

Funeral team member Level 2 Apprenticeship Assessment Plan



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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 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.

Apprentice's readiness for independent end point assessment

i. Achieving full competence

The period of learning, development and continuous assessment is managed by the employer, in most cases with the service of an education or training provider. Although learning, development and on-programme assessment is flexible and the process is not prescribed, the following is the recommended baseline expectation for an apprentice to achieve full competence in line with the standard:

Throughout the period of learning and development, and at least every two months, the apprentice should meet with the on-programme assessor to review and record their progress against the standard using the on-programme progression template (freely available at People1st.co.uk). At these reviews evidence should be discussed and recorded by the apprentice. Once the apprentice is deemed competent the relevant section(s) of the standard should be signed off by the employer with the support of those involved in the learning and development.

The on-programme reviews and record is important to support the apprentice, on-programme assessor and employer in monitoring the progress of learning and development and to determine when the apprentice has achieved full competence in their job role and is ready for independent end point assessment. The on-programme progression template is NOT a portfolio of evidence, but a record of what the apprentice can do following periods of training, development and assessment. A minimum of six meetings and completed records are recommended, to show ongoing competence across the entire standard, over a minimum of a twelve month period prior to starting the independent end point assessment.

Further guidance and support on planning and managing a funeral team member apprentice's training and development journey is available at People1st.co.uk.

This assessment plan covers each specialist function of the funeral team member apprenticeship standard. Regardless of the function selected the same assessment methodology will apply, with the content altered to the correct specialism.

ii. Readiness for end point assessment (Gateway)

The independent end point assessment is synoptic, which means it takes an overview of the apprentices' competence. The end point assessment 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.

A structured meeting will be held and must include the relevant people that have responsibility and accountability for the completion of the apprenticeship, such as: the line manager, on-programme assessor and /or a senior manager as appropriate to the business. It is recommended that the on-programme records, if utilised, are brought to this meeting. Although there is no mandatory documentation to be completed at this stage it is essential

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that all stakeholders in the meeting are clear that all aspects of the apprenticeship have been completed prior to the end point assessor being engaged. To support employers and on programme assessors a 'readiness for independent end point assessment record' has been produced and is freely available at people1st.co.uk for those who wish to utilise it. This record provides a structure and checklist to guide stakeholders through the process of determining readiness and is a useful tool for independent end point assessors to review prior to the planning meeting.

Once the employer (supported by the on-programme assessor) is satisfied that the apprentice has achieved full competence a planning meeting must take place that includes an independent end point assessor. 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 assessment activities, but does not contribute to any assessment decisions.

At the meeting the apprentice will be provided with the competence scenario criteria (see Annex C for details).

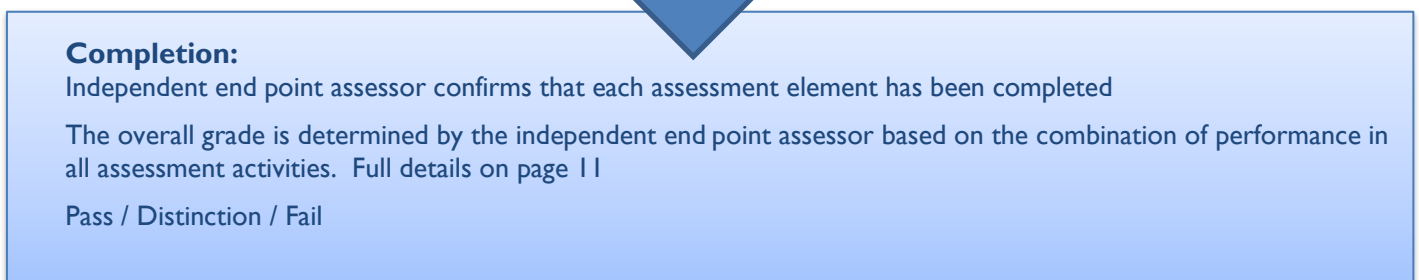
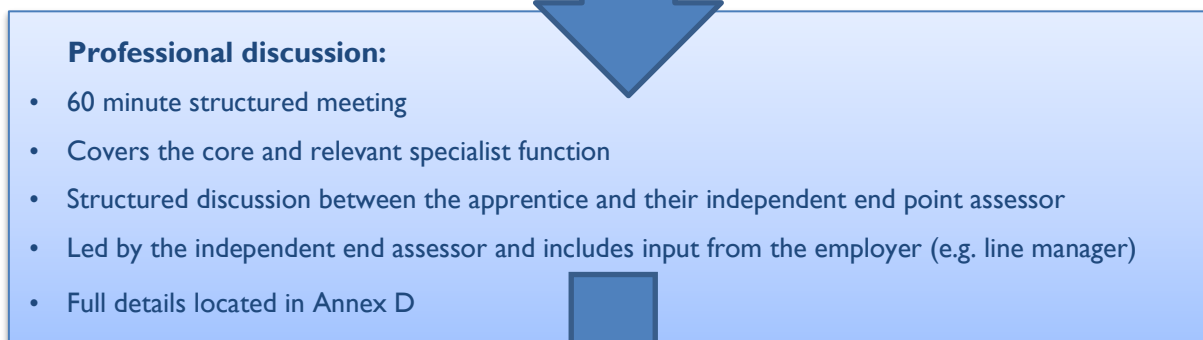
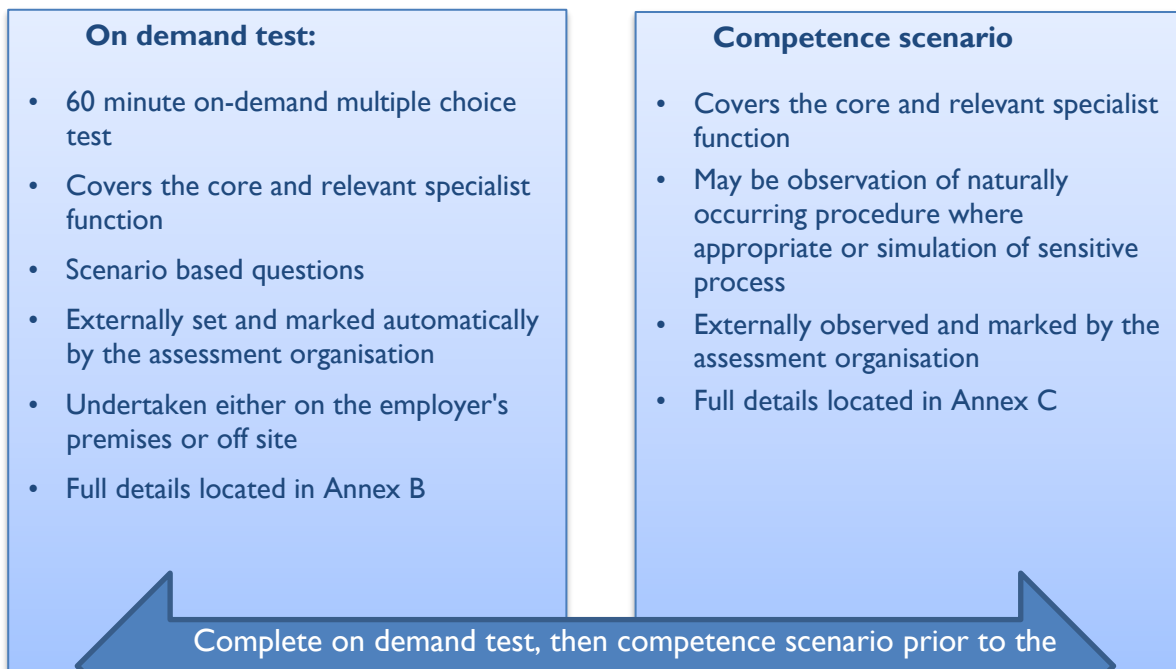
The independent end point assessor will agree a plan and schedule for each assessment activity with the apprentice and employer representative to ensure all components can be completed within a three-month end point assessment window. Assessment organisations must inform People 1st of the independent 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.

iii. Order and timings of the end point assessment

There are three assessment activities for the funeral team member independent end point assessment. The on-demand test must be taken prior to the observed scenario. The observed scenario must be completed after the test, prior to the professional discussion. The professional discussion must be the last activity completed. All assessment activities must be completed within the three-month assessment window.

Summary of assessment process

The apprentice will be assessed to the apprenticeship standard using three complementary assessment methods. The assessment is synoptic, i.e. takes a view of the overall performance of the apprentice in their job. The assessment activities will be completed by the independent end assessor as follows:



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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 assessment organisation which is on the register of apprentice assessment organisations 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, including the use of the **readiness for independent end point assessment record** (freely available from People1st.co.uk). Note: the use of this record is not compulsory
- ✓ A common approach to assessment tools and procedures for independent end point assessment, set out in a common approach document which will be freely available to registered end point assessment organisations from the People 1st EQA area on the website. The common approach will help ensure that end point assessment tools and procedures are consistent in meeting the requirements for fair, accurate and reliable assessment decisions, against the funeral team member apprenticeship standard.
- ✓ The mandating of both technical and assessment competence and continuing professional development (CPD) for independent end 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 assessment organisation.
- ✓ 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

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 line management 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:

a) Occupational Expertise of Funeral team member Independent End Point Assessors

The requirements set out below relate to all funeral team member independent end point assessors. Independent end point assessors must:

- ✓ Have excellent knowledge and understanding of the apprenticeship standard as set out in the industry set Grading Criteria (Annex E)
- ✓ Hold a recognised current workplace assessment qualification. The list of approved qualifications will be published at <http://www.people1st.co.uk/apprenticeships/assessment-organisations/external-quality-assurance/> and updated as new, appropriate qualifications are released.
- ✓ Have current occupational expertise and knowledge, at the level of the occupational area(s) they are assessing, which has been gained through 'hands on' experience in the industry. It is expected that the independent assessor will have experience of working at this level or above, within funeral organisations.
- ✓ Practice standardised assessment principles set out by the assessment organisation.
- ✓ Have sufficient resources to carry out the role of independent end point assessor

b) Continuous Professional Development for funeral team member Independent End Point Assessors

It is necessary for independent end point assessors to maintain a record of evidence of their continuous professional development (CPD). This is necessary to ensure currency of skills and understanding of the occupational area(s) being assessed, and can be achieved in a variety of ways. It should be a planned process, reviewed on an annual basis, for example as part of an individual's performance review.

Independent end point assessors should select CPD methods that are appropriate to meeting their development needs. Within a twelve month period an Independent End Point Assessor will be required to demonstrate to the assessment organisation that they have gained practical experience in the funeral services industry which develops/updates their knowledge/skills. The following provides an example of a variety of methods that can be utilised for CPD purposes, a multiple of which need to be experienced/adopted on an annual basis.

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Updating occupational expertise

- ✓ Internal and external work placements to gain 'hands on' experience
- ✓ Work experience and shadowing
- ✓ External visits to other organisations
- ✓ Updated and new training and qualifications
- ✓ Training sessions to update skills, techniques and methods
- ✓ Visits to educational establishments
- ✓ Trade fairs / shows

Keeping up to date with sector developments and new legislation

- ✓ Relevant sector websites and twitter feeds / social media platforms
- ✓ Membership of professional bodies and trade associations
- ✓ Papers and documents on legislative change
- ✓ Seminars, conferences, workshops, membership of committees/working parties
- ✓ Development days

Standardising and best practice in assessment

- ✓ Regular standardisation meetings with colleagues
- ✓ Sharing best practice through internal meetings, newsletters, email circulars, social media
- ✓ Comparison of assessment and verification in other sectors

Assessment organisations

Assessment organisations are registered on the ESFA Register of apprentice assessment organisations. Assessment organisations are responsible for ensuring assessments are conducted fairly and that assessments are valid, reliable and consistent. It is essential that assessment organisations:

- ✓ Ensure independent end point assessors are competent in meeting both occupational and assessment criteria requirements
- ✓ Approve and appoint independent end point assessors
- ✓ Ensure assessments are planned, communicated and executed fairly
- ✓ Quality assure independent end point assessments
 - With planned internal quality assurance activity
 - Including both desk based and 'live' quality assurance activity
 - This must be performed on a risk basis, i.e. new or poorly performing assessors must have every element of every assessment quality assured, but established, high performing assessors can be quality assured on a sampling basis, with at least one assessment activity being subject to either desk based or live internal quality assurance activity
- ✓ Ensure on-demand tests are correctly invigilated (Annex B)
- ✓ Ensure standardisation of all assessors occurs on a regular basis, including but not limited to:
 - Review of annual adherence to CPD requirements

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- Regular standardisation meetings – usually quarterly but required frequency to depend on internal and external quality assurance outcomes of each assessment organisation
- Assessment and verification training sessions
- Shadowing and cross checking of other assessors
- ✓ Address poor performance from assessors to ensure high standards of end point assessment
- ✓ Obtain and review feedback / satisfaction results from apprentices and employers, taking appropriate actions for improvement
- ✓ Address and administer any appeals and grievances fairly and in line with the consistent approach

All 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. Assessment organisations will be subject to external quality assurance in order to deliver national consistency across the funeral (retail) sector which is overseen by the Funeral (Retail) Apprenticeship Board and managed by People 1st.

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.

Grading

The apprenticeship includes Pass and Distinction grades with the final grade based on the apprentice's combined performance in each assessment activity. In order to pass the apprentice is required to pass each of the three assessments. In order to achieve a distinction the apprentice needs to gain the required number of points as set out in the table below – gaining a distinction in the activity in section A and at least one activities in section B, with a pass in the other.

In order to pass:

In the **on demand test** the apprentice must achieve a minimum of 70% of correct answers to pass the assessment activity. In the on demand test the apprentice must demonstrate competence against all of the grading criteria for a pass in Annex E(i).

In the **competence scenario** the apprentice must demonstrate competence against all of the grading criteria for a pass in Annex E(ii).

In the **professional discussion** the apprentice must demonstrate competence against all of the grading criteria in Annex E(iii).

In order to achieve a distinction:

In the **on demand test** the apprentice must achieve a minimum of 85% of correct answers to gain a distinction in the assessment activity. The on demand test will feature questions based on the assessment criteria in Annex E(i). It will contain questions on both the core and the apprentice's chosen specialist function.

In the **professional discussion** the apprentice must demonstrate competence against **all** of the assessment criteria for a pass in Annex E(iii) and a distinction in Annex E(iv) and will explain, and provide requested evidence to prove, how they have met the relevant assessment criteria, including effective communication, leadership, team work, self-evaluation and the detailed behavioural elements of the standard.

The independent end point assessor will use the assessment tools and processes of their assessment organisation to determine whether the pass and distinction grades have been achieved. Tools will dictate, in detail, how each grade is achieved and their use will be internally and externally quality assured to further ensure assessment of apprentices across the sector is consistent, fair and reliable.

The assessment activities are not 'weighted' in percentage terms as they are all important to demonstrating the apprentice's synoptic performance; however employers have been clear that in order to achieve a distinction overall the apprentice must perform to distinction level in the on demand test and the professional discussion. In order to achieve this, a simple 'Section A / Section B' approach should be taken, set out for each standard as follows:

Section A:	Grade	Score (Pass / Fail)
Competence scenario:		
Total section A:		

Section B:	Grade	Score (Pass=1, Distinction=2)
On demand test:		
Professional discussion:		
Total Section B		

Apprentices cannot achieve the apprenticeship without gaining at least a pass in every assessment method. Once the apprentice has achieved at least a pass in each assessment activity the final grade will be calculated as follows:

Total score	Overall grade
2/3	Pass
4	Distinction

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).

Should an apprentice fail the on demand test, it may be resat. Failure of either of the remaining activities would require them to be retaken as soon as the employer, the training organisation and the apprentice agree that the apprentice is ready and when practicable for the business. This is anticipated to be between one and three months depending on the amount of further support or training required. Both the on-demand test and the scenario tasks must be successfully completed before moving on to the professional discussion.

Affordability

It is anticipated that the cost of the funeral team member end-point assessment will be approximately 15-18% of the overall fundable cost of the apprenticeship and that there will be up to 750 apprentices completing this standard each year.

Annex A: Assessment method by element of the funeral team member standard

A funeral team member is a key part of the funeral business. They must interact sensitively with clients and third parties (potential nursing homes, hospitals, ministers, crematorium, doctors, and church groups) giving a positive, professional representation at all times. Funeral team members need a good knowledge of the funeral products and services offered by the business and the correct procedures to follow. Funeral team members are the first point of contact for the business so must create a good first impression, put the client at ease, take information, answer questions or find answers, thereby 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. Working with people, feeling passionate about supporting and assisting clients is a rewarding and worthwhile job that provides excellent career opportunities.

Key to assessment method identification	
IEA	This chart provides an overview of what an apprentice can expect to be covered in each assessment method and the detailed assessment criteria that must be met can be found in Annex E
T	Assessment will be through the on-demand test
CS	The content of the competence scenario may touch on any area of the core or specialist function, but must cover any areas referenced below
PD	Assessment will be through the professional discussion
2 methods	Some sections of the standard are assessed by more than one method. Specific assessment criteria are set against assessment activities in Annex E

Description of specialist funeral team member functions

Arranger	A funeral arranger delivers excellent client service by handling client enquiries and sales within the business. They deal with client enquiries face-to-face and by telephone, enter data into the client information system and handle payments. In some organisations, this role may be called a funeral planner.
Funeral operative	Funeral Operatives play an active role in assisting the Funeral Director performing transfers, assisting in the preparation and presentation of the deceased, preparing all types of coffins and assisting with visiting by relatives. Funeral operatives undertake driving duties to transport both clients and the deceased and respond to special requests from clients on the day.

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

	Knowledge (Know it)	IEA	Skills (Show it)	IEA	Behaviours (Live it)	IEA
Client	Know how to communicate with clients during the various stages of the grieving process Understand specific client communication needs, for example, dementia, language, cultural diversity	CS PD	Use appropriate methods of communication including non- verbal, verbal, written and social media Demonstrate respect when communicating with all clients and third parties	CS PD	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	CS
	Know client types. how to identify their needs and preferred methods of communication Understand the importance of meeting client's needs and requests, whilst working in line with	CS PD	Use clear, relevant and sensitive/empathetic communication to establish client's needs and satisfy their requirements	CS PD	Communicate clearly and with empathy at all times	CS

	the products and services offered by the business		Deliver excellent service during all interactions, including phone, face to face, electronic and postal communications			
	Know 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	PD	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	Professionally and calmly work with clients to resolve concerns, complaints and use compliments effectively in the funeral business	CS PD
Reputation	Understand how to protect the business reputation based on values, vision, aims and behaviours Know the importance of maintaining a good reputation with clients, competitors and within the local area	PD T	Demonstrate the businesses' values when dealing with clients and team members in all daily activities	CS PD	Support the reputation of the business by providing a professional service to clients, knowledgeable of how it compares to competitors	CS PD
	Know client types and the local community demographic Understand the benefit to yourself and the business of forming professional relationships Understand the acceptable boundaries of professional relationships	PD	Engage in professional relationships with clients, communities and other stakeholders in order to help build a positive public reputation Report any instance where the reputation of the business could be / has been damaged	PD	Treat all clients and colleagues with respect and work positively within the local community	PD
	Know 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	Know how to support and influence the team positively, recognising how all colleagues and teams are dependent on each other to meet business objectives	PD T	Support team members to ensure that the services provided are of a high quality, delivered on time and as required	CS PD	Demonstrate awareness of the impact of personal behaviours on the team by a consistent, positive and professional approach	PD
	Understand 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 demonstrate respect and work positively with team leaders and team	PD
Legal and Governance	Understand the legislative requirements, duties and responsibilities of the business Understand 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 manner demonstrating integrity in all duties respecting the dignity of the deceased at all times	PD

Personal development and performance	Understand how personal development and performance contributes to success of the business Know how to identify personal goals and development opportunities and the support / resources available to achieve these Understand and identify different learning styles	PD	Take ownership for own learning development and performance Carry out personal development activities Identify your own learning styles	PD	Reflect on own ways of working and with support from your line manager, actively create and implement a personal development plan	PD
Products and services	Know the full range and unique selling points of products and services offered by the business Know where to find information regarding specialist products and services	PD CS	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	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

Funeral team member specialist; A funeral arranger delivers excellent client service by handling client enquiries sales within the business. They deal with client enquiries face-to-face and by telephone, enter data into the client information system and handle payments. In some organisations, this role may be called a funeral planner. Funeral arrangers must complete all of the following specialist functions.

	Knowledge (Know it)	IEA	Skills (Show it)	IEA	Behaviours (Live it)	IEA
Funeral arranging	Understand the businesses' process for the care of the deceased Know the third parties involved and the role they play in delivering client needs Know how to plan/arrange a funeral according to client's needs within legislative boundaries and local constraints, rules and regulations Understand the importance of accurate calculation and completion of the client contract and the implications to the business if not completed properly	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 PD	Confidently communicate with clients and third party service representatives with understanding, empathy and integrity Demonstrate own initiative when carrying out arranging activities	CS PD
Administration / Finance	Understand the principles of operating commercially in a competitive industry Know 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, arrange for payments and finance agreements to be made in optimum time	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

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Funeral team member specialist; Funeral operatives play an active role in assisting the funeral director performing transfers, assisting in the preparation and presentation of the deceased, preparing all types of coffins and assisting with visiting by relatives. Funeral operatives undertake driving duties to transport both clients and the deceased and respond to special requests from clients on the day. Funeral operatives must complete all of the following specialist functions.

	Knowledge and Understanding (Know it)	IEA	Skills (Show it)	IEA	Behaviours (Live it)	IEA
Maintain and drive vehicles	Know the legal and business requirements for driving, maintaining and cleaning vehicles for example reporting damage Understand 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	S
Care of the deceased	Know how to handle, remove and move the deceased while maintaining dignity and respect Understand the environments, the equipment used and the importance of completing dynamic risk assessments to move the deceased Know when and how to request additional support when carrying out the transfer of the deceased Know how to prepare and present the coffin and the deceased	CS T	Transfer the deceased using correct techniques ensuring client and business requirements are maintained Assist in the preparation and presentation of the coffin and the deceased	CS PD	Be respectful of the deceased at all times	CS
Funerals	Understand procedures and know 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 Know how to identify and handle potential incidents and when to escalate to an appropriate person	CS T	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	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

Annex B: On demand test specification

Key facts:

- ✓ 60 minute on demand online multiple choice test (60 questions, 4 choices per question)
- ✓ Scenario based questions
- ✓ Externally set and marked by the assessment organisation on the register of apprentice assessment organisations
- ✓ 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 test format ensuring validity and reliability and which allows for consistent, efficient and timely allocation of marks / grades. 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. A bank of three tests will cover the knowledge and skills identified on the standard (Annex A). Assessment organisations need to have in place processes and procedures to periodically review the question bank including statistical information to improve quality and validity of the test questions. Online sample tests will be available. Some questions will be knowledge recall, whereas others will require the apprentice to consider a course of action or solution to a situation / problem based on a 'real-life' workplace activity in line with the identified requirements of the standard. 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. The one-hour test will include two parts, part A (60%) on the core and part B (40%) on the relevant specialist function using the grading criteria identified in Annex E(i). The apprentice must pass both sections to pass overall. Above a pass, marks are permitted from part A and part B to determine the overall test grade. 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 assessment organisation will identify a suitable person to invigilate the on demand test. It may, but does not have to be, the assessor marking the simulated scenario and conducting the professional discussion. Tests will be invigilated in line with the requirements set out by the assessment organisation.

Questions 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. Test specifications will include a clear rationale for pass and distinction levels.

The definition of a 'controlled environment' will be clearly defined and explained by the assessment organisation prior to scheduling the test and will include environmental requirements such as lighting, space, privacy and the requirements for an invigilator to follow a best practice process.

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Annex C: 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 simulated scenario or via observation where suitable.

Key facts:

- ✓ 60 to 90 minute observation / simulation observed by the independent end point assessor
- ✓ Will include areas of the standard identified in Annex A
- ✓ Planned in advance during EPA period to allow the apprentice to prepare fully for the simulation

Simulations must succeed in recreating the atmosphere, conditions and pressures of the real situation. The observation / simulation will focus on a particular activity and will test behavioural, analytical and decision-making skills in a realistic setting.

Where naturally occurring and if appropriate some activities may be observed rather than simulated.

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

A clearly defined brief for the observation / simulation needs (including timing of activities) will be provided for the apprentice during the readiness for independent end point assessment meeting, at least 5 working days before the simulation will take place.

Assessment criteria for the simulated scenario can be found in Annex E.

Annex D: Professional discussion specification

Key facts:

- ✓ 60 minute discussion between the apprentice and the independent end point assessor
- ✓ Will include areas of the standard identified in Annex A
- ✓ Planned in advance during EPA period to allow the apprentice to prepare fully for the discussion

The professional discussion is a structured discussion between the apprentice and their independent end point assessor.

The independent end point assessor conducting and marking the professional discussion would normally be the same person who marked the competence scenario. It allows the independent end point assessor to ask the apprentice questions in relation to:

- ✓ Coverage of the standard as defined in Annex A

The apprentice will be informed of the requirements prior to the discussion at least five working days in advance and can bring additional materials to assist them to demonstrate their competence. The discussion must be appropriately structured to draw out the best of the apprentice's energy, enthusiasm, competence and excellence.

The professional discussion will be conducted in a 'controlled environment' i.e. a quiet room, away from the normal place of work. If for any reason it is not possible for all involved to meet in the same place, the end point assessors must ensure adequate controls are in place to maintain fair and accurate assessment. 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 assessment organisation, which can be contextualised will be used, to ensure that standards are secure but interviewers 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 identified in Annex A.

The professional discussion will recognise areas which have already been covered in the simulated scenario so as not to re-assess an area in which the apprentice has already demonstrated competence. The professional discussion will last up to 60 minutes, and will be marked by the independent end point assessor using the standard template. The template will record full details of all marks applied (and evidence referenced) by the end point assessor.

Grading criteria for the professional discussion can be found in Annex E

Annex E: Grading criteria

N.B. Assessment organisations will clearly identify performance requirements above a pass for apprentices to achieve the distinction grade in each assessment activity. These criteria will be appropriate to the assessment method. For example:

- On-demand test will have grade boundaries 0-69 fail, 70-84 pass, 85-100 distinction)
- Competence scenario will be graded pass / fail
- Professional discussion will have descriptors for performance, such as describe, explain (pass) and evaluate, review, recommend (distinction). See Annex E (ii-iv) for details on Pass and Distinction requirements.

Each apprentice must complete the assessment activities and cover the grading criteria below for both the core and their relevant specialist function.

Annex E(i)	In order to pass the on-demand test all apprentices will demonstrate the knowledge, understanding and skills of the following core and relevant specialist function criteria:
Core	<ul style="list-style-type: none"> • Principles of protecting the business reputation based on values, vision, aims and behaviours • The uses of technology within the business and how it contributes to the reputation of the business • The variety of methods of communication and how to use these depending on the situation and the audience • The types of teams that operate within the industry, how to support colleagues and how strengths and weaknesses affect team dynamics • The legislative requirements of the business
Funeral Arranger	<ul style="list-style-type: none"> • The principles of operating commercially within the industry • The importance of accurate calculation and completion of the client contract
Funeral operative	<ul style="list-style-type: none"> • The legislative requirements regarding the driving and maintenance of vehicles • The principles of risk assessment within the business

Annex E(ii)	The following competencies must form the basis for the competence-based scenario:
Core	<p>In order to pass all apprentices will:</p> <ul style="list-style-type: none"> • Demonstrate effective, two-way communication • Establish specific client needs through questioning, confirm understanding of needs • Deliver excellent service to clients, meeting their needs • Provide clients with accurate information regarding the products and services of the business • Work within required legislation, standards and procedures • Demonstrate respect, professionalism and empathy • Work within legislative guidelines • Protect the business reputation by demonstrating the business values, vision, aims and behaviours • Support team members to achieve objectives
Arranger	<p>In addition, in order to pass funeral arrangers will:</p> <ul style="list-style-type: none"> • Arrange funerals according to the specific needs of clients, in line with legislative and business requirements • Maintain accurate client records • Arrange and assist in visits to the deceased ensuring clients needs are respected
Operative	<p>In addition, in order to pass funeral operatives will:</p> <ul style="list-style-type: none"> • Drive, maintain and clean business vehicles ensuring legislative and business requirements are met • Demonstrate dignity and respect while handling and moving the deceased and preparing and presenting the coffin • Carry out duties on the day of the funeral professionally and safely

Annex E(iii)	In order to pass the professional discussion apprentices will demonstrate ALL of the following during the professional discussion, unless naturally occurring evidence in the competence scenario has already demonstrated competence in which case it should not be reassessed.
Coverage	The apprentice's professional discussion should focus on the elements of the standard identified in Annex A. In order to pass the apprentice will explain, using examples, how they perform to the standards required. This may incorporate the use of additional documentation / working examples.
In order to pass all apprentices will:	<ul style="list-style-type: none"> • Clearly articulate examples from the workplace relevant to evidencing competence across the standard • Explain the methods of adapting communication to suit specific client needs • Provide examples of clear communication with clients using varying media • Provide an overview of ways that client feedback has been obtained and handled • Explain the local demographic and provide examples of forming professional relationships to maintain the business reputation and position within the local community • Describe how they have supported colleagues efficiently • Explain the business policies and procedures relating to third-party locations of the deceased, identification, release of ashes, personal effects, notifiable diseases and specialist services (not already demonstrated in the competence scenario) • Explain how personal goals were identified and evaluate how their completion has contributed to the success of the business
Funeral arrangers will:	<ul style="list-style-type: none"> • Explain the third parties involved in arranging a funeral • Provide examples demonstrating how they have prioritised activities when arranging a funeral
Funeral operatives will	<ul style="list-style-type: none"> • Describe the importance of planning the route, developing contingency routes and checking local disruptions prior to setting off for the funeral • Explain the importance of correctly maintaining and cleaning the funeral vehicles • Describe how and when to request additional support when carrying out the transfer of the deceased • Describe how to identify and handle potential incidents and when to escalate to an appropriate person

Annex E(iv)	In order to obtain distinction in the professional discussion apprentices will, in addition to achieving all pass criteria, demonstrate ALL of the following during the professional discussion
<p>Across the standard – both core and specialist function</p>	<ul style="list-style-type: none"> • Demonstrate confidence, engagement and motivation in handling specific client needs • Demonstrate how own actions have increased quality, cost-saving, value and performance • Demonstrate how they have engaged with the local community to actively promote the business and uphold its reputation • Provide examples of occasions when they have acted under their own initiative to resolve a client concern or complaint • Proactively invite feedback from all stakeholders in order to develop self, team and business