qualification
- the combination of units that a learner must have completed before the qualification will be awarded and any pathways
- any other requirements that a learner must have satisfied before they will be assessed or before the qualification will be awarded
- the knowledge, skills and understanding that will be assessed as part of the qualification
- the method of any assessment and any associated requirements relating to it
- the criteria against which a learner's level of attainment will be measured (such as assessment criteria)
- assessment requirements and/or evidence requirements required as specified by the relevant Sector Skills Council/Standards Setting Body
- assessment requirements/strategy as published by the relevant Sector Skills Council/Standards Setting Body
- the Apprenticeship Framework in which the qualification is included, where appropriate.

1 Introducing Pearson Edexcel NVQ/Competence-based qualifications

What are NVQ/Competence-based qualifications?

National Vocational Qualifications (NVQs)/Competence-based qualifications are work-based qualifications that give learners the opportunity to develop and demonstrate their competence in the area of work or job role to which the qualification relates.

NVQs/Competence-based qualifications are based on recognised occupational standards for the appropriate sector. Occupational standards define what employees, or potential employees, must be able to do and know, and how well they should undertake work tasks and work roles. These standards are written in broad terms to enable employers and providers to apply them to a wide range of related occupational areas.

NVQs/Competence-based qualifications are outcomes-based with no fixed learning programme, therefore allowing flexible delivery to meet the individual learner's needs. At Level 2 and above, these qualifications are recognised as approved training and development courses for employees that have been in the workplace for some time or as a way of inducting, training and developing new entrants into the workplace. Qualifications at Level 1 can be used in Traineeships, which enables progression to entry level employment or to Apprenticeship programmes.

Learners will work towards their qualification in the workplace or in settings that replicate the working environment as specified in the assessment requirements. Colleges, training centres and/or employers can offer these qualifications as long as they have access to appropriate physical and human resources and have the necessary quality assurance systems in place.

Sizes of NVQ/Competence-based qualifications

For all regulated qualifications, Pearson specify a total number of hours that it is estimated learners will require to complete and show achievement for the qualification – this is the Total Qualification Time (TQT). The TQT value indicates the size of a qualification.

Within the TQT, Pearson identifies the number of Guided Learning Hours (GLH) that we estimate a centre delivering the qualification might provide. Guided learning means activities, such as lessons, tutorials, online instruction, supervised study and giving feedback on performance, that directly involve tutors and assessors in teaching, supervising and invigilating learners. Guided learning includes the time required for learners to complete external assessment under examination or supervised conditions.

In addition to guided learning, other required learning directed by tutors or assessors will include private study, preparation for assessment and undertaking assessment when not under supervision, such as preparatory reading, revision and independent research.

As well as TQT and GLH, qualifications can also have a credit value – equal to one tenth of TQT, rounded to the nearest whole number.

TQT and credit values are assigned after consultation with users of the qualifications.

NVQ/Competence-based qualifications are available in the following sizes:

- Award – a qualification with a TQT value of 120 or less (equivalent to a range of 1–12 credits)
- Certificate – a qualification with a TQT value in the range of 121–369 (equivalent to a range of 13–36 credits)
- Diploma – a qualification with a TQT value of 370 or more (equivalent to 37 credits and above).

2 Qualification summary and key information

Qualification Number (QN)	600/9602/0
Regulation start date	07/06/2013
Operational start date	01/08/2014
Approved age ranges	16-18 19+ Please note that sector-specific requirements or regulations may prevent learners of a particular age from embarking on this qualification. Please refer to the assessment requirements/strategy.
Credit value	35
Assessment	Portfolio of Evidence (internal assessment)
Total Qualification Time (TQT)	350
Guided learning hours	129
Grading information	The qualification and units are graded pass/fail.
Entry requirements	No prior knowledge, understanding, skills or qualifications are required before learners register for this qualification. However, centres must follow the Pearson Access and Recruitment policy (see <i>Section 9, Access and Recruitment</i>)
Funding	Qualifications eligible and funded for post-16-year-olds can be found on the funding Hub. The Skills Funding Agency also publishes a funding catalogue that lists the qualifications available for 19+ funding.

Qualification number and qualification title

Centres will need to use the Qualification Number (QN) when they seek public funding for their learners. As well as a QN, each unit within a qualification has a unit reference number (URN).

The qualification title, unit titles and QN will appear on each learner's final certificate. Centres should tell learners this when recruiting them and registering them with Pearson. There is more information about certification in the *Pearson Information Manual*, available on our website: qualifications.pearson.com

Qualification objectives

The Pearson Edexcel Level 2 Certificate in Funeral Operations and Services is for learners who work in, or want to work in the funeral sector.

It gives learners the opportunity to:

- demonstrate competence of learners working in the funeral sector as a Funeral Operative or Funeral Arranger.
- have existing skills recognised
- achieve a nationally-recognised Level 2 qualification

Relationship with previous qualifications

This qualification is a replacement for the EDI Level 2 Certificate in Funeral Operations and Services (QCF), which has expired.

Apprenticeships

Skillsmart Retail UK Limited (People 1st) include the Pearson Edexcel Level 2 Certificate in Funeral Operations and Services as the competence component for the Intermediate Apprenticeship in Funeral Operations and Services.

Progression opportunities through Pearson qualifications

Learners who have achieved the Pearson Edexcel Level 2 Certificate in Funeral Operations and Services can progress to Pearson Edexcel Level 3 Certificate in Funeral Operations and Services or Pearson BTEC Level 2 Certificate in Principles of Funeral Operations and Services.

Industry support and recognition

This qualification is supported by Skillsmart Retail UK (People 1st), the Skills Council for retail, hospitality, passenger transport, travel and tourism.

Relationship with National Occupational Standards

This qualification is based on the National Occupational Standards (NOS) in Funeral Operations and Services, which were set and designed by Skillsmart Retail UK Limited (People 1st), the Sector Skills Council for the sector.

3 Qualification structure

Pearson Edexcel Level 2 Certificate in Funeral Operations and Services

The learner will need to meet the requirements outlined in the table below before the qualification can be awarded.

Minimum number of credits that must be achieved	35
Number of mandatory credits that must be achieved	3
Number of optional credits that must be achieved	32

1	A/503/8992	Interact Sensitive with Clients of a Funeral Business	2	3	17
2	T/503/8991	Establish Client Requirements for Funeral Arrangements	2	6	29
3	M/503/8990	Bring the Deceased into the Care of a Funeral Business	2	6	28
4	F/503/8993	Care for the Deceased within a Funeral Business	2	6	13
5	J/503/8994	Bear the Coffin and Handle Floral Tributes	2	2	8
6	L/503/8995	Encoffin the Deceased	2	2	10
7	R/503/8996	Make Arrangements for Viewing the Deceased	2	2	12
8	Y/503/8997	Prepare Coffins	2	2	6
9	D/503/8998	Drive Funeral Vehicles in Corteges	2	4	8
10	H/503/8999	Assure the Roadworthiness of Funeral Vehicles	2	1	9
11	J/503/9000	Assist Clients to Choose Funeral Products and Services	2	3	14
12	L/503/9001	Conduct Viewings of the Deceased	2	2	12
13	R/503/9002	Control the Payment of Accounts in a Funeral Business	2	2	11

14	H/600/9660	Develop Working Relationships with Colleagues	2	3	15
15	L/601/0933	Give Customers a Positive Impression of Yourself and Your Organisation	2	5	33
16	R/601/2490	Store and Retrieve Information	2	3	17
17	T/503/5685	Help Customers to Choose Products in a Retail Environment	2	6	20
18	M/504/9441	Go the Extra Mile to Exceed Customer Expectations Barred combination with unit T/504/9442	2	6	40
19	T/504/9442	Deliver an Organisation's Service Offer, Vision and Promise Barred combination with unit M/504/9441	2	6	40

4 Assessment

This qualification is assessed through an externally verified Portfolio of Evidence that consists of evidence gathered during the course of the learner's work.

To achieve a pass for the full qualification, the learner must achieve all the required units in the stated qualification structure. Each unit has specified learning outcomes and assessment criteria. To pass each unit the learner must:

- achieve **all** the specified learning outcomes
- satisfy **all** the assessment criteria by providing sufficient and valid evidence for each criterion
- prove that the evidence is their own.

The learner must have an assessment record that identifies the assessment criteria that have been met, and it should be cross-referenced to the evidence provided. The assessment record should include details of the type of evidence and the date of assessment. The unit specification or suitable centre documentation can be used to form an assessment record.

It is important that the evidence provided to meet the assessment criteria of the unit and learning outcomes is:

Valid	relevant to the standards for which competence is claimed
Authentic	produced by the learner
Current	sufficiently recent to create confidence that the same skill, understanding or knowledge persist at the time of the claim
Reliable	indicates that the learner can consistently perform at this level
Sufficient	fully meets the requirements of the standards.

Learners can provide evidence of occupational competence from:

- **current practice** where evidence is generated from a current job role
- a **programme of development** where evidence comes from assessment opportunities built into a learning programme, whether at or away from the workplace. The evidence provided must meet the requirements of the Sector Skills Council's assessment requirements/strategy.
- the **Recognition of Prior Learning (RPL)** where a learner can demonstrate that they can meet the assessment criteria within a unit through knowledge, understanding or skills they already possess without undertaking a course of development. They must submit sufficient, reliable, authentic and valid evidence for assessment. Evidence submitted based on RPL should provide confidence that the same level of skill/understanding/knowledge exists at the time of claim as existed at the time the evidence was produced. RPL is acceptable for accrediting a unit, several units, or a whole qualification.
- Further guidance is available in the policy document *Recognition of Prior Learning Policy*, available on the Pearson website.
- a **combination** of these.

Assessment requirements/strategy

The assessment requirements/strategy for this qualification has been included in *Annexe A*. It sets out the overarching assessment principles and the framework for assessing the qualification to ensure that it remains valid and reliable. It has been developed by Skillsmart Retail UK Limited (People 1st) in partnership with employers, training providers, awarding organisations and the regulatory authorities.

Types of evidence

To achieve a unit, the learner must gather evidence that shows that they have met the required standard specified in the assessment criteria as well as the requirements of the People 1st assessment requirements/strategy. As stated in the assessment requirements/strategy, the evidence for this qualification can take a variety of forms as indicated below:

- direct observation of the learner's performance by their assessor (O)
- outcomes from oral or written questioning (Q&A)
- products of the learner's work (P)
- personal statements and/or reflective accounts (RA)
- outcomes from simulation, in accordance with the assessment strategy (S)
- professional discussion (PD)
- assignment, project/case studies (A)
- authentic statements/witness testimony (WT)
- expert witness testimony (EWT)
- evidence of Recognition of Prior Learning (RPL).

Learners can use the abbreviations for cross-referencing purposes in their portfolios.

Learners can also use one piece of evidence to prove their knowledge, skills and understanding across different assessment criteria and/or across different units. It is not necessary for learners to have each assessment criterion assessed separately. They should be encouraged to reference evidence to the relevant assessment criteria. Evidence must be available to the assessor, internal verifier and Pearson standards verifier.

Any specific evidence requirements for individual units are stated in the unit introduction for the units in *Section 11*.

There is further guidance about assessment on our website. Please see *Section 12* for details.

Assessment of knowledge

The units within this qualification include of knowledge-based learning outcomes and assessment criteria. The evidence provided to meet these learning outcomes and assessment criteria must be in line with Skillsmart Retail UK Limited (People 1st) assessment strategy/requirements. Any specific assessment requirements are stated in the unit introduction for the units in *Section 11*.

Centres need to look closely at the verbs used for each assessment criterion in the units when devising assessments to ensure that learners can provide evidence with sufficient breadth and depth to meet the requirements. Any assignment brief should indicate clearly, the assessment criteria that are being targeted.

Centres are encouraged to give learners realistic scenarios and to maximise the use of practical activities in delivery and assessment. To avoid over-assessment, centres are encouraged to link delivery and assessment across the learning outcomes.

5 Centre resource requirements

As part of the approval process, centres must make sure that the resource requirements below are in place before offering the qualification.

- Centres must have the appropriate physical resources to support both the delivery and assessment of the qualification. For example, a workplace in line with industry standards, or a Realistic Working Environment (RWE), where permitted, as specified in the assessment requirements/strategy for the sector, equipment, IT, learning materials, teaching rooms.
- Where permitted, RWE must offer the same conditions as the normal day-to-day working environment, with a similar range of demands, pressures and requirements for cost-effective working.
- Centres must meet any specific human and physical resource requirements outlined in the assessment requirements/strategy in Annexe A. Staff assessing learners must meet the occupational competence requirements within the overarching assessment requirements/strategy for the sector.
- There must be systems in place to ensure the continuing professional development for staff delivering the qualification.
- Centres must have appropriate health and safety policies, procedures and practices in place for the delivery of the qualification.
- Centres must deliver the qualifications in accordance with current equality legislation. For further details on Pearson's commitment to the Equality Act 2010, please see *Section 9 Access and recruitment* and *Section 10 Access to qualifications for learners with disabilities or specific needs*. For full details on the Equality Act 2010, please go to the Home Office website, www.gov.uk/government/organisations/home-office

6 Centre recognition and approval

Centre recognition

Centres that have not previously offered Pearson Edexcel accredited vocational qualifications need to apply for and be granted centre recognition and approval as part of the process for approval to offer individual qualifications.

Existing centres will be given 'automatic approval' for a new qualification if they are already approved for a qualification that is being replaced by a new qualification and the conditions for automatic approval are met.

Guidance on seeking approval to deliver Pearson Edexcel vocational qualifications is available at qualifications.pearson.com.

Approvals agreement

All centres are required to enter into an approval agreement, which is a formal commitment by the head or principal of a centre, to meet all the requirements of the specification and any associated codes, Conditions or regulations. Pearson will act to protect the integrity of the awarding of qualifications. If centres do not comply with the agreement, this could result in the suspension of certification or withdrawal of approval.

7 Quality assurance of centres

Quality assurance is at the heart of vocational qualifications. Centres will internally assess NVQs/Competence-based qualifications using internal quality assurance procedures to ensure standardisation of assessment across all learners. Pearson uses external quality assurance procedures to check that all centres are working to national standards. It gives us the opportunity to identify and provide support, if needed, to safeguard certification. It also allows us to recognise and support good practice.

For the qualifications in this specification, the Pearson quality assurance model is as described below.

Centres offering Pearson Edexcel NVQs/Competence-based qualifications will usually receive two standards verification visits per year (a total of two days per year). The exact frequency and duration of standards verifier visits must reflect the centre's performance, taking account of the number:

- of assessment sites
- and throughput of learners
- and turnover of assessors
- and turnover of internal verifiers.

For centres offering a full Pearson BTEC Apprenticeship (i.e. all elements of the Apprenticeship are delivered with Pearson through registration of learners on a Pearson BTEC Apprenticeship framework) a single standards verifier will be allocated to verify all elements of the Pearson BTEC Apprenticeship programme. If a centre is also offering stand-alone NVQs/Competence-based qualifications in the same sector as a full Pearson BTEC Apprenticeship, the same standards verifier will be allocated.

In order for certification to be released, confirmation is required that the National Occupational Standards (NOS) for assessment, verification and for the specific occupational sector are being consistently met.

Centres are required to declare their commitment to ensuring quality and to providing appropriate opportunities for learners that lead to valid and accurate assessment outcomes.

For further details, please go to the UK NVQ Quality Assurance Centre Handbook and the *Edexcel NVQs, SVQs and competence-based qualifications – Delivery Requirements and Quality Assurance Guidance* on our website, at qualifications.pearson.com.

8 Programme delivery

Centres are free to offer the qualifications using any mode of delivery (for example full-time, part-time, evening only, distance learning,) that meets learners' needs. However, centres must make sure that learners have access to the resources identified in the specification and to the sector specialists delivering and assessing the units. Centres must have due regard to Pearson's policies that may apply to different modes of delivery.

Those planning the programme should aim to address the occupational nature of the qualification by:

- engaging with learners, initially, through planned induction, and subsequently through the involvement of learners in planning for assessment opportunities
- using naturally occurring workplace activities and products to present evidence for assessment against the requirements of the qualification
- developing a holistic approach to assessment by matching evidence to different assessment criteria, learning outcomes and units, as appropriate, thereby reducing the assessment burden on learners and assessors
- taking advantage of suitable digital methods to capture evidence.

9 Access and recruitment

Pearson's policy regarding access to its qualifications is that:

- they should be available to everyone who is capable of reaching the required standards
- they should be free from any barriers that restrict access and progression
- there should be equal opportunities for all wishing to access the qualifications.

Centres must ensure that their learner recruitment process is conducted with integrity. This includes ensuring that applicants have appropriate information and advice about the qualification to ensure that it will meet their needs.

Centres should review applicants' prior qualifications and/or experience, considering whether this profile shows that they have the potential to achieve the qualification.

For learners with disabilities and specific needs, this review will need to take account of the support available to them during the delivery and assessment of the qualification. The review must take account of the information and guidance in *Section 10 Access to qualifications for learners with disabilities or specific needs*.

10 Access to qualifications for learners with disabilities or specific needs

Equality and fairness are central to our work. Pearson's Equality Policy requires that all learners should have equal opportunity to access our qualifications and assessments and that our qualifications are awarded in a way that is fair to every learner.

We are committed to making sure that:

- learners with a protected characteristic (as defined by the Equality Act 2010) are not, when they are undertaking one of our qualifications, disadvantaged in comparison to learners who do not share that characteristic
- all learners achieve the recognition they deserve from undertaking a qualification and that this achievement can be compared fairly to the achievement of their peers.

Learners taking a qualification can be assessed in British sign language or Irish sign language where it is permitted for the purpose of reasonable adjustments.

Further information regarding Access Arrangements can be found in the Joint Council for Qualifications (JCQ) document *Access Arrangements, Reasonable Adjustments and Special Consideration for General and Vocational qualifications*. Further details on how to make adjustments for learners with protected characteristics are given in the *Supplementary Guidance for Reasonable Adjustment and Special Consideration in Vocational Internally Assessed Units*.

These documents are available on our website, at qualifications.pearson.com

11 Unit format

Each unit has the following sections.

Unit title

This is the formal title of the unit that will appear on the learner's certificate.

Unit reference number

Each unit is assigned a unit reference number that appears with the unit title on the Register of Regulated Qualifications.

Level

All units and qualifications have a level assigned to them. The level assigned is informed by the level descriptors defined by Ofqual, the qualifications regulator.

Credit value

All units have a credit value. When a learner achieves a unit, they gain the specified number of credits. The minimum credit value is 1 and credits can be awarded in whole numbers only.

Guided learning hours

Guided Learning Hours (GLH) is the number of hours that a centre delivering the qualification needs to provide. Guided learning means activities that directly or immediately involve tutors and assessors in teaching, supervising, and invigilating learners, for example lectures, tutorials, online instruction and supervised study.

Unit aim

This gives a summary of what the unit aims to do.

Unit assessment requirements/evidence requirements

The SSC/B set the assessment/evidence requirements. Learners must provide evidence according to each of the requirements stated in this section.

Learning outcomes

The learning outcomes of a unit set out what a learner knows, understands or is able to do as the result of a process of learning.

Assessment criteria

The assessment criteria specify the standard required by the learner to achieve the learning outcome.

Unit 1: Interact Sensitively with Clients of a Funeral Business

Unit reference number: A/503/8992

Level: 2

Credit value: 3

Guided learning hours: 17

Unit aim

The purpose of this unit is to assess the occupational competence of individuals who work in a funeral business and who interact with clients on a general basis rather than developing the client relationship.

Unit assessment requirements/evidence requirements

This unit requires workplace assessment of occupational competence. Please refer to the overall Skillsmart Retail UK Limited (People 1st) assessment requirements/strategy in Annexe A.

Learning outcomes and assessment criteria

To pass this unit, the learner needs to demonstrate that they can meet all the learning outcomes for the unit. The assessment criteria determine the standard required to achieve the unit.

1	Know how to interact sensitively with clients of a funeral business	1.1	Explain why it is important to interact sensitively with clients of a funeral business			
		1.2	Outline different ways in which clients react to loss and the experience of grief			
		1.3	Identify techniques for responding sensitively to clients			
2	Be able to interact sensitively with clients of a funeral business	2.1	Identify self and the organisation to clients clearly			
		2.2	Comply with organisational standards of dress and personal conduct when meeting clients			
		2.3	Provide information to clients that is: <ul style="list-style-type: none"> • accurate • relevant • sensitively given • within own authority to give 			
		2.4	Interact with clients in ways that demonstrate respect for them and sensitivity towards their feelings			

Learner name: _____

Date: _____

Learner signature: _____

Date: _____

Assessor signature: _____

Date: _____

Internal verifier signature: _____

Date: _____

(if sampled)

Unit 2: Establish Client Requirements for Funeral Arrangements

Unit reference number: T/503/8991

Level: 2

Credit value: 6

Guided learning hours: 29

Unit aim

The purpose of this unit is to assess the occupational competence of individuals who are responsible for establishing client requirements for funeral arrangements.

Unit assessment requirements/evidence requirements

This unit requires workplace assessment of occupational competence. Please refer to the overall Skillsmart Retail UK Limited (People 1st) assessment requirements/strategy in Annexe A.

Learning outcomes and assessment criteria

To pass this unit, the learner needs to demonstrate that they can meet all the learning outcomes for the unit. The assessment criteria determine the standard required to achieve the unit.

1	Know how to form sensitive working relationships with clients of a funeral business	1.1	Explain why it is important to respond sensitively to clients' feelings when discussing their requirements for funeral arrangements			
		1.2	Outline different ways in which clients react to loss and the experience of grief			
		1.3	Identify techniques for responding sensitively to different client situations and behaviour when discussing requirements for funeral arrangements			
2	Be able to initiate sensitive working relationships with clients when discussing their requirements for funeral arrangements	2.1	Identify self and the organisation to clients			
		2.2	Interact with clients in a manner that aims to put them at their ease and establish a rapport			

3	Be able to establish and record client requirements for funeral arrangements	3.1	Discuss with the client what documentation will be needed to make the funeral arrangements		
		3.2	Ask questions to establish client requirements for funeral arrangements		
		3.3	Record client details and requirements following organisational procedures		
4	Be able to give clients information and advice about funeral arrangements	4.1	Give clients advice and information that is: <ul style="list-style-type: none"> • accurate • relevant to their situation and requirements • sensitively given • within own authority to give 		
		4.2	Seek assistance in accordance with organisational procedures where clients' requirements or questions are beyond own authority to deal with		

Learner name: _____

Date: _____

Learner signature: _____

Date: _____

Assessor signature: _____

Date: _____

Internal verifier signature: _____

Date: _____

(if sampled)

Unit 3: Bring the Deceased into the Care of a Funeral Business

Unit reference number: M/503/8990

Level: 2

Credit value: 6

Guided learning hours: 28

Unit aim

The purpose of this unit is to assess the occupational competence of individuals who are responsible for making preparations to bring the deceased into the care of a funeral business.

Unit assessment requirements/evidence requirements

AC1.1 Examples of '**relevant details**' might include:

- name and age of deceased
- date of birth
- place where death occurred (or name of hospital in cases where the death occurred in hospital).

This unit requires workplace assessment of occupational competence. Please refer to the overall Skillsmart Retail UK Limited (People 1st) assessment requirements/strategy in Annexe A.

Learning outcomes and assessment criteria

To pass this unit, the learner needs to demonstrate that they can meet all the learning outcomes for the unit. The assessment criteria determine the standard required to achieve the unit.

1	Understand the importance of confirming details before bringing the deceased into the care of a funeral business	1.1	Explain the importance of checking and confirming relevant details before bringing the deceased into the care of a funeral business		

2	Be able to prepare to bring the deceased into the care of a funeral business	2.1	Carry out a risk assessment prior to transferring the deceased, taking into account: <ul style="list-style-type: none"> the location, condition and accessibility of the deceased legal requirements relating to removing the deceased health and safety considerations any client requirements arising from religious customs 			
		2.2	Agree arrangements with clients for transferring the deceased, taking into account: <ul style="list-style-type: none"> the risk assessment client wishes legal requirements 			
		2.3	Confirm satisfactory alternatives with clients and relevant colleagues when circumstances arise that make planned transfer routes unsuitable			
		2.4	Confirm with relevant colleagues that the necessary resources are available for transferring the deceased			
		2.5	Carry out checks to confirm the identity of the deceased			
		2.6	Carry out checks to confirm that identity tags are securely attached and legible			

3	Know how to make the best use of resources provided for bringing the deceased into the care of a funeral business	3.1	Describe how to make the best use of the resources provided for transferring the deceased, including: <ul style="list-style-type: none"> • staff • vehicles • equipment • external resources 			
4	Be able to transfer the deceased to the designated premises	4.1	Wear personal protective equipment in line with organisational requirements when transferring the deceased			
		4.2	Transfer the deceased using methods and equipment that: <ul style="list-style-type: none"> • are appropriate to the condition of the deceased • respect the dignity of the deceased • respect client requirements arising from religious customs • comply with organisational guidelines for safe lifting and handling 			
5	Be able to complete relevant paperwork when bringing the deceased into the care of a funeral business	5.1	Complete relevant paperwork, following organisational procedures, when bringing the deceased into the care of a funeral business			

Learner name: _____

Date: _____

Learner signature: _____

Date: _____

Assessor signature: _____

Date: _____

Internal verifier signature: _____

Date: _____

(if sampled)

Unit 4: Care for the Deceased within a Funeral Business

Unit reference number: F/503/8993

Level: 2

Credit value: 6

Guided learning hours: 13

Unit aim

The purpose of this unit is to assess the occupational competence of individuals who are responsible for caring for the deceased. The unit covers only basic care, such as cleaning and dressing, and does not require any embalming skills.

Unit assessment requirements/evidence requirements

This unit requires workplace assessment of occupational competence. Please refer to the overall Skillsmart Retail UK Limited (People 1st) assessment requirements/strategy in Annexe A.

Learning outcomes and assessment criteria

To pass this unit, the learner needs to demonstrate that they can meet all the learning outcomes for the unit. The assessment criteria determine the standard required to achieve the unit.

1	Be able to protect own and others' health and safety when caring for the deceased	1.1	Follow organisational health and safety procedures when caring for the deceased			
		1.2	Use personal protective equipment in line with organisational requirements when caring for the deceased			
2	Be able to complete identification and tracking procedures when caring for the deceased	2.1	Identify the deceased before carrying out any procedures on them			
		2.2	Complete identification and tracking documents in line with organisational requirements when caring for the deceased			

3	Be able to undertake the initial preparation of the deceased	3.1	Remove clothing and personal effects in ways that: <ul style="list-style-type: none"> • prevent damage to the deceased • prevent damage to the items that are being removed, where possible 		
		3.2	Record all clothing and personal effects of the deceased in line with organisational procedures		
		3.3	Store the deceased's clothing and personal effects securely		
		3.4	Clean the deceased in ways that: <ul style="list-style-type: none"> • protect their dignity and modesty • remove dirt and unwanted bodily products • protect the surface and surroundings from any additional soiling 		
		3.5	Position the deceased so that they can be moved safely and in a way that protects their dignity		
		3.6	Cover the deceased so that they can be moved safely and in a way that protects their dignity		

4	Be able to prepare the deceased for viewing or encoffining	4.1	Prepare the deceased so that: <ul style="list-style-type: none"> • their eyes and mouth are closed • their facial appearance and expression are natural and peaceful • their hands are arranged in a natural position • any unwanted facial hair is removed as agreed with clients • the hair on the head is clean and arranged as agreed with clients 		
		4.2	Apply cosmetics to the deceased as agreed with clients		
		4.3	Dress the deceased: <ul style="list-style-type: none"> • in the items of clothing agreed with clients • so that clothing looks tidy and natural 		
5	Be able to leave the work area tidy after caring for the deceased	5.1	Dispose of any soiled or unwanted bed linen, clothing or personal items as agreed with clients		
		5.2	Follow organisational procedures for cleaning equipment		
		5.3	Store equipment in the designated places		

Learner name: _____

Date: _____

Learner signature: _____

Date: _____

Assessor signature: _____

Date: _____

Internal verifier signature: _____

Date: _____

(if sampled)

Unit 5: Bear the Coffin and Handle Floral Tributes

Unit reference number: J/503/8994

Level: 2

Credit value: 2

Guided learning hours: 8

Unit aim

The purpose of this unit is to assess the occupational competence of individuals who bear coffins and handle floral tributes at funeral services.

Unit assessment requirements/evidence requirements

For the purposes of this unit, 'funeral vehicle' refers to any vehicle that can convey the deceased.

This unit requires workplace assessment of occupational competence. Please refer to the overall Skillsmart Retail UK Limited (People 1st) assessment requirements/strategy in Annexe A.

Learning outcomes and assessment criteria

To pass this unit, the learner needs to demonstrate that they can meet all the learning outcomes for the unit. The assessment criteria determine the standard required to achieve the unit.

1	Understand the importance of bearing coffins and handling floral tributes with dignity and respect at all times	1.1	Explain what is meant by the terms 'dignity' and 'respect' with regard to bearing coffins and handling floral tributes			
		1.2	Explain the importance of bearing coffins and handling floral tributes with dignity and respect at all times			
2	Understand the importance of working as a team when handling and bearing coffins	2.1	Explain the importance of working as a team when handling and bearing coffins			
3	Be able to lift and handle coffins	3.1	Lift and handle coffins in line with organisational procedures for: <ul style="list-style-type: none"> • health and safety • preventing harm to the deceased • preventing damage to the coffin • placing into and removing from funeral vehicles 			
4	Be able to secure coffins ready for transit in funeral vehicles	4.1	Secure coffins in funeral vehicles in compliance with organisational requirements including health and safety requirements			

5	Be able to check selected handling equipment	5.1	Carry out any necessary checks of selected handling equipment to ensure that it: <ul style="list-style-type: none"> • is suited to the purpose and occasion • meets organisational safety requirements 		
6	Be able to handle and bear coffins at funeral services	6.1	Handle and bear coffins at funeral services using techniques that: <ul style="list-style-type: none"> • protect own and others' safety • keep the coffin stable 		
		6.2	Explain the importance of keeping the coffin stable		
7	Be able to identify and arrange floral tributes for transit and at places of service and committal	7.1	Identify the correct floral tributes for the funeral service		
		7.2	Arrange floral tributes for transit: <ul style="list-style-type: none"> • to meet client and organisational requirements for the appearance of the tributes • in ways that protect them from damage • in ways that will ensure they remain secure during transit 		
		7.3	Arrange floral tributes and accompanying message cards at places of service and committal: <ul style="list-style-type: none"> • in line with client and organisational requirements for the appearance of the floral tributes and accompanying message cards • in ways that protect the floral tributes and message cards from damage or loss 		

8	Be able to handle floral tributes at funeral services	8.1	Handle floral tributes at funeral services in ways that meet organisational requirements for: <ul style="list-style-type: none"> • bearing them in a dignified manner • protecting them from damage • ensuring own and others' safety 		

Learner name: _____

Date: _____

Learner signature: _____

Date: _____

Assessor signature: _____

Date: _____

Internal verifier signature: _____

Date: _____

(if sampled)

Learning outcomes and assessment criteria

To pass this unit, the learner needs to demonstrate that they can meet all the learning outcomes for the unit. The assessment criteria determine the standard required to achieve the unit.

1	Understand the importance of carrying out checks before encoffining the deceased	1.1	Explain the importance of checking the identity of the deceased before encoffining them			
		1.2	Explain the importance of checking that nameplates are correct before encoffining the deceased			
		1.3	Explain the importance of checking that the deceased's jewellery and personal effects are as specified in the funeral arrangement instructions and mortuary register			
2	Know different client requirements arising from religious customs relating to placing deceased persons in coffins	2.1	Describe different client requirements arising from religious customs relating to placing deceased persons in coffins			

3	Be able to encoffin the deceased	3.1	Follow organisational procedures for checking that the deceased: <ul style="list-style-type: none"> • is the person for whom the coffin is intended • is correctly identified on the coffin nameplate 		
		3.2	Check that the deceased's jewellery and personal effects are as specified in the funeral arrangement instructions and mortuary register		
		3.3	Use techniques for lifting and handling the deceased that: <ul style="list-style-type: none"> • respect the dignity of the deceased • meet client requirements arising from religious customs • meet organisational requirements for safe lifting and handling 		
		3.4	Check that the final presentation of the deceased in the coffin meets client and organisational requirements		

Learner name: _____

Date: _____

Learner signature: _____

Date: _____

Assessor signature: _____

Date: _____

Internal verifier signature: _____

Date: _____

(if sampled)

Unit 7: Make Arrangements for Viewing the Deceased

Unit reference number: R/503/8996

Level: 2

Credit value: 2

Guided learning hours: 12

Unit aim

The purpose of this unit is to assess the occupational competence of individuals who make arrangements for the deceased to be viewed in accordance with client wishes.

Unit assessment requirements/evidence requirements

LO1/AC1.1/LO3/AC3.1 **'factors'** refers to the condition of the deceased.

This unit requires workplace assessment of occupational competence. Please refer to the overall Skillsmart Retail UK Limited (People 1st) assessment requirements/strategy in Annexe A.

Learning outcomes and assessment criteria

To pass this unit, the learner needs to demonstrate that they can meet all the learning outcomes for the unit. The assessment criteria determine the standard required to achieve the unit.

1	Understand the importance of assessing the factors affecting viewings of the deceased	1.1	Explain the importance of assessing the factors affecting viewings of the deceased			
2	Understand the importance of showing tact and sensitivity when communicating with clients concerning viewings of the deceased	2.1	Explain the importance of showing tact and sensitivity when communicating with clients concerning viewings of the deceased			
3	Be able to explain to clients the factors involved in viewing the deceased	3.1	Explain to clients, when necessary, the factors involved in viewing the deceased			

4	Be able to agree with clients the arrangements for viewing the deceased	4.1	Agree with clients arrangements for viewing that: <ul style="list-style-type: none"> • are in line with health and safety procedures and regulations for viewing • are in line with organisational procedures for viewing • take account of the time of day and location when viewing will take place 		
5	Be able to communicate procedures and arrangements for viewing the deceased	5.1	Inform clients about procedures for viewing the deceased		
		5.2	Communicate viewing arrangements to internal colleagues and external contacts		

Learner name: _____

Date: _____

Learner signature: _____

Date: _____

Assessor signature: _____

Date: _____

Internal verifier signature: _____

Date: _____

(if sampled)

Unit 8: Prepare Coffins

Unit reference number: Y/503/8997

Level: 2

Credit value: 2

Guided learning hours: 6

Unit aim

The purpose of this unit is to assess the occupational competence of individuals who are responsible for preparing coffins within a funeral business.

Unit assessment requirements/evidence requirements

This unit requires workplace assessment of occupational competence. Please refer to the overall Skillsmart Retail UK Limited (People 1st) assessment requirements/strategy in Annexe A.

Learning outcomes and assessment criteria

To pass this unit, the learner needs to demonstrate that they can meet all the learning outcomes for the unit. The assessment criteria determine the standard required to achieve the unit.

1	Understand the safe and effective use of tools for preparing coffins and nameplates	1.1	Explain the importance of selecting the correct tools for the job			
		1.2	Explain the importance of checking that tools are in a safe and effective condition before starting to use them			
2	Engrave a nameplate for a coffin	2.1	Set up a manual or computerised engraver taking into account: <ul style="list-style-type: none"> • size of nameplate • style of nameplate • cultural and religious customs 			
		2.2	Engrave a nameplate using either a manual or computerised engraver			
		2.3	Perform quality checks to ensure that the nameplate: <ul style="list-style-type: none"> • information is accurate • layout is in line with organisational guidelines • is free of damage • meets clients' requirements 			

4	Be able to fix exterior and interior coffin furniture to the coffin	4.1	Use tools that are: <ul style="list-style-type: none"> • suited to the purpose for which they are being used • in a safe and effective condition for use 		
		4.2	Fix coffin furniture to coffins using techniques and procedures that meet organisational health and safety requirements taking into account: <ul style="list-style-type: none"> • handles • nameplate • fittings 		
		4.3	Make any adjustments to ensure that the coffin meets organisational standards of presentation		

Learner name: _____

Date: _____

Learner signature: _____

Date: _____

Assessor signature: _____

Date: _____

Internal verifier signature: _____

Date: _____

(if sampled)

Unit 9: Drive Funeral Vehicles in Corteges

Unit reference number: D/503/8998

Level: 2

Credit value: 4

Guided learning hours: 8

Unit aim

The purpose of this unit is to assess the occupational competence of individuals who drive funeral vehicles in corteges. It is a prerequisite for this unit that the learner must meet legal and organisational eligibility criteria for driving the relevant vehicles.

Unit assessment requirements/evidence requirements

LO1/AC1.1/AC1.2 examples of 'unforeseen circumstances' might include:

- Breakdown of vehicle wither en route to the family's home or to the funeral
- More than the allocated number of mourners try to ride in the limousine

This unit requires workplace assessment of occupational competence. Simulated activities are allowed. Please refer to the overall Skillsmart Retail UK Limited (People 1st) assessment requirements/strategy in Annexe A.

Learning outcomes and assessment criteria

To pass this unit, the learner needs to demonstrate that they can meet all the learning outcomes for the unit. The assessment criteria determine the standard required to achieve the unit.

1	Know what to do in the event of unforeseen circumstances that can arise when driving a funeral vehicle in a cortege	1.1	Describe unforeseen circumstances that can arise when driving a funeral vehicle in a cortege		
		1.2	Describe the procedures to be followed in the event of unforeseen circumstances		

2	Be able to drive a funeral vehicle in accordance with the overall plan for the cortege	2.1	<p>Drive a funeral vehicle in a cortege in accordance with organisational and legal requirements regarding:</p> <ul style="list-style-type: none"> • speed • acceleration • braking • safety 			
		2.2	Explain the importance of keeping to agreed routes and timings when driving a funeral vehicle in a cortege			
		2.3	<p>Follow the plan for the cortege where possible, including the planned:</p> <ul style="list-style-type: none"> • route • timings • cortege formation 			
		2.4	Adapt routes in the event of unforeseen circumstances affecting the planned route			
3	Understand the importance of dealing with mourners courteously	3.1	Explain the importance of dealing with mourners courteously			

4	Understand the importance of complying with the requirements of the vehicle's insurer relating to the use of safety belts	4.1	Explain the importance of complying with the requirements of the vehicle's insurer relating to the use of safety belts			
5	Be able to support mourners travelling in a funeral vehicle in a cortege	5.1	Help mourners to enter and exit funeral vehicles following organisational procedures			
		5.2	Explain tactfully to mourners the use of safety belts			
		5.3	Treat mourners with courtesy and consideration throughout the journey			
		5.4	Carry out checks to ensure clients' personal belongings have been removed from the vehicle or secured as required			
6	Be able to check that funeral vehicles are secure before leaving them unattended	6.1	Carry out checks to ensure that funeral vehicles are secure before leaving them unattended			

Learner name: _____

Date: _____

Learner signature: _____

Date: _____

Assessor signature: _____

Date: _____

Internal verifier signature: _____

Date: _____

(if sampled)

Unit 10: Assure the Roadworthiness of Funeral Vehicles

Unit reference number: H/503/8999

Level: 2

Credit value: 1

Guided learning hours: 9

Unit aim

The purpose of this unit is to assess the occupational competence of individuals who are responsible for ensuring that funeral vehicles are kept in a roadworthy state. This involves some basic maintenance of the vehicle but does not require professional care mechanic skills.

Unit assessment requirements/evidence requirements

AC2.1 **'consumable items'** means such items as vehicle fluids, light bulbs and cleaning supplies.

This unit requires workplace assessment of occupational competence. Please refer to the overall Skillsmart Retail UK Limited (People 1st) assessment requirements/strategy in Annexe A.

Learning outcomes and assessment criteria

To pass this unit, the learner needs to demonstrate that they can meet all the learning outcomes for the unit. The assessment criteria determine the standard required to achieve the unit.

1	Understand the importance of the care and maintenance of funeral vehicles	1.1	Explain the importance of caring for and maintaining funeral vehicles in line with organisational procedures			
2	Be able to carry out routine maintenance of funeral vehicles	2.1	Carry out routine checks and replenishment of fluid levels and consumable items in accordance with organisational schedules and procedures			
		2.2	Monitor and adjust tyre pressures in accordance with: <ul style="list-style-type: none"> • manufacturer's recommendations • organisational health and safety procedures 			
		2.3	Monitor and report the condition of tyres in accordance with: <ul style="list-style-type: none"> • manufacturer's recommendations • organisational policy and procedures 			
		2.4	Carry out cleaning of funeral vehicles in line with organisational procedures, which includes the: <ul style="list-style-type: none"> • exterior of the vehicle • interior of the vehicle 			

3	Be able to check that the condition of funeral vehicles meets requirements	3.1	Carry out checks to determine whether the condition of funeral vehicles meets the legal and functional requirements		
4	Be able to report problems with the roadworthiness of funeral vehicles	4.1	Report problems with the roadworthiness of funeral vehicles that are outside own authority to resolve, following organisational procedures		
5	Be able to keep records of vehicle maintenance	5.1	Update organisational vehicle records in line with organisational requirements		
6	Be able to check that legal documentation for funeral vehicles is current and available	6.1	Perform checks to ensure that legal documentation relating to funeral vehicles is current and available		

Learner name: _____

Date: _____

Learner signature: _____

Date: _____

Assessor signature: _____

Date: _____

Internal verifier signature: _____

Date: _____

(if sampled)

Unit 11: Assist Clients to choose Funeral Products and Services

Unit reference number: J/503/9000

Level: 2

Credit value: 3

Guided learning hours: 14

Unit aim

The purpose of this unit is to assess the occupational competence of individuals in the funeral operations and services sector who are responsible for assisting clients to choose funeral products and services. The unit is relevant both when clients are considering their own future needs and when they have suffered a bereavement.

Unit assessment requirements/evidence requirements

This unit requires workplace assessment of occupational competence. Please refer to the overall Skillsmart Retail UK Limited (People 1st) assessment requirements/strategy in Annexe A.

Learning outcomes and assessment criteria

To pass this unit, the learner needs to demonstrate that they can meet all the learning outcomes for the unit. The assessment criteria determine the standard required to achieve the unit.

1	Know the range of funeral products and services that can be offered to clients	1.1	Describe the range of products and services that can be offered to clients, including the relevant timescales for these		
2	Be able to assist clients to choose funeral products and services that best meet their requirements	2.1	Assess client needs in terms of: <ul style="list-style-type: none"> • budget • religious customs • client expectations 		
		2.2	Describe relevant product features to clients: <ul style="list-style-type: none"> • accurately • in ways that attempt to help clients to differentiate between products 		
		2.3	Give clients opportunities to evaluate products and services and to ask questions		

3	Be able to summarise and record clients' selection of funeral products and services and calculate associated costs	3.1	Calculate the costs and price of the clients' purchases		
		3.2	Explain to clients the full terms and conditions that apply to their purchase		
		3.3	Record clients' selection of funeral products and services, associated costs and any terms and conditions agreed with clients		
		3.4	Confirm clients' buying decisions in line with organisational payment policies		

Learner name: _____

Date: _____

Learner signature: _____

Date: _____

Assessor signature: _____

Date: _____

Internal verifier signature: _____

Date: _____

(if sampled)

Unit 12: Conduct Viewings of the Deceased

Unit reference number: L/503/9001

Level: 2

Credit value: 2

Guided learning hours: 12

Unit aim

The purpose of this unit is to assess the occupational competence of individuals who are responsible for conducting viewings of the deceased at the premises of a funeral business.

Unit assessment requirements/evidence requirements

This unit requires workplace assessment of occupational competence. Simulated activities are allowed. Please refer to the overall Skillsmart Retail UK Limited (People 1st) assessment requirements/strategy in Annexe A.

Learning outcomes and assessment criteria

To pass this unit, the learner needs to demonstrate that they can meet all the learning outcomes for the unit. The assessment criteria determine the standard required to achieve the unit.

1	Understand the importance of showing sensitivity and respect when preparing the deceased for viewing	1.1	Explain the importance of respecting the dignity of the deceased when preparing them for viewing			
		1.2	Explain the importance of respecting customs arising from clients' religious beliefs when preparing the deceased for viewing			
		1.3	Explain the importance of preparing the deceased for viewing with a degree of sensitivity appropriate to the location			
2	Understand the importance of paying attention to detail when preparing the deceased for viewing	2.1	Explain the importance of paying attention to detail when preparing the deceased for viewing, including checks relating to: <ul style="list-style-type: none"> • their identity • their personal effects • their appearance • the coffin details, including the nameplate 			

3	Be able to prepare the deceased for viewing	3.1	Check the identity and personal effects of the deceased before: <ul style="list-style-type: none"> • preparing them for viewing • receiving mourners 		
		3.2	Use personal protective clothing in line with organisational requirements when preparing the deceased for viewing		
		3.3	Carry out checks to ensure that the appearance of the deceased complies with: <ul style="list-style-type: none"> • client instructions • organisational requirements 		
		3.4	Follow organisational procedures for arranging for the deceased to be transferred to viewing locations		
4	Understand the impact and resolution of mistimed viewing arrangements	4.1	Describe the likely impact of mistimed viewing arrangements		
		4.2	Describe how to resolve the impact of mistimed viewings		

5	Be able to prepare viewing locations for mourners	5.1	Prepare the viewing location so that it meets organisational requirements for: <ul style="list-style-type: none"> • cleanliness • tidiness • lighting 		
		5.2	Describe organisational procedures for preparing viewing locations other than the employer's premises		
		5.3	Carry out checks to ensure the viewing location's layout and appearance meet client requirements		
6	Understand the importance of conducting viewings in a dignified, respectful and tactful manner	6.1	Explain the importance of maintaining the dignity of mourners and the deceased and showing respect for them when conducting viewings		
		6.2	Explain the importance of dealing tactfully with requests from mourners		
7	Understand the importance of checking the identity of mourners	7.1	Explain the importance of checking the identity of individuals wishing to view the deceased		

8	Be able to receive mourners	8.1	Comply with organisational requirements for own dress when receiving mourners			
		8.2	Confirm the identity of individuals wishing to view the deceased			
		8.3	Confirm clients' instructions concerning who may view the deceased and in what circumstances			
		8.4	Confirm the appearance of the deceased before admitting mourners			
		8.5	Assist mourners in accordance with: <ul style="list-style-type: none"> organisational procedures for directing and escorting mourners client requirements arising from religious customs 			
9	Be able to leave the premises in a safe and secure state after viewing	9.1	Leave the premises in a safe and secure state after viewing			

Learner name: _____

Date: _____

Learner signature: _____

Date: _____

Assessor signature: _____

Date: _____

Internal verifier signature: _____

Date: _____

(if sampled)

Unit 13: Control the Payment of Accounts in a Funeral Business

Unit reference number: R/503/9002

Level: 2

Credit value: 2

Guided learning hours: 11

Unit aim

The purpose of this unit is to assess the occupational competence of individuals who are responsible for controlling disbursements and client payments in a funeral business.

Unit assessment requirements/evidence requirements

This unit requires workplace assessment of occupational competence. Please refer to the overall Skillsmart Retail UK Limited (People 1st) assessment requirements/strategy in Annexe A.

Learning outcomes and assessment criteria

To pass this unit, the learner needs to demonstrate that they can meet all the learning outcomes for the unit. The assessment criteria determine the standard required to achieve the unit.

1	Know the difference between payments made to suppliers on behalf of the organisation and those made on behalf of clients of a funeral business	1.1	Describe the difference between payments made to suppliers on behalf of the organisation and those made on behalf of clients			
2	Be able to process payments and disbursements in a funeral business	2.1	Record payment transactions in line with organisational procedures			
		2.2	Report variations in anticipated payments following organisational procedures			
3	Be able to raise client invoices in a funeral business	3.1	Raise client invoices that are: <ul style="list-style-type: none"> • accurate • timely 			
		3.2	Explain to clients, when required, any variance between the original estimate and the final invoice			

4	Understand the importance of checking payments received in a funeral business	4.1	Explain the importance of checking payments received from or on behalf of clients			
5	Be able to process payments received in a funeral business	5.1	Ensure payments received from or on behalf of clients are valid and accurate			
		5.2	Record payments from clients and issue receipts at the time of payment			
		5.3	Store client payments securely			
		5.4	Resolve discrepancies between accounts due and payments received, following organisational procedures			
6	Be able to deal with overdue payments in a funeral business	6.1	Bring overdue payments to clients' attention in a sensitive manner			
		6.2	Collect overdue payments in line with organisational procedures			
		6.3	Describe debt control procedures in own organisation			

Learner name: _____

Date: _____

Learner signature: _____

Date: _____

Assessor signature: _____

Date: _____

Internal verifier signature: _____

Date: _____

(if sampled)

Unit 14: Develop Working Relationships with Colleagues

Unit reference number: H/600/9660

Level: 2

Credit value: 3

Guided learning hours: 15

Unit aim

This unit will help learners to establish and develop effective working relationships with colleagues.

Unit assessment requirements/evidence requirements

There are no specific assessment requirements for this unit. Please refer to the overall Skillsmart Retail UK Limited (People 1st) assessment requirements/strategy in Annexe A.

Learning outcomes and assessment criteria

To pass this unit, the learner needs to demonstrate that they can meet all the learning outcomes for the unit. The assessment criteria determine the standard required to achieve the unit.

1	Understand the benefits of working with colleagues	1.1	Describe the benefits of productive working relationships			
2	Be able to establish working relationships with colleagues	2.1	Identify colleagues within own and other organisations			
		2.2	Agree the roles and responsibilities for colleagues			
3	Be able to act in a professional and respectful manner when working with colleagues	3.1	Explain how to display behaviour that shows professionalism			
4	Be able to communicate with colleagues	4.1	Identify, information to others clearly and concisely			
		4.2	Explain how to receive and clarify own understanding of information			
5	Be able to identify potential work-related difficulties and explore solutions	5.1	Identify potential work-related difficulties and conflicts of interest			
		5.2	Explain how to resolve identified potential difficulties			

Learner name: _____

Date: _____

Learner signature: _____

Date: _____

Assessor signature: _____

Date: _____

Internal verifier signature: _____

Date: _____

(if sampled)

Unit 15: Give Customers a Positive Impression of Yourself and Your Organisation

Unit reference number: L/601/0933

Level: 2

Credit value: 5

Guided learning hours: 33

Unit aim

Excellent customer service is provided by people who are good with people. The learner's behaviour affects the impression that customers have of the service they are receiving. This Unit is about communicating with the customers and giving a positive impression whenever dealing with a customer. By doing this the learner can create a positive impression of the organisation and the customer service it provides. All of us enjoy the experience of good customer service if we feel that the person serving us really wants to create the right impression, responds to us and gives us good information. Every detail of the learners' behaviour counts when dealing with a customer.

Unit assessment requirements/evidence requirements

- 1 Your evidence should be collected when carrying out a real job, whether paid or voluntary, and when dealing with real customers, whether internal or external to the organisation. However, for this Unit, evidence collected in a realistic working environment or a work placement is permissible. Simulation is not allowed for any performance evidence within this Unit.
- 2 You may collect the evidence for the Unit through work in a private sector organisation, a not-for-profit organisation or a public services organisation.
- 3 You must provide evidence that shows you have done this over a sufficient period of time with different customers on different occasions for your assessor to be confident that you are competent.
- 4 Your communication with customers may be face to face, in writing, by telephone, text message, email, internet (including social networking), intranet or by any other method you would be expected to use within your job role.
- 5 You must provide evidence of creating a positive impression with customers:
 - a) during routine delivery of customer service
 - b) during a busy time in your job
 - c) during a quiet time in your job
 - d) when people, systems or resources have let you down.

- 6 You must provide evidence that you communicate with customers effectively by:
- a) using appropriate spoken or written language
 - b) applying the conventions and rules appropriate to the method of communication you have chosen

Please refer to the overall Skillsmart Retail UK Limited (People 1st) assessment requirements/strategy in Annexe A.

Learning outcomes and assessment criteria

To pass this unit, the learner needs to demonstrate that they can meet all the learning outcomes for the unit. The assessment criteria determine the standard required to achieve the unit.

1	Establish rapport with customers	1.1	Meet their organisation's standards of appearance and behaviour			
		1.2	Greet their customer respectfully and in a friendly manner			
		1.3	Communicate with their customer in a way that makes them feel valued and respected			
		1.4	Identify and confirm their customer's expectations			
		1.5	Treat their customer courteously and helpfully at all times			
		1.6	Keep their customer informed and reassured			
		1.7	Adapt their behaviour to respond to different customer behaviour			
2	Respond appropriately to customers	2.1	Respond promptly to a customer seeking help			
		2.2	Choose the most appropriate way to communicate with their customer			
		2.3	Check with their customer that they have fully understood their expectations			
		2.4	Respond promptly and positively to their customer's questions and comments			
		2.5	Allow their customer time to consider their response and give further explanation when appropriate			

3	Communicate information to customers	3.1	Quickly find information that will help their customer		
		3.2	Give their customer information they need about the services or products offered by their organisation		
		3.3	Recognise information that their customer might find complicated and check whether they fully understand		
		3.4	Explain clearly to their customers any reasons why their expectations cannot be met		
4	Understand how to give customers a positive impression of themselves and the organisation	4.1	Describe their organisation's standards for appearance and behaviour		
		4.2	Explain their organisation's guidelines for how to recognise what their customer wants and respond appropriately		
		4.3	Identify their organisation's rules and procedures regarding the methods of communication they use		
		4.4	Explain how to recognise when a customer is angry or confused		
		4.5	Identify their organisation's standards for timeliness in responding to customer questions and requests for information		

Learner name: _____

Date: _____

Learner signature: _____

Date: _____

Assessor signature: _____

Date: _____

Internal verifier signature: _____

Date: _____

(if sampled)

Unit 16: Store and Retrieve Information

Unit reference number: R/601/2490

Level: 2

Credit value: 3

Guided learning hours: 17

Unit aim

This unit is about storing and retrieving information securely and within confidentiality requirements of the organisation.

Unit assessment requirements/evidence requirements

Learning outcomes	Assessment criteria	Assessment guidance
1	1.1 – 1.9	Evidence may be supplied via candidate reports/reflective accounts, professional discussion and questioning.
2	2.1 and 2.6	Evidence may be supplied via observation of workplace activities, witness testimony, professional discussion, candidate reports/reflective accounts and inspection of products, using evidence appropriate to the learner's job role from the following sources: <ul style="list-style-type: none">• letters• emails• memos• information
	2.2 – 2.5	Evidence may be supplied via observation of workplace activities, witness testimony, professional discussion, candidate reports/reflective accounts and inspection of products, using evidence appropriate to the learner's job role.

Learning outcomes	Assessment criteria	Assessment guidance
3	3.2	Evidence may be supplied via observation of workplace activities, witness testimony, professional discussion, candidate reports/reflective accounts and inspection of products, using evidence appropriate to the learner's job role.
	3.1, 3.3 – 3.6	Evidence may be supplied via observation of workplace activities, witness testimony, professional discussion, candidate reports/reflective accounts and inspection of products, using evidence appropriate to the learner's job role from the following sources: <ul style="list-style-type: none"> • letters • emails • memos • information

Please refer to the overall Skillsmart Retail UK Limited (People 1st) assessment requirements/strategy in Annexe A.

Learning outcomes and assessment criteria

To pass this unit, the learner needs to demonstrate that they can meet all the learning outcomes for the unit. The assessment criteria determine the standard required to achieve the unit.

1	Understand processes and procedures for storing and retrieving information	1.1	Explain the purpose of storing and retrieving required information			
		1.2	Describe different information systems and their main features			
		1.3	Explain the purpose of legal and organisational requirements for the security and confidentiality of information			
		1.4	Explain the purpose of confirming information to be stored and retrieved			
		1.5	Describe ways of checking information for accuracy			
		1.6	Explain the purpose of checking information for accuracy			
		1.7	Explain the purpose of providing information to agreed format and timescales			
		1.8	Describe the types of information that may be deleted			
		1.9	Describe problems that may occur with information systems and how to deal with them, when necessary			

2	Be able to store information	2.1	Identify, confirm and collect information to be stored		
		2.2	Follow legal and organisational procedures for security and confidentiality of information to be stored		
		2.3	Store information in approved locations		
		2.4	Check and update stored information, if required		
		2.5	Delete stored information, if required		
		2.6	Deal with, or refer problems, if required		
3	Be able to retrieve information	3.1	Confirm and identify information to be retrieved		
		3.2	Follow legal and organisational procedures for security and confidentiality of information		
		3.3	Locate and retrieve the required information		
		3.4	Check and update information, if required		
		3.5	Provide information in the agreed format and timescale		
		3.6	Deal with, or refer problems if required		

Learner name: _____

Date: _____

Learner signature: _____

Date: _____

Assessor signature: _____

Date: _____

Internal verifier signature: _____

Date: _____

(if sampled)

Unit 17: Help Customers to Choose Products in a Retail Environment

Unit reference number: T/503/5685

Level: 2

Credit value: 6

Guided learning hours: 20

Unit aim

This unit assesses the occupational competence of individuals who are responsible for selling products in a retail environment. The unit covers finding out what the customer needs, helping the customer to choose products and closing the sale.

Unit assessment requirements/evidence requirements

This unit requires workplace assessment of occupational competence. Please refer to the overall Skillsmart Retail UK Limited (People 1st) assessment requirements/strategy in Annexe A.

Learning outcomes and assessment criteria

To pass this unit, the learner needs to demonstrate that they can meet all the learning outcomes for the unit. The assessment criteria determine the standard required to achieve the unit.

1	Understand the importance of focusing on the individual customer's requirements	1.1	Explain the importance of customer confidence and loyalty to the business			
		1.2	Explain the importance of focusing on the product features and benefits that interest the individual customer			
2	Know how sales are confirmed with the customer and closed	2.1	Describe how to recognise buying signals			
		2.2	Describe techniques for closing the sale			
3	Be able to find out what products customers may be interested in buying	3.1	Ask customers questions to find out: <ul style="list-style-type: none"> • what they are looking for • which product features and benefits interest them 			
4	Be able to help customers to choose the products that best meet their needs	4.1	Describe relevant product features and benefits accurately in ways that attempt to help customers to differentiate between products			
		4.2	Give customers the opportunity to evaluate products and ask questions			
		4.3	Respond to customers' questions in ways that attempt to encourage sales and promote goodwill			

5	Be able to close sales	5.1	Confirm customers' buying decisions			
		5.2	Use questioning techniques to ascertain whether customers need any associated or additional products			
		5.3	Explain to customers any customer rights that apply to their purchases			
		5.4	Ensure that customers know where to pay for their purchases			

Learner name: _____

Date: _____

Learner signature: _____

Date: _____

Assessor signature: _____

Date: _____

Internal verifier signature: _____

Date: _____

(if sampled)

Unit 18: Go the Extra Mile to Exceed Customer Expectations

Unit reference number: M/504/9441

Level: 2

Credit value: 6

Guided learning hours: 40

Unit aim

When the learner's customer feels that they have taken special care to give them good service and have done something more than they expect, they are likely to enjoy a better customer service experience. Opportunities to add this extra value to the customer's experience depend on the learner spotting what they will particularly appreciate. Often they can offer this little extra when sorting out a difficulty or problem. Whatever special service the learner gives when they 'go the extra mile' must be within their own authority or with the authority of an appropriate colleague. It must also take account of the organisation's service offer and all the relevant procedures and regulations. As customers, we all enjoy and remember it when somebody has 'gone the extra mile' to deliver special customer service.

Unit assessment requirements/evidence requirements

This unit requires workplace assessment of occupational competence. Please refer to the overall Skillsmart Retail UK Limited (People 1st) assessment requirements/strategy in Annexe A.

Learning outcomes and assessment criteria

To pass this unit, the learner needs to demonstrate that they can meet all the learning outcomes for the unit. The assessment criteria determine the standard required to achieve the unit.

1	Know how to go the extra mile in customer service	1.1	Explain how customers form expectations of the service they will receive			
		1.2	Identify what types of service most customers will see as adding value to the customer service received			
2	Be able to identify ways that customer expectations can be met	2.1	Outline the service offer to the customer clearly and concisely			
		2.2	Establish customer needs and expectations			
		2.3	Identify the key differences between the service offer and the customer's needs and expectations			
		2.4	Identify actions that will ensure customer expectations are met			
		2.5	Check actions are possible within the organisation's guidelines			
		2.6	Check actions are possible within regulatory boundaries			
		2.7	Explain actions to a senior colleague or other appropriate authority			

3	Be able to go the extra mile	3.1	Apply actions so customer's expectations are met			
		3.2	Monitor the effects of the actions to ensure the service given to other customers is not unreasonably affected			
		3.3	Give customers opportunities to give feedback about customer service experience			
		3.4	Describe how the organisation processes feedback on customer service			
		3.5	Explain actions that can be included in the service offer to improve customer service			

Learner name: _____

Date: _____

Learner signature: _____

Date: _____

Assessor signature: _____

Date: _____

Internal verifier signature: _____

Date: _____

(if sampled)

Unit 19: Deliver and Organisation's Service Offer, Vision and Promise

Unit reference number: T/504/9442

Level: 2

Credit value: 6

Guided learning hours: 40

Unit aim

The learner may work in an organisation that has a carefully defined brand and vision that includes a specific service offer and promise to their customers. Often, much work has taken place to develop these, and they influence what the customer expects. By promoting the brand, the organisation is making a promise to their customers about what they can expect. Customer satisfaction is unlikely to be achieved if their customer's experience does not match their expectations of that promise. Even in organisations without a strong brand image, customers often have firm expectations. This unit is about the way the learner's work supports the branding of their service or products. It covers what they must do to make sure that they deliver the promise that the customer has come to expect. It also covers how the learner can avoid giving their customer an experience that is significantly different from the one offered in the promise.

Unit assessment requirements/evidence requirements

This unit requires workplace assessment of occupational competence. Please refer to the overall Skillsmart Retail UK Limited (People 1st) assessment requirements/strategy in Annexe A.

Learning outcomes and assessment criteria

To pass this unit, the learner needs to demonstrate that they can meet all the learning outcomes for the unit. The assessment criteria determine the standard required to achieve the unit.

1	Understand the customer service offer, vision and promise	1.1	<p>Explain the key features of the organisation's</p> <ul style="list-style-type: none"> • service offer • vision <p>Promise</p>		
		1.2	<p>Describe the importance to</p> <ul style="list-style-type: none"> • sales • marketing • Public Relations <p>of defining a service offer, vision and promise</p>		
		1.3	Describe moments that might occur within the delivery of customer service that affect customer's experience of the promise being delivered		
		1.4	Explain how particular words and approaches help to support the service offer, vision and promise		

2	Be able to deliver the organisation's service offer, vision and promise to the customer	2.1	Ensure appearance and behaviour supports the organisation's service offer, vision and promise			
		2.2	Explain how the service offer, vision and promise can be communicated to the customer			
		2.3	Ask questions to establish customer needs and expectations			
		2.4	Identify phrases that can be used to reinforce the service offer, vision and promise			
		2.5	Give customers opportunities to give feedback about customer service experience			

Learner name: _____

Date: _____

Learner signature: _____

Date: _____

Assessor signature: _____

Date: _____

Internal verifier signature: _____

Date: _____

(if sampled)

12 Further information and useful publications

To get in touch with us visit our 'Contact us' pages:

- Edexcel, BTEC and Pearson Work Based Learning contact details: qualifications.pearson.com/en/support/contact-us.html
- books, software and online resources for UK schools and colleges: www.pearsonschoolsandfecolleges.co.uk

Key publications

- *Adjustments for candidates with disabilities and learning difficulties, Access and Arrangements and Reasonable Adjustments, General and Vocational qualifications* (Joint Council for Qualifications (JCQ))
- *Supplementary guidance for reasonable adjustments and special consideration in vocational internally assessed units* (Pearson)
- *General and Vocational qualifications, Suspected Malpractice in Examination and Assessments: Policies and Procedures* (JCQ)
- *Equality Policy* (Pearson)
- *Recognition of Prior Learning Policy and Process* (Pearson)
- *UK Information Manual* (Pearson)
- *Pearson Edexcel NVQs, SVQs and competence-based qualifications – Delivery Requirements and Quality Assurance Guidance* (Pearson)

All of these publications are available on our website: qualifications.pearson.com

Further information and publications on the delivery and quality assurance of NVQ/Competence-based qualifications are available at our website on the Delivering BTEC pages. Our publications catalogue lists all the material available to support our qualifications. To access the catalogue and order publications, please go to the resources page of our website.

13 Professional development and training

Pearson supports UK and international customers with training related to our qualifications. This support is available through a choice of training options and sector events, or through customised training at your centre.

The support we offer focuses on a range of issues, including:

- planning for the delivery of a new programme
- planning for assessment
- building your team and teamwork skills
- developing learner-centred learning and teaching approaches
- building functional skills into your programme
- building in effective and efficient quality assurance systems.

For more information on training options and upcoming events, please visit our website, qualifications.pearson.com. You can request customised training by completing the enquiry form on our website and we will contact you to discuss your training needs.

Support services

Face-to-face support: our team of Regional Quality Managers, based around the country, are responsible for providing quality assurance support and guidance to anyone managing and delivering NVQs/Competence-based qualifications. The Regional Quality Managers can support you at all stages of the standard verification process as well as in finding resolutions of actions and recommendations as required. A UK map showing the Regional Quality Managers' contact details can be found at qualifications.pearson.com.

Online support: find the answers to your questions by browsing over 100 FAQs on our website or by submitting a query using our Work Based Learning Ask the Expert Service. You can search the database of commonly asked questions relating to all aspects of our qualifications in the work-based learning market. If you are unable to find the information you need, send us your query and our qualification or administrative experts will get back to you. The Ask the Expert service is available at qualifications.pearson.com.

Online forum

Pearson Work Based Learning Communities is an online forum where employers, further education colleges and workplace training providers are able to seek advice and clarification about any aspect of our qualifications and services, as well as share knowledge and information with others. The forums are sector specific and cover Business Administration, Customer Service, Health and Social Care, Hospitality and Catering and Retail. The online forum is available at qualifications.pearson.com.

14 Contact us

We have a dedicated Account Support team, based throughout the UK, to give you more personalised support and advice. To contact your Account Specialist you can use any of the following methods:

Email: wblcustomerservices@pearson.com

Telephone: 0844 576 0045

If you are new to Pearson and would like to become an approved centre, please contact us at:

Email: wbl@pearson.com

Telephone: 0844 576 0045

Complaints and feedback

We are working hard to provide you with excellent service. However, if any element of our service falls below your expectations, we want to understand why, so that we can prevent it from happening again. We will do all that we can to put things right.

If you would like to register a complaint with us, please email wblcomplaints@pearson.com.

We will formally acknowledge your complaint within two working days of receipt and provide a full response within seven working days.

Annexe A: Assessment requirements/strategy

1 Key principles

Assessment methodologies and guidance for qualifications in the funeral sector are developed and interpreted in accordance with the four key principles set out below. Principles 1-3 apply to both knowledge-based and competence-based qualifications. Principle 4 applies to competence-based qualifications only.

Principle 1:

Assessment should contribute to developing a skilled workforce

Assessment practice in the funeral sector should contribute to the development of a skilled workforce. The choice and application of assessment methods must be consistent with this principle.

Principle 2:

Systems for capturing evidence of competence should be integrated

Assessment systems should, where possible, be integrated with employers' training and career development programmes.

Principle 3:

Assessment methods should be appropriate for the level and nature of the qualification units to be assessed

Methods of assessing achievement against learning outcomes and assessment criteria must be appropriate for the level being assessed and sector expectations of candidates at that level.

Principle 4:

Evidence of competence should come from workplace activity

The sector's competence-based qualifications recognise competence in the workplace. Evidence of competence should therefore come from workplace activity and aim to reflect attainment within an organisational context. Observation should be the principle method of assessment where practicable. However, it is in the nature of the sector to ensure that the feelings of clients and other mourners are respected at all times, and so other assessment methods such as professional discussion and assignments may be more appropriate where the client relationship would otherwise be jeopardised.

2 Definition of 'workplace'

For the purposes of this document, 'workplace' or 'real working environment' means any location where the learner carries out his or her duties as an employee of the funeral sector. This may include for example the employer's business premises, clients' premises, funeral and burial venues and the public highway.

3 Competence-based qualifications (Funeral Skills)

3.1 The use and application of simulation

In broad terms, the funeral sector holds the view that simulation is a practical and effective tool for establishing skill and understanding where naturally occurring evidence of competence is rarely available.

Skillsmart Retail requires that Awarding Organisations:

- a Discourage the inappropriate use of competence-based qualifications by organisations that do not assess candidates in a working environment. Competence-based qualifications are suitable only for learners who are in some form of employment in the sector.
- b Establish criteria to ensure that simulation is not used as the sole form of evidence for any unit of a competence-based qualification. This should be expressed in guidance for qualifications operating in the sector.
- c Provide clear guidance to centres to indicate that evidence towards a competence-based qualification should come from the workplace except where simulation is expressly allowed in the evidence requirements for a particular unit. Workplace evidence may be gathered in the context of full-, part-time, casual or voluntary employment. Assessment may be undertaken in a 'work placement' (i.e. full-time students placed into a working environment as part of their course) although supporting evidence from a supervisor or manager, associated with some form of work activity, must supplement the assessment process.

3.1.1 Use of simulation as an assessment method

Assessment for competence-based units must always be carried out in the workplace except where a Realistic Working Environment (as defined in 3.1.2) is permitted for simulation. Simulation is allowed only where:

- the assessment criteria require the learner to respond to an event that rarely occurs

or

- a unit originates from another sector and the originator expressly allows simulation to be used for that unit.

A list of those units for which simulation is allowed is appended to this document.

Evidence generated from simulated activities will not be acceptable for any other unit.

3.1.2 Definition of a Realistic Working Environment (RWE)

A Realistic Working Environment, for the purpose of simulated work activities, is a created situation that doesn't involve the client. For example in terms of assessment criteria 2.4 of the unit '*Drive Funeral Vehicles in corteges*' the assessor can take the driver out in the vehicle and provide the driver with mock scenarios that simulate unforeseen circumstance such as a road closures.

Where simulation is used the sector requires that:

- a Simulation must be undertaken in a Realistic Working Environment
- b Awarding Organisations provide guidance for centres that requires that Realistic Working Environments provide an environment that replicates the key characteristics of the workplace in which the skill to be assessed is normally employed.

4 Assessors and Verifiers

4.1 The roles of assessors and verifiers

The roles and competence of assessors, expert witnesses and verifiers are central to the way assessment is managed.

Skillsmart Retail requires that the following conditions be fulfilled:

4.1.1 The role of supervisors and managers in the assessment process

Wherever possible, assessment should be conducted by the learner's supervisor and/or manager in a workplace environment. Where the skill or capability of these individuals is inadequate to deliver the requirements of the organisation or the quality infrastructure, services external to the work unit or organisation may be introduced (peripatetic assessors). In no circumstances may a competence-based qualification for the funeral sector be delivered without the involvement of the learner's line manager or the business owner/manager to confirm the learner's competence.

Where the learner's supervisor or manager carries out the assessment or internal verification roles, employers with the agreement of their Awarding Organisation may choose between:

- a achieving the appropriate regulatory authority approved qualifications for assessment and internal verification
- or
- b demonstrating that training and development activity undertaken by the employer to prepare, validate and review these assessment/verification roles, maps 100% to the National Occupational Standards on which these qualifications are based. The mapping process **must be agreed** by the Awarding Organisation as providing the equivalent level of rigour and robustness as the achievement of the qualification.

The alternative option described in (b) above, which waives the need for the regulatory approved units in the funeral sector, must be applied on an 'organisation by organisation' and 'qualification by qualification' basis. **Prospective organisations must be able to confirm that their in-house practices conform to the requirements of the NOS in association with the prospective Awarding Organisation who will be offering the qualification.**

4.1.2 The role of peripatetic assessors and internal verifiers in the assessment process

Peripatetic assessors and internal verifiers must hold or be working towards the appropriate regulatory authority approved qualifications for assessment and internal verification.

The services offered by the peripatetic assessor must complement the activity of a line manager or owner/manager and the competence of a candidate employed in the funeral sector may not be confirmed without the participation of a line manager or owner/manager in the process. It is also requested that specific reference be made to auditing this provision, within external verification processes.

4.2 Occupational competence of assessors and verifiers

4.2.1 Occupational competence of assessors

Assessors in the funeral sector should have an in-depth knowledge of, and be competent in performing, the occupational requirements of any competence-based units for which they do not use expert witness testimony.

This competence will have been acquired either in direct employment in the occupational role to which the unit relates, or in employment as a manager, supervisor or in-house trainer of employees carrying out the role.

It is unlikely that occupational competence will have been achieved in less than twelve months of employment as a funeral professional, or less than six months in a managerial position, but individuals with less experience could be considered as assessors if sufficiently occupationally competent.

4.2.2 Occupational competence of verifiers

Internal Verifiers (or equivalent quality assurance experts) in the funeral sector must have a current understanding of the structure, content and occupational requirements of the units that they are internally verifying. This understanding will have been acquired while working directly within the relevant occupational area in either an operational or a support function.

The level of understanding should be sufficient to allow the Internal Verifier to judge whether the assessor has fully assessed learners against all the assessment criteria in the unit.

It is unlikely that a person could have gained this level of understanding in less than six months of being employed in the funeral sector, but individuals with less experience could be considered as Internal Verifiers if they have the required level of understanding.

External Verifiers (or equivalent quality assurance experts) in the funeral sector must have a current understanding of the occupational requirements of the units they are verifying. This understanding will have been acquired while working within the relevant occupational area in either an operational or a support function.

The External Verifier must understand the requirements of the units sufficiently well to be able to determine whether sufficient evidence of the learner's competence has been collected.

4.2.3 Continuing professional development of assessors and verifiers

All assessors and verifiers, if not currently employed within a funeral business, will need to prove they have a current working knowledge of the sector they are assessing or verifying. This can be demonstrated by maintaining records of evidence from occupational updating activities such as:

- Internal or external work experience
- Internal or external work shadowing opportunities
- Other relevant CPD activities with the prior approval of the Awarding Organisations.

Note: Funeral businesses who have chosen not to use the regulatory authority approved qualifications for assessment and internal verification should be encouraged to offer the qualifications as CPD where the willingness by the employer to support this additional activity becomes known to the Awarding Organisation.

4.3 External quality control of assessment

The application and implementation of external quality control (i.e. independent assessment, external moderation, tests and projects) has been thoroughly researched and employers felt it was neither feasible nor practical. The rationale supported by employers was that a robust quality system is based upon processes associated with risk assessment and management.

The Awarding Organisation's risk rating system must be auditable by the regulatory authority.

4.3.1 Risk identification

In order to achieve the required level of external quality control, the Awarding Organisation must undertake a risk assessment of **each** prospective centre at the point of **application for approval to offer any Skillsmart Retail qualification**. The Awarding Organisation must obtain information on a number of specified 'risk factors' for each prospective centre at the point of approval. Skillsmart Retail would recommend the following, but Awarding Organisations should feel free to recommend alternative risk factors if more appropriate:

- Prospective centres' experience of operating competence-based qualifications
- The appropriateness of existing systems, or systems developed to meet the requirements of other quality assurance regimes, for the delivery of competence-based qualifications
- Whether the prospective centre has had a previous application for centre approval refused or their approval status withdrawn
- The proposed ratio of candidates to assessors and Internal Verifiers, taking account of whether the assessors and Internal Verifiers are full-time or part-time in their roles
- Whether candidates are going to be in employment (paid or voluntary), on work placements or learning in a Realistic Working Environment (see section 4.1.2 for definition)
- The Awarding Organisation must have a **method of rating** the prospective centre against each of the risk factors noted above, including an overall rating that identifies the level of risk associated with the prospective centre. The rating should then be used by the Awarding Organisation in determining the degree of support during the first year of approval.

4.3.2 Risk management

In order to identify and manage risk during ongoing centre operation, the Awarding Organisation must undertake a **yearly risk assessment of each active centre for the funeral sector competence-based qualifications**. The Awarding Organisation must obtain information on a number of specified 'risk factors' for each centre. Skillsmart Retail would recommend the following, but Awarding Organisations should feel free to recommend alternative risk factors, which would be more appropriate.

- The turnover of assessors and internal verifiers
- The throughput of candidates
- The ratio of candidates to assessors and internal verifiers, taking account of whether the assessors and internal verifiers are full-time or part-time in their roles

- Whether public funding is being accessed for the training of candidates towards/assessment of candidates for the competence-based qualifications
- Whether candidates are in employment (paid or voluntary), on work placements or learning in a realistic working environment (see section 4.1.2 for definition)

The Awarding Organisation must have a **method of rating** each centre against each of the risk factors noted above and, also, producing an overall rating which identifies the level of risk associated with the centre. The rating should then be used by the Awarding Organisation to assist in determining the level of ongoing support for the centre, including the level of external verification activity.

Annexe B: Personal, Learning and Thinking Skills (PLTS) Mapping

Independent Enquirers	
1 identify questions to answer and problems to resolve	•
2 plan and carry out research, appreciating the consequences of decisions	•
3 explore issues, events or problems from different perspectives	•
4 analyse and evaluate information, judging its relevance and value	•
5 consider the influence of circumstances, beliefs and feelings on decisions and events	•
6 support conclusions, using reasoned arguments and evidence	•
Creative Thinkers	
1 generate ideas and explore possibilities	•
2 ask questions to extend their thinking	•
3 connect their own and others' ideas and experiences in inventive ways	•
4 question their own and others' assumptions	•
5 try out alternatives or new solutions and follow ideas through	•
6 adapt ideas as circumstances change	•
Reflective Learners	
1 assess themselves and others, identifying opportunities and achievements	
2 set goals with success criteria for their development and work	
3 review progress, acting on the outcomes	
4 invite feedback and deal positively with praise, setbacks and criticism	
5 evaluate experiences and learning to inform future progress	
6 communicate their learning in relevant ways for different audiences	•
Team Workers	
1 collaborate with others to work towards common goals	
2 reach agreements, managing discussions to achieve results	
3 adapt behaviour to suit different roles and situations, including leadership roles	•
4 show fairness and consideration to others	
5 take responsibility, showing confidence in themselves and their contribution	•
6 provide constructive support and feedback to others	

Self-Managers		
1	seek out challenges or new responsibilities and show flexibility when priorities change	•
2	work towards goals, showing initiative, commitment and perseverance	•
3	organise time and resources, prioritising actions	•
4	anticipate, take and manage risks	
5	deal with competing pressures, including personal and work-related demands	•
6	respond positively to change, seeking advice and support when needed	
7	manage their emotions, and build and maintain relationships	•
Effective Participators		
1	discuss issues of concern, seeking resolution where needed	•
2	present a persuasive case for action	•
3	propose practical ways forward, breaking these down into manageable steps	•
4	identify improvements that would benefit others as well as themselves	•
5	try to influence others, negotiating and balancing diverse views to reach workable solutions	
6	act as an advocate for views and beliefs that may differ from their own	•

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