



SHOOBRIDGE

FUNERAL SERVICES

Independent Family Funeral Directors

Code of Practice

SHOOBRIDGE FUNERAL SERVICES

8/1/2012



This Code of Practice sets the high level of service that clients may expect in their dealings with Shoobridge Funeral Services.

Code of Practice

- A.** Company and Operative Conduct & Presentation
- B.** Funeral, Funeral Services and Sales Policy
- C.** Confidentiality
- D.** Customer Information and Choices
- E.** Prices, Price Lists and Their Availability
- F.** Estimates and Invoicing
- G.** Funeral Home
- H.** Transport and Equipment
- I.** Other Services
- J.** Personnel
- K.** Dissatisfaction- Procedures
- L.** Explanations

A. Conduct and Presentation

A.1 Employees are to conduct themselves in a totally professional manner, behave sensitively, with courtesy and dignity at all times, both privately and professionally.

A.2 Employees shall exert the highest professional standard and competence in every aspect of the service they provide to every client, family representative or associated colleague within or allied to, the funeral profession including competitive funeral directors and their staff.

A.3 Employees shall treat as confidential all information obtained in relation to their clients and carry out their duties with total regard for the laws of privacy and data protection.

A.4 All employees responsible for making arrangements must establish and interpret client needs without exploiting their vulnerability or exerting any pressure on them. Additionally they shall not try to persuade clients to choose an expensive or elaborate funeral when a less expensive funeral is more appropriate to their circumstances.

A.5 All employees shall conduct themselves in a courteous and professional manner in all dealings with clients, taking into account their religious and cultural needs.

A.6 No employee shall act in any way detrimentally to or, whereby a conflict of interest may arise with Shoobridge Funeral Services its principles or its objectives.

A.7 No employee, employee relation or associated business colleague shall do anything that might prejudice or harm the good name and reputation of Shoobridge Funeral Services.

B. Marketing, Sales and Promotions

B.1. Advertising and sales practises should be informal (based on information), and dignified, reflecting the sympathetic and sensitive nature of the funeral profession represented.

B.2 Advertising and promotional activities must comply with legal and advisory codes of practice.

B.3 Employees shall not solicit or offer **any** inducement of any nature for instructions for funeral services or any other associated funeral sales or services (e.g. pre-paid funeral plans, memorials etc.); nor shall they engage or reward any other party whether an individual, a partnership, a company or other formal or informal association or group - to do so on their behalf.

It should be noted that we represent a professional business for which we receive payment in the form of wages; other professionals we encounter e.g. in Residential and Nursing Homes, Doctor's Surgeries and Hospitals are also professionals in receipt of wages.

B.4 Employees must ensure they convey a completely professional image to the general public both through the delivery of the services they offer and by ensuring that all public relation activities are appropriate and sensitive in regard to their professional responsibilities.

B.5 Shoobridge Funeral Services is wholly and exclusively owned by Mr. Terry Shoobridge reflecting the premise's company names.

B.6 Copies of Shoobridge Funeral Services 'Code of Practice' must be available or on display for the general public at all of their premises for clients or potential clients to inspect, read and take away at no financial charge.

C. Third Party Obligations

C.1 Shoobridge Funeral Services are to ensure where possible that, literature and information relevant to other related services such as the local Register Office, church authorities, funeral services, alternative options and bereavement associations are accessible to their clients either in written form or directed to, an electronic means such as a personal computer, mobile device or the internet.

C.2 Shoobridge Funeral Services should communicate and co-operate with the relevant authorities, institutions, professions and voluntary organisations so they themselves can advise their own contacts, clients or patients on funeral matters.

D. Information and Choice

D.1 Shoobridge Funeral Services will provide a choice of coffins at varying prices, one of which will be an inexpensive, or plain in nature coffin which must be shown in a brochure, photo or printed form.

D.2 Shoobridge Funeral Services will explain their full range of services relevant to the particular client, including the availability of a simple funeral before giving them a written estimate.

D.3 Clients will be given full advice on all the actions, including registration; they need to take in relation to the death and the funeral by Shoobridge Funeral Services.

E. Prices and Price Lists

E.1 Prices must be fair and reasonable in relation to the particular goods or services offered and supplied, thereby ensuring clients receive fair value at all times. Price lists, detailing all the services offered must be available to the client and members of the public – estimate or quotation publications should also be available or explained.

E.2 Clients should be made aware of the existence of price lists which must be presented if requested and left with the client when a home visit is made to arrange or advance, funeral arrangements.

E.3 In the case of a home visitation for the purpose of arranging a funeral, clients or potential clients must also be informed of the statutory 'cooling-off' period of seven working days in which they may change their mind. Where an agreement is rescinded, a reasonable charge for services provided and received should be made but not as a penalty. A contract under the seven day acceptance period is deemed a non-contract or the equivalent of - legally.

The client has a right to change their mind unilaterally; bearing in mind the sensitive nature of the client's position, judgement should be exercised wisely or carefully when seeking feedback. Generally, no reason should be requested by the funeral director or staff.

F. Charges - Estimates and Invoices

F.1 Shoobridge Funeral Services, specifically upon request shall make clients aware of 'their' financial **Terms and Conditions**, any discounts available or interest levies and also make clients aware of any financial support or grants, if known or direct clients to a written or electronic knowledge source if possible.

This information should be made available in written form upon request and where pertinent, should be included and clearly stated on every price estimate, quotation or invoice relating to services available or, provided and given to said clients or enquirers.

Shoobridge Funeral Services

F.2 Every effort should be made to adequately inform or provide the estimate or quotation to the client prior to the funeral arrangement's finalisation.

Where a client or potential customer requests an estimate in writing at an earlier stage e.g. during an initial meeting or by telephone, the funeral director should provide this as far as is practical.

F.3 Shoobridge Funeral Services should ensure that clients confirm their acceptance of the estimate formally, where possible and at a timely stage prior to the funeral. Failing the reasonable receipt of this acceptance, Shoobridge Funeral Services will proceed with the client's arrangements as if the acceptance were received.

F.4 Estimates and/or Invoices must at least give or indicate the following details or references of the Funeral Director's charges:

- The funeral director's professional fees – *including use of premises and Places or Chapels of Rest*
- Removal of the deceased from the place of death – *this can be included in the professional fees.*
- The coffin including fittings and the interior – *sometimes collectively referred to as the 'furniture.'*
- The embalming process or deceased hygienic preparation and sanitization.
- The transportation chosen and agreed by the client – *Hearse and Limousine/s.*
- The Disbursements – *fixed charges by other service providers, e.g. the Church.*
- Foreseen additional charges that may apply.

Where only an approximate cost can be given, it must be made clear that this may vary.

F.5 Estimates must itemise each disbursement individually or collectively including:

- Cemetery and/or Crematorium fees.
- Doctors' fees.
- Religious ministerial or officiating fees including travel charges.
- Church and associated fees – *organist, vergers, heating and miscellaneous charges.*
- Pacemaker Removal and doctor's travelling fees if applicable.

Additionally, if catering, the provision of floral tributes, memorials or notices for the newspaper are requested by the client and the costs known or an approximation available, these should be included or advised on the estimate.

F.6 Additional items which arise or are instructed after the initial estimate has been issued will be added to the invoice as the variation should be advised orally or in writing prior to the funeral service.

Clients will doubtless be aware of their own instructions to vary and advised accordingly.

F.7 The invoice should reflect the prices given in part or total of the previously stated estimate or quotation. The details contained within should be summarised or duplicated as per the estimate or quotation and any variation explained upon request.

It should be noted that some disbursements are statutory fixed fees but others vary between similar organisations e.g. churches in England and Wales have numerous fees fixed at the beginning of the calendar year but organist fees, heating and verger fees differ.

F.8 It is advisable to issue the invoice approximately seven days after the funeral services unless otherwise requested or agreed. This facilitates the early forwarding of the invoice to other interested or legal parties, is considered a suitable interval following the funeral and does not pose an unknown as estimates were previously provided.

F.9 In the case of a Pre-paid Funeral Plan, the funeral director will request or make electronically, a copy of the Death Certificate to forward to the Pre-paid Funeral Plan Trust Company. Items exceeding the cost of the funeral plan remittance value will be invoiced separately to the client who will have previously been made aware of, authorised or requested the provision of additional services or a variation to the original specified plan.

F.10 Clarity must be given to the contractual and financial responsibilities of the person arranging the funeral with Shoobridge Funeral. Any interest charges (*see paragraph F.1*), with respect to late, deferred or partial payments of the account which should, if deemed necessary, be made in writing to avoid any confusion at a later date.

Although primarily conceived as being relative to the funeral service estimate, quotation or invoice, the preceding paragraphs apply in part only to other services provided by Shoobridge Funeral Services. Where cremated remains (Ashes), are being dealt with separately or the supply of services other than the actual funeral e.g. the provision of floral tributes or memorials to a related or non-related customer, the practice of providing an estimate is neither necessary or appropriate.

G. Funeral Home - Premises and Facilities

G.1 The premises of the funeral director (funeral home), must be acceptable in all respects for the provision and delivery of all pertinent funeral services.

G.2 Shoobridge Funeral Services must fully comply with all health and safety regulations, related legislation and Codes of Practice and shall display the appropriate certificates and notices as required by law.

G.3 Shoobridge Funeral Services should provide adequate facilities for clients, in relation to reception areas, arranging rooms and washroom facilities.

Shoobridge Funeral Services

G.4 There must be an adequately-appointed, well-maintained area and facilities for the preparation of the deceased and the holding or storage of the deceased.

G.5 A Chapel or Place of Rest or, suitable private viewing area must be available to family, friends or executors in order to see the deceased and pay their respects in suitably tranquil and peaceful surroundings.

H. Vehicles and Equipment

H.1 All vehicles incorporated in the business of Shoobridge Funeral Services must comply with current legislation, be maintained and presented to the highest practical standards at all times.

H.2 Vehicle incorporated in the business of Shoobridge Funeral Services should not be driven, used or appear to be used in a dangerous manner at any time nor should any member of staff or the public be subjected to any action which may or appear to, cause injury or damage to others, the property of Shoobridge Funeral Services or the property of any member of the public.

H.3 There is a standard expected by the profession and the public regarding funeral vehicles or vehicles used by funeral director's staff, this 'image' must be promoted and maintained at all times.

H.4 All equipment associated with the preparation and provision of funeral services must be properly maintained to the standards specified by the manufacturer and/or supplier and comply to current Health and Safety specifications and legislation.

I. Additional & Associated Services

I.1 Shoobridge Funeral Services should offer or make available additional services and provide either directly or through suitable agents or sub-contractors, floral tributes, catering, monumental and other ancillary funeral provisions and services.

I.2 Shoobridge Funeral Services will provide a professional approved Pre-paid Funeral Planning service and make all relevant factors known to clients or potential clients. The plan will be guaranteed by a separate Trust Fund the accounts record of which must be available on request either from the funeral director or the company.

I.3 No inducement or misleading information concerning the acceptance of the plan should be forthcoming, present during or after the arrangement and the customer must at any time be able to rescind their decision to purchase or, request and receive a refund upon cancellation of the plan. Any administrative charges previously stated or as part of the Pre-paid funeral plan companies Terms and Conditions must be met.

Shoobridge Funeral Services

I.4 Pre-paid funeral plans arranged and accepted by the customer should be accessible and available to change given reasonable notice by the customer.

I.5 Pre-paid funeral plans should be made available to the public and available by post or at the funeral director's premises by arrangement and postage should be free-of-charge.

J. Personnel - Employment & Staff

J.1 Shoobridge Funeral Services shall train their staff to a high level of professionalism and client awareness, taking full account of the sensitive nature of the services they provide.

J.2 Employees of Shoobridge Funeral Services should be fully aware of and comply with the contents of this Code of Practice, including the complaints and redress procedures, throughout the performance of their duties.

J.3 Staff conduct must always reflect the sensitive nature of their employment.

J.4 Staff members of Shoobridge Funeral Services will, at the earliest possible time (*usually the place of removal*), make every effort to establish the correct identity of the deceased and respectfully place or ensure the placement of an identity bracelet on either wrist of the deceased legibly and pertinently allowing for the minimum possible confusion.

J.5 Jewellery or valuable items, sentimental or monetary will be clearly noted, received, logged and placed in a safe or secure designated receptacle for collection by, or delivery to, the client or the client's representative.

Wherever possible, ensure that such items of value be left with the client's representative or relation making such facts emphatically known to that representative due to the unusual balance of the situation.

J.6 It cannot be stressed enough the importance of the identity process – the staff of Shoobridge Funeral Services must be made aware and respond with the utmost care in the matter of identity and instructions received concerning the deceased.

J.7 The deceased must be treated with the utmost respect at all times.

J.8 The coffin will be treated as a final 'temple of carriage' and not disrespected in any way at any time

J.9 If any member of staff should observe or note, be requested to perform an action or duty that he/she seems unbecoming or possibly extreme; he/she must bring it to the immediate attention of Terry, Penny or Paul Shoobridge. If it remains or is perceived not to have been dealt with satisfactorily, that member of staff is entitled to document and make

Shoobridge Funeral Services

a permanent personal record of the occurrence be it related to them personally, another member of staff or a member of the public.

J.10 No member of staff will enter into acts or actions of unacceptable behaviour whilst on duty or whilst representing Shoobridge Funeral Services at work or in public.

J.11 The practise of smoking or the consumption of alcohol whilst on duty or when representing Shoobridge Funeral Services is strictly forbidden at all times.

J.12 Smoking will only be carried out in designated smoking areas as directed by Shoobridge Funeral Services notwithstanding national and local bylaws and only during private or official breaks.

K. Complaints and their Redress

The vast majority of funerals are completed in a highly satisfactory manner but, on rare occasions, situations can arise where a client may be dissatisfied and may, therefore, seek redress. Always communicate initially so that the misunderstanding can first be recognised - you may see or appear to see, something that is 'invisible' to others.

K.1 Shoobridge Funeral Services do not belong to either one of the two recognised professional 'trade associations' on the principle that the membership is 'by subscription,' and are largely powerless to enforce decisions but are acknowledged and recognised as partially 'policing' the industry and effecting change through constant 'lobbying' practices; - and, these financial, subscription costs must ultimately be passed on to the customer.

K.2 If a dispute arises, Shoobridge Funeral Services will endeavour to work with the client to a satisfactory conclusion. Failure in this direction leaves the consumer with a number of options: if the customer feels that trading standards have not been achieved, Devon County Council can be contacted to arbitrate in an agreeable solution. Failing that or if other redress is sought, ultimately there is a Funeral Ombudsman that can be contacted with a view to party satisfaction.

K.3 If there is a concern regarding the conduct or action of an employee of Shoobridge Funeral Services, please bring it to the attention of Terry, Penny or Paul Shoobridge who will deal with it as they see fit for the benefit of the client and staff member.

K.4 A complaint should be put in writing for record purposes to Terry, Penny or Paul Shoobridge at Shoobridge Funeral Services who will acknowledge its receipt promptly, investigate it, give a written response and where appropriate, an apology and/or, offer of compensation and/or other form of redress as soon as practically possible to the complainant if found to be justified.

Shoobridge Funeral Services

Our reputation is important to us; we have numerous letters of client and family recommendation. If something appears to have gone wrong, there may be a solution or reason for or to, that event. Please contact Terry, Penny or Paul initially.

L. Explanations

L.1 Employees are defined as 'employed' persons receiving financial rewards for the services they provide to Shoobridge Funeral Services.

L.2 'Client' means a customer, potential customer or member of the public making a physical or other enquiry for any service provided by Shoobridge Funeral Services whether or not they accept any contract or offer of those services available.

L.3 A 'coffin' is the container supplied or provided as the last means of transport to contain the deceased excepting the Ashes, for the purpose of moving the deceased from the premises of Shoobridge Funeral Services to another place, usually but not exclusively, the place of service or final resting.

L.4 An 'estimate' is an offer by Shoobridge Funeral Services to provide the specified services requested by the customer or enquirer. An 'estimate' shall include details of the funeral directors charges and disbursement at the time that the estimate is given. It might be practicable to give an approximate cost or a range of prices where it is not possible to give a confirmed cost.

L.5 A 'quotation' is the fixed price accepted by the customer or enquirer to receive the exact services requested by the customer. If the customer wishes to vary the agreed arrangements or, due to circumstances reasonably outside the control of Shoobridge Funeral Services, communication between the parties should be entered to discuss reasonably, as a result, the variations and a new agreement entered into.
(Numerous factors could affect the arrangements including inclement or severe weather conditions).

L.6 A 'simple or basic funeral' comprises some or all of the following elements

- Removal of the deceased locally during office hours
Monday – Friday 8.30am – 5.30 pm
Where locally refers to a private residence, nursing or care home facility or hospital within a 12 mile radius of Shoobridge Funeral Services or Shoobridge & Son Funeral Services.
- Veneered coffin, lined, complete with furniture and brassed nameplate
- Funeral service arrangements made at the Funeral Directors premises
- Viewing of the deceased during office hours only
- Advance payment of all charges
- The provision of a hearse only – *limousines can be provided at extra costs*
- Funeral service within 20 mile radius of Funeral Directors premises
- Charitable donations administered by client
- Service Sheets, floral tributes, catering or refreshments, newspaper notifications and items not mentioned above are optional extras and will be charged accordingly

M. Safety & Miscellaneous

M.1 A Safety & First Aid Officer shall be appointed, named and indicated to staff on their initial induction to facilitate basic First Aid and informed of subsequent practices should hospitalisation or advanced procedures be required. The nearest Emergency facility should be indicated with the ultimate information of premises address should 999 Emergency Services be necessary.

M.2 The past practise of recording first aid or accident procedures in an 'Accident Book' is widely discouraged at present due to personal data protection; books locked in safes effectively have their access denied – in consequence, the individual is responsible for submitting in writing, any incident he or she feels may be relevant in the future to an insurance of legal claim for compensation.

Shoobridge Funeral Services will keep on file any and every submission and will, acknowledge that submission in writing as a record to the 'injured' party.

M.3 Fire notices and evacuation procedures are distributed around the premises of Shoobridge Funeral Services – it is the duty of all people in or visiting the premises to responsibly make themselves aware of the Fire Exits, Emergency Lighting positions and execute the instructions immediately should an incident occur.

It must be stressed that although most fire situations and safety actions are a matter of common sense, personal safety is the ultimate responsibility of the 'person.'

No responsibility will be accepted by Shoobridge Funeral Services if these procedures are not followed.

Rescues should only be undertaken by officially trained emergency services personnel.

Shoobridge Funeral Services

M.4 A safety and personal health policy is in existence and should be followed at all times. Every member of staff is responsible for reporting any discrepancy or issue that they feel contravenes the overall safety policy.

This applies to electrical items, portable or non-fixed heating devices, vehicle issues or internal and external structural issues.

If you feel that a matter has not been dealt with satisfactorily, you **MUST** submit a report in writing to Terry, Penny or Paul Shoobridge and request a written acknowledgement.

M.5 Every new member of staff will be shown and given time to read Shoobridge Funeral Services Health and Safety Policy and Risk Assessment Procedures as they apply to the workplace, funeral environment and field operations. Staff may also be requested to sign an acknowledgement of this facet.

M.6 Every member of staff involved with operating or driving duties associated with Shoobridge Funeral Services, will be required to furnish a copy of their UK or equivalent, Driving Licence and Penalty record upon receiving appointment of employment. Shoobridge Funeral Services policy dictates that a maximum of SIX penalty driving points is the maximum number acceptable to operate funeral related vehicles. Exceeding this limit is likely to render termination of said employment unless good reason exists and is accepted by Mr. T Shoobridge to vary or waive the policy.

A record may be kept of personal relative individual qualifications to effect policy adhesion.

M.7 Every member of staff employed by Shoobridge Funeral Services should automatically or upon request, receive a Contract of Employment in a reasonable time. Suffice it to say that a job description may not be supplied but may be identified through the above Code of Practice which describes in detail, numerous facets and aspects of the duties involved and common to all positions of employment.

M.8 Staff should continually strive to uphold and promote the good reputation of Shoobridge Funeral Services at all times.