Apprenticeship End-Point Assessment Plan

Funeral Team Member Level 2

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Introduction

This document sets out the requirements and process for independent end-point assessment of the funeral team member apprenticeship standard. All apprenticeship standards must include independent end-point assessment to check the apprentice's overall performance against the standard. It is designed for employers, apprentices, education and training providers and assessment organisations.

Independent end-point assessment occurs when the employer is satisfied that the apprentice is working consistently at or above the level set out in the funeral team member apprenticeship standard. The end-point assessment period for the funeral team member apprenticeship standard can commence at any point once the apprentice is competent after the twelve-month minimum period of learning and development.

Gateway

The independent end-point assessment is synoptic, and should only commence once the employer is confident that the apprentice has developed all the knowledge, skills and behaviours defined in the apprenticeship standard. The independent end-point assessment ensures that all apprentices consistently achieve the industry set professional standard for a funeral team member. Apprentices without level 1 English and maths will need to achieve this level and take the test for level 2 English and maths prior to taking the end-point assessment. For those with an education, health and care plan or a legacy statement the apprenticeships English and maths minimum requirement is Entry Level 3 and a British Sign Language qualification is an alternative to English qualifications for whom this is their primary language.

Once the employer is satisfied that the apprentice has achieved full competence, the apprentice moves through the Gateway and enters the end-point assessment period. Once the EPA period is entered, a further planning meeting must take place that includes the apprentice, the employer and an independent end-point assessor appointed by the EPAO. This meeting may be conducted remotely – e.g. a virtual meeting using technology such as Skype, as its aim is to secure the plan for the end-point assessment activities, but does not contribute to any end-point assessment decisions.

The apprentice must supply a copy of the portfolio of evidence to the EPAO and the employer at this time. The portfolio of evidence is utilised by the independent end-point assessor to underpin the professional discussion but it is not assessed. It allows the independent end-point assessor to prepare a minimum of 10 questions to ask the apprentice.

The independent end-point assessor will agree a plan and schedule for each end-point assessment activity with the apprentice and employer to ensure all components can be completed within a three-month end-point assessment window. End-point assessment organisations must inform the EQA of the independent end-point assessments prior to commencement to ensure external quality assurance activity can be planned and implemented. It should be noted that the on-programme assessor is not involved in this planning activity as this forms the next step of the apprenticeship journey, moving from the on-programme phase to the end-point assessment.

Order and timings of the end-point assessment

There are three assessment activities for the funeral team member independent end-point assessment. These assessments may be carried out in any order. All assessment activities must be completed within the three-month assessment window, after the EPA gateway. This end-point assessment window begins on commencement of the first assessment method.

Summary of end-point assessment methods

The apprentice will be assessed to the apprenticeship standard using three complementary assessment methods. The assessment activities are not 'weighted' in percentage terms, as they are all important to demonstrating the apprentice's synoptic performance. The assessment activities will be completed by the independent end-point assessor as follows:

Method 1

On demand test:

- 40-minute (including reading time) on-demand multiple choice test
- Covers the core and relevant specialist function
- Scenario based questions
- Externally set and marked automatically by the assessment organisation
- Undertaken either on the employer's premises or off site

Method 2

Competence scenario

- 75-minute (+/- 10% at the discretion of the assessor) observation
- Covers the core and relevant specialist function
- May be observation of naturally occurring procedure where appropriate or simulation of sensitive process
- Externally observed and marked by the assessment organisation

Method 3

Professional discussion:

- 60-minute (+/- 10% at the discretion of the assessor) structured meeting
- Covers the core and relevant specialist function and portfolio of evidence
- Structured discussion between the apprentice and their independent end-point assessor
- Led by the independent end assessor

Completion:
Independent end-point assessor confirms that each end-point assessment method has been completed

The **achievement** is determined by the independent end-point assessor based on the combination of performance in all end-point assessment activities.

Fail / Pass / Distinction

On demand test specification

The apprentice must carry out a knowledge test during the EPA period

- Apprentices must have a maximum of 40-minutes (including reading time)
- On-demand online multiple-choice test (20 questions, 4 choices per question 1 correct answer = 1 mark, incorrect answers must be assigned 0 marks)
- Scenario based questions, externally set and marked by the end-point assessment organisation on the RoEPAO, undertaken either on the employer's premises or off site

The assessment will be an objective on-demand, online test and will be in a multiple-choice format ensuring validity and reliability and which allows for consistent, efficient and timely allocation of marks. It is expected that the on-demand tests will be on-screen and computer marked, with validated results notified to the independent end-point assessor. Questions will cover the knowledge and skills identified on the standard (Annex A) and will be written using the language, tone and style expected for the level of standard. Apprentices taking the tests will be given a proportional sample of these questions which reflect general coverage of the standards to demonstrate competence within the given time constraints.

The 40-minute test will include two parts, part A (12 questions) on the core and part B (8 questions) on the relevant specialist function. The apprentice must pass both sections to pass overall.

EPAOs must develop ‘question banks’ of sufficient size to prevent predictability and review them regularly (and at least once a year) to ensure they, and the specifications they contain, are fit for purpose.

The questions will be scenario based requiring the apprentice to demonstrate reasoning and joined up thinking, demonstrating synoptic performance against the key elements of the standard. Apprentices will complete their tests on-screen, unless individual assessment needs dictate a suitable alternative method, and in a 'controlled' environment, which may be on or off the employers’ premises.

The EPAO will identify a suitable person to invigilate the on-demand test. It may, but does not have to be, the assessor marking the competence scenario and conducting the professional discussion. Tests will be invigilated in line with the requirements set out by the assessment organisation.

Competence Scenario Specification

As a key element of the standard, apprentices are required to demonstrate their skills, competence and behaviour in their specialist job role. Due to the highly sensitive nature of these roles and the need for client confidentiality, the assessment method for these criteria will be via a competence scenario. This will be a practical observation of an activity where suitable or via a simulated scenario where not.

- 75-minute (+/- 10% at the discretion of the assessor) observation / simulation observed by the independent end-point assessor
- Will include areas of the standard identified in Annex A
- The independent end-point assessor will select the scenario from a bank of scenarios generated by the EPAO.

Where naturally occurring (and if appropriate), activities will be observed rather than simulated. The observation / simulation will focus on a particular activity and will test behavioural, analytical and decision-making skills in a realistic setting.

Simulations must succeed in recreating the atmosphere, conditions and pressures of the real situation.

Any resources or equipment that would normally be in the work environment should be available and in working order for the observation/simulation.

Apprentices will complete the required tasks in the timescales normally expected in the workplace, taking account of any legislation and regulations that would apply. Only one apprentice will be observed at any time.

Activities suitable for practical observation are included (but not limited to) the scenarios outlined in Appendix 1.

Professional discussion specification

- 60-minute (+/- 10% at the discretion of the assessor) discussion between the apprentice and the independent end-point assessor
- Will include areas of the standard identified previously and the portfolio of evidence.

The independent end-point assessor conducting and marking the professional discussion would normally be the same person who marked the competence scenario.

The portfolio of evidence is used by the independent end-point assessor to extract the best of the apprentice's energy, enthusiasm, competence and excellence in relation to the specific criteria. The portfolio supports the interview and will not be assessed during the end-point assessment.

The supporting portfolio of evidence should have a minimum of 5 and a maximum of 10 pieces of evidence. Examples of evidence are:
- Witness testimonies
- Completed documentation
- Client feedback
- Performance review documentation
- Reflective log

Independent assessors will select 3 pieces of evidence, which they will require the apprentice to discuss. The apprentice will be notified 48 hours before the interview of what these will be.

The professional discussion will be conducted in a 'controlled environment'. The professional discussion may be conducted using technology, as long as fair assessment conditions can be maintained. Acceptable means of remote assessment include video conferencing / video calling and must include a two-way visual and audio link.

A standard template, provided by the end-point assessment organisation, which can be contextualised, will be used to ensure that standards are secure but assessors are able to focus on key areas for confirmation of performance and effective appraisal of the discussion. This will ensure that consistent approaches are taken and that all key areas are appropriately explored. The professional discussion will be planned in advance to allow for quality assurance activity in line with sampling requirements and will cover the key elements of the standard previously identified.

The professional discussion will recognise areas that have already been covered in the competence scenario so as not to re-assess an area in which the apprentice has already demonstrated competence. The amount of questions asked during the professional discussion will vary according to the breadth and depth of the answers given (and how many follow-on questions are required) but as a **minimum** there must be 10 questions asked to cover all the criteria requirements and give full opportunity for the apprentice to demonstrate all the requirements for a distinction.

Reliability, Validity and Consistency

Independent end-point assessment is a culmination of a learning and development journey resulting in external confirmation of an apprentice meeting the industry-defined standard. The assessments are conducted by an independent end-point assessor approved and appointed by an end-point assessment organisation (EPAO) which is on the register of end-point assessment organisations (RoEPAO) and which is quality assured to ensure consistent, reliable and valid judgements.

In summary, the following controls must be adhered to:

- ✓ A formal structure to plan the end-point assessment, allowing planning of internal and external quality assurance.
- ✓ The mandating of both technical and assessment competence and continuing professional development (CPD) for independent end-point assessors to ensure that they have the right tools, qualifications, training and experience to make reliable judgements.
- ✓ An end-point assessor from an independent assessment organisation, who has had no prior involvement with the apprentice, providing an objective independent view
- ✓ The internal quality assurance of individuals conducting independent end-point assessments and of independent end-point assessment outcomes and results, by an ESFA registered EPAO.
- ✓ The use of on-demand tests with automated marking ensuring a consistent approach regardless of the apprentice's workplace.
- ✓ Three complementary assessment methods that provide a clear structure for synoptic assessment across the standard.

Roles and responsibilities

Apprentice

The apprentice takes responsibility for learning independently, preparing for the EPA and contributing to the decision on the timing of their EPA.

Employer

The employer determines when the apprentice is competent and ready to attempt the EPA. They enable the independent end-point assessor to observe the apprentice within the workplace.

Independent end-point assessor

An independent end-point assessor must be someone who has nothing to gain from the outcome of the assessment and must not have been involved in training or employment of the apprentice. They must be approved and appointed by the assessment organisation to undertake the independent end-point assessment of the apprentice.

To ensure consistent and reliable judgements are made, independent end-point assessors will be subject to rigorous quality assurance and must take part in regular standardisation activities. The mandatory criteria for independent end-point assessors is set out below:

Mandatory requirements:	**Independent Assessors**
Be independent of the apprentice, their employer and training provider(s) i.e. there must be no conflict of interest	√
Have significant relevant practical experience in a funeral team member role	√
5 years' experience of working within the relevant sector	√
Hold or be working towards Assessor Award (EPAQ/A1/A2/D32/D33/TAQA or equivalent qualification)	√
Attend a minimum of 2 days EPAO standardisation sessions per year	√
Undertake a minimum of 2 days continuing professional development relating to the actual job role per year	√
Hold a recognised funeral qualification at Level 2 or higher	√

End-Point Assessment Organisations (EPAOs)

EPAOs are registered on the ESFA Register of End-Point Assessment Organisations (RoEPAO). EPAOs are responsible for ensuring assessments are conducted fairly and that assessments are valid, reliable and consistent.

EPAOs must:

- Develop a question bank for the questioning elements of sufficient size to mitigate predictability.
- Develop a bank of competency-based questions for the professional dialogue, of sufficient size to mitigate predictability.
- Create documentation for recording assessment decisions.
- Appoint independent assessors that meet the requirements as detailed in this plan – see above.
- Have internal expertise in terms of qualified personnel with V1 or equivalent
- Provide training for independent assessors in terms of good assessment practice, operating the assessment tools and grading.
- Have quality assurance systems and procedures that support fair, reliable and consistent assessment across the organisation and over time.
- Operate regular standardisation events that enable assessors to attend a minimum of 2 events per year.
- Operate moderation of assessment activity and decisions, through examination of documentation and observation of activity. Moderation must be performed on a risk basis, i.e. new or poorly performing independent assessors must have every component of every assessment quality assured, but established, and high performing independent assessors can be quality assured on a sampling basis, with at least one assessment component being subject to either desk based or live internal quality assurance activity.

All end-point assessment organisations are required to check the independence of the end-point assessor from the apprentice, ensuring that the end-point assessor has not been involved in the learning, development or line management of the apprentice. End-point assessment organisations will be subject to external quality assurance in order to deliver national consistency across the funeral (retail) sector that is overseen by the employer-led EQA body.

Affordability

This approach to independent assessment has been tested with employers who have confirmed that it is the preferred approach.

It is anticipated that the funeral director end-point assessment will not represent more than 20% of the maximum funding band for this apprenticeship standard.

Volumes

It is anticipated that there will be 750 starts in the first year on this apprenticeship and 500 per year once established.

Manageability and feasibility

This apprenticeship has been designed to be viable for both large and small organisations. This means that there will be a wide geographical take up. Existing funeral director training providers are used to dealing with this and the assessment model is a simple one to administer.

External quality assurance (EQA) of the end-point assessment for the funeral team member apprenticeship standard

The external quality assurance will be an employer-led model carried out by People 1st on behalf of the employers.

Assessment method by element of the funeral team member standard

Funeral team members are the first point of contact for the business so must create a good first impression, put clients at ease, take information, answer questions or find answers, building good client relationships and confidence while upholding the image of the business. Funeral team members make a positive difference to their clients at a challenging, emotional time and contact with the deceased is a key aspect of any role within this industry. Working with people, feeling passionate about supporting and assisting clients is a rewarding and worthwhile job that provides excellent career opportunities. Funeral team members will specialise in one of two roles. A Funeral Arranger – Supports the funeral director by arranging funerals and pre-payment plans, handling customer enquiries, sales and after care either on or off site. Administration and payment reconciliation is a part of this job role. A Funeral Operative – Plays an active role in assisting the funeral director on funerals, cleaning and driving a variety of vehicles, bringing the deceased into care, preparing the deceased and coffins and supporting client visits. Operatives will participate in an out-of-hours service.

Key to assessment method identification	
End-point assessment method EPA	This chart provides an overview of what an apprentice can expect to be covered in each assessment method.
T	Assessment will be through the on-demand test
CS	Assessment will be through the competence scenario
PD	Assessment will be through the professional discussion
2 methods	Some sections of the standard are assessed by more than one method.

Core: <u>All</u> funeral team members must have all of the following generic skills, knowledge and behaviour

	Knowledge (Know it)	EPA	Skills (Show it)	EPA	Behaviours (Live it)	EPA
Client	How to communicate with clients during the various stages of the grieving process.	T	Use appropriate methods of communication including non- verbal, verbal, written and social media. Show respect when communicating with all clients and third parties.	CS CS	Confidently interact with clients adapting to the needs of the individual during the grieving process. Use clear language in all communication, verbal and written,	CS CS

	Specific client communication needs, for example, dementia, language, cultural diversity.	T			seeking help when it is required. Communicate politely at all times.	CS
	Client types, how to identify their needs and preferred methods of communication. The importance of meeting client's needs and requests, whilst working in line with the products and services offered by the business.	CS T	Use clear, relevant and empathetic communication to establish clients' needs and satisfy their requirements. Deliver excellent service during all interactions, including phone, face-to-face, electronic and postal communications.	CS CS	Communicate clearly and with empathy at all times.	CS
	How to obtain and handle client feedback both positive and negative, the information required from clients to resolve an issue and when to ask for help.	T	Apply business policies and procedures to handle client concerns, complaints and compliments. Deal with client feedback within the limits of your own authority, sharing positive comments, escalating negative comments and finding solutions where possible.	PD PD	Professionally and calmly, work with clients to resolve concerns, complaints and use compliments effectively in the funeral business.	CS
Reputation	How to protect the business reputation based on values, vision, aims and behaviours. The importance of maintaining a good reputation with clients, competitors and within the local area.	T T	Operate within the business values when dealing with clients and team members in all daily activities.	CS	Support the reputation of the business by providing a professional service to clients, knowledgeable of how it compares to competitors.	CS
	Client types and the local community demographic. The benefit to yourself and the business of forming professional relationships.	PD PD	Engage in professional relationships with clients, communities and other stakeholders in order to help build a positive public reputation.	PD	Treat all clients and colleagues with respect and work positively within the local community.	PD

	The acceptable boundaries of professional relationships.	PD	Report any instance where the reputation of the business could be / has been damaged.	PD		
	How technology, including social media is used in the business and how it contributes to the business reputation.	T	Use technology including social media in line with business requirements.	PD	Actively promote the reputation of the business by using social media and business technology tools responsibly.	PD
Team	How to support and influence the team positively, recognising how all colleagues and teams are dependent on each other to meet business objectives.	PD	Support team members to ensure that the services provided are of a high quality, delivered on time and as required.	PD	Be conscious of the impact of personal behaviours on the team by a consistent, positive and professional approach.	PD
	Different types of teams, third party team members and stakeholders within the wider team and how strengths and weaknesses affect team dynamics	T	Adapt positively to all types of team leaders, team members and different types of team within the business in which you work.	PD	Consistently exhibit respect and work positively with team leaders and team.	PD
Legal and Governance	The legislative requirements, duties and responsibilities of the business. The policies and procedures of the business regarding the deceased when they are in own premises or third party locations, identification, release of ashes, personal effects, notifiable diseases and specialist services.	T PD	Comply with legal and business requirements whilst conducting all services. Follow business policies and procedures relating to third party locations of the deceased, identification, release of ashes, personal effects, notifiable diseases and specialist-services.	CS PD	Operate in an honest and trustworthy way demonstrating integrity in all duties respecting the dignity of the deceased at all times.	PD
Personal development and performance	How personal development and performance contributes to success of the business.	PD	Take ownership for own learning development and performance. Carry out personal development activities.	PD PD	Reflect on own ways of working and with support from your line manager, actively create and implement a personal development plan.	PD

	How to identify personal goals and development opportunities and the support / resources available to achieve these. Different learning styles.	PD T	Identify your own learning styles.	PD		
Products and services	The full range and unique selling points of products and services offered by the business. Where to find information regarding specialist products and services for example exhumation, repatriation and burial at sea.	PD T	Take a proactive approach to providing clients with product and service information within your area of responsibility. Offer information and assistance with specialist services and products.	CS CS	Promote the products and services offered by the business. Consistently work to personalise the funeral to the needs of the deceased, client, family, and friends.	CS CS

A Funeral Arranger – Supports the funeral director by arranging funerals and pre-payment plans, handling customer enquiries, sales and after care either on or off site. Administration and payment reconciliation is a part of this job role.

	Knowledge (Know it)	EPA	Skills (Show it)	EPA	Behaviours (Live it)	EPA
Funeral arranging	The businesses' process for the care of the deceased. The third parties involved and the role they play in delivering client needs. How to plan/arrange a funeral according to client's needs within legislative boundaries and local constraints, rules and regulations. The importance of accurate calculation and completion of the client contract and the implications to the business if not completed properly.	CS T CS PD	Arrange, plan and assist in visits to the deceased, ensuring client's needs are respected at all times. Arrange at need or pre-need funerals according to clients' requirements, maintaining accurate records of all products and services ordered. Complete, discuss and agree client contracts efficiently and according to business guidelines. Gather and collate feedback from clients using the businesses approved systems and communication methods.	CS CS CS PD	Confidently communicate with clients and third party service representatives with understanding, empathy and integrity. Use own initiative when carrying out arranging-activities.	CS PD

Administration / Finance	The principles of operating commercially in a competitive industry. The business administration / finance systems and how invoices are created.	T PD	Access and use systems accurately, efficiently and within legislation requirements. Maintain precise records of all products and services purchased by clients. Ensure the timely receipt of payments and finance agreements.	PD PD PD	Consistently prioritise and arrange financial records and client accounts. Consistently review information and clerical processes for errors and make corrections before finalising administration / financial duties.	PD PD

A Funeral Operative – Plays an active role in assisting the funeral director on funerals, cleaning and driving a variety of vehicles, bringing the deceased into care, preparing the deceased and coffins and supporting client visits. Operatives will participate in an out-of-hours service.

	Knowledge and Understanding (Know it)	EPA	Skills (Show it)	EPA	Behaviours (Live it)	EPA
Maintain and drive vehicles	The legal and business requirements for driving, maintaining and cleaning vehicles for example reporting damage. The importance of knowing routes and planning contingency routes before setting off, keeping up-to-date and checking local disruptions to routes in advance.	T PD	Follow relevant legislation, codes of practice and business standards for driving, maintaining and cleaning business vehicles. Use pre-arranged routes when driving business vehicles during funeral services and alternative routes when necessary reporting issues with routes to the appropriate person.	CS PD	Show pride in maintaining and cleaning business vehicles. Remain calm and drive responsibly at all times.	CS CS
Care of the deceased	How to handle, remove and move the deceased while maintaining dignity and respect. The environments, the equipment used and the importance of	CS T	Transfer the deceased using correct techniques and maintaining client and business requirements. Assist in the preparation and presentation of the coffin and the deceased.	CS PD	Be respectful of the deceased at all times.	CS

	completing dynamic risk assessments to move the deceased. When and how to request additional support when carrying out the transfer of the deceased. How to prepare and present the coffin and the deceased.	 PD CS				
Funerals	Pre-funeral checking procedures and your role for the 'day of the funeral' service. How to bear coffins or use appropriate equipment safely, professionally and in varying environments with dignity and respect. How to identify and handle potential incidents and when to escalate to an appropriate person.	CS T PD	Attend funeral briefings and use information to assist in the delivery of the funeral. Handle coffins and floral tributes safely and respectfully at all times. Carry out allocated duties with dignity and respect to ensure the smooth running of the funeral.	CS PD CS	Actively and competently, participate in the smooth running of the funeral service. Remain calm and respectful in different situations and help colleagues to do the same.	PD PD

Grading criteria

The assessment activities are not ‘weighted’ in percentage terms as they are all important to demonstrating the apprentice’s synoptic performance.
The independent end-point assessor will be notified of successful completion of the on-demand test (results of which will usually be computer generated and validated by the assessment organisation, or if not computer generated but paper based, must use automated marking by the assessment organisation and results notified).

- **On-demand test** – in order to pass the apprentice will achieve the following grade boundaries (core) 0-7 fail, 8+ pass and (specialism) 0-4 fail, 5+ pass. Apprentices must pass both core and specialism questions to pass 0-12 fail 13-16 pass. Apprentices achieving 17-20 correct answers will achieve distinction
- **Competence scenario** will be graded pass / fail
- **Professional discussion** – in order to pass the apprentice will need to achieve the grade boundaries outlined in annex E (iii)

Apprentices who fail to demonstrate competence against the standard for the on-demand test, competence scenario or the professional discussion will be considered to have failed that assessment and as a result will fail overall (see table below).

On-demand test	Competence scenario	Professional discussion	Overall grade
Fail	Fail	Fail	Fail
Fail	Pass	Fail	Fail
Fail	Fail	Pass	Fail
Pass	Fail	Fail	Fail
Pass	Pass	Fail	Fail
Fail	Pass	Pass	Fail
Pass	Fail	Pass	Fail
Pass	Pass	Pass	Pass
Pass	Pass	Distinction	Pass
Distinction	Pass	Pass	Pass
Distinction	Pass	Distinction	Distinction

Resits / retakes

Apprentices who fail one or more assessment method will be offered the opportunity to take a re-sit/re-take. A re-sit does not require further learning, whereas a re-take does.

Apprentices should have a supportive action plan to prepare for the re-sit/re-take. The apprentice's employer will need to agree that a re-sit/re-take is an appropriate course of action.

Any assessment method re-sit/re-take must be taken during the maximum EPA period; otherwise, the entire EPA must be retaken, unless in the opinion of the EPAO exceptional circumstances apply outside the control of the apprentice or their employer.

Re-sits/re-takes are not offered to apprentices wishing to move from pass to distinction. Where any assessment method has to be re-sat/re-taken, the apprentice may not be awarded a distinction, unless the EPAO determines there are exceptional circumstances requiring a re-sit/re-take. Under normal circumstances, only a pass is available to apprentices who have re-taken or re-sat part of their EPA.

There is no limit to the number of re-sits or re-takes. The employer would agree this.

	The following knowledge, skills and behaviours must form the basis for the competence-based scenario:
Core knowledge, skills and behaviours	In order to pass all apprentices will: • Demonstrate knowledge and understanding of client types, how to identify their needs and preferred methods of communication. • Use appropriate methods of communication including non- verbal, verbal, written and social media. • Show respect when communicating with all clients and third parties. • Use clear, relevant and empathetic communication to establish clients' needs and satisfy their requirements. • Deliver excellent service during all interactions, including phone, face-to-face, electronic and postal communications. • Operate within the business values when dealing with clients and team members in all daily activities. • Support team members to ensure that the services provided are of a high quality, delivered on time and as required. • Comply with legal and business requirements whilst conducting all services. • Follow business policies and procedures relating to third party locations of the deceased, identification, release of ashes, personal effects, notifiable diseases and specialist services. • Take a proactive approach to providing clients with product and service information within your area of responsibility. • Offer information and assistance with specialist services and products. • Confidently interact with clients adapting to the needs of the individual during the grieving process. • Use clear language in all communication, verbal and written, seeking help when it is required. • Communicate politely at all times. • Communicate clearly and with empathy at all times. • Professionally and calmly, work with clients to resolve concerns, complaints and use compliments effectively in the funeral business. • Support the reputation of the business by providing a professional service to clients, knowledgeable of how it compares to competitors. • Promote the products and services offered by the business. • Consistently work to personalise the funeral to the needs of the deceased, client, family, and friends.

Arranger knowledge skills and behaviours	In addition, in order to pass funeral arrangers will: • Demonstrate knowledge and understanding of the full range and unique selling points of products and services offered by the business. • Demonstrate how to plan/arrange a funeral according to client's needs within legislative boundaries and local constraints, rules and regulations • Arrange, plan and assist in visits to the deceased, ensuring client's needs are respected at all times. • Arrange at-need or pre-need funerals according to clients' requirements, maintaining accurate records of all products and services ordered. • Complete, discuss and agree client contracts efficiently and according to business guidelines. • Confidently communicate with clients and third party service representatives with understanding, empathy and integrity.
Operative knowledge skills and behaviours	In addition, in order to pass funeral operatives will: • Know how to prepare and present the coffin and the deceased. • Know how to undertake pre-funeral checking procedures and your role for the 'day of the funeral' service. • Know how to bear coffins or use appropriate equipment safely, professionally and in varying environments with dignity and respect. • Follow relevant legislation, codes of practice and business standards for driving, maintaining and cleaning business vehicles. • Transfer the deceased using correct techniques and maintaining client and business requirements. • Assist in the preparation and presentation of the coffin and the deceased. • Handle coffins and floral tributes safely and respectfully at all times. • Show pride in maintaining and cleaning business vehicles. Remain calm and drive responsibly at all times. • Be respectful of the deceased at all times.

	The following knowledge skills and behaviours must form the basis of the professional discussion
	The apprentice's professional discussion should focus on the elements of the standard identified previously and the selected portfolio evidence. In order to **pass** the apprentice's answers will solely demonstrate how they perform to the standards required. In order to achieve **distinction** the apprentice's answers will demonstrate understanding of their learning, by demonstrating changes they have implemented, evaluating their actions and analysing their performance.
Core knowledge skills and behaviours	• Apply business policies and procedures to handle client concerns, complaints and compliments. Deal with client feedback within the limits of your own authority, sharing positive comments, escalating negative comments and finding solutions where possible. • Knowledge of client types and the local community demographic. • The benefit to yourself and the business of forming professional relationships. • The acceptable boundaries of professional relationships. • Report any instance where the reputation of the business could be / has been damaged. • Treat all clients and colleagues with respect and work positively within the local community. • Use technology including social media in line with business requirements. • Actively promote the reputation of the business by using social media and business technology tools responsibly. • How to support and influence the team positively, recognising how all colleagues and teams are dependent on each other to meet business objectives. • Support team members to ensure that the services provided are of a high quality, delivered on time and as required. • Be conscious of the impact of personal behaviours on the team by a consistent, positive and professional approach. • Adapt positively to all types of team leaders, team members and different types of team within the business in which you work. • Consistently exhibit respect and work positively with team leaders and team. • The policies and procedures of the business regarding the deceased when they are in own premises or third party locations, identification, release of ashes, personal effects, notifiable diseases and specialist services. • Follow business policies and procedures relating to third party locations of the deceased, identification, release of ashes, personal effects, notifiable diseases and specialist services. • Operate in an honest and trustworthy way demonstrating integrity in all duties respecting the dignity of the deceased at all times. • How personal development and performance contributes to success of the business. • How to identify personal goals and development opportunities and the support / resources available to achieve these. • Different learning styles. • Take ownership for own learning development and performance. • Carry out personal development activities. Identify your own learning styles. • Reflect on own ways of working and with support from your line manager, actively create and implement a personal development plan.

	• Where to find information regarding specialist products and services for example exhumation, repatriation and burial at sea.
Funeral arranger knowledge, skills and behaviours	• The third parties involved and the role they play in delivering client needs. • The importance of accurate calculation and completion of the client contract and the implications to the business if not completed properly. • Arrange, plan and assist in visits to the deceased, ensuring client's needs are respected at all times. • Gather and collate feedback from clients using the businesses approved systems and communication methods. • Use own initiative when carrying out arranging activities. • The business administration / finance systems and how invoices are created. • Access and use systems accurately, efficiently and within legislation requirements. • Maintain precise records of all products and services purchased by clients. • Ensure the timely receipt of payments and finance agreements. • Consistently prioritise and arrange financial records and client accounts. • Consistently review information and clerical processes for errors and make corrections before finalising administration / financial duties.
Funeral operative knowledge, skills and behaviours	• The importance of knowing routes and planning contingency routes before setting off, keeping up-to-date and checking local disruptions to routes in advance. • Use pre-arranged routes when driving business vehicles during funeral services and alternative routes when necessary reporting issues with routes to the appropriate person. • Transfer the deceased using correct techniques and maintaining client and business requirements • Attend funeral briefings and use information to assist in the delivery of the funeral. • Handle coffins and floral tributes safely and respectfully at all times. • Carry out allocated duties with dignity and respect to ensure the smooth running of the funeral. • Actively and competently, participate in the smooth running of the funeral service. • Remain calm and respectful in different situations and help colleagues to do the same.

Appendix 1 Example competence scenarios

Funeral Arranger route - observing the apprentice carrying out either a pre-need (plan) or at need arrangement conversation. This could either be one of the set plans offered across the industry, a tailor made plan or a normal at need arrangement. Variations could include a cremation or a burial, different types of service so church or non-religious/celebration of life, different vehicles i.e. specialist hearse, horse drawn, motorcycle, different coffins, flowers, orders of service, music etc.
Encourages a confident apprentice listening to the clients' needs and offering a full and varied choice of options to suit the clients' needs and budget ensuring the client gets the best funeral for their loved one they can.

Funeral Operative route – Apprentices must be observed carrying out 3 of these activities.

Finishing the coffin - checking the coffin meets the clients' needs and is in good condition then finishing the coffin off by creating and fixing a nameplate and any other coffin decorations. Apprentices must follow procedure; carry out identification checks and safe use of tools and machinery.

Preparing the deceased - carrying out first offices, generally completed when a deceased is not being embalmed. Washing the deceased including hair and shaving if required, packing the deceased ears, nose and throat, placing eye caps and suturing the mouth. Making sure the deceased is ready for their funeral. Apprentices must follow procedure, preparing the deceased in line with client's wishes, safe use of tools, dignity and respect and safe working practices following health and safety guidelines.

Dressing and Encoffining the deceased - dressing the deceased in line with the clients wishes in own clothes or gown, carrying out with dignity and respect then placing the deceased in their coffin again with dignity and respect whilst considering health and safety i.e. manual handling. Apprentices must follow procedure, dressing of the deceased in line with client's wishes, safe use of tools, dignity and respect and safe working practices following health and safety guidelines.

Maintaining a vehicle - carrying out and recording in line with business procedures weekly and pre-funeral checks i.e. fuel level, oil, tyres etc., making sure the vehicle they are checking (hearse, limousine, ambulance, fleet car) is roadworthy and ready for the funeral or next journey. Washing and polishing of the vehicle both interior and exterior. Apprentices must follow procedure, safe use of equipment and materials tools, and safe working practices following health and safety guidelines as well as an understanding of what makes a car road worthy.

Loading a deceased into the hearse - carrying out the final pre-funeral checks, making sure the coffin is in perfect condition, carrying out identification checks before closing the coffin, closing of the coffin and then loading the deceased into the hearse. Apprentices must follow procedure, specifically the identification procedure, working with both dignity and respect at all times and safe working practices following health and safety guidelines, specifically manual handling

Driving a funeral vehicle - could be the ambulance, hearse or limousine either on a funeral, the collection of a deceased or any other funeral business. Apprentices must demonstrate safe driving taking into consideration that vehicles are what give people either a positive or a negative impression of the business.