

The **Principles** and **Standards** in this document were developed in consultation with providers of bereavement support across the breadth of the UK. Building on the excellent work already carried out by many bereavement support services, they are an important first step in ensuring that bereaved people in the UK can be confident that the support which they are offered will be safe, appropriate and ethical. This work will be taken forward and developed by the forthcoming Bereavement Care Standards: UK Council.

I am indebted to all those individuals and services who responded so thoughtfully and constructively to the consultation material and who were so willing to share their work on my many visits around the regions and nations of the UK. There is not enough space to list them here, but I would particularly like to thank the members of the Project Steering Group, and their organisations, for contributing their hard work, wisdom and experience to the work of the Project:

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Thank you also to the London Bereavement Network for acting as Lead Body for the Project and to Ms Dorothea Hackman for her management and advice throughout.

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This document is the preliminary version of the UK Standards for Bereavement Care. A revised version is in preparation, and undoubtedly the planned national council will continue to revise the document regularly which makes all comment and feedback relevant and welcome.

It is intended that the next version will also include:

**Delivery Context Standards:** Examples of Core Standards translated into contexts such as befriending, counselling, facilitated groups and telephone support; and benchmark examples of service deliveries.

If you would like to know more about this work and to be sent details of the Full Report and about joining the Bereavement Care Standards: UK Council, please contact:

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<b>CONTENTS:</b>	<b>Page:</b>
<b>Introduction</b>	<b>1</b>
<b>1 Policy Context</b>	
1.1 <b>The Standards</b>	<b>2</b>
1.2 <b>Bereavement Care and Support</b>	<b>6</b>
<b>2 The Principles</b>	
2.1 <b>Principles</b>	<b>9</b>
<b>3 The Core Standards</b>	
3.1 <b>Standards Framework</b>	<b>10</b>
3.2 <b>Core Standards</b>	
3.2.1 Confidentiality	<b>11</b>
3.2.2 Equal Opportunities	<b>14</b>
3.2.3 Health and Safety	<b>17</b>
3.2.4 Record Keeping and Administration	<b>19</b>
3.2.5 Selection, Recruitment and Training of Volunteers	<b>22</b>
3.2.6 Statement of Purpose	<b>24</b>
3.2.7 Support and Supervision	<b>26</b>
3.2.8 Training	<b>29</b>
3.3 <b>Related issues</b>	<b>31</b>

## Introduction

### The need

The death of someone close is often the most devastating experience that we will ever have. Although life will never be the same again, most people find ways of adjusting to the loss. It is normal and natural to grieve but for some doing so may be just too difficult or traumatic without additional support.

At times like this, when people can be at their most vulnerable, bereavement support services can provide a range of appropriate professional and trained support.

For the first time in the UK, there is now a set of **nationally agreed Standards** to ensure that that support is safe, appropriate and ethical.

### The Standards and the Principles

**The Bereavement Care Standards** in this document have the status of work in progress, and are generalised not prescriptive statements. They need to be adapted to individual needs and circumstances and the availability of local services. Key to their implementation is the set of ethical **Principles**, which can be universally applied whether support is offered one-to-one or within a wider group. These help to define the quality of bereavement support offered.

Taken together with the **Principles**, the **Standards** will:

- provide national recognition for the valuable support already provided by bereavement services
- give users and funders greater confidence because bereavement services will be seen to be working to a National Standard.

### The Bereavement Care Standards: UK Council

This organisation is being established to carry the work of the Standards Project forward. Recognising that the Standards are not tablets of stone fixed for all time, the Council will ensure that the Standards are constantly monitored and revised in the light of experience.

Membership of the Council will be drawn from:

- the four organisations of the National Bereavement Consortium
- individual and service providers from across the UK
- anyone with a declared interest in bereavement support across the UK.

**It is an essential starting point that all members of the Council subscribe to the ethical Principles.**

## Chapter 1 - Policy Context

### 1.1 The Standards

#### Why have the Standards been written?

The **Bereavement Care Standards**, written following widespread consultation amongst bereavement supporters, provide a tool to ensure that those who deliver support to bereaved people in the UK will do so safely, ethically, and appropriately.

Anyone involved in bereavement work aspires to give the best possible service to people who seek help with issues of loss or grief. Many of the services and individuals offering support to bereaved people in the UK do so with the highest integrity and according to their own well-developed standards. Cruse Bereavement Care alone offers in the order of 500,000 hours of support to bereaved people each year, delivered according to organisationally agreed standards.

Until now, however, there have been no nationally recognised Standards to which services can subscribe.

The principal beneficiaries will be:

- bereaved people - at a time when they are most vulnerable, they can make informed choices and be more confident that the support they seek will be safe and effective
- providers of bereavement support - good practice will be validated and efforts to improve quality endorsed
- health and social care professionals - those who refer bereaved people to services can be more confident of the quality of support offered
  - fundors - services will be more openly accountable.

It is estimated that 80% of bereavement support is delivered by the voluntary sector, and 90% of it by volunteers. The **Standards** are firmly founded in the Voluntary Sector and will have their biggest impact there. However, statutory providers of bereavement care have been closely involved in the work of the Project. Coupled with the increasing recognition of the efficacy of bereavement support and more resources being made available within the Statutory Sector, it is therefore predicted that they will inform much of the work of bereavement support which takes place in the Statutory Sector.

#### Who has been involved in writing them?

The **Standards** are the product of the Bereavement Care Standards: UK Project which was set up in 1998 by the National Bereavement Consortium, consisting of the four leading bodies in bereavement care:

- Cruse Bereavement Care

- London Bereavement Network (lead body)
- National Association of Bereavement Services
- National Council for Hospices and Specialist Palliative Care Services

This unique collaborative initiative was funded by the National Lottery Charities Board. The tasks of the Project were:

1. develop and publish **National Standards** for the support offered to bereaved people across the UK
2. establish a **UK Council for Standards in Bereavement Care**

The work of the Project, directed by Jonathan Hartley, has been guided by a Steering Group consisting of members of each of the four organisations. Their professional expertise, experience, and advice have contributed enormously to the successful outcome of the Project. Through them, the Project has also accessed the experience and knowledge of over 10,000 volunteers and paid staff offering bereavement support.

During the term of the Project, the Director has consulted with over 1500 individuals from more than 900 services and related organisations involved in offering bereavement support, through visits, meetings, conferences and written communications. This has helped to root the **Standards** in effective practice and ensure that services will adopt and develop them for the future.

Equally importantly, the Project has sought the views of bereaved people themselves on the kind of support they feel they need and their experience of being helped. However experienced and professional bereavement supporters become, the bereaved person is still the expert on their own experience of grieving.

The work of the Project will be carried forward and developed by the new Bereavement Care Standards: UK Council. This organisation will provide a reference point for issues relating to standards in bereavement support and enable and actively encourage the sharing of good practice.

**The Council's vision** "the quality of support for bereaved people in the UK meets an agreed standard".

**The Council's mission** 'to ensure that bereavement support offered in the UK meets recognised standards and is safe, appropriate and ethical.'.

### **What do they contain?**

**The Bereavement Care Standards** identify issues which must be addressed by providers of bereavement support in the UK if it is to be deemed safe, appropriate and ethical.

The **Standards** consist of two main elements:

### the **Principles**

These underpin all work with bereaved people and adherence to them is essential.

### the Core **Standards**

These cover aspects of delivering support to bereaved people for which individual and/or service providers must have established agreed policies and protocols. For each aspect, Core Standard Statements outline the issues involved and identify the core components which providers of bereavement support need to have in place.

The Core **Standards** do not impose levels of performance for a particular service, nor do they prescribe standardised ways of delivering bereavement support. Rather, they are designed to stand alongside services own organisational standards of performance and delivery. They indicate what is essential for the efficacy of bereavement support, not how well a service is run.

It is important that individuals and services offering support to bereaved people interpret the **Standards** within their own context. Taking personal safety as an example, the Core **Standard** (which includes reference to the minimum legal requirements) clearly states that bereaved people and those who work with them must be kept safe from harm. Agencies have a "duty of care" to those who use and work in their services. However, how that is interpreted will vary enormously across the range of services provided. A bereavement visitor meeting a bereaved person in their own home for the first time will have different safety requirements from a counsellor working in an agency building where others are present. These need to be addressed in detail within the local context in which a service operates and are beyond the scope of national standards to describe.

### **Where will they be used?**

The **Principles** and **Standards** are achievable in practice. We know this from experience of what is already being provided across the range of bereavement care in the UK.

The **Bereavement Care Standards** do not distinguish between services. They apply to any situation in which contact is made with or by a bereaved person involving the offering of a professional service.

The most common context in which they will be adopted is within a service specifically targeted at bereaved people, such as a local voluntary group, a borough based bereavement service staffed by volunteers or a bereavement service managed by a paid co-ordinator.

**The Standards** relate to the efficacy of bereavement support. As such they complement, and are not a substitute for, organisational or operational standards.

**The Standards** are intended to cover work with bereaved adults. They **do not** apply to working with bereaved children and young people. Whilst the general principles are the same, there are specific and additional issues to be addressed when working alongside children and young people. These will be covered by the standards currently being developed by the Childhood Bereavement Project, with which the Standards Project has been liaising closely.

### **How will they be put into practice?**

Many providers of support to bereaved people in the UK already have standards in place which match the **Bereavement Care Standards** and will be acknowledged for this by becoming members of the Bereavement Care Standards: UK Council.

It is, however, recognised that as the **Standards** are initially introduced, not every individual or service provider will be able to adopt them in full. There are practical and realistic constraints on finance and resources which mean that they cannot all be addressed immediately.

Even so, **it is an essential starting point that all services subscribe to the agreed Principles** which underpin all work with bereaved people. **This is a minimum expectation.**

Where services have not yet developed standards to match the **Bereavement Care Standards**, they will be recognised as Working Towards meeting their essential requirements.

## 1.2 Bereavement Care and Support

When describing the types of service offered to meet the differing needs of each bereaved person, providers of bereavement support use a multiplicity of terms, sometimes interchangeably, which can be confusing for those seeking support.

So that each bereaved person can make informed choices about how and where to seek support, Core **Standard** 3.2.6 - Statement of Purpose -requires providers of bereavement support to state accurately the purpose of the support offered, how this is delivered, and who can use the service.

This section discusses the variety of ways in which bereavement care is generally offered and how these may be matched to the needs of each bereaved person.

### **The essence of bereavement support is the match between needs and support**

At the heart of any support is the **provision of a safe relationship**. Implementing the core components of the **Bereavement Care Standards** is essential to ensure that this relationship remains safe, appropriate and ethical.

Also common to virtually all approaches to bereavement support is that they aim to enable and strengthen each bereaved person's ability to manage the impact of loss by death. In so doing, they are sensitive to the context and community within which each bereaved person lives.

There is no implied hierarchy of need or level of support. Rather, bereavement supporters simply aim to "be there" for each person as they experience their grief. Specific interventions are only offered when they match the perceived needs for that type of support.

Thus, a booklet outlining common reactions at a time of loss can reassure a person who is feeling confused by the severity of their pain and grief; a facilitated group where each member is supported in expressing their grief can help to reduce a sense of isolation; a volunteer with trained listening skills meeting face-to-face in someone's home can enable them to talk about their grief in a way which they feel unable to do with family and friends; a memorial service organised by a hospice can allow a public acknowledgement of the deceased; a counsellor trained in working with the learning disabled can enable grief to be expressed in a more creative way; a therapist trained in systemic family theory can bring a whole family together to provide a context for resolving blocks to grieving within that group; a funeral director sensitive to multicultural needs can advise on alternative arrangements which reflect a different way of grieving.

The essence of these approaches, and many more, is that they fit with the differing needs of each of the bereaved people involved. This is recognised in **Principle a)** which requires bereavement support to *"be responsive to the needs of each bereaved person"*.

## **A multiplicity of needs and support**

A bereavement can give rise to a wide range of needs - practical, financial, emotional and psychosocial.

To meet this range of needs, a range of support services are offered. Sometimes one organisation can offer a variety of support services, but more often each individual and organisation offers support based on their particular experience and competencies.

These needs and ways of support are not cast in concrete . They are fluid and changing and difficult to tabulate or chart. Each bereaved person may have a complex mix of needs, requiring a variety of support.

In Figure 1, three main groups of need are represented by variously shaded circles. Broadly speaking, these groups are:

General - those whose need might be for straightforward information and education about loss and grief - as anyone is likely to suffer loss by death at some stage in their lives, this effectively covers everyone and includes education in schools

Psychosocial - those whose need is for additional support to help them deal with the emotional and psychological impact of loss by death - this is estimated to cover between 7 and 10 % of those who are bereaved

Mental Health - those whose need is for specific psychiatric and psychological therapy treatments to cope with a serious mental health problem related to loss by death - this is estimated to cover between 2 and 4 % of those who are bereaved

The circles overlap because the needs of one individual may fall into more than one grouping. Similarly, the support offered may benefit more than one group, for instance counselling may contain an element of education about the emotional impact of loss.

In the same way, some services overlap the circles through offering support at many levels, geared to a particular client group, such as those bereaved people who are learning disabled, or in relation to the specific nature of a bereavement, such as suicide.

Within each grouping, some ways of meeting the need and groups which would do so are listed - these are not exhaustive.

### **The relevance of the Principles and the Core Standards**

**The Principles** apply to anyone who claims to offer support to any bereaved person. The Core Standards apply especially to bereavement support services (mainly psychosocial).

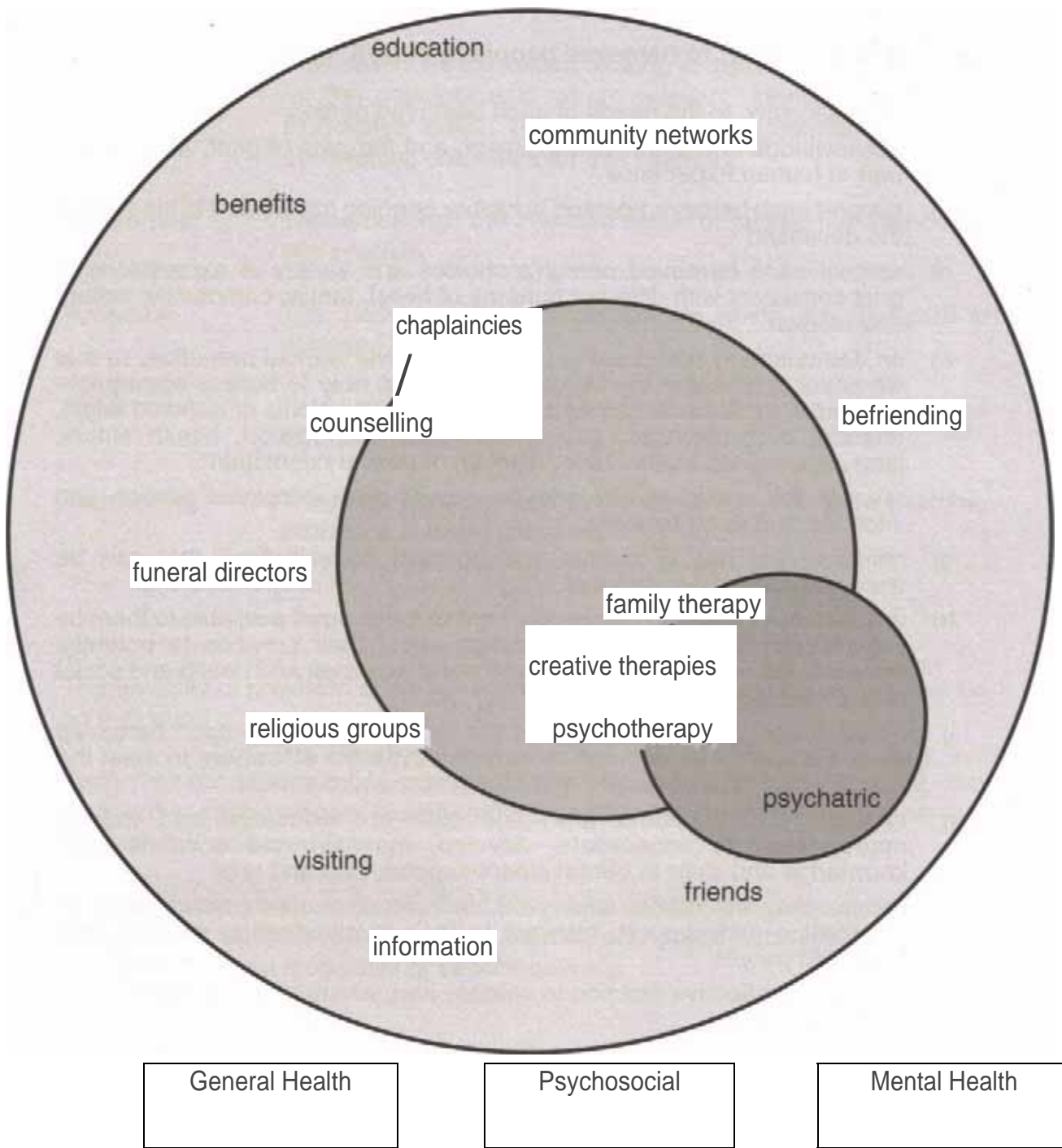


Figure 1 - Matching support to need

## CHAPTER 2 - THE PRINCIPLES

To ensure that support offered to bereaved people is appropriate, safe and ethical, certain **Principles** can be universally applied, whether support is offered one-to-one or within a wider group. These key concepts help to define the quality of bereavement support offered.

### 2.1 Principles

#### **Providers of support to bereaved people in the UK should:**

- a) be responsive to the needs of each bereaved person
- b) acknowledge and affirm bereavement, and the pain of grief, as a natural part of human experience
- c) support each bereaved person in his/her ongoing adjustment to life without the deceased
- d) respect each bereaved person's choices and variety of expressions of grief consistent with different patterns of belief, family, community, culture and religion
- e) be demonstrably non-discriminatory and deliver without prejudice, so that wherever practicable the bereaved person is able to access appropriate support regardless of their age, colour, disability, ethnic or national origin, financial circumstances, gender, geographical location, health status, language, marital status, race, religion, or sexual orientation<sup>1</sup>
- f) respect the confidentiality and privacy of each bereaved person and information shared by them
- g) minimise the risk of mental and physical complications that can be associated with bereavement
- h) ensure each bereaved person is aware of the support available to them by pro-actively disseminating information about their services to potential beneficiaries, including the bereaved, local agencies and health and social care professionals
- i) be clear about the boundaries of the support offered to each bereaved person and offer information on services available elsewhere to meet the needs which are beyond their services' scope and abilities
- j) ensure that volunteers and paid staff are educated and trained appropriately to consolidate, develop, maintain and enhance their knowledge and skills in bereavement support, loss and grief
- k) ensure that volunteers and paid staff receive appropriate levels of supervision and support, relevant to their involvement in working with bereaved people
- l) encourage reflective practice to validate and, where possible, improve on current practice
- m) involve all stakeholders in planning, design, development and delivery of services
- n) collect data to monitor and evaluate outcomes leading to effective change, including feedback from clients, volunteers and paid staff, referral agencies and supervisors
- o) be organisationally open and accountable.

<sup>1</sup>This list is not exhaustive and may be varied from time to time to recognise particular forms of hidden or overt discrimination

## CHAPTER 3 - THE CORE STANDARDS

### 3.1 Standards Framework

Within each category, there are five sections:

**Background:** This describes the issues relating to setting the **Standards** for the category and, where relevant, identifies the ethical **Principles** which apply. The boxed statements are the overarching outcomes for this category.

**Outcomes:**

**Process:**

**Structure:**

**Monitoring**

These describe the intended result of putting the **Standards** into practice.

This describes the mechanism by which the Standard is achieved.

This lists what needs to be in place in order to deliver the **Standard** in this category.

This lists some of the evidence which will show that the Standard is being achieved

The diversity of provision of bereavement support means that these can only be an indication of specific requirements.

Each provider of support to bereaved people will need to construct their own standard in each category based on the type of support offered and the context in which it is delivered.

The Bereavement Care Standards: UK Council will bring together providers of bereavement support to share good practice and agree sets of standards for different types and modalities of service delivery.

### 3.2.1 Confidentiality

***Providers of support to bereaved people in the UK respect the confidentiality and privacy of those who use their service.***

Principle (f) requires providers of bereavement support:

**to respect the confidentiality and privacy of each bereaved person and information shared by them.**

It is essential that the relationship between each bereaved person (the bereaved client) and the individual or agency which offers them support is one of trust. Confidentiality respects that trust and offers safety and privacy to those seeking support.

The duty to maintain confidentiality extends to all those involved in offering support, including management committees, and continues after that support has stopped and beyond the death of a bereaved client.

Confidentiality is not absolute. In exceptional circumstances, it may be necessary to share information about a bereaved client with a third party. This can happen if:

- the law requires it
- there is a real and serious risk of danger or harm to the bereaved client or another person
- there has been unethical or criminal behaviour.

Bereaved clients need to be made aware of the limits to confidentiality as soon as possible, preferably before support begins. If information is to be disclosed to a third party, bereaved clients should wherever possible give informed and meaningful consent.

Any decision to break confidentiality should be discussed with a supervisor or senior colleague before any action is taken.

***Providers of support to bereaved people in the UK disclose any information in an ethical manner***

Any disclosure of information should be on a 'need to know' basis. It should be:

- restricted to relevant information
- given only to a person with a legitimate interest in receiving the information
- given only to meet the needs of the justice system or to alleviate the exceptional circumstances

***Providers of support to bereaved people in the UK safeguard personal information***

Bereaved clients have the right to believe that information given in confidence will be kept private.

Identifiable personal information should be kept securely and in line with legal requirements, such as the Data Protection Act 1998. Only those authorised to do so should have access.

Any casework material which is recorded or shared must:

- effectively disguise the identity of the bereaved client
- only be shared with the bereaved client's prior consent
- only be discussed purposefully

**Outcomes:**

- a) Only that information which is needed to deliver appropriate support to bereaved people is recorded
- b) Information remains confidential within the service and is only passed on on a need to know basis
- c) Clinical records are held separately from personal information and in a way in which the two are not easily matched
- d) Any information obtained for the purposes of the individual or organisation offering bereavement support is recorded anonymously
- e) Information obtained by bereavement supporters is only disclosed to those who have a legitimate need to know
- f) Bereaved people give informed and meaningful consent to the disclosure of any personal information concerning themselves
- g) Services meet the requirements of the Data Protection Act 1998
- h) Service provides environment with sight and sound privacy

## **Process:**

- a) All those providing bereavement support to convey accurately to any users and potential users their commitment to, and ways of, maintaining confidentiality
- b) All bereavement supporters and those involved in running a bereavement support service, staff, volunteers and committee members, to receive induction and training on procedures for maintaining confidentiality
- c) All bereavement supporters and those involved in running a bereavement support service to sign a statement agreeing to abide by confidentiality procedures, including obligation to maintain confidentiality after leaving the service
- d) Confidentiality procedures to be reviewed regularly and all those involved in operating these to be informed of any changes and retrained accordingly
- e) Confidentiality applies to all communications, written and verbal, and includes referrals to outside agencies
- f) All those providing bereavement support to alert users of that support the confidentiality of shared information, for instance as members of groups

## **Structure:**

- a) Guidelines and policy on confidentiality, including clear statement of when confidentiality can/must be broken (e.g. in the case of self-harm or abuse), with review date and procedures
- b) Agreed written Code of Ethics available for all staff/volunteers (e.g. BACP)
- c) Clause in paid staff/volunteer/management committee contract requiring the following of confidentiality guidelines and procedures with disciplinary consequences if breached
- d) Records and correspondence with clients kept in locked cabinets, only accessible to those with authorisation
- e) Clinical notes kept separately from personal data
- f) Agreed period of time after which records are destroyed
- g) Monitoring information to be 'anonymised'
- h) Signed statements of confidentiality
- i) Reference to confidentiality in all published literature
- j) Explanatory notice on confidentiality in any waiting areas and/or reception room in which clients cannot be seen or heard from outside

## **Monitoring:**

- a) Copies of guidelines and policy on confidentiality
- b) Record of review of confidentiality policy
- c) Copies of signed contracts on confidentiality
- d) Sample review/audit trail of procedures
- e) Notices displayed in client areas
- f) References in publicity material
- g) Records of training given to staff

### 3.2.2 Equal Opportunities

#### *Providers of support to bereaved people in the UK:*

- *recognise that particular groups in society are discriminated against at an individual and institutional level*
- *work actively to combat discrimination*
- *as far as is reasonably practical, ensure equality of access to services*
- *be sensitive to the social, cultural and spiritual beliefs, values and practices of bereaved people in the community which they serve*
- *reflect at all levels within the organisation the diverse community in which they operate.*

Principles (e) and (d) require providers of bereavement support:

**to be demonstrably non-discriminatory and delivered without prejudice, so that wherever practicable the bereaved person is able to access appropriate support regardless of their age, colour, disability, ethnic or national origin, financial circumstances, gender, geographical location, health status, language, marital status, race, religion, or sexual orientation<sup>1</sup>**

**and to respect each bereaved person's choices and variety of expressions of grief consistent with different patterns of belief, family, community, culture and religion**

The aim of equal opportunities and practice in bereavement care is to try to eliminate discrimination and to ensure that all sections of the community have access to and benefit from bereavement support.

Equal opportunities is not about treating each bereaved person equally as they do not all start from the same point. Positive actions can be taken to assist members of disadvantaged groups to reach the same starting point.

Ensuring equality and being truly representative of the community in which a service operates, applies to all aspects of delivering a service, including:

- governance and management "
- recruitment, employment and training of paid staff and volunteers
- liaison with other organisations, groups and individuals
- Race Relations Act 1976
- Sex Discrimination Acts, 1975 and 1976
- Disability Discrimination Act 1995
- European Community Laws - Equal Treatment Directive
- UN Charter on Human Rights

and voluntary organisations are required to have an equal opportunities policy.

[This list is not exhaustive and may be varied from time to time to recognise particular forms of hidden or overt discrimination]

Any organisation offering a service must comply with relevant legislation, including –

However, the law can only provide a framework and the responsibility remains with individual and organisational providers of bereavement support to adopt, and have the commitment to implement in practice, policies and values which make bereavement support truly sensitive to the needs of each bereaved person and representative at all levels of the diverse community which they serve.

**Outcomes:**

- a) The cultural and personal needs of each bereaved person offered support, and of volunteers and paid staff members offering support are respected
- b) The spiritual dimensions of bereaved people and their families are explored, acknowledged and responded to appropriately
- c) Services providing support to bereaved people reflect the cultural diversity of the community they serve
- d) Bereavement support volunteers and paid staff have knowledge of the social and cultural groups represented in their catchment area and an understanding of those social and historical factors relevant to their circumstances
- e) Services are delivered in a manner sensitive to social, cultural and spiritual beliefs, values and practices of each bereaved person
- f) Services providing bereavement support promote accessibility by taking account of identified differences in the needs of bereaved people.

**Process:**

- a) Volunteers and paid staff are trained in cultural awareness and equal opportunities, with special emphasis on the community in which they are based
- b) Recruitment procedures for volunteers and paid staff are based on objective criteria to assess skills and abilities and ensure that no applicant receives less favourable treatment
- c) Services adopt and implement Equal Opportunities Policies, which are regularly reviewed in the light of organisational and external developments
- d) Services monitor the profile of those who use support, and the volunteers and paid staff to see if this matches the profile of the community which they serve

- e) If the profile does not match, then services take steps to explore why and to redress any gaps
- f) Bereavement Services adopt and implement clear disciplinary procedures to **deal with abuse or harassment on the grounds of race, gender, disability or sexuality etc.**

Structure:

- a) Copies/extracts of relevant legislation
- b) Equal Opportunities Policies, with review dates and procedures for implementation
- c) All those involved in providing bereavement support to be trained in equal opportunities and cultural awareness
- d) Disciplinary procedures

Monitoring:

- a) Feedback from those offered support showing/stating that their cultural beliefs and needs were acknowledged and responded to
- b) Records of equal opportunities training
- c) Copies of Equal Opportunities Policies, and records of implementation and review/updates
- d) Monitoring data on those supported, volunteers and paid employees

### 3.2.3 Health and Safety

*Providers of support to bereaved people in the UK must, as far as is reasonably practical, provide a healthy, safe and accessible environment for:*

- *bereaved people*
- *bereavement support providers*
- *other visitors/users of the service*

Bereavement support providers are caring organisations and individuals. There is an implied duty of care on any provider of support to bereaved people. This extends to all those involved in delivering and using the service. It includes a responsibility for the personal safety of all those involved as well as ensuring a safe and private environment.

**Outcomes:**

- a) All those involved in bereavement support are protected from unnecessary risk and harm
- b) All those providing bereavement support, including paid staff, volunteers, committee members, clients and visitors, recognise and share responsibility for health and safety
- c) All bereavement support providers meet the requirements of relevant legislation,

including the Health and Safety at Work Act 1974 and the Management of Health and Safety at Work Regulations 1992

- d) All those providing bereavement support ensure, as far as practicable, the health and safety of anyone using, working in, or connected with the service while engaged in activities to provide that support
- e) Health and Safety applies to personal safety, occupational health, and the safety of premises
- f) Bereavement supporters are not required to maintain a relationship with a bereaved person they are supporting when they feel at risk
- g) Individual and service providers reserve the right to refuse bereavement support where this is felt to threaten personal safety or the bereaved person's expectations are inappropriate
- h) No bereaved person or volunteer or paid staff should suffer violence or abuse as a consequence of being involved in the provision of bereavement support

### **Process:**

- a) Assess all health and safety risks to bereaved people, support providers and users and visitors
- b) Take appropriate action to protect bereaved people, support providers and users and visitors from unnecessary risk or harm
- c) Train and instruct those concerned with providing bereavement support (paid staff, volunteers, management committee) to enable them to perform their **work safely**
- d) Provide basic first aid training to selected volunteers and paid staff where support is provided within an agency building without named qualified first aid staff**
- e) Adopt and implement a policy for personal safety, including home visits, journey times etc. where applicable**
- f) Adopt and implement a policy for occupational health, including first aid, taking into account all relevant legislation**
- g) Adopt and implement policies for safety of any premises, including fire, taking into account all relevant legislation**
- h) Insure volunteers, paid staff and premises to cover potential risks and liabilities**

### Structure:

- a) Copies/extracts of relevant legislation**
- b) Provision and maintenance of all necessary safety and first aid equipment**
- c) Named volunteer/staff member/committee member with specific responsibility to ensure that requirements are met**
- d) Health and Safety guidelines and policies, with review dates and procedures for implementation**

- e) Emergency procedures for fire, including evacuation, displayed prominently
- f) Procedures for accidents, including incident record book, identified First Aider
- g) Copies of insurance policies

Monitoring:

- a) Training records
- b) Routine audit of health and safety procedures
- c) Maintenance and inspection records of health and safety equipment
- d) Copies of insurance certificates and policies
- e) Copies of notices displayed and information provided to support health and safety

### 3.2.4 Record Keeping and Administration

***Providers of support to bereaved people in the UK must comply with relevant legal requirements***

Principle (f) requires providers of bereavement support :

**to respect the confidentiality and privacy of each bereaved person and the information shared by them**

and Principle (n) requires them :

**to collect data to monitor and evaluate outcomes leading to effective change.**

The Data Protection Act 1998 outlines 'data protection principles' which mean that registered data must be:

- obtained and processed lawfully and fairly
- adequate, relevant, and not excessive in relation to the purpose for which they are held
- accurate
- kept up to date where necessary
- held under appropriate scrutiny to prevent unauthorised access to data, accidental loss or destruction of personal data and unauthorised alteration, disclosure or destruction of personal data
- used only for those purposes for which it is obtained
- disclosed only to people with a legitimate right to know
- held no longer than is necessary for the purpose

These can be regarded as minimum requirements for the keeping of information.

At the same time, records need to be helpful and useful rather than simply adding to the administrative burden. There needs to be a balance between maintaining professional competency and reducing unnecessary detail.

Records are kept for many reasons, including:

- to meet certain legal and accountability requirements on e.g. health and safety, financial matters
- to evaluate outcomes and inform effective change
- to demonstrate to funders that you are meeting their requirements
- to support clinical decisions and learning
- provide an overview of the service offered
- to support any complaint process

They should help to plan support for those who use a service, and to support and manage paid staff and volunteers and service effectively.

***Providers of support to bereaved people in the UK manage their service in a responsible and professional manner so that it can be used with confidence and in confidence***

Principle (o) requires providers of bereavement support: **to be**

**organisationally open and accountable**

Good administration and management is important. For consistent and effective delivery of services, explicit operating and administrative procedures need to be in place. If volunteers and paid staff are supported in undertaking their management and administrative tasks effectively they will have more time to spend directly supporting bereaved people.

**Outcomes:**

- a) Services meet with the requirements of relevant legislation, notably the Data Protection Act 1998
- b) Services meet the requirements laid out in Core Standard 3.2.1 - Confidentiality
- c) Record keeping is kept to a minimum effective level
- d) Relevant financial information and monitoring data is available to inform service planning and development
- e) Volunteers and paid staff have adequate and appropriate resources to carry out

their duties effectively and efficiently

- f) Volunteers and paid staff understand their respective roles and responsibilities for operating and administrative procedures

#### **Process:**

- a) Bereavement supporters keep such records as are required by the agency
- b) All records are kept securely and only accessed by those authorised to do so
- c) All records are regularly updated
- d) Resources are regularly reviewed and developed to meet the changing needs of bereaved people, volunteers and paid staff
- e) All those involved in providing bereavement support to receive induction and training in the operating and administrative procedures
- f) Operating and administrative procedures are continually reviewed in response to feedback and organisational needs

#### **Structure:**

- a) Explicit operating and administrative procedures laid out, including designated volunteer and staff responsibilities
- b) Standing financial instructions
  - c) Guidelines and policies on Record Keeping, including Confidentiality
  - d) Resources e.g. lockable cabinets and dedicated computers, for separate keeping of clinical notes and personal data
  - e) Complaints procedure

#### **Monitoring:**

- a) Copies of guidelines, policies, operating and administrative procedures
- b) Records of review of guidelines, policies, operating and administrative procedures
- c) Sample review/audit trail of records kept
- d) Statistics and monitoring data
- e) Records of induction and training given to staff

### **3.2.5 Selection, Recruitment and Training of Volunteers**

#### ***Providers of bereavement support in the UK:***

- ***employ volunteers and paid staff who have the qualities, skills and life situations relevant to their work with bereaved people***
- ***define roles and tasks for all those who offer support to bereaved people***
- ***train volunteers and paid staff in the knowledge and skills in bereavement support, loss and grief***

- ***adopt recruitment procedures which protect the safety of the bereaved people supported***
- ***apply principles of equal opportunity to the recruitment process***

Principle (j) requires providers of bereavement support:

**to ensure that volunteers and paid staff are educated and trained appropriately to consolidate, develop, maintain and enhance their knowledge and skills in bereavement support, loss and grief**

Volunteers and paid staff need to be appropriately qualified and trained to deliver the particular type of bereavement support offered. This means having clearly defined roles and responsibilities for all those involved and underpinning these with rigorous procedures to ensure expectations and contracts are met.

No checks can guarantee that the individual providing bereavement support does not pose a threat of harm to the bereaved person supported. However, the risk can be minimised by taking up references and conducting relevant checks with the Criminal Records Bureau (CRB).

The duty of care owed by bereavement service providers to their volunteers and paid staff can be met by ongoing support, supervision and training. However, as part of a selection process, it is important to ascertain if the volunteer or paid staff's personal circumstances and life situation are appropriate to someone offering support.

Volunteers and paid staff both need to be treated professionally. Though no formal legal contract may exist, it is good practice to sign an agreement between the volunteer and the organisation, which makes expectations clear to both parties.

### **Outcomes:**

- a) All those involved in offering bereavement support are clear about their roles and responsibilities
- b) Bereavement services have signed agreements with all those involved, spelling out these roles and responsibilities and the procedures in the event of their not being fulfilled
- c) Bereavement supporters have the necessary skills, qualities, and background to deliver appropriate support
- d) Bereavement supporters have the necessary initial training in bereavement, loss and grief to deliver appropriate support
- e) As far as is practicable, individuals engaged in offering bereavement

- support, have been checked as safe to do so
- f) Recruitment of volunteers and paid staff is inclusive and accords with equal opportunities principles (see Standard 3.2.2)

**Process:**

- a) Volunteers and paid staff endorse their commitment to providing support by signing agreements which include:
  - Job description, including role and responsibilities
  - Conditions of 'employment'
  - Confidentiality Policy
  - Equal Opportunities Policy
  - Grievance procedures
  - Disciplinary Procedures
- b) Annual review of job descriptions and performance/practice
- c) Potential volunteers and staff assessed and interviewed for suitability
- d) Initial training programme in bereavement, loss and grief knowledge and skills
- e) References and CRB checks

**Structure:**

- a) Recruitment policy and procedures
- b) Individual job descriptions for all, including roles and responsibilities for committee etc.
- c) Agreements for volunteers and paid staff
- d) Grievances and disciplinary procedures
- e) Initial training specification

**Monitoring:**

- a) Job descriptions, person specifications
- b) Recruitment procedures
- c) Copies of references and CRB Checks
- d) Notes of initial interviews and assessment
- e) Record of annual review of job descriptions and performance/practice
- f) Copies of 'employment' agreements
- g) Equal opportunities monitoring data

### 3.2.6 Statement of purpose

***All individuals or organisations offering bereavement care and support must accurately state:***

- ***their purpose***
- ***how this is delivered***
- ***who can use the service***

Principle (h) requires providers of bereavement support:

**to ensure each bereaved person is aware of the support available to them by pro-actively disseminating information about their services to potential beneficiaries, including the bereaved, local agencies and health and social care professionals**

and Principle (i) requires them:

**be clear about the boundaries of the support offered to each bereaved person and offer information on services available elsewhere to meet the needs which are beyond their services' scope and abilities**

Individual and organisational providers of bereavement support need to be clear about their values and aims and how these will be delivered. They have a responsibility to be clear and explicit about the nature of the service they offer. This includes describing the nature of interventions, such as advice and information, befriending, counselling.

To enable bereaved people to make informed choices about where and how to find support for their needs, this information needs to be available in as wide a variety of forms as possible and delivered in a sensitive and appropriate manner.

#### **Outcomes:**

- a) Bereaved people are enabled to make informed choices about how and where to seek support
- b) The support provided by individual and organisational providers of bereavement support matches as closely as possible the needs of bereaved people seeking support

#### **Process:**

- a) All those providing bereavement support to convey the purpose of that support accurately to anyone seeking information and/or support. This to include reference to the way in which support is delivered and to whom it is available
- b) Any information to be provided in a variety of ways e.g. spoken for the visually

- impaired
- c) All promotional material for a service to provide consistent information

### **Structure:**

- a) An identified purpose for each service provider. This can be in the form of, for instance, a mission or vision statement, or a list of aims and objectives
- b) An outline of the means by which bereavement support is provided, including type of service offered (e.g. Helpline, befriending, counselling, group, family therapy), hours of operation, and duration
- c) An agreed list of referral criteria and parameters for access to the service, including demographic, nature of bereavement, age, time since bereavement, disability access
- d) All those involved in providing the service to be aware of the above and to be trained in communicating and conveying this information accurately, adjusting it to the circumstances of the individual enquirer

### **Monitoring:**

- a) Copies of publicity material, recordings of information conveyed
- b) Records of training given to staff providing information
- c) Sample evaluation of those contacting the service (enquirers and users) to establish their understanding of the service being offered

## **3.2.7 Support and Supervision**

### ***Providers of bereavement support in the UK:***

- ***recognise and respond to the impact on volunteers and staff of providing care for the bereaved***
- ***provide initial and ongoing training relevant to the type of support offered***
- ***provide regular support and supervision relevant to the level of involvement of the bereavement supporter***

Principle (k) requires providers of bereavement support:

**to ensure that volunteers and paid staff receive appropriate levels of supervision and support, relevant to their involvement in working with bereaved people.**

### Supervision

The primary purposes of supervision are to provide support and ensure

accountability, ensure that boundaries are well-maintained and to enhance and develop skills. It aims to:

- safeguard the well-being of the bereaved person and ensure that their needs are being addressed
- appreciate and value bereavement supporters
- develop the skills, knowledge and personal awareness of the bereavement supporter in relation to that role
- provide regular opportunities for bereavement supporters to reflect upon both the content and process of their work
- ensure that the bereavement supporter is not left isolated or carrying difficulties alone
- monitor and evaluate the supportive relationship and set objectives for ongoing work where appropriate
- provide the opportunity for an annual review of the bereavement supporter's work
- ensure accountability of the service offered by checking that:
  - supporters are doing what they say they are, and what they are supposed to be doing
  - the objectives of the support are being met
  - boundaries are being observed
  - there is no exploitation or abuse - emotional, financial, or sexual

Models of supervision can vary, but will usually provide the supervisor with an overview of all the bereavement supporter's work, match the needs of the supporter and challenge them to grow and learn.

The frequency of supervision is generally determined by the experience and support-load of the bereavement supporter and may be influenced by the nature and magnitude of the bereaved person's support needs. Anything less than monthly is likely to fall short of the supporter's needs.

Bereavement supporters may need to access ad hoc support and supervision at times of exceptional workload or following demands which are out of the norm, e.g. after a local crisis or tragedy.

It is also expected that the supervisor will attend supervision to support and monitor them in that role.

### Support

Supervision and training focus attention on the clinical needs of the bereavement supporter and on issues of accountability. Support focuses attention on the needs of the volunteers and paid staff in fulfilling their roles as supporters.

Whilst many bereavement supporters feel valued and rewarded personally and emotionally by their work, continually witnessing the pain of grief can have a cumulative emotional impact which makes it difficult to continue to offer support. Similarly, a major loss or change in the life of a bereavement supporter can make it difficult to support other bereaved people.

Bereavement support services need to recognise this and provide support for their volunteers and paid staff which reflects the impact of such events.

There are a variety of methods for offering supervision and support, including: small group, face-to-face, peer support, telephone link, training, and personal development work. The key element is that it should match the needs of the bereavement supporter and the bereaved people being supported. It will also reflect the ethos of the agency or organisation and the professional requirements of the supporter, e.g. meet the parameters laid down by the British Association of Counselling & Psychotherapy in the case of those offering a service as counsellors who are also members of that organisation.

### **Outcomes:**

- a) Bereavement supporters attend regular supervision - an essential condition
- b) Staff have access to regular support activities, to assist with the social, psychological and emotional impact of the various stresses involved in bereavement work, at least on a monthly basis
- c) Supporters able to work within agreed boundaries and guidelines

### **Process:**

- a) Any major loss or bereavement experienced by those involved in offering the bereavement support is discussed, assessed and their case load commitment etc. adjusted accordingly
- b) Volunteers and staff are trained intimately in the importance and use of supervision
- c) Observe the requirements of any professional body

### **Structure:**

- a) Clear protocol for supporting staff during and after events that have an impact outside the norm
- b) Signed commitment/agreement to attend supervision
- c) Model of supervision/supervisor individual, group etc.
- d) Ad hoc supervision/support available
- e) Procedures in the event of non-attendance

## **Monitoring:**

- a) Attendance records
- b) Records of annual supervision reviews/appraisals

### **3.2.8 Training**

#### ***Providers of bereavement support in the UK:***

- ***provide initial and ongoing training and supervision relevant to the type of support offered***

Principle (j) requires providers of bereavement support:

**to ensure that volunteers and paid staff are educated and trained appropriately to consolidate, develop, maintain and enhance their knowledge and skills in bereavement support, loss and grief**

Training has a direct impact on the quality of support provided to bereaved people. Providers of bereavement support have a responsibility to ensure that supporters are trained in the skills and knowledge of bereavement, loss and grief which are relevant to the type of support offered in a particular setting.

These skills and knowledge need to be continually updated and enhanced to match the changing support needs of bereaved people and the professional development needs of bereavement supporters.

Bereavement supporters come from a variety of backgrounds and bring diverse levels of skill, existing knowledge and life experience on which to build. An integral part of initial training is to ensure that these are consolidated, enhanced, and matched to the type of support offered.

Initial training also needs to include an element of assessment to establish the level of skills and knowledge acquired and the trainee's suitability for working with bereaved people to deliver the type of support offered.

A wide variety of methods are used to provide training, including experiential workshops and seminars. These will normally include raising trainee's personal awareness of their own experiences of loss and grief and developing their capacity to reflect upon their work and how personal experience might impact on this.

Training will often involve input from external trainers and specialists.

**Outcomes:**

- a) Bereavement supporters receive the necessary and relevant initial training in bereavement, loss and grief to deliver appropriate support
- b) Bereavement supporters acquire the necessary and relevant skills and knowledge to deliver appropriate support
- c) Bereavement supporters have the necessary and relevant ongoing training to maintain, consolidate and develop their skills and knowledge in bereavement, loss and grief
- d) Bereavement supporters are trained in the importance and use of supervision and support
- e) Bereavement supporters are trained in related issues such as health and safety
- f) Bereavement supporters are committed to ongoing training and development

**Process:**

- a) Bereavement supporters are trained initially and assessed in the skills and knowledge of bereavement, loss and grief relevant to delivering support to bereaved people
- b) Bereavement supporters receive ongoing training and supervision to maintain and develop their skills and knowledge of bereavement, loss and grief relevant to delivering support to bereaved people
- c) The training and development needs of bereavement support staff and volunteers are regularly reviewed

**Structure:**

- a) Specification of initial training course and content
- b) Specification of ongoing training courses and content
- c) Specification of supervision model
- d) Procedures for initial and ongoing assessment of bereavement supporters' skills, knowledge and performance

**Monitoring:**

- a) Training specifications
- b) Supervision specifications
- c) Procedures for assessment
- d) Records of training and assessments

**3.3 Related Issues**

As referred to above, the Core Standards are preliminary and will be the

subject of ongoing consultation and review.

Prior to their being developed further, this section highlights four issues to be included at a later stage.

These arise from the ethical Principles, as follows:

### 3.3.1 Boundaries

Principle (i) requires providers of bereavement support:

**to be clear about the boundaries of the support offered to each bereaved person and offer information on services available elsewhere to meet the needs which are beyond their services' scope and abilities**

Boundaries are a fundamental, integral part of establishing and maintaining a safe, appropriate and ethical relationship within which support can be offered.

Clear and explicit boundaries are essential to avoid confusion on issues of confidentiality, conduct and working limits. This can be as straightforward as defining and complying with time boundaries, through maintaining the trust of confidentiality, to keeping within more complex parameters such as distinguishing between counselling and emotional support.

Boundaries also work for the protection and safety of both the bereavement supporter and those who are receiving support.

### 3.3.2 Monitoring and Evaluation

Principle (n) requires providers of bereavement support:

**to collect data to monitor and evaluate outcomes leading to effective change, including feedback from clients, volunteers and paid staff, referral agencies and supervisors.**

The support needs of bereaved people change over time and the ways of meeting these needs also change. There is an ongoing need to review how support is offered and to learn from experience of delivering support.

Bereavement support services need to have clear review and evaluation mechanisms for people using the service and the service itself. This means collecting information from clients, volunteers and paid staff, and other relevant agencies to inform changes and developments.

Such information may take the form of quantitative statistical data and/or qualitative material like verbal descriptions or case studies.

Some comments on the bereavement support provided will be of an adverse nature. It is important to acknowledge and act upon these, including use of an agreed procedure for complaints where necessary.

### 3.3.3 Referral and Assessment

Principle (h) requires providers of bereavement support:

**to ensure each bereaved person is aware of the support available to them by pro-actively disseminating information about their services to potential beneficiaries, including the bereaved, local agencies and health and social care professionals**

In order to achieve the best fit between the support offered and the needs of bereaved people, individuals and service providers of bereavement support need to promote their services within the community. This means providing information to people who may wish to use the service and liaising with other agencies who wish to refer people on for support.

In both cases, there is a need for clear referral and assessment criteria.

Individual and service providers of bereavement support cannot always meet, or be expected to meet, the identified needs of those seeking bereavement support. So that bereaved people can make informed choices about seeking support, it is helpful for bereavement support staff to know about the range of other local bereavement services, agencies and support resources available to clients and be able to provide information on how to access them.

### 3.3.4 Stakeholder Involvement

Principle (m) requires providers of bereavement support:

**to involve all stakeholders in the planning, design, development and delivery of services.**

Bereavement support needs to take into account the needs of all those involved, including the bereaved, the volunteers and paid staff, the management body, and the funders.

It also needs to take into account the needs of social and cultural groups in the community it serves and to involve these groups in the planning and implementation of services.