

# **Pearson BTEC Level 2 Certificate in Principles of Funeral Operations and Services**

## **Specification**

BTEC Specialist qualification

First teaching August 2014

Issue 2

## **Edexcel, BTEC and LCCI qualifications**

Edexcel, BTEC and LCCI qualifications are awarded by Pearson, the UK's largest awarding body offering academic and vocational qualifications that are globally recognised and benchmarked. For further information, please visit our qualifications website at [qualifications.pearson.com](http://qualifications.pearson.com). Alternatively, you can get in touch with us using the details on our contact us page at [qualifications.pearson.com/contactus](http://qualifications.pearson.com/contactus)

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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](http://qualifications.pearson.com)

This qualification was previously known as:

Pearson BTEC Level 2 Certificate in Principles of Funeral Operations and Services (QCF)

The QN remains the same.

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*All information in this specification is correct at time of publication.*

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## Summary of Pearson BTEC Level 2 Certificate in Principles of Funeral Operations and Services specification Issue 2 changes

Summary of changes made between previous Issue 1 and this current Issue 2	Section number
All references to QCF have been removed throughout the specification	Throughout
Definition of TQT added	Section 1
Definition of sizes of qualifications aligned to TQT	Section 1
TQT value added	Section 2
GLH range removed and replaced with lowest GLH value for the shortest route through the qualification	Section 2
Reference to credit transfer within the QCF removed	Section 5
QCF references removed from unit titles and unit levels in all units	Section 12
Guided learning definition updated	Section 12

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](http://qualifications.pearson.com/en/support/contact-us.html).



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# Purpose of this specification

The purpose of a specification as defined by Ofqual is to set out:

- the qualification's objective
- any other qualification that a learner must have completed before taking the qualification
- any prior knowledge, skills or understanding that the learner is required to have before taking the qualification
- units that a learner must have completed before the qualification will be awarded and any optional routes
- 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 (giving a clear indication of their coverage and depth)
- the method of any assessment and any associated requirements relating to it
- the criteria against which the learner's level of attainment will be measured (such as assessment criteria)
- any specimen materials
- any specified levels of attainment.





# 1 Introducing BTEC Specialist qualifications

BTEC Specialist qualifications are work-related qualifications available from Entry to Level 3 in a range of sectors. They give learners the knowledge, understanding and skills they need to prepare for employment in a specific occupational area. The qualifications also provide career development opportunities for those already in work. The qualifications may be offered as full-time or part-time courses in schools or colleges. Training centres and employers may also offer these qualifications.

## Sizes of Specialist qualifications

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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.

BTEC Specialist qualifications are generally 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 title	Pearson BTEC Level 2 Certificate in Principles of Funeral Operations and Services
Qualification Number (QN)	601/0122/2
Regulation start date	03/07/2013
Operational start date	01/08/2014
Approved age ranges	14-16 16-18 19+
Credit value	13
Assessment	Centre-devised assessment (internal assessment).
Total Qualification Time (TQT)	130
Guided learning hours	87
Grading information	The qualification and units are at pass grade.
Entry requirements	No prior knowledge, understanding, skills or qualifications are required before learners register for this qualification. However, centres must follow our access and recruitment policy (see <i>Section 10 Access and recruitment</i> ).

## Qualification Number and qualification title

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Centres will need to use the Qualification Number (QN) when they seek public funding for their learners. The qualification title, unit titles and QN are given on each learner's final certificate. You should tell your learners this when your centre recruits them and registers them with us. There is more information about certification in our *UK Information Manual*, available on our website, [qualifications.pearson.com](http://qualifications.pearson.com)

## Qualification objective

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

It gives learners the opportunity to:

- develop knowledge related to the funeral sector
- achieve a nationally-recognised Level 2 qualification.

## Apprenticeships

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Skillsmart Retail UK Ltd (People 1st) approve the Pearson BTEC Level 2 Certificate in Principles of Funeral Operations and Services as a knowledge component for the Intermediate Apprenticeship in Funeral Operations and Services.

## Relationship with previous qualifications

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This qualification is a direct replacement for the EDI Level 3 Certificate in Funeral Operations and Services (QCF).

## Progression opportunities through Pearson qualifications

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

## Industry support and recognition

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

## Relationship with National Occupational Standards

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This qualification relates to the National Occupational Standards in Funeral Operations and Services.

### 3 Qualification structure

#### Pearson BTEC Level 2 Certificate in Principles of Funeral Operations and Services

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

Minimum number of credits that must be achieved	13
Number of mandatory credits that must be achieved	8
Number of optional credits that must be achieved	5

Unit	Unit reference number	Mandatory units	Level	Credit	Guided learning hours
1	R/503/9792	Understanding how Individuals and Teams Contribute to the Work of a Funeral Business	2	3	17
2	D/503/9794	Understanding how a Funeral Business Maintains Health and Safety within the Working Environment	2	2	17
3	D/602/4769	Understanding Employment Responsibilities and Rights	2	3	30
Unit	Unit reference number	Optional units	Level	Credit	Guided learning hours
4	Y/503/9793	Understanding the Features and Benefits of Funeral Plans	2	2	14
5	H/503/9795	Understanding how to Sell and Arrange Memorial Products for Clients of a Funeral Business	2	3	27
6	K/503/9796	Understanding how to Maintain Sensitive Communication and Client Care within a Funeral Business	2	3	17
7	M/503/9797	Understanding how Religious and Cultural Customs can Affect Funeral Services	2	2	6
8	T/503/9798	Understand Funeral Law and its Importance to the Arrangements of Funerals	2	2	18

## 4 Assessment

The table below gives a summary of the assessment methods used in the qualification.

Units	Assessment method
All units	Centre-devised assessment

### Centre-devised assessment (internal assessment)

Each unit has specified learning outcomes and assessment criteria. To pass an internally assessed unit, learners must meet all of the unit's learning outcomes. Centres may find it helpful if learners index and reference their evidence to the relevant learning outcomes and assessment criteria.

Centres need to write assignment briefs for learners to show what evidence is required. Assignment briefs should indicate clearly which assessment criteria are being targeted.

Assignment briefs and evidence produced by learners must meet any additional requirements given in the *Information for tutors* section of each unit.

Unless otherwise indicated in *Information for tutors*, the centre can decide the form of assessment evidence (for example performance observation, presentations, projects, tests, extended writing) as long as the methods chosen allow learners to produce valid, sufficient and reliable evidence of meeting the assessment criteria.

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 units.

There is more guidance about internal assessment on our website. For details please see *Section 13 Further information and useful publications*.

## 5 Recognising prior learning and achievement

### Recognition of Prior Learning

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Recognition of Prior Learning (RPL) is a method of assessment (leading to the award of credit) that considers whether a learner can demonstrate that they can meet the assessment requirements for a unit through knowledge, understanding or skills they already possess and so do not need to develop through a course of learning.

Pearson encourages centres to recognise learners' previous achievements and experiences in and outside the workplace, as well as in the classroom. RPL provides a route for the recognition of the achievements resulting from continuous learning.

RPL enables recognition of achievement from a range of activities using any valid assessment methodology. If the assessment requirements of a given unit or qualification have been met, the use of RPL is acceptable for accrediting a unit, units or a whole qualification. Evidence of learning must be sufficient, reliable and valid.

Further guidance is available in our policy document *Recognition of Prior Learning Policy and Process*, available on our website, [qualifications.pearson.com](http://qualifications.pearson.com)

## 6 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 appropriate physical resources (for example IT, learning materials, teaching rooms) to support delivery and assessment.
- Staff involved in the assessment process must have relevant expertise and occupational experience.
- There must be systems in place that ensure continuing professional development (CPD) for staff delivering the qualification.
- Centres must have in place appropriate health and safety policies relating to the use of equipment by learners.
- 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 10 Access and recruitment* and *Section 11 Access to qualifications for learners with disabilities or specific needs*. For full details of the Equality Act 2010, please go to [www.legislation.gov.uk](http://www.legislation.gov.uk)

## 7 Centre recognition and approval centre recognition

Centres that have not previously offered Pearson qualifications need to apply for, and be granted, centre recognition 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 BTEC qualifications is given on our website.

### Approvals agreement

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All centres are required to enter into an approval agreement that 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.



## 8 Quality assurance of centres

Quality assurance is at the heart of vocational qualifications. The centre assesses BTEC qualifications. The centre will use quality assurance to make sure that their managers, internal verifiers and assessors are standardised and supported. Pearson use quality assurance 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 will follow one of the processes listed below.

- 1 Delivery of the qualification as part of a BTEC Apprenticeship ('single click' registration):
  - an annual visit by a Standards Verifier to review centre-wide quality assurance systems and sampling of internal verification and assessor decisions.
- 2 Delivery of the qualification outside the Apprenticeship:
  - an annual visit to the centre by a Centre Quality Reviewer to review centre-wide quality assurance systems
  - Lead Internal Verifier accreditation – this involves online training and standardisation of Lead Internal Verifiers using our OSCA platform, accessed via Edexcel Online. Please note that not all qualifications will include Lead Internal Verifier accreditation. Where this is the case, each year we will allocate a Standards Verifier to conduct postal sampling of internal verification and assessor decisions for the Principal Subject Area.

For further details please see the *UK Vocational Quality Assurance Handbook* on our website.

## 9 Programme delivery

Centres are free to offer this qualification using any mode of delivery (for example full-time, part-time, evening only, distance learning) that meets their learners' needs. Whichever mode of delivery is used, centres must make sure that learners have access to the resources identified in the specification and to the subject specialists delivering the units.

Those planning the programme should aim to enhance the vocational nature of the qualification by:

- liaising with employers to make sure that a course is relevant to learners' specific needs
- accessing and using non-confidential data and documents from learners' workplaces
- developing up-to-date and relevant teaching materials that make use of scenarios that are relevant to the sector
- giving learners the opportunity to apply their learning in practical activities
- including sponsoring employers in the delivery of the programme and, where appropriate, in assessment
- making full use of the variety of experience of work and life that learners bring to the programme.

Where legislation is taught, centres must ensure that it is current and up to date.

## 10 Access and recruitment

Pearson's policy regarding access to our 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 those wishing to access the qualifications.

Centres are required to recruit learners to BTEC Specialist qualifications with integrity.

Applicants will need relevant information and advice about the qualification to make sure it meets their needs.

Centres should review the applicant's 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 the learner during teaching and assessment of the qualification. The review must take account of the information and guidance in *Section 11 Access to qualifications for learners with disabilities or specific needs*.

Learners may be aged between 14 and 16 and therefore potentially vulnerable. Where learners are required to spend time and be assessed in work settings, it is the centre's responsibility to ensure that the work environment they go into is safe.

# 11 Access to qualifications for learners with disabilities or specific needs

Equality and fairness are central to our work. Pearson's Equality Policy requires all learners to 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.

For learners with disabilities and specific needs, the assessment of their potential to achieve the qualification must identify, where appropriate, the support that will be made available to them during delivery and assessment of the qualification. Please see the information on reasonable adjustments and special consideration in *Section 4, Assessment*.

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

## 12 Units

Units have 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

When a learner achieves a unit, they gain the specified number of credits.

### 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.

### Essential resources

This section lists any specialist resources needed to deliver the unit. The centre will be asked to make sure that these resources are in place when it seeks approval from Pearson to offer the qualification.

### 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

Assessment criteria specify the standard required by the learner to achieve each learning outcome.

## Unit amplification

This section clarifies what a learner needs to know to achieve a learning outcome.

## Information for tutors

This section gives tutors information on delivery and assessment. It contains the following subsections.

- *Delivery* – explains the content’s relationship to the learning outcomes and offers guidance on possible approaches to delivery.
- *Assessment* – gives information about the evidence that learners must produce, together with any additional guidance if appropriate. This section should be read in conjunction with the assessment criteria.
- *Suggested resources* – lists resource materials that can be used to support the teaching of the unit, for example books, journals and websites.

# **Unit 1: Understanding how Individuals and Teams Contribute to the Work of a Funeral Business**

**Unit reference number:** R/503/9792

**Level:** 2

**Credit value:** 3

**Guided learning hours:** 17

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## **Unit aim**

The purpose of this unit is to provide learners with the knowledge and understanding of how individuals and teams contribute to the operation and effective working of funeral businesses. It covers the benefits of working as a team and building constructive relationships with colleagues including the importance of good communication skills. It also looks at personal performance of individuals in terms of monitoring own performance and looking after own emotional wellbeing.

## **Essential resources**

There are no special resources needed for this unit.

## Learning outcomes, assessment criteria and unit amplification

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.

Learning outcomes		Assessment criteria		Unit amplification
1	Know how the roles and responsibilities of colleagues relate to the structure and operation of a funeral business	1.1	Describe the different job roles and responsibilities of colleagues within a funeral business	<ul style="list-style-type: none"> <li>□ Colleagues you work with and the different jobs each colleague performs</li> <li>□ Different responsibilities each colleague has</li> </ul>
		1.2	Describe the lines of accountability within a funeral business	<ul style="list-style-type: none"> <li>□ Who each of your colleagues reports to and who reports to them</li> <li>□ Organisational chart</li> </ul>
2	Understand the characteristics of effective team work within a funeral business	2.1	Explain how working as a team benefits the operation of a funeral business	<ul style="list-style-type: none"> <li>□ Benefits to you: e.g. sharing of ideas, collaboration, leadership experience</li> <li>□ Benefits to colleagues: e.g. working with people with different personalities, compromise, influencing skills</li> <li>□ Benefits to the company: e.g. find a better solution to the problem, find a more streamlined approach to work through the problem, motivation in the workplace, friendly atmosphere will be created</li> <li>□ Disadvantages to the company: e.g. arguments, hostility towards each other, dictatorship</li> </ul>
		2.2	Outline the personal qualities required to be an effective member of a team	<ul style="list-style-type: none"> <li>□ Qualities of an effective team player: e.g. listening skills, motivating, role model, flexibility</li> <li>□ Qualities you wouldn't want to see: e.g. selfishness, argumentative, dictator</li> </ul>



Learning outcomes		Assessment criteria		Unit amplification
3	Know how to communicate with colleagues within the <b>working environment</b>	3.1	Describe the importance of effective communication with colleagues	<ul style="list-style-type: none"> <li>□ Effective communication: e.g. timely, to the point, appropriately written or spoken</li> <li>□ Importance when working in a team: e.g. everyone gets the same message, everyone understands, minimum number of questions will need to be asked, task will be done efficiently</li> </ul>
		3.2	Describe the different methods for communicating information between colleagues	<ul style="list-style-type: none"> <li>□ Ways of communicating: e.g. verbal, non-verbal, electronic, written</li> <li>□ Advantages and disadvantages of different communication methods</li> </ul>
		3.3	Describe how presenting inaccurate, incomplete or illegible written information to colleagues can impact upon the performance of a funeral business	<ul style="list-style-type: none"> <li>□ Bad communication: e.g. rushed, inaccurate, incomplete</li> <li>□ Be able to give example of bad communication and the impact on colleagues</li> <li>□ Impact on clients: e.g. wrong thing put in place, not what the client wanted and/or ordered, upsetting to the client</li> <li>□ The negative impact this has on the company: e.g. unprofessional, bad reputation</li> </ul>
4	Know how to maintain confidentiality of information within the <b>working environment</b>	4.1	State the type of information that must be treated as confidential	<ul style="list-style-type: none"> <li>□ Confidential: information that can't be shared, information that is personal to the client</li> <li>□ Company's policy on confidentiality</li> <li>□ How the Data Protection Act (1998) impacts on the company</li> </ul>
		4.2	Describe organisational procedures for exchanging confidential information between colleagues	<ul style="list-style-type: none"> <li>□ Confidential information: where it's stored, how it's stored, who has access to it, procedure for how to relay the information between colleagues and onto external agencies e.g. ministers of religion, doctors, police</li> </ul>

Learning outcomes		Assessment criteria		Unit amplification
5	Know how to maintain constructive relationships with colleagues within a funeral business	5.1	Describe approaches that can be used to resolve disagreements and/or conflicts with colleagues	<ul style="list-style-type: none"> <li>□ What to do and what not to do if you have had a disagreement with a colleague</li> <li>□ Person, people, agency and/or organisation that can give support and/or advice in relation to a disagreement</li> </ul>
		5.2	Identify organisational standards and guidelines relating to behaviour in the workplace	<ul style="list-style-type: none"> <li>□ Company's policy on behaviour in the workplace</li> <li>□ Company's policy on behaviour towards colleagues</li> <li>□ Professional relationship: behaviour and attitude towards someone you work with being appropriate to the workplace</li> </ul>
		5.3	Identify different situations where behaviours with colleagues will need to be adapted	<ul style="list-style-type: none"> <li>□ Type of conflicts and/or disagreements that can occur between colleagues</li> <li>□ Give examples of how behaviour needs to change to resolve the conflict/disagreement</li> <li>□ Company's policy limits and expectations in relation to behaviours with colleagues</li> </ul>
		5.4	Describe how to provide support to colleagues in their work	<ul style="list-style-type: none"> <li>□ Different situations when colleagues would have to be supported: e.g. returning to work, a specific task or job, mentoring</li> <li>□ Types of support that can be provided: e.g. listening, 1:1 discussions, shadowing, physical support, emotional support</li> </ul>
		5.5	Describe how to respond to feedback from colleagues	<ul style="list-style-type: none"> <li>□ Different situations that you can be given feedback</li> <li>□ Difference between positive, negative and constructive feedback</li> <li>□ How to turn negative feedback into constructive feedback</li> <li>□ How to respond to feedback appropriately</li> <li>□ How to use all feedback to enhance practice</li> </ul>

Learning outcomes		Assessment criteria		Unit amplification
6	Know how to reflect upon personal performance	6.1	Describe methods for assessing personal development needs	<ul style="list-style-type: none"> <li>□ SWOT analysis: strengths, weaknesses, opportunities and threats</li> <li>□ Discuss and document personal training needs</li> <li>□ Company's procedure for identifying staff training needs</li> </ul>
		6.2	Describe how work and/or personal learning objectives are set	<ul style="list-style-type: none"> <li>□ SMART objectives: how to set them, who to set them with, how to assess them, how they help to achieve work objectives, how they fit into team and company objectives</li> </ul>
		6.3	Describe how work and/or personal learning objectives are monitored and reviewed	<ul style="list-style-type: none"> <li>□ Ways of measuring objectives: e.g. team meetings, one to one supervision, staff appraisals, development plans and work reviews, 6 monthly appraisals</li> <li>□ Tools that can be used to show objectives: e.g. Personal Development Plan (PDP), to do lists, work calendars</li> </ul>
		6.4	Describe how work and/or personal learning objectives can inform future learning and career decisions	<ul style="list-style-type: none"> <li>□ Knowledge and application of TNA (training needs analysis)</li> <li>□ How career goals link to current work and knowledge needed for job role</li> <li>□ Importance of long-term objectives which will further your career</li> <li>□ Career progression routes</li> </ul>

Learning outcomes		Assessment criteria		Unit amplification
7	Know how to deal with the pressures within a <b>funeral service environment</b> that can affect emotional wellbeing	7.1	State the importance of emotional wellbeing when working in a <b>funeral service environment</b>	<ul style="list-style-type: none"> <li>□ Emotional wellbeing: looking after your own emotions especially when working in an environment which may have a greater emotional impact on you than most environments</li> <li>□ Importance of emotional wellbeing</li> </ul>
		7.2	Identify the circumstances that can trigger emotional distress within the <b>funeral service environment</b>	<ul style="list-style-type: none"> <li>□ Events and activities: e.g. children, emotional relative, emotional stories relating to the situation</li> <li>□ Personal issues that may impact on your work: e.g. moving house, marriage, children, personal relationships</li> <li>□ Support that is available if you are distressed at work</li> </ul>
		7.3	Describe personal strategies for coping with emotions	<ul style="list-style-type: none"> <li>□ Research and assess different techniques for managing emotions</li> <li>□ Identify which techniques may work better in different situations</li> </ul>
		7.4	Describe how to maintain a work life balance	<ul style="list-style-type: none"> <li>□ Work life balance: e.g. spending equal amount of time and emotion on both work and home life, ensure that one doesn't dominate</li> <li>□ Identify strategies that are helpful for maintaining a work life balance</li> </ul>
		7.5	Identify sources of support that are available to help employees cope with the pressures of the <b>funeral service environment</b>	<ul style="list-style-type: none"> <li>□ Internal and external support systems should be identified</li> </ul>

## Information for tutors

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### Delivery

This unit should be delivered and assessed in the workplace. This unit can be delivered individually or in groups as is suggested in the title. The learning outcomes can be covered in different sections and do not have to be in set order as certain learning outcomes can be delivered as stand-alone, e.g. learning outcome 7.

Learners should be encouraged to use their company policies and procedures and they need to be able to show a clear understanding of these and the importance of adhering to them in their workplace.

It would be good practice for learners to have an open discussion in relation to learning outcomes 1 and 2 as certain learners might work in larger funeral businesses which would obviously have more people working in different roles.

Carrying out role-play exercises in relation to communication, where scenarios and activities were set up to demonstrate barriers, would help learners to understand what effective communication is. It would also help them to understand how to communicate important information accurately to ensure that the recipient fully understands what is being communicated. This would include all aspects of active listening, which is a key component of effective communication. Also, tasks with different electronic systems such as instant and text messaging could be used to highlight inappropriate use of abbreviations and jargon. These exercises would help learning outcome 3.

For learning outcome 4, learners should be encouraged to use their workplace documentation, e.g. communication registers and books to show how they communicate and check that confidential information is correct and stored appropriately. Where these registers are in multiple-copy format, the learners would be able to demonstrate how confidential data is passed between internal departments and external agencies when needed.

For learning outcome 5, it would be beneficial to look at the Code of Practice and also behaviour management. Again, role-play may be used for this but special attention needs to be paid to organising this professionally to safeguard learners. The use of "real-life" experiences may be sought from the learners so that they can talk through their experiences of how they have dealt with situations where they have had to manage their behaviour. These could be openly discussed to encourage looking at other options which could have been used. This would help learners to look at the impact of inappropriate behaviour on them as well as on their company.

Learning outcome 6 is a very personal outcome and learners should be encouraged to carry out an individual SWOT analysis. A blank document could be prepared and provided for each learner to encourage them to think of their strengths, weaknesses, etc. Some learners will have other methods which are being used to assess their personal development needs and these can be shared if appropriate. Tutors need to be aware that not all learners will have access to formal staff appraisals or regular supervision but this process should still be discussed as it helps to promote best practice in the funeral service.

For learning outcome 7, scenarios could be devised as some learners might not have the life-experiences to draw upon and being given this scenario to work through would help their understanding of situations which could trigger emotional distress so that the learner can understand how to identify such triggers.

## Assessment

LO3 and LO4, "**working environment**" and LO7 – AC7.1 – AC7.5 "**funeral service environment**" refer to a funeral business premises and other environments outside of the business' premises where the employee may be working, such as the deceased's home, crematoria and hospitals.

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

The centre will devise and mark the assessment for this unit.

Learners must meet all assessment criteria to pass the unit.

Workbooks and assignments can be used for learners to record evidence which can be assessed to the criteria and professional discussion should be used to ensure that the evidence collected is valid, authentic, etc.

Because this is a knowledge-based unit, professional discussion can be an excellent stand-alone method of collecting evidence, especially when this has been planned for by the assessor and the candidate is well – prepared.

## Suggested resources

### Books

Adair J – *Effective Communication (Revised Edition): The Most Important Management Skills of All* (Pan, 2009) ISBN: 9780330504263

### Websites

[www.businessballs.com](http://www.businessballs.com) – This is a website where there is information on carrying out a SWOT analysis and also provides templates

[www.legislation.gov.uk](http://www.legislation.gov.uk) – Government site where you can find the Data Protection Act (1998)

[www.nafd.org.uk](http://www.nafd.org.uk) – This website allows you to access the National Association of Funeral Directors' Code of Practice

[www.nhs.uk/](http://www.nhs.uk/) – This is an NHS website which gives information on well being and tools to assist in identifying risks

[www.office.microsoft.com](http://www.office.microsoft.com) – This is a website where you can find a basic organisational chart for learners to use

# **Unit 2: Understanding how a Funeral Business Maintains Health and Safety within the Working Environment**

**Unit reference number: D/503/9794**

**Level: 2**

**Credit value: 2**

**Guided learning hours: 17**

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## **Unit aim**

The purpose of this unit is to provide learners with the knowledge and understanding of the procedures and legislation required for maintaining health and safety on the premises of a funeral business as well as in the employees' working environment outside of the funeral business. It also covers employers' and employees' responsibilities in terms of legislation and safe working practices.

## **Essential resources**

There are no special resources needed for this unit.

## Learning outcomes, assessment criteria and unit amplification

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.

Learning outcomes		Assessment criteria		Unit amplification
1	Know the main provisions of health and safety legislation in relation to a funeral business	1.1	Describe the responsibilities, in relation to health and safety legislation, of: <ul style="list-style-type: none"> <li>• employers</li> <li>• employees</li> </ul>	<ul style="list-style-type: none"> <li>□ Health &amp; Safety at Work Act in relation to yours and your employer's responsibilities</li> <li>□ Management of Health &amp; Safety at Work Regulations in relation to yours and your employer's responsibilities</li> </ul>
		1.2	Describe how the legal requirements of funeral businesses are met in terms of: <ul style="list-style-type: none"> <li>• the control of substances hazardous to health</li> <li>• the disposal of clinical waste</li> <li>• the notification of infectious diseases</li> <li>• the use of personal protective equipment</li> </ul>	<ul style="list-style-type: none"> <li>□ Cleaning materials or other hazardous substances: where and how they are stored, what you must never do</li> <li>□ Clinical waste: types, company's policy on disposal</li> <li>□ Infectious diseases: examples, who to inform if you identify one or come into contact with someone that has one, legislation that covers this, your company's policy</li> <li>□ Personal Protective Equipment (PPE): who provides it, different types within workplace, how PPE should be disposed of once it has been used</li> </ul>



Learning outcomes		Assessment criteria		Unit amplification
2	Know what actions to take in accidents and emergencies	2.1	<p>State the actions, within own limits of authority, that should be taken in the event of accidents and emergencies such as:</p> <ul style="list-style-type: none"> <li>• fire</li> <li>• floods/water leakage</li> <li>• acute illness or accident</li> <li>• faults in power supply</li> </ul>	<ul style="list-style-type: none"> <li>□ Fire: company's policy, who to notify, what to do if you discover the fire</li> <li>□ Burst water pipe: company's policy, who to notify</li> <li>□ Illness: company's policy, who to notify, different types of illness that need to be reported</li> <li>□ Accidents: company's policy, who to notify, information that is recorded in an accident book, location of the accident book</li> <li>□ Procedure for fused lights in the workplace</li> </ul>

Learning outcomes		Assessment criteria		Unit amplification
3	Understand the employees' responsibilities in reducing risks to health and safety within own <b>working environment</b>	3.1	Explain why it is important to report hazards and potential risks to health and safety to a designated person within own organisation	<ul style="list-style-type: none"> <li><input type="checkbox"/> Meaning of the term hazard</li> <li><input type="checkbox"/> Meaning of the term risk</li> <li><input type="checkbox"/> Reasons why you need to identify hazards and risks</li> <li><input type="checkbox"/> Person and/or people that you have to report risks and hazards to</li> </ul>
		3.2	Describe organisational procedures for reporting: <ul style="list-style-type: none"> <li>• accidents and emergencies</li> <li>• potential hazards and risks to health and safety</li> </ul>	<ul style="list-style-type: none"> <li><input type="checkbox"/> Person and/or people to contact if an emergency occurs in your workplace</li> <li><input type="checkbox"/> Where these incidents and accidents are recorded</li> <li><input type="checkbox"/> Any potential hazards</li> <li><input type="checkbox"/> Person and/or people you should inform if you identify a potential hazard</li> </ul>
		3.3	Identify the infectious diseases which are notifiable to the local Health Authority	<ul style="list-style-type: none"> <li><input type="checkbox"/> What is meant by the term infectious disease</li> <li><input type="checkbox"/> Infectious diseases that need to be reported to your manager</li> <li><input type="checkbox"/> Infectious diseases that need to be reported to the local Health Authority</li> </ul>
		3.4	Explain how safe working practices can contribute to: <ul style="list-style-type: none"> <li>• the prevention of the spread of disease and infection</li> <li>• the prevention of personal injury and damage to clothing</li> <li>• the reduction of wastage and spillage of hazardous substances</li> </ul>	<ul style="list-style-type: none"> <li><input type="checkbox"/> How infections and/or diseases are spread</li> <li><input type="checkbox"/> How to prevent the spread of diseases and/or infections</li> <li><input type="checkbox"/> Type of accidents that can occur in the workplace</li> <li><input type="checkbox"/> How clothes can get damaged when you are carrying out your normal duties</li> <li><input type="checkbox"/> How to protect your clothes when carrying out your normal duties</li> <li><input type="checkbox"/> How to prevent the spillage of substances</li> <li><input type="checkbox"/> How to prevent wastage within your workplace</li> </ul>

Learning outcomes		Assessment criteria		Unit amplification
		3.5	Explain the importance of not exceeding the limits of own responsibility and authority when dealing with health and safety risks	<ul style="list-style-type: none"> <li>□ Your responsibility when dealing with risk</li> <li>□ Your manager's responsibility when dealing with risk</li> <li>□ Importance of each person keeping to their own roles</li> </ul>
4	Know safe handling and lifting techniques for own <b>working environment</b>	4.1	State the importance of identifying potential risks in situations which require handling and lifting of: <ul style="list-style-type: none"> <li>• deceased persons</li> <li>• equipment</li> <li>• materials</li> </ul>	<ul style="list-style-type: none"> <li>□ Potential risks when moving a deceased person and how to identify the risks</li> <li>□ Type of equipment you are likely to use</li> <li>□ Types of risks that are involved in moving equipment</li> <li>□ Types of materials you are likely to be moving within your workplace</li> <li>□ Types of risks that are likely to happen when moving such materials</li> </ul>
		4.2	Describe safe techniques for the handling and lifting of: <ul style="list-style-type: none"> <li>• deceased persons</li> <li>• equipment</li> <li>• materials</li> </ul>	<ul style="list-style-type: none"> <li>□ How a deceased person should be moved and handled</li> <li>□ Person and/or people that can help you move and handle a deceased person</li> <li>□ How to move and handle empty coffins</li> <li>□ How to move and handle a coffin with a deceased person in it</li> <li>□ How to move materials within your work environment</li> </ul>

Learning outcomes		Assessment criteria		Unit amplification
5	Know how to handle hazardous substances and materials	5.1	Identify hazardous substances and materials that may be found in own <b>working environment</b>	<ul style="list-style-type: none"> <li><input type="checkbox"/> Types of cleaning materials and chemicals that are in your work environment</li> <li><input type="checkbox"/> Types of hazardous substances that are in your work environment</li> </ul>
		5.2	Describe safe practices for: <ul style="list-style-type: none"> <li>• storing hazardous substances and materials</li> <li>• using hazardous substances and materials</li> <li>• disposing of hazardous substances and materials</li> </ul>	<ul style="list-style-type: none"> <li><input type="checkbox"/> Location where hazardous substances are stored in your work environment</li> <li><input type="checkbox"/> How hazardous substances are stored, according to your company's policies</li> <li><input type="checkbox"/> How you should use the hazardous substances within your work environment</li> <li><input type="checkbox"/> Precautions that should be taken before you use hazardous substances within your work environment</li> <li><input type="checkbox"/> How to dispose of hazardous substances within your work environment</li> <li><input type="checkbox"/> Storage of hazardous substances until they are collected</li> </ul>
6	Know own role and responsibilities in maintaining health and safety standards within own <b>working environment</b>	6.1	State the importance of complying with organisations' health and safety procedures	<ul style="list-style-type: none"> <li><input type="checkbox"/> Why Health &amp; Safety procedures within your work environment have to be followed</li> <li><input type="checkbox"/> What could happen to you if you do not follow your company's Health &amp; Safety procedures</li> <li><input type="checkbox"/> What could happen to your colleagues and/or your clients if you do not follow your company's Health &amp; Safety procedures</li> </ul>
		6.2	State own responsibilities and duties for ensuring that equipment, materials and instruments are: <ul style="list-style-type: none"> <li>• used correctly</li> <li>• stored safely</li> </ul>	<ul style="list-style-type: none"> <li><input type="checkbox"/> How to ensure that equipment and materials are stored safely within your work environment</li> <li><input type="checkbox"/> How to ensure equipment and materials are used correctly</li> <li><input type="checkbox"/> What could happen to you, or your colleagues, if equipment and/or materials were used incorrectly</li> <li><input type="checkbox"/> Where you store your instruments when they are not in use</li> </ul>

## Information for tutors

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### Delivery

This unit should be delivered and assessed in the workplace. This unit can be delivered to individuals but it might be better if delivered in groups where learners can share experiences which will help their understanding.

It would be ideal if the learning outcomes were dealt with in order for this unit.

Learners should be encouraged to use their company's policies and procedures and they need to show a clear understanding and knowledge of these and the importance of adhering to them in their workplace.

For learning outcome 1, a summary of the relevant legislation should be used to spur discussions. Tutors could look at the comparisons between the two pieces of legislation and the impact they have on employers. The tutors could also provide Control of Substances Hazardous to Health (COSHH) Regulations as well as demonstrate Reporting of Injuries, Diseases and Dangerous Occurrences Regulations (RIDDOR). It could also be beneficial if the tutor could provide a range of Personal Protective Equipment (PPE) that is available within funeral businesses. Demonstrations could take place on the correct use of PPE including the correct procedure for removing gloves, aprons, etc.

For learning outcome 2, learners could be asked to bring in copies of their company's fire procedures and policies as well as their accident books/forms. These could be compared, in groups, to ensure that learners fully understand procedures to follow. These policies and procedures could be compared to the relevant policies and procedures within the learning environment.

Learning outcomes 3 and 4 naturally follow on from learning outcome 2 in identifying accidents and risks. It would be good practice to carry out "mock" risk assessments where learners are encouraged to identify hazards and risks. By physically carrying out these assessments, it would help to reduce the fear of risk assessment and would promote the understanding that it is everyone's responsibility within the work environment to identify risk.

Learning outcome 5 is looking at identifying hazardous substances and materials and, again, it would be beneficial if this was discussed between learners so that they could benefit from each other's experiences. Tutors need to be aware that some learners, especially those from private funeral businesses, may not have access to such robust policies and procedures and their storage of hazardous materials might be more ad hoc so discussion with others may encourage better practice.

Learning outcome 6 is more of a summing up outcome which reinforces learners' own responsibilities and duties.

## Assessment

LO3, LO4, AC5.1 and LO6 "**working environment**" refers to a funeral business premises and other environments outside of the business' premises where the employee may be working, such as the deceased's home, crematoria and hospitals.

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

The centre must devise and mark the assessment for this unit.

Learners must meet all assessment criteria to pass the unit.

Workbooks and assignments can be used for learners to record evidence which can be assessed to the criteria and professional discussions should be used to ensure that the evidence collected is valid, authentic, etc.

## Suggested resources

### Books

Workplace Health, Safety and Welfare: Workplace (Health, Safety & Welfare) Regulations 1992 – Approved Code of Practice & Guidance (Health & Safety Commission) (Health & Safety Executive (HSE) (1998))

### Websites

[www.hse.gov.uk](http://www.hse.gov.uk) – This is a Government website which shows the five steps to risk assessment and how to identify hazards

[www.hse.gov.uk/coshh](http://www.hse.gov.uk/coshh) – This is a Government website which explains the Control of Substances Hazardous to Health

[www.hse.gov.uk/coshh](http://www.hse.gov.uk/coshh) – This is a Government website which explains the use of Personal Protective Equipment

[www.hse.gov.uk/riddor](http://www.hse.gov.uk/riddor) – This is a Government website which explains the Reporting of Injuries, Diseases and Dangerous Occurrences

[www.youtube.com](http://www.youtube.com) – Type in "Requested: Putting On and Removing Personal Protective Equipment". This is a short demonstration on how to put on and remove PPE effectively and correctly

## **Unit 3: Understanding Employment Responsibilities and Rights**

**Unit reference number: D/602/4769**

**Level: 2**

**Credit value: 3**

**Guided learning hours: 30**

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### **Unit aim**

The purpose of this unit is to assess the knowledge and understanding of employment responsibilities and rights within the workplace.

### **Essential resources**

There are no special resources needed for this unit.

## Learning outcomes, assessment criteria and unit amplification

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.

Learning outcomes		Assessment criteria		Unit amplification
1	Know the statutory rights and responsibilities of employees and employers within own area of work	1.1	Outline employee rights and responsibilities under Employment Law	<ul style="list-style-type: none"> <li>□ Employee rights: e.g. terms, itemised pay slip, national minimum wage, paid holiday</li> <li>□ What you have to do in relation to Employment Law</li> </ul>
		1.2	Describe how related legislation can support employees in the workplace	<ul style="list-style-type: none"> <li>□ Legislation: Employment Rights Act 1996</li> <li>□ The support your employer has to give</li> <li>□ What your employer has to provide for you when you are in the workplace</li> </ul>
		1.3	Describe employer responsibilities in the workplace	<ul style="list-style-type: none"> <li>□ Responsibilities: what your employer has to provide for you, what your employer has to do for you, what information your employer has to give to you</li> </ul>
		1.4	Identify sources and types of information and advice on own employment rights and responsibilities	<ul style="list-style-type: none"> <li>□ Information you might need from your employer in relation to your work</li> <li>□ Where you can get this information from</li> <li>□ Person, people, agencies and/or organisations that can help with this information</li> </ul>



Learning outcomes		Assessment criteria		Unit amplification
2	Understand agreed ways of working that protect own relationship with employer	2.1	Explain the terms and conditions of own contract of employment	<ul style="list-style-type: none"> <li>□ Terms and conditions: what your contract says you have to do, what your contract says your employer will do, what benefits you are entitled to from your employer</li> </ul>
		2.2	Describe information shown on own pay statement	<ul style="list-style-type: none"> <li>□ Information that is included on your payslip: gross and net pay, National Insurance contributions, tax deductions, hours worked, employee number, other contributions e.g. pension</li> <li>□ Additional deductions or payments: e.g. pension, health insurance</li> </ul>
		2.3	Explain the procedures to follow in event of a grievance	<ul style="list-style-type: none"> <li>□ Person, people, agencies and/or organisation to contact if you are unhappy and aggrieved because of the way you have been treated at work</li> <li>□ How they can support you with this</li> <li>□ How you can document this situation</li> <li>□ Timescales for evoking your company's grievance policy is</li> <li>□ How long it will take to hear about the outcome of your grievance</li> </ul>
		2.4	Identify the personal information that must be kept up to date with own employer	<ul style="list-style-type: none"> <li>□ Information your employer has to have about you: name, date of birth, address, contact number, National Insurance number</li> <li>□ Importance of keeping this information up to date: able to contact you, send letters to the correct address, information needed for finance e.g. P45, P60</li> <li>□ Person/people to notify of any changes in your personal details or circumstances: Human Resources</li> </ul>
		2.5	Explain agreed ways of working with employer	<ul style="list-style-type: none"> <li>□ Agreed ways of working: complying with company policies and procedures</li> <li>□ Where you can access the agreed ways of working</li> <li>□ Person, people, agencies and/or organisation you can speak to if you have questions or queries in relation to the agreed ways of working</li> </ul>

Learning outcomes		Assessment criteria		Unit amplification
3	Know how own role fits within the wider context of the sector	3.1	Describe the effect of own role on service provision	<ul style="list-style-type: none"> <li><input type="checkbox"/> Your main role within your work environment</li> <li><input type="checkbox"/> How this role impacts on your colleagues</li> <li><input type="checkbox"/> How this role impacts on your employer</li> <li><input type="checkbox"/> How the role that you perform affects your clients within the Funeral Care business</li> <li><input type="checkbox"/> Impact on your colleagues and employer if you are absent</li> </ul>
		3.2	Describe how own role links to the wider sector	<ul style="list-style-type: none"> <li><input type="checkbox"/> Role you provide within your work situation</li> <li><input type="checkbox"/> The part you play in the team</li> <li><input type="checkbox"/> How your role fits into the company objectives</li> </ul>
		3.3	Describe the main roles and responsibilities of representative bodies that influence the wider sector	<ul style="list-style-type: none"> <li><input type="checkbox"/> Representative bodies which are involved with your work establishment</li> <li><input type="checkbox"/> Main representative body in the UK</li> <li><input type="checkbox"/> Roles the representative bodies play</li> <li><input type="checkbox"/> How you can get in touch with the representative bodies</li> </ul>
		3.4	Outline different viewpoints around an issue of public concern relevant to the sector or occupation	<ul style="list-style-type: none"> <li><input type="checkbox"/> Identify an issue of concern which has been raised through the media regarding funeral care</li> <li><input type="checkbox"/> Outline the different points of view that people had</li> <li><input type="checkbox"/> Outline your views on this issue</li> </ul>
		3.5	Describe how issues of public concern have altered public views of the sector or occupation	<ul style="list-style-type: none"> <li><input type="checkbox"/> How the viewpoints identified above affected your clients</li> <li><input type="checkbox"/> How these viewpoints have affected the way you carry out your role</li> <li><input type="checkbox"/> How these viewpoints have impacted on the policies and procedures within the company</li> </ul>

Learning outcomes		Assessment criteria		Unit amplification
4	Know career pathways available within own and related sectors	4.1	Describe occupational opportunities within own sector and related sectors	<ul style="list-style-type: none"> <li><input type="checkbox"/> Different jobs within the company</li> <li><input type="checkbox"/> Suitable progression routes for you</li> <li><input type="checkbox"/> Based on your current skills, identify other sectors of employment that you would you be able to transfer your skills to</li> </ul>
		4.2	Identify sources of information related to a chosen career pathway	<ul style="list-style-type: none"> <li><input type="checkbox"/> How jobs are advertised within the company</li> <li><input type="checkbox"/> Person and/or people that you would speak to if you wish to relocate to another region but remain within the same company</li> </ul>
		4.3	Identify next steps in own career pathway	<ul style="list-style-type: none"> <li><input type="checkbox"/> Goals: short-term goals (within the next two years), long-term goals (within the next five years)</li> <li><input type="checkbox"/> Person and/or people you can speak to for help in achieving these goals</li> </ul>

## Information for tutors

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### Delivery

This unit should be delivered and assessed in the workplace. This unit can be delivered individually or in groups. The learning outcomes can be covered in different sections and do not have to be in set order as certain learning outcomes can be delivered as stand-alone outcomes.

Learners should be encouraged to use their company's policies and procedures as they need to be able to show clear understanding of these and the importance of adhering to them in the workplace.

Planning for this unit is crucial as it is important that learners are prepared and that they bring relevant documentation such as payslips and copies of their contracts of employment so that these can be used to form discussions to show their understanding.

Learning outcomes 1 and 2 are very much based on Employment Law and the suggested resources should be used to aid discussion. Candidates would benefit from discussing their individual contracts as these will vary from small businesses to national corporations. Although payslips are confidential, it would be helpful to have an example of different payslips so that candidates can see that there are generic things that should appear on a payslip. Company policies and procedures would help discussions and understanding of "ways of working".

For learning outcome 3 it would be beneficial to look at the learners' roles and get them to share their experiences wherever possible. Tutors should use the suggested resources and facilitate viewing of relevant TV documentaries and media articles. These will help to identify different viewpoints and the impact that these have on the public in relation to working in the Funeral Care business. Learners should be encouraged to discuss these issues but the tutor needs to be mindful that these can be very personal issues and some of the media coverage might have involved their individual companies in the past. Suggestions of topics for discussion could include:

- Alternatives to burial and cremation
- Cost of funerals
- Environmental impact of burial and cremation
- Inappropriate storage of bodies

Learning outcome 4 looks at job opportunities and progression. Some learners may not have thought through the process of progressing in their career so it would be good to have examples of job opportunities within the funeral business as well as providing examples of related sectors. It might be beneficial to touch upon relevant qualifications which would help learners to develop further.

## Assessment

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

The centre will devise and mark the assessment for this unit.

Learners must meet all assessment criteria to pass the unit.

Workbooks and assignments can be used for learners to record evidence which can be assessed to the criteria and professional discussions should be used to ensure that the evidence collected is valid, authentic, etc.

Because this is a knowledge-based unit, professional discussion can be an excellent stand-alone method of collecting evidence, especially when this has been planned for by the assessor and the candidate is well prepared.

## Suggested resources

### Websites

[www.acas.org.uk](http://www.acas.org.uk) – this is a website which give information on Employment Law

[www.channel4.com/programmes/dispatches](http://www.channel4.com/programmes/dispatches) – this website allows you access to the article "Undercover Undertaker" which had a big impact on the general public and their perception on undertakers generally

[www.dailymail.co.uk](http://www.dailymail.co.uk) – News Article 2163891 gives an opportunity to compare different viewpoints on the above article

[www.gov.uk/](http://www.gov.uk/) – this is a government website which gives information on discrimination legislation

[www.legislation.gov.uk](http://www.legislation.gov.uk) – this is a government website where you can find the Data Protection Act (1998)

[www.mylocalfuneraldirector.co.uk](http://www.mylocalfuneraldirector.co.uk) – this is a general website which provides information on, and a description on, the different roles within the Funeral business

# **Unit 4: Understanding the Features and Benefits of Funeral Plans**

**Unit reference number:** Y/503/9793

**Level:** 2

**Credit value:** 2

**Guided learning hours:** 14

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## **Unit aim**

The purpose of this unit is to assess the knowledge and understanding of funeral plans. The unit focuses on features and benefits of funeral products as well as including the processes of selling.

## **Essential resources**

There are no special resources needed for this unit.

## Learning outcomes, assessment criteria and unit amplification

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.

Learning outcomes		Assessment criteria		Unit amplification
1	Know the product knowledge required for selling funeral plans	1.1	Describe the range of funeral plans on offer by own organisation	<ul style="list-style-type: none"> <li>□ Different types of funeral plans that are on offer and how each plan differs in what they provide</li> <li>□ If your company does not offer funeral plans, what information can you provide to clients if they have requested a funeral plan</li> </ul>
		1.2	Describe the features and benefits of own organisation's funeral plans	<ul style="list-style-type: none"> <li>□ Benefits to clients of having a funeral plan in place</li> <li>□ What your company's funeral plans offer their clients</li> <li>□ Benefits of your company's funeral plans compared with those of competitors</li> <li>□ Benefit to your company of promoting funeral plans</li> </ul>
		1.3	Describe the terms and conditions of own organisation's funeral plans	<ul style="list-style-type: none"> <li>□ How to explain to a client what your company will provide through the funeral plan</li> <li>□ How to ensure that it meets their needs</li> <li>□ How to ensure, if possible, that funeral plans are bespoke plans</li> <li>□ How to obtain agreement with the client to ensure they comply with the terms and conditions of the funeral plan</li> </ul>
		1.4	Describe different payment options available	<ul style="list-style-type: none"> <li>□ Different payment options for funeral plans that are available to the client</li> <li>□ Benefits of each option to the client and to the company</li> <li>□ Issues that may occur with the different payment options</li> </ul>

Learning outcomes		Assessment criteria		Unit amplification
2	Understand the benefits of funeral plans	2.1	Explain the benefits to funeral businesses of providing funeral plans	<ul style="list-style-type: none"> <li>□ Benefits to your company of offering funeral plans: e.g. financial, planning</li> <li>□ Disadvantages to your company if they do not offer funeral plans</li> </ul>
		2.2	Explain the benefits of funeral plans to clients	<ul style="list-style-type: none"> <li>□ Benefits to the client of offering funeral plans: e.g. financial, personal, peace of mind</li> </ul>
3	Understand the funeral planning market	3.1	Describe the types of clients and range of organisations providing funeral plans	<ul style="list-style-type: none"> <li>□ Type of client that is most likely to require a funeral plan</li> <li>□ Other organisations, apart from funeral businesses, that offer funeral plans</li> </ul>
		3.2	Explain the different types of funeral plans available on the market	<ul style="list-style-type: none"> <li>□ Types of funeral plans your company offers and the differences between them</li> <li>□ How your company's funeral plans compare with those that other companies offer</li> <li>□ Options, other than funeral plans, that are available to clients to aid covering funeral costs e.g. savings accounts, ISAs</li> </ul>



Learning outcomes		Assessment criteria		Unit amplification
4	Know processes for providing funeral plans	4.1	Describe the different ways in which initial contact with a client can be obtained	<ul style="list-style-type: none"> <li>□ Your company's policies and procedures in relation to contacting prospective clients</li> <li>□ How to introduce and present yourself to clients</li> <li>□ Code of Practice in relation to "selling products" to bereaved clients</li> </ul>
		4.2	Describe the stages of how to conduct a funeral plan arrangement with a client in order to complete a funeral planning form	<ul style="list-style-type: none"> <li>□ Stages: arrange an introductory meeting, plan a mutually acceptable venue</li> <li>□ Information you need to collect from clients in relation to the funeral plan: e.g. burial and cremation options, transport arrangements, interment options, coffin and casket options, floral tributes, masonry options, payment options</li> <li>□ Information you need to provide to the client</li> </ul>
		4.3	Describe processes for making changes to funeral plans	<ul style="list-style-type: none"> <li>□ How to ensure that clients are aware of the "cooling off" period</li> <li>□ How to ensure that clients are informed if they want to make amendments to their funeral plans</li> <li>□ Person and/or people clients should speak to if they wish to make changes to their funeral plans</li> <li>□ How to ensure you inform clients of any changes that your company may need to make</li> </ul>
		4.4	Describe processes for cancelling funeral plans	<ul style="list-style-type: none"> <li>□ The "cooling off period" when arranging funeral plans</li> <li>□ Whether clients can cancel funeral plans with your company</li> <li>□ Cost to clients if they cancel a funeral plan</li> <li>□ Person and/or people clients need to speak to if they wish to cancel a funeral plan</li> </ul>

Learning outcomes		Assessment criteria		Unit amplification
5	Know how funeral plans are stored and redeemed	5.1	Describe how clients' funeral plans are stored	<ul style="list-style-type: none"> <li>□ Person and/or people that are responsible for the safe storage of funeral plans within your company</li> <li>□ Where the funeral plans are stored</li> <li>□ How they are stored to ensure their safety and that they comply with data protection</li> </ul>
		5.2	Describe the process for redeeming funeral plans	<ul style="list-style-type: none"> <li>□ Person and/or people who are responsible for locating the relevant funeral plan when needed</li> <li>□ How the process is carried out</li> <li>□ Person and/or people that are responsible for paying any external agencies involved</li> </ul>

## Information for tutors

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### Delivery

This unit should be delivered and assessed in the workplace. This unit can be delivered to individuals but it might be better if delivered in groups where learners can share experiences which will help their understanding.

It would be ideal if the learning outcomes were dealt with in order for this unit.

Learners should be encouraged to use their company's policies and procedures and they need to show a clear understanding of these and the importance of adhering to them in their workplace.

Learners should be encouraged to take their organisation's documentation on what is available in relation to funeral plans. This should be discussed openly so that learners can benefit from what is available across funeral care services. By discussing this, learners will be able to answer the criteria for learning outcomes 1, 2 and 3.

For learning outcome 4, learners should be encouraged to reflect on their own organisation's procedures and how these ensure that the Code of Practice for Funeral Directors is adhered to. A range of forms for compiling funeral plans should be used so that learners get a broad understanding of what information should be collected and also the importance of checking that the information is accurate so that they can maximise clients' wishes and expectations. Tutors could look at the role that learners play in marketing their organisation in relation to funeral plans and ensuring that these are kept up to date with clients' wishes. Learners also need to look at the legal requirements and constraints in relation to funeral plans and how the law protects clients.

For learning outcome 5, learners need to look at appropriate storage of information which complies with legal requirements and data protection.

### Assessment

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

The centre will devise and mark the assessment for this unit.

Learners must meet all the assessment criteria to pass the unit.

Workbooks and assignments can be used for learners to record evidence which can be assessed to the criteria and professional discussions should be used to ensure that the evidence collected is valid, authentic, etc.

Because this is a knowledge-based unit, professional discussion can be an excellent stand-alone method of collecting evidence, especially when this has been planned for by the assessor and the candidate is well prepared.

## Suggested resources

### Websites

[www.ageuk.org.uk/](http://www.ageuk.org.uk/) – This website looks at the different options available within funeral planning, funeral costs and the benefits of arranging a funeral plan

[www.funeralplanningauthority.com](http://www.funeralplanningauthority.com) – This website provides information on the FPA which exists to help protect clients' interests across the Funeral Planning sector within the UK

[www.legislation.gov.uk](http://www.legislation.gov.uk) – Government site where you can find the Data Protection Act (1998)

[www.legislation.gov.uk](http://www.legislation.gov.uk) – Details of the regulations of funeral planning are contained in Articles 59 and 60 of the Financial Services and Markets Act (2000) (Regulated Activities) Order (2001)

[www.mylastsong.com/advice](http://www.mylastsong.com/advice) – "Benefits of prepaid funeral plans". This is a website which looks at the benefits of prepaid funeral plans and provides a range of options

[www.nafd.org.uk](http://www.nafd.org.uk) – This website allows you to access the National Association of Funeral Directors' Code of Practice

# **Unit 5: Understanding how to Sell and Arrange Memorial Products for Clients of a Funeral Business**

**Unit reference number:** H/503/9795

**Level:** 2

**Credit value:** 3

**Guided learning hours:** 27

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## **Unit aim**

The purpose of this unit is to assess the learner's knowledge and understanding of the specific product knowledge required for selling and arranging memorial products. It also covers the process of arranging a memorial for a client.

## **Essential resources**

There are no special resources needed for this unit.

## Learning outcomes, assessment criteria and unit amplification

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.

Learning outcomes		Assessment criteria		Unit amplification
1	Understand the importance of memorials to clients	1.1	Explain why memorials are important to clients	<ul style="list-style-type: none"><li>□ Memorials: e.g. headstones, plaques, urns</li><li>□ Purpose of memorials: e.g. to remember loved ones, as a place to visit</li><li>□ Importance of helping clients choose the most appropriate memorial for them</li></ul>

Learning outcomes		Assessment criteria		Unit amplification
2	Know the rules and regulations relating to memorials	2.1	Explain how regulations may affect the advice offered to clients, taking into account: <ul style="list-style-type: none"> <li>• purchasing memorial products</li> <li>• erecting memorial products</li> <li>• timescales</li> </ul>	<ul style="list-style-type: none"> <li>□ Regulations that could apply: e.g. registered with British Register of Accredited Memorial Masons (BRAMM), permit, inspection of work, insurance, health and safety</li> <li>□ Person to contact before erecting a memorial</li> <li>□ Reasons regulations must be followed</li> <li>□ Reasons clients must be informed of the specific regulations which have an impact on them</li> <li>□ Recommended timescales for erecting different types of memorials</li> </ul>
		2.2	Explain the term "exclusive right of burial"	<ul style="list-style-type: none"> <li>□ Exclusive right of burial: owner has the right to say who can be buried, or have ashes buried or scattered, in the grave</li> <li>□ People who can have exclusive right of burial</li> <li>□ People who can use exclusive right of burial</li> </ul>
		2.3	Describe how to obtain permission to erect a memorial	<ul style="list-style-type: none"> <li>□ Person, people, agency and/or organisation who's permission has to be given to erect a memorial</li> <li>□ Documentation that is needed</li> </ul>
		2.4	State the purpose of title deeds	<ul style="list-style-type: none"> <li>□ Meaning of the term title deeds: legal documents that show who officially owns and holds the title to the land</li> <li>□ Where to get title deeds from</li> </ul>

Learning outcomes		Assessment criteria		Unit amplification
3	Know the product knowledge relating to the different memorial options available to clients	3.1	Describe the different features of memorial products, taking into account: <ul style="list-style-type: none"> <li>• materials</li> <li>• finishes</li> <li>• shapes</li> <li>• sizes</li> <li>• design options</li> <li>• lettering styles</li> <li>• lettering type</li> </ul>	<ul style="list-style-type: none"> <li>□ Common materials that are used</li> <li>□ Common finishes that are used</li> <li>□ Benefits of different materials and finishes on offer: e.g. low maintenance, cost, longevity, bespoke</li> <li>□ Lettering: e.g. style, type, colour, material</li> </ul>
		3.2	Describe the care and maintenance instructions required by different memorial products	<ul style="list-style-type: none"> <li>□ Memorial products that can be recommended as low-maintenance</li> <li>□ Person responsible for the care and maintenance of memorial products</li> </ul>
		3.3	Describe the different processes and options that are available for renovating existing memorials	<ul style="list-style-type: none"> <li>□ Person responsible for renovating existing memorials</li> <li>□ Procedure for renovating existing memorials</li> </ul>
		3.4	Describe the common layout for memorials	<ul style="list-style-type: none"> <li>□ Main information: name, date of birth, date of death</li> </ul>
		3.5	Identify examples of popular inscriptions for memorials	<ul style="list-style-type: none"> <li>□ Company inscription help-sheet</li> <li>□ Common inscriptions: e.g. precious memories of, in loving memory of</li> <li>□ Epitaphs that could be offered</li> </ul>



Learning outcomes		Assessment criteria		Unit amplification
		3.6	Describe the process for arranging renovations of existing memorials	<ul style="list-style-type: none"> <li>□ Person, people and/or organisation to contact if you were asked for advice on renovating an existing memorial</li> <li>□ Information that would need to be collected</li> <li>□ How this information is documented to ensure accuracy</li> </ul>
4	Know how to arrange memorials	4.1	List, in order of priority, the different considerations to discuss with clients when arranging memorials	<ul style="list-style-type: none"> <li>□ Different considerations that need to be taken into account when arranging memorials</li> <li>□ Person who has to be consulted and considered when arranging memorials</li> <li>□ Person who can advise and support clients when making choices in relation to memorials</li> <li>□ How to ensure that clients' wishes, choices and needs are met and are appropriate</li> </ul>
5	Know the processes for completing memorial arrangements	5.1	Describe how to process memorial arrangements	<ul style="list-style-type: none"> <li>□ Company's policies and procedures in relation to documenting clients' wishes when arranging memorials</li> <li>□ Person that completes the documentation</li> </ul>
		5.2	Describe the organisational processes for informing clients of completion	<ul style="list-style-type: none"> <li>□ Company's policies and procedures for informing clients that their memorial is complete</li> <li>□ Person responsible for informing the client</li> </ul>
		5.3	Describe organisational procedures for cancelling orders	<ul style="list-style-type: none"> <li>□ Cooling off period</li> <li>□ Procedure for how clients are informed of when they can cancel orders</li> <li>□ Financial costs involved when cancelling orders and who is liable for the financial cost</li> </ul>

## Information for tutors

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### Delivery

This unit should be delivered and assessed in the workplace. This unit can be delivered individually or in groups. The learning outcomes can be covered individually but, ideally, learning outcomes 1, 2, 4 and 5 should be delivered in order and learning outcome 3 can be a stand-alone outcome.

Learners should be encouraged to use their company policies and procedures and they need to be able to show a clear understanding of these and the importance of adhering to them in their workplace. Learners should also be encouraged to bring copies of the relevant documentation in relation to memorials. It would be good for learners to share experiences when looking at this.

To assist with learning outcome 3, the suggested resources such as the Norfolk Stonemasons site, have good examples of different materials that can be used and also has examples of different styles of lettering. Learners could be encouraged to devise different layouts for memorials and could suggest appropriate inscriptions that they could share to increase the range that they can offer their clients when they return to their workplace.

For learning outcomes 1, 2, 4 and 5, learners should look at the Parliament Briefing paper suggested below and they should be encouraged to look up the regulations of the Local Authority where they are based. The tutor should encourage them to make comparisons to see how the Local Authority's policies and procedure comply with the Government guidelines. It would be important here to compare different Local Authorities so that learners can gain a range of knowledge of the differences so that they can understand the importance of complying with these.

### Assessment

LO2 – AC2.1 "**regulations**" refers to the regulations of church yards and cemeteries.

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

The centre will devise and mark the assessment for this unit.

Learners must meet all assessment criteria to pass the unit.

Workbooks and assignments can be used for learners to record evidence which can be assessed to the criteria and professional discussion should be used to ensure that the evidence collected is valid, authentic, etc.

Because this is a knowledge-based unit, professional discussion can be an excellent stand-alone method of collecting evidence, especially when this has been planned for by the assessor and the candidate is well prepared.

## Suggested resources

### Websites

[www.namm.org.uk](http://www.namm.org.uk) – This website is the National Association of Memorial Masons. It has their code of working practice and code of business practice which are good examples

[www.norfolkstonemasons.co.uk](http://www.norfolkstonemasons.co.uk) – This website has information on the requirements relating to memorials and also covers the renovation. It provides good examples of materials, wording, finishes, sizes, lettering

[www.parliament.uk](http://www.parliament.uk) – This website has a pdf document which gives the government's stance on Exclusive Rights of Burial. This is useful because it gives the general guidance to all Local Authorities who can then make minor amendments to suit their own areas

# **Unit 6: Understanding how to Maintain Sensitive Communication and Client Care within a Funeral Business**

**Unit reference number: K/503/9796**

**Level: 2**

**Credit value: 3**

**Guided learning hours: 17**

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## **Unit aim**

The purpose of this unit is to assess the learner's knowledge and understanding of providing sensitive client care and communication to clients of a funeral business. This takes into account approaches for dealing with clients at the initial point of contact as well as developing and maintaining working relationships with clients. It also focuses on the processes for dealing with client complaints and feedback.

## **Essential resources**

There are no special resources needed for this unit.

## Learning outcomes, assessment criteria and unit amplification

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.

Learning outcomes		Assessment criteria		Unit amplification
1	Understand the importance of providing sensitive client care within a funeral business	1.1	Explain the importance to a funeral business of creating a good impression to the client at the first point of contact	<ul style="list-style-type: none"> <li><input type="checkbox"/> Importance of first impressions</li> <li><input type="checkbox"/> What helps to make a good first impression</li> <li><input type="checkbox"/> How you can prepare so that your first impression counts</li> <li><input type="checkbox"/> How the environment within the funeral business can affect first impressions</li> <li><input type="checkbox"/> How the client's first impression impacts on your company</li> </ul>
		1.2	Explain the importance to the client of making a good impression at the first point of contact	<ul style="list-style-type: none"> <li><input type="checkbox"/> Client's expectation when they initially make contact with your company</li> <li><input type="checkbox"/> How the client feels if they have been provided with a good first impression of your company</li> </ul>
		1.3	Explain the importance of maintaining a rapport with clients throughout their relationship with the funeral business	<ul style="list-style-type: none"> <li><input type="checkbox"/> Why a good professional relationship is important to your clients</li> <li><input type="checkbox"/> How to ensure that you have a good relationship which supports your clients</li> <li><input type="checkbox"/> How to maintain this relationship to ensure you meet the client's needs</li> </ul>

Learning outcomes		Assessment criteria		Unit amplification
		1.4	Explain the importance of modifying tone of voice, language and body language when interacting with clients	<ul style="list-style-type: none"> <li>□ Impact tone of voice has when communicating</li> <li>□ How tone can change to improve the situation</li> <li>□ Impact dialect and jargon can have on effective communication</li> <li>□ How body language and non-verbal communication contribute to effective communication when dealing with bereaved clients</li> <li>□ How to ensure that you use appropriate tone of voice, language and body language when dealing with clients</li> </ul>
2	Know how to deal with the effects of bereavement on clients	2.1	Identify the different emotions that can be displayed by bereaved clients	<ul style="list-style-type: none"> <li>□ 5 stages of grief: denial, anger, bargaining, depression, acceptance</li> <li>□ Role that you can play in these different stages</li> </ul>
		2.2	Identify techniques for responding to some of the emotions displayed by bereaved clients, taking into account: <ul style="list-style-type: none"> <li>• tone of voice</li> <li>• use of language</li> <li>• use of body language</li> </ul>	<ul style="list-style-type: none"> <li>□ How you would change or modify your tone of voice when dealing with a bereaved client</li> <li>□ Type of language you would use when dealing with a bereaved client</li> <li>□ Type of body language you would display when dealing with a bereaved client</li> <li>□ Person, people, agencies and/or organisation that can provide support and advice on these techniques</li> </ul>

Learning outcomes		Assessment criteria		Unit amplification
3	Know how to communicate sensitively when interacting with clients of a funeral business	3.1	Describe how to greet and interact sensitively with clients, including face-to-face interactions and telephone calls	<ul style="list-style-type: none"> <li>□ Company's procedure for meeting clients face to face for the first time</li> <li>□ Company's procedure for speaking to bereaved clients on the telephone</li> <li>□ How to greet or interact with a client who came for an appointment with your manager or funeral director</li> </ul>
		3.2	Identify approaches to interactions with clients which could be considered insensitive	<ul style="list-style-type: none"> <li>□ Why the correct use of terminology is important when communicating with bereaved clients</li> <li>□ Terminology which could be seen as inappropriate and provide appropriate words which could be used instead</li> <li>□ How your body language can be interpreted as being insensitive when dealing with bereaved clients</li> <li>□ How your actions can be interpreted as being insensitive when dealing with bereaved clients</li> </ul>
		3.3	Identify the different types of questioning techniques used to identify the needs of clients	<ul style="list-style-type: none"> <li>□ Difference between "open" and "closed" questioning</li> <li>□ Why open questions should be used</li> <li>□ How questions can be worded to ensure that your clients are providing enough detail to enable you to provide the best service for them</li> </ul>
		3.4	State how listening skills, use of body language and facial expressions can be used to respond sensitively to the needs of clients	<ul style="list-style-type: none"> <li>□ What makes a good listener</li> <li>□ Importance of being a good listener</li> <li>□ How to improve your listening skills</li> <li>□ Importance of accepting and allowing pauses in conversation when dealing with bereaved clients</li> <li>□ The part body language and facial expressions play when promoting good listening skills when dealing with bereaved clients</li> <li>□ How to ensure that you control your body language and facial expressions to meet the needs of the situation</li> </ul>

Learning outcomes		Assessment criteria		Unit amplification
4	Know how to deal with clients at first contact	4.1	Identify the different reactions of clients at first contact, including face-to-face meetings and telephone calls	<ul style="list-style-type: none"> <li><input type="checkbox"/> How a client might react when you first meet them</li> <li><input type="checkbox"/> How a client might sound when they telephone your company to request your services</li> </ul>
		4.2	Identify the information that must be obtained from the client at the first contact	<ul style="list-style-type: none"> <li><input type="checkbox"/> Information you need to have from the client at the first point of contact</li> <li><input type="checkbox"/> Pro forma/checklist your company has for recording this information</li> </ul>
		4.3	Identify techniques for conducting first contact with clients, including face-to-face meetings and telephone calls	<ul style="list-style-type: none"> <li><input type="checkbox"/> How to conduct yourself when you first meet clients</li> <li><input type="checkbox"/> How you should communicate when speaking to clients for the first time on the telephone</li> <li><input type="checkbox"/> How your tone of voice impacts on these interactions</li> <li><input type="checkbox"/> How to explain to clients that there is certain information that you need to collect</li> </ul>
5	Know how to deal with client complaints within a funeral business	5.1	Identify the different types of complaints made by clients that can arise within a funeral business	<ul style="list-style-type: none"> <li><input type="checkbox"/> Types of complaints that have been made by clients, in the past six months, within your company</li> <li><input type="checkbox"/> What makes the clients complain</li> <li><input type="checkbox"/> Similarities in the types of complaints that have been made</li> </ul>
		5.2	Outline organisational procedures for recording and reporting complaints	<ul style="list-style-type: none"> <li><input type="checkbox"/> How complaints are made within your company</li> <li><input type="checkbox"/> Who complaints are reported to and how they are recorded</li> <li><input type="checkbox"/> Your organisation's policy in relation to complaints</li> <li><input type="checkbox"/> Your role when you are the first point of contact when a client is making a complaint</li> <li><input type="checkbox"/> Who deals with complaints within your company</li> </ul>



Learning outcomes		Assessment criteria		Unit amplification
6	Know how client feedback on the provision of services within a funeral business is captured and recorded	6.1	Identify the ways in which a funeral business can capture feedback on their services	<input type="checkbox"/> Importance feedback plays in the funeral business <input type="checkbox"/> How your company collects feedback from your clients <input type="checkbox"/> How your company collects feedback from other agencies and organisations that have input into the funeral business
		6.2	Identify organisational procedures for reporting and recording client feedback	<input type="checkbox"/> Different ways that clients may provide feedback <input type="checkbox"/> How feedback is recorded by your company <input type="checkbox"/> How feedback is used to review the service given

## Information for tutors

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### Delivery

This unit should be delivered and assessed in the workplace. This unit can be delivered individually or in groups. The learning outcomes can be covered in different sections and do not have to be in set order as certain learning outcomes can be delivered as stand-alone outcomes.

Learners should be encouraged to use their company's policies and procedures as they need to be able to show clear understanding of these and the importance of adhering to them in the workplace.

In learning outcome 1, learners should be encouraged to look at what makes a professional relationship and how the learners need to provide a good first impression to their clients. It is important to look at what a first impression consists of and the impact this has on the client, the learner and the funeral business in general. The suggested resource materials would be good for this and perhaps learners could take part in role play activities where they can gain experience of using different tones of voice and the impact this has on communicating effectively.

For learning outcome 2, tutors should use the "Grief Cycle" to look at the different stages of grief and discuss how learners can play a part in this. It would be beneficial for learners to look at the difference between sympathy and empathy as this may also relate to other units.

In learning outcome 3, learners should use their own policies and procedures to discuss how they interact with clients either by face-to-face contact or by telephone. Tutors should encourage learners to look at the terminology used so that learners understand the impact that inappropriate terminology can have on clients. Examples of this could be "body", "van", "box" and "limo". Tutors need to suggest and agree appropriate alternatives. Again, role-play could be used in relation to using "open" and "closed" questions so that learners understand and have first-hand experience of using both types.

Role-play could play a big part in learning outcome 4 as this would help learners identify with some of their clients' feelings and how they should respond in a given situation.

Learning outcomes 5 and 6 relate to feedback and complaints and, again, learners should be encouraged to use their organisation's policies and procedures to discuss these and, where possible, without breaching confidentiality, discuss real life examples.

## Assessment

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

The centre will devise and mark the assessment for this unit.

Learners must meet all assessment criteria to pass the unit.

Workbooks and assignments can be used for learners to record evidence which can be assessed to the criteria and professional discussions should be used to ensure that the evidence collected is valid, authentic, etc.

Because this is a knowledge-based unit, professional discussion can be an excellent stand-alone method of collecting evidence, especially when this has been planned for by the assessor and the candidate is well prepared.

## Suggested resources

### Websites

[www.businessballs.com/Elizabeth\\_kubler\\_ross](http://www.businessballs.com/Elizabeth_kubler_ross) – Search Elizabeth Kubler Ross. This website "Five Stages of Grief" discusses the Grief Cycle and describes individual stages

[www.changingminds.org/techniques/questioning/open\\_closedquestions.htm](http://www.changingminds.org/techniques/questioning/open_closedquestions.htm) – This website provides definitions of "closed" and "open" questions and describes how to use them effectively

[www.helpguide.org/mental/eq6\\_nonverbal\\_communication.htm](http://www.helpguide.org/mental/eq6_nonverbal_communication.htm) – This website provides definitions of non-verbal communication and body language and describes how to use them effectively

[www.mindtools.com](http://www.mindtools.com) – This website looks at the importance of first impressions and gives support and advice on how to ensure that the first impression you give is a good one

# **Unit 7: Understanding how Religious and Cultural Customs can Affect Funeral Services**

**Unit reference number:** M/503/9797

**Level:** 2

**Credit value:** 2

**Guided learning hours:** 6

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## **Unit aim**

The purpose of this unit is to assess the learner's knowledge and understanding of the different types of funerals that are common to a local area and/or community within the UK. It focuses on how cultural and religious customs can impact upon funerals.

## **Essential resources**

There are no special resources needed for this unit.

## Learning outcomes, assessment criteria and unit amplification

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.

Learning outcomes		Assessment criteria		Unit amplification
1	Understand different <b>types</b> of funeral ceremonies	1.1	<p>Explain a range of different <b>types</b> of funeral ceremonies and services that are common to the funeral business, taking into account:</p> <ul style="list-style-type: none"> <li>• the role of the officiants</li> <li>• customers and practice</li> </ul>	<ul style="list-style-type: none"> <li>□ Types of funeral services your company can provide</li> <li>□ How different faiths and religious beliefs impact on the services provided: e.g. officiant needed, different ways to care for the deceased</li> <li>□ Role you would play in each of the different types of services</li> <li>□ Person, people, agencies and/or organisation that can provide advice to the funeral business in meeting the needs of the clients</li> </ul>
2	Know how different customs and beliefs have a bearing on how the deceased is cared for prior to the funeral	2.1	Describe how different customers and beliefs can have a bearing on how the deceased is cared for prior to the funeral	<ul style="list-style-type: none"> <li>□ Common customs to the area</li> <li>□ Common beliefs to the area</li> <li>□ Differences in customs and/or beliefs: e.g. washing, dressing, person who can care for the deceased</li> </ul>
3	Understand etiquette of funerals	3.1	Explain how the etiquette of mourners can be influenced by different types of funeral services	<ul style="list-style-type: none"> <li>□ Meaning of etiquette</li> <li>□ Role etiquette plays when arranging a funeral service</li> <li>□ Why it is important for you to understand the etiquette of mourners</li> <li>□ Person, people, agencies and/or organisation that can help understand the correct etiquette for each individual funeral service</li> </ul>

Learning outcomes		Assessment criteria		Unit amplification
4	Understand the roles and responsibilities of the funeral director in relation to maintaining different religious and cultural customs at funerals	4.1	Explain how religious and cultural customs can impact upon the role and responsibilities of funeral directors during funerals at: <ul style="list-style-type: none"> <li>• crematoria</li> <li>• burials</li> </ul>	<ul style="list-style-type: none"> <li>□ Common religious and cultural customers that your company deals with</li> <li>□ Other common religious and cultural customers that you may encounter</li> <li>□ Role the Funeral Director plays in each of the different types of funeral</li> <li>□ Responsibility of the Funeral Director during a funeral service at a crematorium</li> <li>□ Responsibility of the Funeral Director during a funeral service at a burial</li> </ul>

## Information for tutors

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### Delivery

This unit should be delivered and assessed in the workplace. This unit can be delivered individually or in groups. The learning outcomes should be delivered as a full unit as they naturally flow.

Learners should be encouraged to use their company policies and procedures and they need to be able to show a clear understanding of these and the importance of adhering to them in their workplace. Tutors should be aware that not all learners will have experiences of providing services for the deceased in relation to different religions and cultures.

The suggested resources should be used to encourage understanding of some of the learning outcomes and this will help to stimulate discussion with the learners. Learners should be encouraged to use their own experiences but also to consider how they would deal with other religions and cultures. If this unit is discussed in a group situation, tutors and other learners need to remember to respect the differing views of the others.

### Assessment

LO1 – AC1.1 and AC3.1 "**types**" can refer to different types of ceremonies that may be common to a geographical area and reflect the demographic of the funeral business

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

The centre will devise and mark the assessment for this unit.

Learners must meet all assessment criteria to pass the unit.

Workbooks and assignments can be used for learners to record evidence which can be assessed to the criteria and professional discussion should be used to ensure that the evidence collected is valid, authentic, etc.

Because this is a knowledge-based unit, professional discussion can be an excellent stand-alone method of collecting evidence, especially when this has been planned for by the assessor and the candidate is well prepared.

### Suggested resources

#### Websites

[www.amemorytree.co.nz/customs](http://www.amemorytree.co.nz/customs) – This website looks at different religions and customs. It covers the beliefs and how funerals should be conducted to ensure that the beliefs are fully considered. It covers all main religions

[www.funeralwise.com](http://www.funeralwise.com) – This website covers different customs and practices, religions and cultures relating to funerals

[www.thefuneralsource.org](http://www.thefuneralsource.org) – This is a useful website that looks at funeral traditions and funeral etiquette which would be very helpful for learners

# **Unit 8: Understand Funeral Law and its Importance to the Arrangements of Funerals**

**Unit reference number:** T/503/9798

**Level:** 2

**Credit value:** 2

**Guided learning hours:** 18

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## **Unit aim**

The purpose of this unit is to assess learners' knowledge and understanding of the legal requirements for arranging funerals. It covers documentation for the authorisation of funerals as well as looking at the roles of different authorities involved in the arranging of funerals.

## **Essential resources**

There are no special resources needed for this unit.



## Learning outcomes, assessment criteria and unit amplification

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.

Learning outcomes		Assessment criteria		Unit amplification
1	Know the legal requirements for issuing a medical certificate for cause of death	1.1	Identify who can legally issue a certificate for cause of death	<ul style="list-style-type: none"> <li>□ Person that would normally issue a certificate for cause of death</li> <li>□ Other people that can also issue the certificate</li> <li>□ Under what circumstances might these people issue the certificate: e.g. unnatural death, cause of death unknown</li> </ul>
		1.2	Describe under what circumstances a certificate for cause of death can be legally issued	<ul style="list-style-type: none"> <li>□ Normal/legal circumstances when a certificate can be issued</li> <li>□ Other circumstances when a certificate can be issued</li> </ul>
		1.3	Explain what the certificate of cause of death is used for	<ul style="list-style-type: none"> <li>□ Reason certificates of cause of death are issued</li> <li>□ Person and/or people certificates of cause of death are provided for and what they use them for</li> </ul>
2	Know the legal responsibilities of the Coroner or Procurator Fiscal	2.1	Identify circumstances where a death must be referred to the Coroner or Procurator Fiscal	<ul style="list-style-type: none"> <li>□ Person and/or people who refer a death to the Coroner or Procurator Fiscal</li> <li>□ Circumstances that determines whether a death is referred to the Coroner or Procurator Fiscal</li> </ul>
		2.2	Outline the legal responsibilities of the Coroner or Procurator Fiscal within a funeral service context	<ul style="list-style-type: none"> <li>□ Role of the Coroner or Procurator Fiscal and what they do once a death is reported to them</li> </ul>

Learning outcomes		Assessment criteria		Unit amplification
3	Know the legal requirements for registering adult deaths	3.1	Identify the documentation required by the registrar to register a death in: <ul style="list-style-type: none"> <li>• a case referred to the Coroner or Procurator Fiscal</li> <li>• a case not referred to the Coroner or Procurator Fiscal</li> </ul>	<ul style="list-style-type: none"> <li>□ Documentation a Registrar needs to see before they can register a death</li> <li>□ Information they will ask for when they are registering a normal death: e.g. medical certificate, date and place of death, full name, date and place of birth</li> <li>□ Information they will ask for when they are registering a case which has been referred to the Coroner or Procurator Fiscal: e.g. medical certificate, date and place of death, full name, date and place of birth</li> <li>□ Person and/or people that will provide this information</li> </ul>
		3.2	Describe the registrar's guidelines for who can register a death	<ul style="list-style-type: none"> <li>□ Person and/or people who would normally register a death: e.g. relative, person present at the death</li> <li>□ Other people who can do this: e.g. occupier of the house or hospital, another person living in the house, person making the funeral arrangements</li> <li>□ Timescales involved for registering a death</li> </ul>
		3.3	Describe the processes for reporting a death which occurred outside of the UK	<ul style="list-style-type: none"> <li>□ Where to report a death which has occurred outside the UK</li> <li>□ Person, people and/or organisation who can provide advice in this situation: e.g. government website, funeral arranger</li> <li>□ Situations when the death does not have to be registered in the UK</li> </ul>
		3.4	State why the person registering the death may need duplicate copies of the certificate of registration of death	<ul style="list-style-type: none"> <li>□ Death certificates: types of death certificate, number of copies needed, reason why more than one copy is needed, organisations that may require a copy of the death certificate</li> </ul>
		3.5	Identify circumstances where attendance at the registrar is not required	<ul style="list-style-type: none"> <li>□ Circumstances when deaths are registered without having to visit the registrar's office</li> </ul>

Learning outcomes		Assessment criteria		Unit amplification
4	Know the ways in which registration of children's deaths may differ from that of adults	4.1	Identify the ways in which registration of children's deaths may differ from that of adults	<ul style="list-style-type: none"> <li>□ Differences when registering a child's death rather than an adult's death</li> <li>□ Timescales in which the death of an adult has to be registered</li> <li>□ Timescales in which the death of a child has to be registered</li> <li>□ Timescales in which a still-birth has to be registered</li> </ul>
5	Know the legal requirements for cremation	5.1	Identify the legal documentation required for a cremation when the death: <ul style="list-style-type: none"> <li>• has been referred to a Coroner or Procurator Fiscal</li> <li>• has not been referred to a Coroner or Procurator Fiscal</li> </ul>	<ul style="list-style-type: none"> <li>□ Documents that are required before a deceased can be cremated if the case has been referred to a Coroner or Procurator Fiscal</li> <li>□ Documents that are required before a deceased can be cremated if the case has not been referred to a Coroner or Procurator Fiscal</li> <li>□ Person and/or people who issue these documents</li> <li>□ Place documents are collected from</li> </ul>
		5.2	Identify what considerations must be taken into account when disposing of cremated remains	<ul style="list-style-type: none"> <li>□ Importance of knowing the deceased wishes</li> <li>□ Person and/or people to discuss these wishes with</li> <li>□ Circumstances that might cause a problem in relation to the disposal of cremated remains</li> <li>□ Person, people and/or organisation you can go to for help with this</li> </ul>

Learning outcomes		Assessment criteria		Unit amplification
6	Know the legal requirements for burial	6.1	Identify the legal documentation required for a burial in: <ul style="list-style-type: none"> <li>• a case reported to the Coroner or Procurator Fiscal</li> <li>• a case not reported to the Coroner or Procurator Fiscal</li> </ul>	<ul style="list-style-type: none"> <li>□ Documents that are required before a deceased can be buried if the case has been referred to a Coroner or Procurator Fiscal</li> <li>□ Documents that are required before a deceased can be buried if the case has not been referred to a Coroner or Procurator Fiscal</li> <li>□ Person and/or people who issue these documents</li> <li>□ Place documents are collected from</li> </ul>
		6.2	Identify the authorities that need to be informed about arrangements for burials	<ul style="list-style-type: none"> <li>□ Person, people, organisation and/or authority you would notify of a planned interment if it was within your Local Authority area</li> <li>□ Person, people, organisation and/or authority you would notify of a planned interment if it was outside your Local Authority area</li> </ul>

## Information for tutors

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### Delivery

This unit should be delivered and assessed in the workplace. It can be delivered individually or in groups. The learning outcomes can be covered in different sections and do not have to be in set order as certain learning outcomes can be delivered as stand-alone.

Learners should be encouraged to use their company policies and procedures and they need to be able to show a clear understanding of these and the importance of adhering to them in their workplace.

It would be good practice for learners to have open discussions in relation to these learning outcomes as certain learners may have worked in different sized funeral businesses or different Local Authorities.

The suggested resources should be used to check the learner's understanding of the legal requirements and the roles of the different agencies.

In learning outcome 1, learners will have to research who else, apart from GPs and medical professionals, can issue a certificate of cause of death and, by researching this, they will be able to address the criteria fully. The tutor will need to be aware, for learning outcomes 2 and 3, that there are slight differences between England, Scotland, Wales and Northern Ireland and these differences should be discussed openly so that there is a clear understanding.

Product evidence such as copies of the register of deaths, as well as learners' company documentation, could be used and shared so that learners can see, at first hand, what is required for learning outcomes 3, 5 and 6. The suggested resource materials will also help to cover these outcomes.

Copies of the recognised legal forms for cremation and burial should be downloaded and provided to the learners so that they can actually see what information is required and by whom.

Role-play could be used in that they should have to provide and complete the individual documentation as if they were a Funeral Director, a relative or a Local Authority employee. Tutors need to be mindful that doing this may be problematic and cause distress to learners, based on their previous personal experiences.

### Assessment

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

The centre will devise and mark the assessment for this unit.

Learners must meet all assessment criteria to pass the unit.

Workbooks and assignments can be used for learners to record evidence which can be assessed to the criteria and professional discussion should be used to ensure that the evidence collected is valid, authentic, etc.

Because this is a knowledge-based unit, professional discussion can be an excellent stand-alone method of collecting evidence, especially when this has been planned for by the assessor and the candidate is well prepared.

## Suggested resources

### Websites

[www.bereavementadvice.org](http://www.bereavementadvice.org) – This website gives valuable information on the role of the Coroner/Procurator Fiscal as well as the documentation they provide and the action they take

[www.gov.uk/after-a-death](http://www.gov.uk/after-a-death) – This is a government website which gives information on the documentation required to register a death and the differences between the four countries within the UK

[www.justice.gov.uk/coroners-burial-cremation](http://www.justice.gov.uk/coroners-burial-cremation) – This is a government website which provides sample forms relating to what is required for cremation and burial. These can be used, as suggested in the delivery paragraphs above

[www.nafd.org.uk](http://www.nafd.org.uk) – This website gives frequently asked questions about what is required when someone dies; who issues the death certificates and what information is required for registering a death

## 13 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](http://qualifications.pearson.com/en/support/contact-us.html)
- books, software and online resources for UK schools and colleges: [www.pearsonschoolsandfecolleges.co.uk](http://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)
- *BTEC UK Quality Assurance Centre Handbook*

All of these publications are available on our website.

Publications on the quality assurance of BTEC qualifications are also available on our website.

Our publications catalogue lists all the material available to support our qualifications. To access the catalogue and order publications, please visit our website.

### Additional resources

If you need further learning and teaching materials to support planning and delivery for your learners, there is a wide range of BTEC resources available.

Any publisher can seek endorsement for their resources and, if they are successful, we will list their BTEC resources on our website.

## 14 Professional development and training

Pearson supports UK and international customers with training related to BTEC qualifications. This support is available through a choice of training options offered on our website.

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

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

The national programme of training we offer is on our website. You can request centre-based training through the website or you can contact one of our advisers in the Training from Pearson UK team via Customer Services to discuss your training needs.

### BTEC training and support for the lifetime of the qualifications

**Training and networks:** our training programme ranges from free introductory events through sector-specific opportunities to detailed training on all aspects of delivery, assignments and assessment. We also host some regional network events to allow you to share your experiences, ideas and best practice with other BTEC colleagues in your region.

**Regional support:** our team of Curriculum Development Managers and Curriculum Support Consultants, based around the country, are responsible for providing advice and support in centres. They can help you with planning and curriculum developments.

To get in touch with our dedicated support teams please visit our website.

### Your Pearson support team

Whether you want to talk to a sector specialist, browse online or submit your query for an individual response, there's someone in our Pearson support team to help you whenever – and however – you need:

- **Subject Advisors:** find out more about our subject advisor team – immediate, reliable support from a fellow subject expert
- **Ask the Expert:** submit your question online to our Ask the Expert online service and we will make sure your query is handled by a subject specialist.

Please visit our website at [qualifications.pearson.com/en/support/contact-us.html](http://qualifications.pearson.com/en/support/contact-us.html)



## Assessment requirements/strategy

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### 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.

**December 2017**

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