

# **Introduction to Training and Developing Interns**

## **Guide to Training Plan and Performance Review**

2007

### **Board of Funeral Services**

2810-777 Bay Street, Box 117  
Toronto, ON M5G 2C8

Tel: (416) 979-5450

Toll Free: 1 (800) 387-4458

Fax: (416) 979-0384

[www.funeralboard.com](http://www.funeralboard.com)  
[info@funeralboard.com](mailto:info@funeralboard.com)

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## **Introduction**

Becoming a funeral director requires dedication and commitment to the profession and to the bereaved. While academic training is essential, hands-on training during an internship period is an integral part of becoming a professional in any discipline.

Funeral service is more than a job or a position; it involves a strong vocational component. There are many reasons why people choose funeral service as a career, but in the majority of cases new entrants still choose funeral service as a career based on their desire to care for people in time of need.

The purpose of the guide is to provide the preceptor with a road map to assist in providing a meaningful experience for the intern. The Board of Funeral Services has set out goals and objectives for internships and we hope this introduction will assist in the successful development of aspiring funeral directors.

The Board of Funeral Services recognizes the importance the internship plays in developing the skills required to become a funeral director. To that end, it is the hope that all preceptors will embrace the methodology and tools of training described in this document and those taught in the Preceptor Training Program thereby ensuring that interns can rise to their potential.

## Becoming A Funeral Director – A Four Step Process

The education, training and licensing of funeral directors in Ontario is a process that combines academic training, an internship (in-service period) and the successful completion of provincial licensing exams.

The four main steps to becoming a funeral director in Ontario are illustrated in the figure below.

Step 1	Step 2	Step 3	Step 4
<b>Pre-Admission To FSE Program</b>	<b>Academic Program</b>	<b>Internship Program</b>	<b>Licensing Examinations</b>
Candidate applies and completes pre-admission process, including task-based observation in a funeral establishment	Student completes <b>two year</b> academic program <ul style="list-style-type: none"> <li>• The first year is in class</li> <li>• The second year is by distance learning</li> </ul>	Intern completes a <b>twelve month</b> internship period under supervision and direction of a preceptor	Candidate successfully passes the licensing exams set by the regulator. Exams include: <ol style="list-style-type: none"> <li>1. Practical exam</li> <li>2. Written Exams <ul style="list-style-type: none"> <li>• Multiple Choice</li> <li>• Short Answer</li> </ul> </li> </ol>

The funeral service profession has long recognized that effective education for professionals combines academic programming and practical experience. The education of a funeral director in Ontario has included an internship for many years. The training that goes on during the internship can also be referred to as ‘On the Job Training’.

### Importance of ‘On the Job Training’

On the Job Training is a proven method of combining the theoretical knowledge and the skills necessary to become an effective professional. Under the guidance of a licensed funeral director, the intern has the opportunity to be exposed to a wide range of learning experiences and to experience the total dynamic and challenges of working in a funeral establishment. However, for On the Job Training experiences to be optimized, the process must be well managed.

On the Job Training of interns is facilitated when all of the following elements are present or completed.

- Goals and objectives are clearly communicated
- The *Professional Competency Profile* is reviewed with the intern
- A clear job description is provided and reviewed with the intern
- The *Intern Training Plan* is utilized to guide and direct the learning activities of the intern
- Performance review sessions are conducted regularly (monthly or quarterly)

### Internship Goals

The overall mandate for in-service training is for interns to receive training in all aspects of funeral service. In order to assist interns and preceptors in meeting this requirement, criteria and learning goals have been established. During the internship, it is expected that the intern will achieve the following core requirements:

- Embalm fifty (50) bodies (if applicable)
- Arrange five (5) at-need funerals
- Arrange five (5) pre-need funerals
- Direct five (5) funerals

### Building Competencies

In addition to achieving the quantitative goals of an internship, it is equally important that the intern experience and receive direction in acquiring the qualitative aspects of being a funeral director.

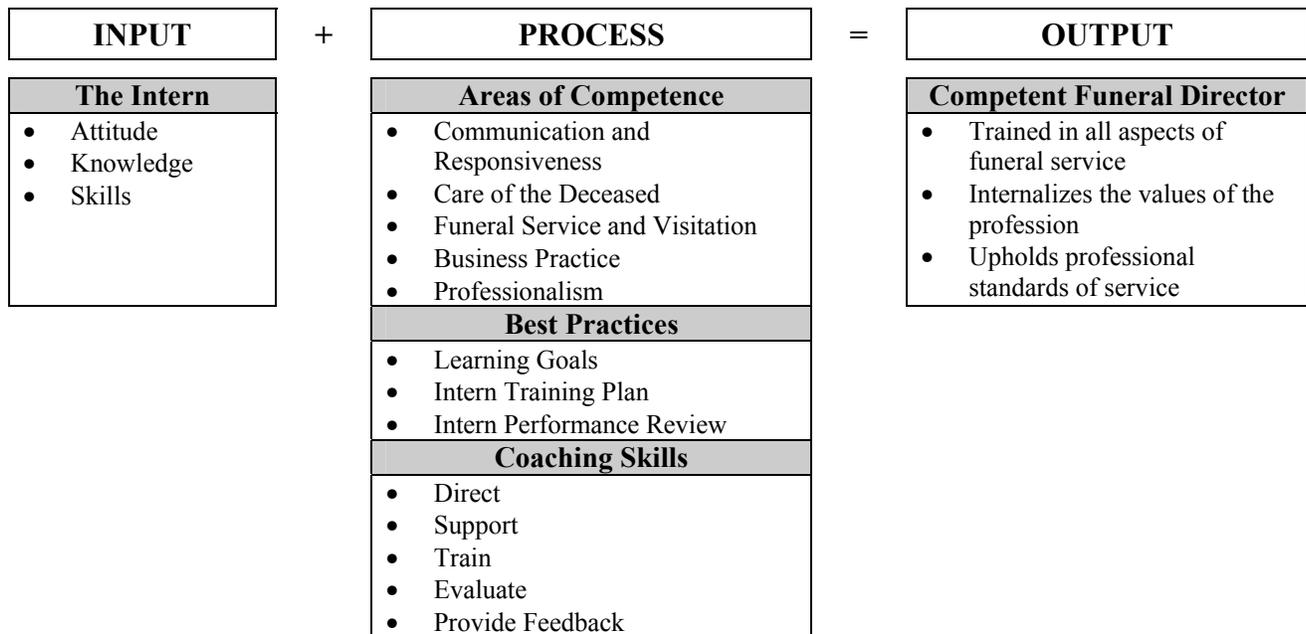
The *Professional Competency Profile* details the competency requirements for funeral directors in Ontario in the following key areas:

- Communication and Responsiveness
- Care of the Deceased
- Funeral Service and Visitation
- Business Practice
- Professionalism

The *Professional Competency Profile* is an excellent guide for the preceptor to review before taking on the responsibility of training an intern. The preceptor is responsible for reviewing the *Professional Competency Profile* with the intern at the commencement of the internship and throughout the internship process.

### **Developing an Intern**

A new intern, as with any new employee, comes to the situation with her/his own attitude, knowledge and skill. The process through which the interns learns to acquire competencies of a funeral director involves employing best practices in On the Job Training and the skills of the preceptor in being a trainer and coach. The degree to which the preceptor employs effective training and coaching strategies will directly influence the readiness of the intern to begin their career in funeral service. The diagram below outlines the overall framework, or equation, for the training of an intern.



## **Roles and Responsibilities of Internship Partners**

The Board of Funeral Services (BOFS), the College and the funeral establishment play an integral role in the internship process. The internship is a joint responsibility.

### The Board of Funeral Services

The role of the BOFS is to ensure that interns are receiving the right quantity and quality of on the job training in order to ensure the interests of the consumer are served. Properly qualified and licensed funeral directors perform their duties and responsibilities according to established standards. Licensed funeral directors who are properly qualified understand the importance of performing their duties and responsibilities in accordance with established standards of the profession and take great pride in making sure consumers are properly served.

### The College

It is the role of the College to provide the student (intern) with theoretical knowledge of the profession, share training and development of the intern during the internship through regular feedback of submitted assignments and assist the intern with preparing for the provincial licensing examinations.

### The Funeral Establishment

Throughout the term of the internship, the funeral establishment contributes to the training of the intern through providing a safe and supportive learning environment.

### The Intern

The intern contributes to the partnership through demonstrating a willingness to learn, receiving instruction, acting professionally in all aspects of funeral service and striving to become a valuable team player.

It is the responsibility of the intern to ensure the BOFS is fully apprised of their status throughout the internship. The BOFS must be notified in writing of the termination or transfer of an internship. These may be due to illness, pregnancy, or other unforeseen circumstances. Similarly, an intern requiring an extension of internship must provide the BOFS with a written explanation of the request.

### The Preceptor

Pursuant to subsection 51(3) of Ontario Regulation 470, made under the *Funeral Directors and Establishments Act* (FDEA), an intern must be trained in all aspects of funeral service.

51. (3) A funeral director shall ensure that a student receiving in-service training is trained in all aspects of the profession. (RRO 470, s. 53)

The preceptor is responsible for educating, training and coaching the intern. This task is achieved when the preceptor effectively transfers their own knowledge and skill to the intern. Through providing an opportunity to develop a professional attitude while imparting the values of the profession, the intern learns to effectively service a family with empathy, understanding, compassion and attention to detail.

To accomplish this endeavor the preceptor will need to:

- be an effective communicator explaining clearly the 'why' of each task
- demonstrate patience and respect of different learning styles and capabilities
- provide clear direction and constructive feedback
- monitor and evaluate progress
- set and communicate performance standards and expectations

- ensure a safe and secure work environment
- work with a plan to ensure the overall success of the internship
- be accountable for ensuring that the intern has a successful experience

### Preceptor's Commitment - Critical to Internship Success

Internship program studies in the United States indicate that when an intern receives direct supervision, employs a training plan and has the opportunity to experience a full range of tasks, they have higher performance level and higher test scores on formal exams. (*Spectrum: The Journal of State Government*)

Similar results have also been established from studies of On the Job Training. The fact is that when supervised On the Job Training is structured and supported and interns receive regular feedback, the result is increased job performance and performance on test scores. (*Contextual Learning: Resource Bulletin 1996*)

Likewise, a further study of the importance of coaching in the transfer of learning yielded productivity increase four times the level achieved by training/education alone. (*Public Personnel Management Winter 1997*)

Clearly research confirms what common sense dictates, people learn best by doing, but people learn even better when the doing is planned, organized and under the direction of a coach.

### **Training Tools**

The effectiveness of On the Job Training can be substantially improved by communicating learning goals, working to a plan and conducting regular performance reviews. The BOFS strongly recommends that all preceptors incorporate these tools when training interns. Based on the experience of training practices and internships in other professions, the adoption of these tools will result in more efficient and effective training.

To assist preceptors, the BOFS has developed a sample *Intern Training Plan* and *Intern Performance Review*. A detailed explanation of each document along with many helpful tips for using the information effectively is outlined below.

### **Intern Training Plan**

#### The Structure of Learning

Structured learning involves the communication of learning goals and objectives, a plan of learning tasks, usually sequenced according to the level of complexity and difficulty, and a review process designed to provide the intern with feedback on their performance.

The *Intern Training Plan* is intended to provide the preceptor with a framework to help create and manage a successful learning environment for the training and development of the intern.

The *Intern Training Plan* is designed to:

- ensure the intern is trained in tasks required to attain competency
- provide focus to the internship experience
- outline clear expectations from the outset
- establish a measurable plan for development
- facilitate personal time management and scheduling of tasks
- facilitate scheduled discussions and performance review

Individual learning styles and circumstances need to always be considered and may necessitate modification and adjustment throughout the process. Nevertheless, working to a plan will undoubtedly be of benefit to both the preceptor and intern as it provides a protocol for both parties to follow.

The *Intern Training Plan* attempts to clearly identify goals and tasks that should be accomplished by the intern within each quarter or during the internship process.

## **Intern Performance Review**

### Performance Management

Performance management, simply put, is applying management skills and techniques based on the employee's performance. Plan – Act – Reflect – Plan – Evaluate! The basis of quality management.

**Plan – Act – Reflect – Act – Evaluate**

Plan the work and work the plan. While the concept is important, it is equally important to spend time reflecting on actions and revising the plan as necessary before evaluating the overall effectiveness.

In addition to quarterly face to face coaching sessions to discuss the overall development with the intern directly, it is important to provide regular and continuous feedback on a daily or weekly basis.

Everyone deserves to understand how they are progressing. A discussion that focuses on accomplishments as well as areas for improvement are important for both professional and personal development. Face to face coaching sessions provide a foundation for success offering an opportunity to review learning goals and ensure everyone is on track to success.

### Importance and Benefits of Performance Feedback

Delivering effective feedback comes with many benefits and positive outcomes including:

- an opportunity to clearly communicate work expectations and identify performance standards
- an increased self awareness and understanding for both parties
- the identification of required training, coaching and counseling
- recognition of good performance
- an opportunity to discuss areas for improvement and take corrective action immediately
- the creation of a platform to increase communication and share ideas
- a chance to contribute to evolvement of the intern as an individual
- an opportunity for the preceptor to personally grow as a respected coach

## **Providing Effective Feedback**

Providing clear, concise and effective feedback is essential to the overall success of the intern. When delivering constructive performance-related feedback, the preceptor needs to consider the following tips.

- Clearly describe, using examples, the specific behaviour that needs to be identified
- Determine the objective of the conversation in advance of addressing the issue with the intern
- Maintain a clear focus of the issue and avoid any tendency to assert authority or repeatedly address previously discussed issues
- Demonstrate the effectiveness of a team with the use of the word ‘we’
- Direct the onus of the issue to you as the preceptor by positioning feedback using ‘I’ instead of ‘you’.
- Explain clearly the consequences of all behaviour both favourable and unfavourable
- Ensure the message is being understood by the intern through checking in regularly during the conversation
- All behaviour needs praise – recognize performance that meets and exceeds expectations
- Be aware of surroundings. Provide positive feedback in public. Save critiquing for private meetings
- Criticism lasts longer than praise – give credit where it is due, often
- Develop dialogue that focuses on competency development, eliminating the need to meet only the minimum requirement of the task

## **When Do Interns Perform Best?**

Interns perform best when they:

- receive clear, consistent direction
- understand the goals / objective
- are included in the planning process
- have a clear understanding of roles and responsibilities
- have a defined training path (*Intern Training Plan*)
- receive effective feedback regularly (*Intern Performance Review*)
- work collaboratively with other team members
- have an opportunity to contribute to team performance

## **Leading the Way: Am I Being an Effective Preceptor?**

Periodically conducting a self-assessment of one’s own skills and effectiveness is an important practice of a supervisor or manager. The key to effective self-evaluation is to be honest with oneself and know the questions to ask.

In groundbreaking studies of employee attitudes, The Gallup Organization identified 12 questions that determine the effectiveness of the coach. These questions have become known as the ‘Q12’. When the coach is doing a lot of the right things employees remain committed and work becomes more than just a job.

Funeral service has for years been considered a calling, now more than ever is time for preceptors to take the lead and set the example for a new generation of funeral directors. Providing clear answers to the questions below positions you as a preceptor with an opportunity to have a positive impact on the intern.

The Gallup Organization's "Q12"

1. Does the intern know what is expected?
2. Does the intern have the materials and equipment needed in order to do the work?
3. Does the intern have the opportunity to experience a wide range of tasks?
4. In the past seven days, have you given recognition or praise for work done?
5. Have you demonstrated genuine interest in the interns growth and maturity?
6. Have you encouraged personal development as well as professional development?
7. Have you listened to the ideas and needs of the intern?
8. Have you communicated the values of the profession?
9. Have you demonstrated your personal commitment to doing quality work?
10. Have you been a friend at work?
11. How often have you talked to the intern about their progress?
12. Have you provided the intern with opportunities at work to learn and grow?

These and other tools can make an internship a wonderful experience for everyone involved. The *Preceptor Training Program* developed by the Board of Funeral Services is designed to help preceptors to develop their skills. We encourage all preceptors to attend the program.

## **Glossary of Terms**

The following are some important terms that appear in the guide, along with their definitions.

**BOFS** – refers to the Board of Funeral Services.

**Professional Competency Profile** – refers to the *Professional Competency Profile – Ontario Funeral Director*, produced by the Board of Funeral Services.

**Internship** – the in-service training period as defined in the *Funeral Directors and Establishments Act*.

**Intern** – refers to a student completing his or her internship.

**Preceptor** – an individual charged with supervising and training an intern during the internship.

**FSE** – means Funeral Service Education.

## ***Board of Funeral Services***

### ***Introducing the Intern to the Arrangement Conference***

#### **Goal**

- Build the intern's comfort level with arranging a funeral and the arrangement conference.
- Build the preceptor's confidence in the intern to become proficient at making arrangements.

#### **Step 1 – Introduction to the arrangement conference and the goals**

Discuss with the intern the nature of an arrangement. Emphasize to the intern the fact that the family/individual 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. Your 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 have to be completed and the information you will be trying to extract from the family.
- Provide the intern with the same documents that you will use in the arrangement conference.
- Explain to the family that the intern is training and will sit in and take notes to help to ensure all needs are met. (This may help to make the intern's presence more meaningful and place it in a positive light for the family.) Assure the family that all that is discussed remains confidential between them and the funeral director/intern for the purpose of arranging the funeral, and 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 after the arrangement conference or during a break.
- After the arrangement conference is done, review the documents together to compare the information collected, and deal with any questions still outstanding.
- 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.

#### **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 during and after the arrangement conference.

- During the arrangement conference, the preceptor asks the questions and the intern takes notes and completes the actual forms that will be used. The preceptor does not take his/her own notes as in Step 1. This raises the expectations on the intern that it is for real and they are accountable for the completion of the forms and taking notes. Step 2 allows the intern to become comfortable with the forms and the pressure of collecting the information during the arrangement conference, but in a controlled environment. The preceptor has to be careful not to go too fast for the intern. The preceptor may want to review the information collected from time to time.
- After the conference, meet with the intern to go over the notes and paperwork. Be certain to explain thoroughly the need for any necessary changes.

### **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 family 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 preceptor takes notes and completes the necessary forms.
- The preceptor fills out the forms, and enters the discussion ONLY when vital information has not been sought.
- Following the arrangement conference the preceptor and intern should discuss the arrangement with the preceptor providing feedback and the intern being allowed the opportunity to ask questions of the preceptor.

### **Step 4 – Intern demonstrates 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 preceptor can be in the room. It is a complete role reversal from Step 1. The preceptor is welcome to take notes for discussion after the conference, but ought not interfere.

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

### **Other ways of getting intern opportunities to interact with the family**

- Following visitation, the intern can clear the funeral with the family (explain what is to happen, inquire about any last minute details the family might want clarified, etc.)
- The preceptor MUST ensure the intern is very clear about what is to be confirmed and what information must be communicated to the family and what information has to be retrieved from the family. The intern cannot be expected to know how and what to do without coaching. Where possible, explain the "why" so the intern can be more effective in delivering a message to the family.
- NEVER assume the intern knows if YOU have NOT told them.

