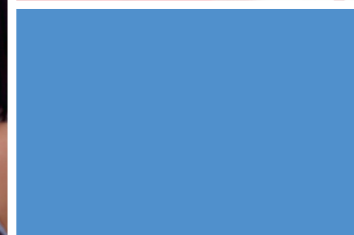
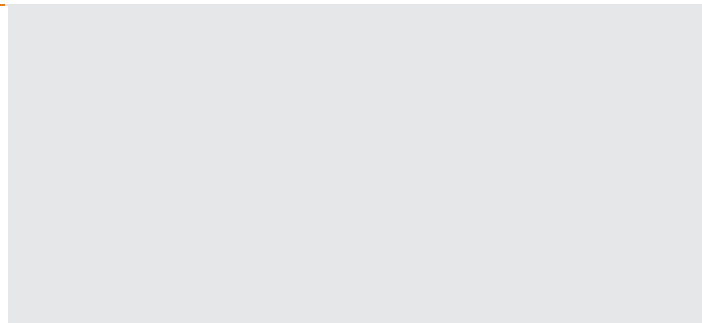


Funeral Sector Professional Competency Profiles – Second Edition



BAO FUNERAL SECTOR PROFESSIONAL COMPETENCY PROFILES

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Committed to ensuring the consumers of Ontario are served by licensees who meet high standards of learning, competence and professional conduct, the *BAO Funeral Sector Professional Competency Profiles – Second Edition* identifies the competencies of each specified licence class including:

- **Funeral Director – Class 1 (Embalming)**
- **Funeral Director – Class 2 (Non-Embalming)**
- **Transfer Service Sales Representative**
- **Funeral Preplanner**

Key to the development of a comprehensive document that accurately reflects the scope of practice for each licence class, the services of an external education consultant were engaged to lead the process in collaboration with stakeholders, licensees from across the province representing various demographics, and other members of the funeral profession.

Designed to provide a solid foundation for funeral service education initiatives, the *BAO Funeral Sector Professional Competency Profiles – Second Edition* offers a single point of reference to assist licensees with assessing competence, identifying potential training objectives and establishing effective performance plans.

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**COMPETENCIES LISTED IN THIS DOCUMENT ARE ASSOCIATED
TO THE FOLLOWING FUNERAL SECTOR LICENCE CLASSES:**

Funeral Director – Class 1 – (Embalming)
Funeral Director – Class 2 – (Non-Embalming)
Transfer Service Sales Representative
Funeral Preplanner

AREA	DESCRIPTION
1. Communication and Responsiveness	The needs of the legal representative(s) of the deceased and the bereaved are fulfilled through effective communication skills in a supportive atmosphere
2. Care of the Deceased	The care and handling of the deceased is consistent with accepted principles and sound practices of the profession and the direction of the legal representative(s) of the deceased.
3. Disposition, Funeral Services and Visitation	Disposition, funeral services and visitation are arranged and directed effectively and professionally, consistent with the direction of the legal representative(s) and sensitive to the needs of the bereaved.
4. Business Practice	All aspects of business operations are carried out in a legal, ethical, effective, safe and efficient manner and effective community relations are maintained.
5. Professionalism	Conduct is consistent with the principles and accepted standards of practice of the profession at all times.

Note: Each licensee has a scope of practice limited by applicable legislation.

**COMPETENCY 1
COMMUNICATION
AND RESPONSIVENESS:**

**THE NEEDS OF THE LEGAL REPRESENTATIVE(S) OF THE DECEASED AND THE
BEREAVED ARE FULFILLED THROUGH EFFECTIVE COMMUNICATION SKILLS
IN A SUPPORTIVE ATMOSPHERE.**

Core Competency	Expected Performance to Demonstrate the Competency	FD – Class 1 (Embalming)	FD – Class 2 (Non-Embalming)	TS Sales Rep.	Funeral Pre-planner
<p>1. Conduct arrangement conference in an ethical, supportive, sensitive and effective manner</p>	<p>1. Be supportive and sensitive to the needs and expectations of the person(s) making the arrangements:</p> <ul style="list-style-type: none"> • communicate in a manner deemed supportive and sensitive consistent with accepted professional practice • receive the initial enquiry and subsequent – by telephone, in person or other means • provide required information and respond to requests, clarifying any misinformation or misperceptions • arrange follow up as required 	X	X	X	X
	<p>2. Determine appropriate authorities:</p> <ul style="list-style-type: none"> • ask appropriate questions to determine who has the legal authority to make arrangements for a funeral or disposition of the deceased, obtaining written confirmation and supporting documentation wherever necessary and possible 	X	X	X	X

Core Competency	Expected Performance to Demonstrate the Competency	FD – Class 1 (Embalming)	FD – Class 2 (Non-Embalming)	TS Sales Rep.	Funeral Pre-planner
<p>1. Conduct arrangement conference in an ethical, supportive, sensitive and effective manner</p>	<p>3. Assess the emotional and psychological needs of the person(s) making the arrangements and the bereaved, recognizing the limitations in the scope of practice:</p> <ul style="list-style-type: none"> • determine the concerns, expectations and needs of the person(s) making the arrangements, based on verbal and non verbal communication • show concern for those who are in distress, while retaining professional objectivity • understand and be able to explain fundamental theories of grief or common reactions to grief • where beyond the scope of practice make persons aware of the availability of counselling or refer to appropriate health care professional(s), e.g. physician, grief counsellor or therapist • understand how grief affects the functioning of a family from childhood through adulthood, and respond appropriately • be sensitive and accepting of the person’s social, cultural and economic status and religious or philosophical persuasion • remain aware of different coping styles, attitudes and expectations among those affected by death 	X	X	X	X

Core Competency	Expected Performance to Demonstrate the Competency	FD – Class 1 (Embalming)	FD – Class 2 (Non-Embalming)	TS Sales Rep.	Funeral Pre-planner
<p>1. Conduct arrangement conference in an ethical, supportive, sensitive and effective manner</p>	<p>4. Communicate effectively and sensitively with the person(s) making arrangements and the bereaved:</p> <ul style="list-style-type: none"> • apply basic techniques of dispute resolution and counselling, including communication and listening skills, use of questions, identifying feelings, summarizing and paraphrasing, use of examples and clarifying • obtain complete and accurate information for the purpose of documentation • assist in the preparation of death announcements • communicate in a manner that exemplifies reverence, empathy and dignity at all times • explain and discuss the importance of documentation (such as the Statement of Death – Form 15 and the funeral director’s proof of death) • explain and discuss price list and options for disposition • maintain confidentiality of information at all times • use all means of communication effectively 	X	X	X	X

Core Competency	Expected Performance to Demonstrate the Competency	FD – Class 1 (Embalming)	FD – Class 2 (Non-Embalming)	TS Sales Rep.	Funeral Pre-planner
<p>1. Conduct arrangement conference in an ethical, supportive, sensitive and effective manner</p>	<p>5. Provide information about disposition and memorialization options in a sensitive and respectful manner and assess the needs and expectations of the person(s) making arrangements and of the bereaved:</p> <ul style="list-style-type: none"> • explain available options for disposition and memorialization, including anatomical donation (organ, tissue, whole body) • explain processes and procedures accurately and thoroughly to allow the person(s) making arrangements sufficient information to make informed decisions, including the potential advantages and disadvantages • present, describe and explain services and merchandise offered for sale • communicate limitation of scope of practice, available services or facilities • provide price list and explain clearly as it applies to the options offered 	X	X	X	X

Core Competency	Expected Performance to Demonstrate the Competency	FD – Class 1 (Embalming)	FD – Class 2 (Non-Embalming)	TS Sales Rep.	Funeral Pre-planner
<p>1. Conduct arrangement conference in an ethical, supportive, sensitive and effective manner</p>	<p>6. Discuss financial arrangements with the person(s) making arrangements:</p> <ul style="list-style-type: none"> • verify in a sensitive manner who is legally responsible to make arrangements and who will be financially responsible as the purchaser under the contract • ensure delivery of up to date price list to the appropriate person(s), prior to entering into a contract • explain and discuss clearly, concisely and accurately applicable payment policies • explain and discuss clearly, concisely and accurately potential sources of financial assistance when appropriate • provide clearly, concisely and accurately information about government requirements and benefits that may be available • identify and clearly explain disbursements that may be necessary and payment options for same • identify in a respectful and sensitive manner the purchaser’s financial parameters, as established by the purchaser 	X	X	X	X
	<p>7. Obtain permissions for the transfer, casketing or preparation of the deceased in a respectful and sensitive manner:</p> <ul style="list-style-type: none"> • obtain oral or written permission to transfer the human remains • obtain oral or written permission to complete the preparation to be performed on the body 	X	X	X	X

Core Competency	Expected Performance to Demonstrate the Competency	FD – Class 1 (Embalming)	FD – Class 2 (Non-Embalming)	TS Sales Rep.	Funeral Pre-planner
<p>1. Conduct arrangement conference in an ethical, supportive, sensitive and effective manner</p>	<p>8. Obtain permission to arterially embalm the deceased in a respectful and sensitive manner:</p> <ul style="list-style-type: none"> • obtain in a respectful manner specific authorization to embalm 	X	X	N/A	X
	<p>9. Provide and explain information about prearranging and prefunding services and merchandise in a sensitive and respectful manner:</p> <ul style="list-style-type: none"> • discuss clearly and accurately the advantages and limitations of prearranging services and merchandise • discuss clearly and accurately the advantages and limitations of prefunding services and merchandise, including a clear explanation of the total cost, how a prepaid contract is fulfilled at time of need and the contractual and financial rights and obligations of all parties, including guarantees and cancellation rights • discuss clearly, concisely and accurately the funding and financing options available to the consumer, (e.g., trust or insurance), including the advantages and limitations of each • be knowledgeable about various funding options and how they may be liquidated or transferred effectively, efficiently and with minimal impact on the consumer 	X	X	X	X

Core Competency	Expected Performance to Demonstrate the Competency	FD – Class 1 (Embalming)	FD – Class 2 (Non-Embalming)	TS Sales Rep.	Funeral Pre-planner
<p>1. Conduct arrangement conference in an ethical, supportive, sensitive and effective manner</p>	<p>10. Manage effectively and sensitively contractual negotiations and obligations:</p> <ul style="list-style-type: none"> • outline in writing the services and merchandise agreed upon with their corresponding prices • note any special instructions and pertinent details of the arrangements • obtain in a respectful manner specific authorization to carry out any preparation of the human remains requested by the legal representative(s) • review and affirm with the purchaser all arrangements agreed upon • disclose clearly, concisely and accurately, information concerning affiliations with other organizations or commissions or other benefits, as appropriate • explain, discuss and present for signature an itemized contract containing all the details of the agreement, including a list of agreed upon funeral services, merchandise, and disbursements • ensure that the contract is complete and accurate, including appropriate signatures and initials • provide purchaser with signed copy of contract at the time it is signed, or as soon as is reasonably practicable thereafter, or as required by law 	X	X	X	X

**COMPETENCY 2
CARE OF THE DECEASED:**

THE CARE AND HANDLING OF THE DECEASED IS CONSISTENT WITH ACCEPTED PRINCIPLES AND SOUND PRACTICES OF THE PROFESSION AND THE DIRECTION OF THE LEGAL REPRESENTATIVE(S) OF THE DECEASED.

Core Competency	Expected Performance to Demonstrate the Competency	FD – Class 1 (Embalming)	FD – Class 2 (Non-Embalming)	TS Sales Rep.	Funeral Pre-planner
<p>2(a) Care for and handle the human remains respectfully and safely at all times</p>	<p>1. Verify permission to proceed with the transfer of the human remains:</p> <ul style="list-style-type: none"> • verify with appropriate authorities, permission to transfer the human remains • verify identification of human remains at point of transfer and receipt 	X	X	X	N/A
	<p>2. Ensure the human remains are safe and secure (only while in possession or control of the human remains)</p>	X	X	X	N/A
	<p>3. Arrange for the transferring or receiving of the human remains transported to or from a third party or alternate destination</p> <ul style="list-style-type: none"> • manage ship-in and ship-out arrangements • manage arrangements for anatomical donation 	X	X	X	N/A

Core Competency	Expected Performance to Demonstrate the Competency	FD – Class 1 (Embalming)	FD – Class 2 (Non-Embalming)	TS Sales Rep.	Funeral Pre-planner
<p>2(a) Care for and handle the human remains respectfully and safely at all times</p>	<p>4. Handle the human remains safely:</p> <ul style="list-style-type: none"> • employ universal precautions (e.g., barriers and aseptic technique) and encourage co-workers and colleagues to do so • comply with and apply WHMIS standards and requirements • comply with jurisdictional health and safety standards as required by federal and provincial health laws and ministries, local boards of health, or other authorities • correctly identify and follow all special requirements for cases involving infections, diseases and other traumatic conditions, considering the cause of death • remove medical and hazardous materials and ensure safe disposal consistent with relevant laws, regulations, accepted practice standards and policies 	X	X	X	N/A
	<p>5. Effect the safe and respectful transfer of the human remains:</p> <ul style="list-style-type: none"> • assess and determine needs to effect an appropriate transfer of human remains • transfer the human remains in a dignified and timely manner, using appropriate protocols and techniques • disinfect stretcher, equipment and facilities in a timely manner, but before it is used to transfer another body • secure, label and record personal effects • position body on preparation table maintaining the dignity of body 	X	X	X	N/A

Core Competency	Expected Performance to Demonstrate the Competency	FD – Class 1 (Embalming)	FD – Class 2 (Non-Embalming)	TS Sales Rep.	Funeral Pre-planner
<p>2(b) Care for and handle the human remains respectfully and safely at all times – WITHOUT embalming or restoration</p>	<p>1. Verify instructions to prepare the body (excluding embalming):</p> <ul style="list-style-type: none"> • verify in a respectful manner the authorization to perform any preparation – with individual who made the arrangements or the legal representative(s) directly • identify and adhere to preparation instructions, including any cultural, religious or personal requirements • verify the identification tags affixed to the body prior to carrying out any procedures 	X	X	X	N/A
	<p>2. Assess the condition of the body taking into account all intrinsic and extrinsic factors that may affect the ability to remove personal effects and casket the body, considering but not limited to:</p> <ul style="list-style-type: none"> • a detailed understanding of the anatomy of the human body • a detailed understanding of the bacteriology and the process of infection 	X	X	X	N/A
	<p>3. Conduct effectively the pre-preparation case analysis of body and take all intrinsic and extrinsic factors into account to determine and perform appropriate techniques as required, including but not limited to the following:</p> <ul style="list-style-type: none"> • select and set up preparation room equipment and supplies (e.g., soaps, disinfectants, equipment, instruments) 	X	X	N/A	N/A

Core Competency	Expected Performance to Demonstrate the Competency	FD – Class 1 (Embalming)	FD – Class 2 (Non-Embalming)	TS Sales Rep.	Funeral Pre-planner
<p>2(c) Embalm and restore the body safely at all times and appropriately</p>	<p>1. Verify permission to embalm or restore the body:</p> <ul style="list-style-type: none"> • verify in a respectful manner the authorization to embalm – with funeral director who made the arrangements or the legal representative(s) directly • verify the identification tags affixed to the body before embalming • ensure effective and accurate communication between arranging funeral director and the funeral director performing the embalming • identify and adhere to any cultural, religious or personal requirements for embalming 	X	X	N/A	N/A
	<p>2. Conduct effectively the pre-embalming preparation case analysis of body and take all intrinsic and extrinsic factors into account to determine and perform appropriate techniques as required, including but not limited to the following:</p> <ul style="list-style-type: none"> • select and set up preparation room embalming equipment and supplies (e.g., fluids, instruments) • ensure appropriate set up for concurrent disinfection of the body • identify accurately anatomical guides, and determine anatomical limits and linear guides of major vessels used in embalming • determine accurately the methods and points of injection and drainage • determine accurately the type, volume and solution strength of embalming fluid required, considering the ingredients of the fluid and their effects on a body • determine accurately the pressure and rate of flow setting for embalming equipment 	X	N/A	N/A	N/A

Core Competency	Expected Performance to Demonstrate the Competency	FD – Class 1 (Embalming)	FD – Class 2 (Non-Embalming)	TS Sales Rep.	Funeral Pre-planner
<p>2(c) Embalm and restore the body safely at all times and appropriately</p>	<p>3. Complete/perform effective embalming and restoration processes:</p> <ul style="list-style-type: none"> • be knowledgeable of the operation of equipment and select most appropriate equipment to carry out the embalming, disinfection and restoration • select and prepare appropriately, vessels for injection and drainage • operate correctly embalming machines, instruments and other embalming equipment • ensure body is monitored carefully during injection • during injection, monitor pressure and rate of flow and adjust as required • monitor accurately fluid distribution and drainage • employ massage or other techniques to ensure complete distribution of embalming fluids • examine body to ensure embalming fluid has reacted adequately with body tissues • ligate vessels and suture incisions using appropriate and recommended closure techniques • disinfect and prepare cavities in the recommended manner (i.e. aspirate cavities thoroughly and perform cavity injection) • select and use appropriate hypodermic chemicals as required • use topical applications as required • apply recommended preservation techniques to autopsied body as required • return all treated tissues to the cavities of the autopsied body in an appropriate and recommended manner • utilize procedures required to deal with consequences of tissue and/or organ donation • diaper and/or pack orifices as required • complete/perform restoration of body (e.g. wax, tissue builder), in addition to setting the features, consistent with the desired outcomes • comply with municipal and other applicable health regulations for pathological waste disposal 	<p>X</p>	<p>N/A</p>	<p>N/A</p>	<p>N/A</p>

Core Competency	Expected Performance to Demonstrate the Competency	FD – Class 1 (Embalming)	FD – Class 2 (Non-Embalming)	TS Sales Rep.	Funeral Pre-planner
<p>2(d) Complete the non-embalming preparation of the body effectively and efficiently</p>	<p>1. Complete effectively and efficiently all non-embalming preparation processes:</p> <ul style="list-style-type: none"> • unshroud body in a dignified manner and ensure attachment of accurate identification and cover genitals • undress the body and remove all devices or equipment in preparation for bathing or dressing • bathe and groom the body consistent with the direction of the legal representative(s) • correctly and thoroughly disinfect the body consistent with the direction of the legal representative(s) • prepare the body, including setting of features, in a manner consistent with the direction of the legal representative(s) • dress the body maintaining the dignity of the deceased at all times consistent with the direction of the legal representative(s) • style the hair and apply cosmetics consistent with the direction of the legal representative(s) • complete accurately and thoroughly a preparation report and any other required reports 	<p>X</p>	<p>X</p>	<p>N/A</p>	<p>N/A</p>

Core Competency	Expected Performance to Demonstrate the Competency	FD – Class 1 (Embalming)	FD – Class 2 (Non-Embalming)	TS Sales Rep.	Funeral Pre-planner
<p>2(e) Place the body in the casket or container in a respectful and appropriate manner</p>	<p>1. Place the body in the casket or container in a respectful and appropriate manner:</p> <ul style="list-style-type: none"> • obtain and inspect selected casket or container • centre casket or container on carriage or bier, if applicable • adjust interior bedding as appropriate • place and position body in casket or container and add personal effects as directed by the legal representative(s) • perform final inspection and ensure all has been done according to the wishes of the legal representative(s) • monitor body until time of disposition 	X	X	X	N/A

**COMPETENCY 3
DISPOSITION,
FUNERAL SERVICES:**

DISPOSITION, FUNERAL SERVICES AND VISITATION ARE ARRANGED AND DIRECTED EFFECTIVELY AND PROFESSIONALLY, CONSISTENT WITH THE DIRECTION OF THE LEGAL REPRESENTATIVE(S) AND SENSITIVE TO THE NEEDS OF THE BEREAVED.

Core Competency	Expected Performance to Demonstrate the Competency	FD – Class 1 (Embalming)	FD – Class 2 (Non-Embalming)	TS Sales Rep.	Funeral Pre-planner
<p>3(a) Confirm in a professional and dignified manner the services and merchandise that have been agreed upon</p>	<p>1. Confirm and finalize arrangements consistent with the requests of the legal representative(s):</p> <ul style="list-style-type: none"> • review and confirm in a sensitive and respectful manner the final arrangements and procedures for services • arrange all other service details as appropriate • confirm identification of human remains and casket, container or urn 	X	X	X	N/A
<p>3(b) Carry out body identification professionally and with dignity</p>	<p>1. Prepare the environment for body identification consistent with the direction of the legal representative(s) and carry out identification:</p> <ul style="list-style-type: none"> • position casket or container appropriately • set and adjust lighting as appropriate • present the body in a professional manner and with dignity 	X	X	X	N/A

Core Competency	Expected Performance to Demonstrate the Competency	FD – Class 1 (Embalming)	FD – Class 2 (Non-Embalming)	TS Sales Rep.	Funeral Pre-planner
<p>3(c) Direct funeral services and visitation professionally and with dignity</p>	<p>1. Prepare the environment for visitation or funeral service consistent with the direction of the legal representative(s):</p> <ul style="list-style-type: none"> • place casket, container or urn appropriately • set and adjust lighting as appropriate • arrange floral tributes, memorabilia, religious symbols, flag(s), etc. • set out register book, memorial folders, prayer cards and other items, as appropriate • designate reserved seating • designate reserved parking area for family, funeral coach, casket bearers, and others 	X	X	N/A	N/A
	<p>2. Organize and direct processions in a respectful and safe manner:</p> <ul style="list-style-type: none"> • organize and direct processions, (e.g. to the church, cemetery or crematorium), reminding guests to obey all traffic regulations 	X	X	N/A	N/A

Core Competency	Expected Performance to Demonstrate the Competency	FD – Class 1 (Embalming)	FD – Class 2 (Non-Embalming)	TS Sales Rep.	Funeral Pre-planner
	<p>3. Direct funeral services or visitation in a respectful and sensitive manner consistent with the direction of the legal representative(s):</p> <ul style="list-style-type: none"> • receive and direct guests to the appropriate area • monitor visitation and reception area • close casket or container properly • meet with officiant to review final details for the funeral • assign appropriate staff and vehicles and arrange for necessary equipment • send vehicle(s) for family as appropriate • direct casket bearers in all aspects of their involvement • usher family, friends, and guests to appropriate seats • place receptacle (casket, urn, etc.) in appropriate position for the funeral, as appropriate • direct the funeral according to the preferences agreed upon with the legal representative(s) • support officiant in conducting the funeral as appropriate • make appropriate arrangements for family and officiant to be returned to the desired destination (e.g., home, church, funeral home) • attend, support and monitor post service or disposition gathering as appropriate 	X	X	N/A	N/A

Core Competency	Expected Performance to Demonstrate the Competency	FD – Class 1 (Embalming)	FD – Class 2 (Non-Embalming)	TS Sales Rep.	Funeral Pre-planner
<p>3(c) Direct funeral services and visitation professionally and with dignity</p>	<p>4. Oversee and coordinate all disposition details consistent with the direction of the legal representative(s):</p> <ul style="list-style-type: none"> • burial or cremation services • arrange for and supervise postponed disposition or disposition by a third party (e.g., spring interment, shipout, cremated remains) • return cremated remains in a respectful manner to the appropriate individual(s) • supervise the correct closure of outer container • manage memorial donations in an efficient and ethical manner 	X	X	X	N/A
<p>3(d) Provide appropriate follow up services</p>	<p>1. Complete post disposition details in a timely manner:</p> <ul style="list-style-type: none"> • provide necessary documentation to support estate settlement (e.g. CPP forms, proof of death, cancellation of SIN, health card, driver's licence, credit cards, insurance reports etc.) • complete documentation in compliance with specified business practices • ensure return of personal effects to the appropriate person or destination • ensure delivery of expressions of sympathy (e.g. donations, floral tributes) and documentation to the appropriate person(s) 	X	X	X	X
	<p>2. Respond respectfully and sensitively to the post service or disposition needs of the bereaved:</p> <ul style="list-style-type: none"> • provide general guidance to the bereaved coping with grief • provide access to resource materials on bereavement • distribute appropriate information • refer bereaved to appropriate support services or health care professional(s) as required 	X	X	X	X

**COMPETENCY 4
BUSINESS PRACTICE:**

ALL ASPECTS OF BUSINESS OPERATIONS ARE CARRIED OUT IN A LEGAL, ETHICAL, EFFECTIVE, SAFE AND EFFICIENT MANNER AND EFFECTIVE COMMUNITY RELATIONS ARE MAINTAINED.

Core Competency	Expected Performance to Demonstrate the Competency	FD – Class 1 (Embalming)	FD – Class 2 (Non-Embalming)	TS Sales Rep.	Funeral Pre-planner
<p>4(a) Identify and comply with all relevant and current regulatory requirements</p>	<p>1. Identify and comply with relevant governing legislation and maintain current knowledge of applicable laws and codes, such as the following:</p> <ul style="list-style-type: none"> • specific laws governing the sale of funeral and cemetery services and supplies, relevant family and privacy law, and licensing and other reporting requirements • human rights and employment law • codes of conduct and policies established by the regulatory body • municipal, health and safety, labour, taxation, consumer protection, etc. 	X	X	X	X
	<p>Owner/Manager: Ensure the business is operated pursuant to relevant governing legislation and maintain current knowledge of applicable laws and codes</p>	X	X	X	N/A

Core Competency	Expected Performance to Demonstrate the Competency	FD – Class 1 (Embalming)	FD – Class 2 (Non-Embalming)	TS Sales Rep.	Funeral Pre-planner
<p>4(b) Apply effective and efficient business practices</p>	<p>1. Support the operation of the business and service delivery in compliance with business policies and procedures such as:</p> <ul style="list-style-type: none"> • carry out assigned duties in keeping with accepted sales and service delivery practices • complete accurately all records required by the business • comply with business policies • abide by policies relating to telephone etiquette, appropriate dress and conduct 	X	X	X	X
	<p>Owner/Manager: Operate the business consistent with sound governance and generally accepted practices in business management:</p> <ul style="list-style-type: none"> • develop, or participate in, the development of long-term and short-term goals and objectives for the business • develop and implement business policies and procedures (e.g. employee code of conduct, record completion requirements, accepted sales and service delivery practices, personal effect tracking) • evaluate and obtain appropriate insurance coverage (e.g., personal and business liability, third party liability) • display merchandise in a respectful and tasteful manner and in compliance with regulatory requirements • ensure performance of required administrative duties • apply basic computer skills to managerial, administrative and other functions • provide appropriate training for personnel and maintain accurate records • ensure all other records required by applicable laws and regulations are maintained accurately • ensure accurate inventory of merchandise and business supplies is maintained 	X	X	X	N/A

Core Competency	Expected Performance to Demonstrate the Competency	FD – Class 1 (Embalming)	FD – Class 2 (Non-Embalming)	TS Sales Rep.	Funeral Pre-planner
4(b) Apply effective and efficient business practices	2. Apply sound judgement and decision making skills: <ul style="list-style-type: none"> • use critical thinking and reflective practice to predict, prevent and solve problems 	X	X	X	X
	3. Apply appropriate customer service practices: <ul style="list-style-type: none"> • adjust services as required based on feedback (of both consumers and management) 	X	X	X	X
	Owner/Manager: Apply appropriate marketing and customer service practices: <ul style="list-style-type: none"> • use appropriately demographics and marketing data • gather feedback on service and level of satisfaction • modify services based on feedback (consumers and employees) 	X	X	X	N/A
	4. Complete accurately all required financial transactions and related record keeping consistent with business policies and procedures.	X	X	X	X
	Owner/Manager: Ensure the accurate completion of all required financial transactions on behalf of the business, such as: <ul style="list-style-type: none"> • develop or provide input to budgets, pricing and price list(s) • ensure that payroll, accounts payable and receivable are processed • maintain operational records 	X	X	X	N/A
	5. Use relevant technology effectively in the conduct of business and provision of services	X	X	X	X

Core Competency	Expected Performance to Demonstrate the Competency	FD – Class 1 (Embalming)	FD – Class 2 (Non-Embalming)	TS Sales Rep.	Funeral Pre-planner
<p>4(c) Ensure safe and functional equipment and environment</p>	<p>1. Ensure or provide, effective general maintenance functions related to facilities and equipment such as:</p> <ul style="list-style-type: none"> • appropriate landscaping, grounds keeping • housekeeping and maintenance of facilities • cleaning, and maintenance of vehicles • timely cleaning and maintenance of equipment • safety and security of facilities and equipment 	X	X	X	X
<p>4(d) Work effectively with staff and coworkers to create a healthy work environment</p>	<p>1. Apply accepted principles of team work:</p> <ul style="list-style-type: none"> • use time management and organizational skills effectively • support the development of appropriate job descriptions • participate in employee meetings and personnel decisions as appropriate • supervise other employees as required • work with all personnel to prevent and resolve workplace conflicts • apply appropriate strategies to reduce the risk of personal injury and illness to self or other team members • apply effective stress management skills 	X	X	X	X

Core Competency	Expected Performance to Demonstrate the Competency	FD – Class 1 (Embalming)	FD – Class 2 (Non-Embalming)	TS Sales Rep.	Funeral Pre-planner
<p>4(d) Work effectively with staff and coworkers to create a healthy work environment</p>	<p>Owner/Manager: Effectively apply accepted principles of personnel management:</p> <ul style="list-style-type: none"> • use time management and organizational skills effectively • develop or assist in the development of appropriate job descriptions • involve employees or participate in personnel decisions where appropriate • conduct and participate effectively in employee meetings • supervise employees appropriately • work with all personnel to prevent and resolve workplace conflicts • schedule appropriately employees, facilities and equipment • train employees in their respective responsibilities and duties • ensure professional development of employees • regularly evaluate employees on their performance • maintain accurate employee records • adhere to legislative requirements regarding employees (e.g., mandatory source deductions from wages) • engage in fair employment practices • ensure appropriate health and safety requirements are met (e.g., WHMIS, disposal of hazardous waste, implementation of universal precautions) • apply appropriate strategies to reduce the risk of personal injury and illness • apply effective stress management skills 	X	X	X	X

Core Competency	Expected Performance to Demonstrate the Competency	FD – Class 1 (Embalming)	FD – Class 2 (Non-Embalming)	TS Sales Rep.	Funeral Pre-planner
<p>4(e) Maintain effective community/public relations</p>	<p>1. Present to the community at all times a professional image:</p> <ul style="list-style-type: none"> • follow professional ethics consistent with accepted professional practice • show sensitivity to diversity • provide compassionate service • relate professionally and positively to other professionals and organizations connected directly or indirectly to the funeral sector 	X	X	X	X
	<p>2. Serve as a community resource related to death and the funeral sector:</p> <ul style="list-style-type: none"> • make professional presentations to community groups • conduct tours professionally and as appropriate • cooperate with media • provide accurate and relevant information on the history and importance of the funeral sector and the profession’s respect for the diversity of cultural, religious, and social values • provide accurate information on the emotional and psychological benefits of memorialization • provide accurate and comprehensive information on the ethical foundation of the services provided by those in the funeral sector • maintain and distribute resources for public education and information about death, dying and grief • develop or help develop appropriate written communication templates for use with families, professional groups, etc. 	X	X	X	X

**COMPETENCY 5
PROFESSIONALISM:**

**CONDUCT IS CONSISTENT WITH THE PRINCIPLES AND ACCEPTED STANDARDS OF
PRACTICE OF THE PROFESSION AT ALL TIMES.**

Core Competency	Expected Performance to Demonstrate the Competency	FD – Class 1 (Embalming)	FD – Class 2 (Non-Embalming)	TS Sales Rep.	Funeral Pre-planner
<p>5(a) Practice professionalism at all times</p>	<p>1. Implement professional abilities at all times:</p> <ul style="list-style-type: none"> • accept professional responsibility to protect the dignity and interest of those served • apply competencies and conduct consistent with accepted professional practice • understand that professional accountability relies upon conscientious, self-disciplining and responsible members • conduct self in a manner consistent with professional ethics, decorum, and dignity in every aspect of operations • recognize professional misconduct and respond appropriately, consistent with reporting requirements and accepted professional practice to mitigate any adverse effects depending on the context • identify current trends and developing social and cultural approaches to death and their impact on professional practice • understand historic criticisms leading to changes in the funeral sector and of underlying sensitivities and concerns • be sensitive to the needs, beliefs and expectations of others • maintain a professional relationship with other funeral sector providers and related businesses 	X	X	X	X

Core Competency	Expected Performance to Demonstrate the Competency	FD – Class 1 (Embalming)	FD – Class 2 (Non-Embalming)	TS Sales Rep.	Funeral Pre-planner
5(b) Maintain competence at professional levels at all times	<p>1. Regularly participate in ongoing personal and professional development activities:</p> <ul style="list-style-type: none"> • attend recognized professional development activities and events • maintain currency in the beliefs and practices relating to death in multicultural communities • read current trade magazines, journals and web sites • ensure currency about emerging trends in services, merchandise and technology • engage in interprofessional collaboration activities and network with peers to exchange information and ideas 	X	X	X	X
5(c) Maintain personal health	<p>1. Actively pursue personal physical, emotional and mental health maintaining a good work/life balance</p>	X	X	X	X