

Introduction to the Arrangement Conference

NOTICE:
Effective April 1, 2016, the Bereavement Authority of Ontario assumed responsibility for the licensing and enforcement activities previously exercised by the Board of Funeral Services (BOFS) and BOFS was dissolved as a corporation. This publication remains for informational purposes. Please contact the BAO at 1-844-493-6356 or visit www.bereavementauthorityontario.ca for more information.

**INTERNSHIP
SUPPORT
PROGRAM**

In support of the internship program, the Board of Funeral Services (BOFS), in collaboration with funeral directors, has developed a process to support the introduction of the intern to the arrangement conference. While there are many ways to approach training an intern, the following is a proven approach that has worked successfully for many interns and preceptors.

Step 1 – Introduction to the Arrangement Conference

The purpose of the training during Step 1 is to familiarize the intern with the arrangement conference. Prior to meeting with the consumer, discuss with the intern the nature of an arrangement. Ensure the intern understands the consumer with whom they will be meeting may be in a fragile or emotional state, which means sensitivity and compassion are needed above all.

- Review and explain what the intern will see in terms of the meeting room set up, process to be followed, anticipated seating arrangement and steps to be taken. The general approach to arrangements should be outlined ahead of time, to give the intern a good sense of what to expect and why.
- Explain how the forms need to be completed and how attempts will be made to extract the information from the consumer.
- Provide the intern with the same documents that will be used by the funeral director/preceptor in the arrangement conference.
- Explain to the consumer that the intern is training and will sit in to take notes and help to ensure all needs are met. Assure the consumer that all that is discussed remains completely confidential and will be used only for the purpose of arranging the funeral. Any information provided will NOT be shared more widely as part of the intern's education process.
- Instruct the intern to take notes and fill out documents exactly as if they were making the arrangements. Encourage the intern to note questions he/she has at the bottom of the form or on a separate sheet of paper to be discussed with the funeral director/preceptor after the arrangement conference.
- After the arrangement conference has concluded, review the documents together to compare the information collected, and deal with any outstanding questions.
- Repeat Step 1 several times with the intern to ensure the intern is comfortable with the process and expectations.
- The intern should be able to take notes and complete the necessary forms competently before proceeding to Step 2.

Step 2 – Teach the Forms

The purpose of the training during Step 2 is to familiarize the intern with the forms and documents that will be completed both during and after the arrangement conference.

- During the arrangement conference, the funeral director/preceptor asks the questions while the intern takes notes and completes the actual forms required. The funeral director/preceptor does not take his/her own notes as in Step 1. This raises the expectations

Introduction to the Arrangement Conference

of the intern and communicates they are accountable for the completion of the forms and taking notes.

- Through providing a controlled environment, the intern is given an opportunity to become comfortable with the forms and the pressure of collecting the information during the arrangement conference. The funeral director/preceptor has to be careful not to go too fast for the intern. The funeral director/preceptor may want to review the information collected from time to time.
- After the conference, the funeral director/preceptor and intern meet to go over the notes and paperwork. It is important to discuss any necessary changes in detail.
- The intern should be comfortable with completing all necessary forms before proceeding to Step 3.

Step 3 – Teach the Arrangement Discussion

The purpose of the training during Step 3 is to give the intern the experience to interact with the consumer and to lead the arrangement discussions, without having to worry about also completing the forms or taking notes.

- The intern must lead the arrangement discussion, while the funeral director/preceptor takes notes and completes the necessary forms.
- The funeral director/preceptor fills out the forms, and enters the discussion ONLY when vital information has not been sought.
- Following the arrangement conference the funeral director/preceptor and intern meet to discuss the arrangements. During the conversation, the funeral director/preceptor provides feedback and the intern is given the opportunity to ask questions of the funeral director/preceptor.
- The intern should be able to interact effectively with the consumer throughout the arrangement discussion before proceeding to Step 4.

Step 4 –Allow Intern to Demonstrate Competency

The purpose of the training during Step 4 is to give the intern the opportunity to put all of the learning of Steps 1 through 3 together and carry out the arrangement conference on their own. The funeral director/preceptor is welcome to be in the room although the process is a complete role reversal of Step 1. The funeral director/preceptor is encouraged to take notes for discussion with the intern after the arrangement conference, but ought not interfere.

- The intern leads the arrangement discussion while the funeral director/preceptor simply observes. Interjections should not be necessary. DO NOT raise issues while the consumer is present if they can wait for a private moment as doing so could undermine both the consumer's confidence in the intern and the intern's confidence in her/himself.
- Following the arrangement conference, the funeral director/preceptor and intern meet to discuss the arrangements with the funeral director/preceptor providing feedback and the intern being allowed the opportunity to ask questions of the funeral director/preceptor.

Introduction to the Arrangement Conference

Additional suggestions for providing the intern opportunities to interact with families

- Following visitation, give the intern the opportunity to clear the funeral with the consumer. Explain to the intern what is to happen and provide encouragement to inquire about any last minute details the consumer might want clarified, etc.
- The funeral director/preceptor **MUST** ensure the intern clearly understands the details that need to be confirmed, the information that must be communicated to the consumer and the particulars that need to be retrieved from the consumer. The intern cannot be expected to know how and what to do without coaching. Where possible, it is important to explain the “why” so the intern can effectively deliver a message to the consumer in a professional manner.
- It is imperative to **NEVER** assume the intern knows something if the funeral director/preceptor has **NOT** shared all of the necessary information.