SERVICESKILLS AUSTRALIA
TRENDS & INTELLIGENCE

FUNERAL SERVICES

ENVIRONMENTAL SCAN 2011

2011

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This document supports the *Service Skills Australia 2011 Environmental Scan*.

For information on trends in other service industries, see our Environmental Scan findings for:

- Community Pharmacy
- Hairdressing and Beauty Services
- Retail, Wholesale, and Floristry
- Sport, Fitness, Community and Outdoor Recreation
- Tourism, Hospitality and Events.

All of these documents can be viewed and downloaded from our website, **www.serviceskills.com.au**

INTRODUCTION

THE ROLE OF SERVICE SKILLS AUSTRALIA

Service Skills Australia (SSA) is the Industry Skills Council for the service industries. Skills councils are the recognised national bodies providing advice to government and industry on industry training and skill development needs.

SSA is an independent, not-for-profit body, managed by industry members and funded by the Australian government. The strategic goals of SSA, developed in partnership with the industries, are to:

- develop a culture within the service industries which promotes and enhances the skills development of its workforce
- develop policies, programs and services, including industry training packages, that support industry needs in relation to skills and workforce development
- achieve quality skills outcomes throughout the service industries
- produce quality workforce development information and use industry intelligence to inform decision making.

SSA represents the interests of businesses across sectors, including tourism, hospitality and events; sport, fitness and recreation; and retail, wholesale and personal services.

OBJECTIVES

This environmental scan provides an industry-specific overview of current and future trends and developments in the funeral service industry in relation to workforce development and vocational education and training (VET). Developed in partnership with industry and based on data mostly collected between February and December 2010, the scan reflects key issues and provides information on current and future skill demands, and their context, to inform the continuous improvement of SSA's suite of skills and workforce development strategies, including training package.

> *"Skill development needs to occur in a way that ensures that the right skills are being developed for the job outcome, context of learners, and learners' work circumstances"*

KEY MESSAGES

SSA's Environmental Scan 2010 advocated for skill development in the right way and in the right timeframe. Skill development needs to occur in a way that ensures that the right skills are being developed for the job outcome, context of learners, and learners' work circumstances[1]. These issues are still valid and current.

The prevailing general focus for government and industry on higher level skills does not apply as much for the funeral services sector, given its workforce composition training and education needs.
Parts of the industry, especially larger businesses and the public sector, are investing in skilling their workforce and consider Certificate III to be a suitable skill level. As the majority of businesses in regional and rural areas are small, owner-operated companies, attendance is made easier when training is offered as short courses.

LATEST INDUSTRY INTELLIGENCE

MACRO-ENVIRONMENT FACTORS

Ageing population and death rates

Population ageing is occurring globally, with a substantial shift in the age structure towards older ages. The median age of Australia's population (36.8 years at June 2009)[2] is projected to increase to between 38.7—40.7 years in 2026 and to between 41.9—45.2 years in 2056[3]. Despite the ageing of the population over the last 20 years, death rates have continued to decline as a result of increases in life expectancy, also contributing to ageing in Australia.

Despite the ageing of the population over the last 20 years, death rates have declined overall. In 1989 the crude death rate was 7.4 deaths per 1,000 population, decreasing to 6.4 in 2009. Given the ageing of Australia's population, the overall decline in the crude death rate indicates a considerable decline in age-specific death rates over the period. The standardised death rate (SDR), which takes into account the effect of changes in the age structure of Australia's population over time, has also decreased over the past 20 years. In 1989, the SDR was 9.1 deaths per 1,000 standard population, decreasing to 5.7 in 2009 (an overall decrease of 37%).

During 2009, there were 140,800 deaths (72,300 males and 68,400 females) registered in Australia, a decrease of 3,200 deaths (or 2.2%) compared with the number of deaths registered in 2008 (143,900). Since the late 1980s, the number of deaths registered has increased by around 0.4% per year on average for males and 0.9% per year for females, with year to year fluctuations. The steady increase in the number of deaths over time reflects the increasing size of the population and, in particular, the increasing number of older people. With the continued ageing of the population, the number of deaths is projected to continue to increase throughout the remainder of the century[4].

However, between 2022 and the late 2030s deaths are projected to increase more rapidly (up to 2.7% a year in 2032). This is seen to be a result of the ageing population and in particular the progression into older age groups of those born during the post World War II 'baby boom' and migrants born from 1947. From the middle of this century on, the number of deaths will generally increase but at gradually declining rates. From 134,800 deaths in 2006—07, deaths are projected to more than double by 2056, and reach around 411,400 in 2101[5].

An increasing scarcity in burial sites within reasonable driving distances of larger cities and high density areas of nursing homes and retirees is expected. This may result in the re-use of decommissioned graves where the remains are buried deeper.

Funeral industry growth tends to follow the same pattern as the change in death rate. A more highly mobile population that travels more frequently, together with the legislated requirement in Australia for any deceased person who is transported via air to be embalmed by a qualified embalmer, increases the demand for funeral service occupations. However, the industry faces a skilled labour shortage and to date embalmer and funeral directors have not been included in the Employer Nomination Scheme Occupation List (ENSOL) for permanent skilled migration, the Skilled Occupation List (SOL) nor in the Migration Occupations in Demand List (MODL). However, Pathologists have now been added to these lists.

International comparison

Australian life expectancy is currently among the highest in the world. According to the Population Reference Bureau (PRB) 2006 World Population Data Sheet, the combined life expectancy at birth of males and females globally is 67 years. Life expectancy in Australia (estimated by the PRB to be 81 years for both males and females) is above that of the United States of America and the United Kingdom (both 78 years), Greece and New Zealand (both 79 years), and Canada (80 years). It is the same as that of Spain, Sweden, Switzerland, Iceland and Hong Kong and slightly lower than that of Japan (82 years)[6].

Health agenda

Progress in the health agenda is another factor that influences the number of deaths. Decreasing infant mortality rates, fewer road deaths, reduced deaths from heart disease, improved diet, and reduced smoking and alcohol consumption have assisted in reducing the crude death rate, as have improved medical procedures, diagnosis and treatments.

With the increasing incidence of communicable diseases, such as AIDS, TB and Hepatitis B, the funeral services industry has become much more health-conscious, and personal protective equipment like disposable gloves is now mandatory.

Immigration

During 2008—09, migrants who contributed to Australia's population were born in over 200 countries, with China making the largest net positive contribution to Australia's population of 28,700 persons. This was followed closely by migrants born in New Zealand (27,400), the United Kingdom (24,000) and India (23,900).

Interestingly, over recent years, the country of origin of permanent arrivals has changed. Between 1999 and 2009, of the top 50 countries of birth of those migrating to Australia, Nepal had the highest rate of increase with an average annual growth rate of 28.5%. However, this growth began mid-1999 from a small base of 2,000 people. The second fastest increase over this period were migrants from Sudan (20.9% per year on average), followed by those from Bangladesh (13.4%), India (13.0%) and Zimbabwe (10.7%)[7].

The increasing cultural diversity of the workforce and its customer base means that the ability to provide services attuned to different cultures is becoming an essential skill for many funeral service employees. In addition, changing immigration calls for funeral ceremonies that cater for different religions and cultural expectations, as every culture and religion has its own rituals and requirements. Industry feedback indicates that larger companies are increasingly employing specialists with culture-specific awareness to cater for nationality-specific funerals.

Leadership and management skills are particularly important for handling changes in Australian society and growth in the cultural diversity of employees and customers, as are other skills like the ability to work and interact with people from different cultural backgrounds. The importance of cultural awareness ranks highly in the funeral services industry, as do workplace relationships, communication skills, compliance with policies and laws, and customer service[8].

The funeral services industry has noted that since mausoleums were introduced in 1996, older generation European migrants adhering to the traditions of their country of origin have utilised this burial option.

Industry feedback has also recognised the potential impacts of changes to the social geography of NSW and Sydney basin. Changing international and internal migration has led to changes in pricing policy which has an effect on the consumers' choice of service provider.

Sustainability

IN LINE WITH THE GENERAL GROWING AWARENESS IN AUSTRALIA OF ENVIRONMENTAL SUSTAINABILITY ISSUES, SUCH AS REDUCING WATER AND ENERGY USE, FUNERAL SERVICES COMPANIES ARE EXPECTED TO BECOME MORE ENVIRONMENTALLY FRIENDLY AND REDUCE THEIR CARBON FOOTPRINT through such measures as installing energy efficient lighting systems, solar panels and water-retention systems. Cremator suppliers are also including technology developments to make their products more environmentally friendly and consume less energy and water, introducing new products like biodegradable urns that dissolve and decompose naturally.

Industry feedback has confirmed that sustainable work practices also have the benefit of attracting new customers. In Victoria it is reported that there is a growing demand for natural burials which utilise materials that readily break down. As part of the natural burial process, bodies are wrapped in a shroud or placed in solid pine, cardboard or wicker coffins. The graves are often situated in natural settings that require less energy to maintain and are not marked with a headstone. Elsewhere, in NSW products have been successfully marketed to communities in areas such as Byron Bay and Ballina where there is an established commitment to environmentally friendly products and services.

The funeral services industry is also responding to increased consumer demand for environmentally-friendly practices by working with a Registered Training Organisation (RTO) to develop a Certificate III and Certificate IV in Carbon Management Training. The aim of the qualifications is to provide employees with the skills and knowledge to manage the carbon footprint of every part of the business. This is achieved by the staff and management developing a Carbon Management Plan (CMP). The benefits of implementing a CMP include reduced waste and cost and improved efficiency in the control of supply lines and enable the intelligent targeted marketing of products and services that have attained a green rating or can be presented as an environmentally friendly choice for consumers. SSA is committed to ensuring sustainable work practices are appropriately included in all training packages. This will be covered through the process of continuous improvement.

SIF08 Funeral Services Training Package addresses environmental sustainability issues in the following units of competency:

- SIFBCR001A Coordinate burial site preparation and re-instalment
- SIFOHS004A Work in confined spaces
- SIFOHS007A Identify hazards and assess risks in a cemetery or crematorium
- SIFMWK017A Design a mortuary

These units are incorporated into qualifications from Certificate III to Diploma level. Specific references to sustainability skills within these units include adherence to the Environmental Protection Act; hygiene and waste management and disposal; water tables and water quality protection; non-compacted soil; the clearing of work area; and the disposal or recycling of materials according to a project environmental management plan.

Consultation has identified further ways to address sustainability gaps and these will be incorporated into the funeral services units of competency as part of continuous improvement.

Business trends

Pre-paid funerals continue to be popular and require funeral directors to have the skills to meet the information needs of the public and to act ethically and responsibly with client funds. Budgeting is becoming an increasingly important task of managers in the funeral services industry, as investments for future care and maintenance of infrastructure have to be calculated and budgeted for.

Industry feedback has indicated that there are a number of factors that contribute to consumers choosing cremations over burials, stating the reasons go further than simply price issues; these factors include:

- The increasingly transitional nature of the population, meaning people will not necessarily die in the same state in which they were born. Therefore, cremations are the convenient choice for transporting remains, with burials seen as unnecessary in cases where families are located in different states or territories.
- Increased consumer awareness about the shortage of burial sites.
- Sociological changes in consumers' views on religion. This has also led to a noted increase in demand for more informal, private funerals within funeral homes.

Industry consultation has also revealed that funeral directors are also investing more capital into their own premises; offering private and informal services that includes hospitality services (food and beverages) within funeral homes. In the past, services of this kind were often outsourced. This diversification of services also extends to some funeral businesses installing a cremator to provide cremation services and cemeteries providing memorial services (where legislation permits).

As more burial and funeral options become available, there are impacts upon workforce planning. Industry feedback indicates that smaller funeral directing businesses will continue to rely on a mix of casual/part-time staff to support the variation in daily demand. Feedback also states that the crematoria sector is running at less than its capacity so the need for increasing the current staffing levels will be dependent on the increase in cremations that will also drive the development and maintenance of memorial gardens and infrastructure. The cemetery sector is dependent on available land for burial.

Customers are also increasingly more informed of their funeral options and frequently research the various options on the internet before approaching a funeral director. Consumers are also increasingly aware of their rights and options. Front line funeral staff therefore require sales skills training and must be aware of legal requirements when doing business (e.g. the importance of having comprehensive written agreements). There has been a shift away from standard funeral offerings (often dictated by religious rites) to services that are more individual or personalised. The funeral provider is therefore required to be aware of the various options available and that they take the time to ensure that the correct choices are made to match families' wishes. This impacts upon workforce planning as more hours are required to arrange and carry out each service and more training is required to ensure that funeral staff are knowledgeable about various offerings.

IDENTIFIED WORKFORCE DEVELOPMENT NEEDS

SECTOR PROFILE

THE FUNERAL SERVICES INDUSTRY IN AUSTRALIA CONSISTS OF DIFFERENT TYPES OF BUSINESSES PROVIDING SERVICES AND PRODUCTS TO MEMBERS OF THE AUSTRALIAN COMMUNITY DEALING WITH DEATH AND BEREAVEMENT.

Population increases and ageing means the demand for services in the funeral industry will grow and thus lead to an expansion in employment in the funeral industry sector[9].

In 2010 there were approximately 1,300 businesses (funeral directors, crematoria and cemeteries)[10], with the industry employing approximately 7,600 people[11]. Based on 2006 census data, around 65% of all employees were community and personal service workers (which include funeral directors and funeral workers) and around 14% were in clerical and administrative occupations. Approximately 7% were trades occupations (e.g. stonemasons and gardeners) and around 5% were managers[12]. Appendix B provides information on occupations and qualifications in demand in the funeral services industry. The industry is currently lobbying to have funeral directors added to the list of occupations in demand to prepare for the increased demand in the next five years.

In 2009-10 industry revenue was estimated to be AUD910 million and industry gross domestic product AUD335 million. In 2010-11 industry is expected to have total revenue of AUD931 million[13], with industry revenue segmented as follows:

- funeral directors, to account for approximately AUD652 million
- cemeteries and crematoria, to account for approximately AUD279 million.

Segmentation of the funeral services market could also be based of the type of service provided. On a national basis this would be:

- double service at church/chapel and the cemetery (45% of all funerals)
- single cemetery/crematorium service (20% of all funerals)
- single service chapel funeral (about 10% of all funerals)
- single church service (about 6% of all funerals)
- direct committal (1% of all funerals)
- other combinations of the above (18%).

A further segmentation of the industry could be by method. Burial and cremation hold an estimated equal share of the national market. Cremations average between 55–60% of all funerals in metropolitan areas[14].

Crematoria have traditionally been located in the grounds of a cemetery.

Cemeteries operate in all states and territories of Australia. Some are run on a not for profit basis, whilst others are run by private companies but all are required to adhere to state Cemeteries Acts or similar legislation.

It is estimated that the labour involved in providing funeral services varies from a minimum of 24 hours to a maximum of 40 hours per funeral, depending on the services required.

There is some seasonality to demand with a higher number of deaths usually recorded in the colder winter months. A reduced number of deaths generally occur around Christmas, but usually increase again in January.

The industry largely competes on the basis of service. Geographical proximity, brand recognition and word-of-mouth recommendations are also important for sales, as is the price of specific services.

The Australian Funeral Directors Association (AFDA) is the major association representing Funeral Directors and its members carry out approximately 75% of all funeral services in Australia. For admission to the AFDA an application is lodged with the association and an inspection of the premises is undertaken to ensure a minimum set of standards is maintained. Applicants accepted by AFDA are bound by a code of ethics. In late 2009 AFDA approved the implementation of a compulsory continuing professional development model[15].The Australian Cemeteries and Crematoria Association (ACCA) is the peak industry association for the representation of Cemeteries and Crematoria with its members performing approximately 88% of all burial and cremation services carried out in Australia[16]. ACCA promotes the highest standard of service for the industry and actively promotes this through education to its members and the provision of numerous guidelines. ACCA will soon be providing the Funeral Training Package to its members nationally in conjunction with a Registered Training Organisation.

Industry concentration

The funeral directors industry has traditionally been structured around family owned and operated private companies. Some of the largest firms are currently operating on a multi-firm basis under different names. However, in regional areas of Australia nearly all operators are still private companies usually with a long family tradition. In such companies, the owner or manager of the business has to fulfil several roles. In addition, increased competition and the economic environment demand strong skills in resource management and budgeting.

More than half the crematoria in Australia are owned and operated by the private sector, although they handle around 25% of cremations. Private ownership of crematoria applies in both NSW and Queensland. Twelve of the eighteen facilities in NSW are privately owned, while in Queensland nine out of ten are. Tasmania and South Australia each have one privately-owned crematorium[17].

Two companies, InvoCare Limited and Bledisloe Holdings Pty Ltd, have an estimated combined share of approximately 26% of funerals nationally.[18] In November 2010, InvoCare announced its intention to purchase Bledisloe Group Holdings and expects to complete the transaction in the first quarter of the calendar year 2011[19].

In 2009, InvoCare operated from 182 funeral locations in Australia, of which the majority operated under a traditional or heritage brand (e.g. Le Pine Funeral Services Pty Ltd in Victoria, Liberty Funerals in Sydney, and Chippers Funerals in the Perth region), 24.7% under the Simplicity brand and 23.6% under the White Lady brand. In addition, InvoCare operates twelve cemeteries and crematoria in NSW and Queensland[20].

Across the entire Australian funeral and cemeteries industry, the majority of enterprises employ ten staff or less, with approximately 60% employing between one to ten staff and a further 32% with no employees[21].

REGIONAL ASPECTS

The industry is broadly spread according to the size of the population in each state or territory. Other factors, like the number of deaths (which is related to the age distribution of the population, particularly those aged over 65) and/or the median age, also affect industry distribution.

Figures 1 and 2 below present the distribution of funeral director and cemetery businesses in Australia and deaths in Australia respectively.

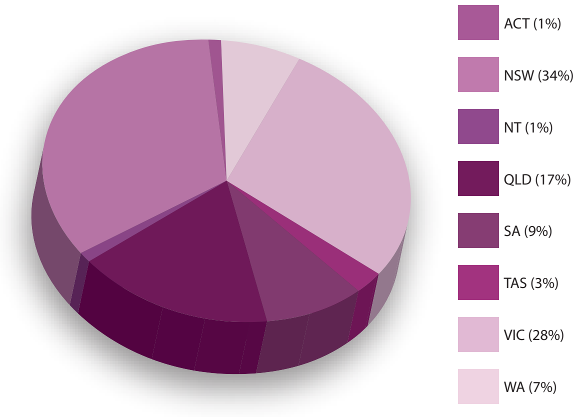

FIGURE 1 FUNERAL DIRECTOR AND CEMETERY BUSINESSES IN AUSTRALIA (2010)[22]

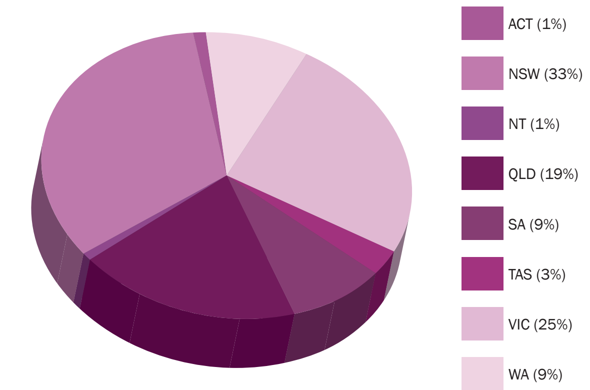

FIGURE 2 DEATHS IN AUSTRALIA (2009)[23]

Over the past twenty years all states and territories have experienced sustained decline in SDRs, with the Northern Territory (NT) experiencing the largest absolute decline (from 12.4 deaths per 1,000 standard population in 1989 to 7.9 in 2009) and the Australian Capital Territory (ACT) experiencing the smallest absolute decline (from 7.7 to 5.4 over the same period). NT's SDR of 7.9 remained much higher than the other states and territories, while Tasmania recorded the second highest SDR (6.7). The lowest SDR was recorded in the ACT, with 5.4 deaths per 1,000 standard population[24].

In terms of market structures in metropolitan areas, it is funeral operators located in local suburbs that provide the primary competition to city-based operators. In regional areas, competition within the funeral market comes from within the town in which the company is located, but depending on the size of the town, a company may be the only funeral business servicing the market.

For funeral service companies located in small towns and with a single funeral director, the industry rule of thumb is that 100 funerals a year are required to maintain a financially viable company on a full-time basis[25].

REGULATION

The overall level of regulation surrounding activity by the funeral services industry is increasing. Further regulations require more office staff to deal with compliance requirements, particularly organizations that operate in various states with differing needs. Recent regulation changes in Australia are detailed below on a state by state basis.

Victoria

The Victorian Government introduced new industry regulations under the 2003 Funeral Act, which came into force in July 2005. The Act aims to enhance consumer protection by regulating the industry and strengthening enforcement and inspection powers. It also seeks to improve how the industry is monitored and delivers services and information to the public. Furthermore, as of 1 January 2009, GST was removed from cemetery trust products and services; however, as of 1 January 2011 it was put back in place on certain services.

Queensland

A 2005 paper by Queensland University of Technology for the Funeral Industry Regulation Working Party, which was set up by the Queensland Government, revealed serious problems in the industry. It recommended that funeral directors be licensed by Fair Trading, that a code of conduct and complaints process be set up, that the handling of bodies with infectious diseases be regulated, and that mortuaries be audited. The report found Queensland laws did not address public safety issues on the transportation, display and disposal of dead bodies carrying infectious diseases. In 2009, the call for regulation was again raised amidst concerns of unqualified funeral directors in the industry[26].

New South Wales

In July 2007, the Parliament of New South Wales assented the Fair Trading Amendment (Funeral Goods and Services) Bill 2007[27], which includes such things as the provision of written quotes for all costs and services for the agreed funeral. In addition, in April 2008 the review of Exhumation Guidelines was published.

Western Australia

The Department of Consumer and Employment Protection (Consumer Protection) has prepared a final report on the regulation of pre-paid funerals. This report recognises that the potential risks to consumers are sufficiently high as to warrant statutory regulation and recommends that a mandatory code of conduct be established under the Fair Trading Act 1987 to regulate conduct in the pre-paid funeral industry. The recommendations have been approved by the Minister for Consumer Protection and a draft code of practice is currently being prepared[28].

The industry is further affected by local council planning and health regulations and also state government health regulations and supervision regarding such things as infection control.

TECHNOLOGY TRENDS

THE FUNERAL SERVICES INDUSTRY CONTINUES TO WITNESS THE INTRODUCTION AND INCREASING USE OF NEW TECHNOLOGIES, like energy-efficient cremators. Company websites, tribute websites, online condolence books and online death registries are becoming more common.

Industry feedback reports that other forms of technology are being utilised in order to broaden the range of services offered to customers. Increased use of the internet allows businesses to provide information to consumers and promote business products and services and present the human face of the industry. GIS mapping systems and stock control technologies are also employed. The challenge in utilising new technology is in keeping the workforce up to date with both generic software products and specific tailored programs. Funeral Services workers are often required to have data entry ability, understanding of file management, knowledge of IT terminology, understand how to report or trouble shoot basic technical problems and how to operate AV equipment.

IT knowledge and good IT infrastructure are important for the success of e-learning programs, especially in regional and remote areas, where they are important tools for the ongoing development and maintenance of up-to-date knowledge of employees. However e-learning offers a flexible method of training tailored to industry-specific needs and work times in metropolitan areas also.

CURRENT IMPACT OF TRAINING PACKAGES

PARTICIPATION IN VOCATIONAL EDUCATION[29]

The funeral services industry consists of four broad sectors.

- Funeral homes and funeral directors
- Funeral celebrants
- Cemetery and crematorium services and grounds maintenance
- Embalming

Certificate II and IV in Funeral Services and Embalming qualifications in SIF08 Funeral Services Training Package are only available in Victoria, under a traineeship scheme. Certificate IV in Embalming is also offered in WA under a traineeship scheme.

Some privately-funded registered training organisations have SIF08 Funeral Service Training Package on their scope of registration; however only a few actually deliver its qualifications.

Please refer to Appendix A for further information on the continuous improvement process for SIF08 Funeral Services Training Package.

The number of new graduates into the industry is limited by the high cost of courses, geographical restrictions on availability, and the fact that a significant component of practical assessment while studying requires employment in the funeral industry.

Economy of scale in service delivery affects the funeral industry. Feedback to SSA indicated that training providers are reluctant to offer vocational education and training to small target groups found in some sectors, such as operators of crematoria. Further feedback to SSA, along with the data below, indicates that the funeral services industry is enforcing its training effort and that industry is increasingly seeing training as part of a corporate culture.

	Commenced	In-training	Completed	Cancellations/ Withdrawals	Total
Certificate II in (Funeral Operations)	1	1	0	1	3
Certificate III in (Funeral Operations)	10	48	0	4	62
Certificate III in (Cemetery/ Crematoria Operations)	0	4	0	0	4
Certificate III in (Gravedigging, Grounds and Maintenance)	0	15	1	0	16
Certificate IV in Funeral Services	34	221	12	8	275
Certificate IV in (Embalming)	4	19	0	1	24
Total	49	307	13	15	384

TABLE 1 APPRENTICE AND TRAINEES, COMMENCEMENTS AND COMPLETIONS, JANUARY – DECEMBER 2009[30]

Completion rates

Completion rates as an exclusive measure of effectiveness continue to be a critical concern to the service industries. Industry overall, and the service industries in particular, believe that they have been unnecessarily disadvantaged by use of completion rates as a measure of success of industry training. This situation remains a concern as there is a strong need for the development of nationally-consistent data collection tools that more accurately measure and evaluate course completion and non-completion rates.

In response to these concerns, SSA has commissioned JMA Analytics to undertake a research project to determine if the current assumptions about the reasons for non-completions are correct and to mount a case for a more consistent and accurate national measurement system. The project considers what non-completion data is currently being collected in VET, what non-completion data isn't being collected that should be, and aims to find out what is the preferred structure, frequency and collection methodology for data on non-completions. A broad range of reasons why students do not complete programs is being collected including, relationship with employer, personal barriers, quality of provider and interest in the job role.

Early findings from this research project indicate that the two primary categories of issues in relation to the current data collection tool for completion rates (The Australian Vocational Education and Training Management Information Statistical Standard, or AVETMISS) are:

1. the potential for significant inaccuracies in the statistics reported (e.g. no universal student identifier), and
2. the need for some alternative future approaches that do not automatically interpret qualification non-completion as a negative outcome (e.g. some students may never intend to complete a program, rather only certain aspects).

Importantly, this project does not set out to argue that completion rates *shouldn't* be measured, nor is it arguing that low completion rates are okay, nor is it trying to avoid the issue of improving quality delivery. What it is trying to do is argue for a better understanding of the issue and a better way of measuring the effectiveness of the system. Qualifications are an important outcome for education systems and our investigation into this issue is driven by an appreciation that 'life is not linear' and that contemporary measurement systems should accommodate this reality.

The complete findings of this research project, *Evaluation Frameworks for VET*, are due to be published in March 2011.

FUTURE DIRECTIONS FOR ENDORSED COMPONENTS OF TRAINING PACKAGES

SIF08 Funeral Services Training Package was updated in 2010 to ensure that current policy directives relating to sustainability and flexibility are met. A case for exemption was submitted to the NQC for the Certificate IV in Embalming due to the potential risk resulting from the greater flexible packaging rules as a result of consultations held at the Australian Institute of Embalmers conference on 19 June 2010.

APPENDIX A – REPORT OF CONTINUOUS IMPROVEMENT OF SIF08 FUNERAL SERVICES TRAINING PACKAGE

<table>
<tr><th colspan="5">TRAINING PACKAGE: SIF08 Funeral Services Training Package</th></tr>
<tr><th>BRIEF SUMMARY OF CHANGE</th><th>INDUSTRY IMPERATIVES/ RATIONALE FOR CHANGE</th><th>DATE SUBMITTED TO NQC SECRETARIAT</th><th>DATE ENDORSED BY NQC/ or ISC UPGRADE</th><th>DATE MADE PUBLIC THROUGH NTIS</th></tr>
<tr><td>Version 1.2 of the SIR08 Funeral Service Training Package was released to reflect the following changes:
Qualification rules for all qualifications, except SIF40208 Certificate IV in Embalming updated to comply with recent NQC flexibility rules.
Aspects of sustainability added to Required Knowledge and Range Statement sections to relevant units.
Version identifiers changed from A to B for the following units:
• SIFBCR005A Install burial vaults
• SIFBGM001A Provide general grounds care
• SIFBGM003A Clean and maintain public conveniences and amenities
• SIFBCR001A Coordinate burial site preparation and reinstatement
• SIFCCS001A Provide service to clients
• SIFFNL008A Coordinate funeral operations
• SIFIND001A Work effectively in the funeral services industry
• SIFMWK004A Coordinate mortuary operations
AQTF information updated.</td><td>The purpose of this version update was to ensure that the National Quality Council flexibility and sustainability directives are addressed within the SIF08 Funeral Services Training Package.
A case for exemption was submitted to the NQC for the Certificate IV in Embalming due to the potential risk resulting from the greater flexible packaging rules as a result of consultations held at the Australian Institute of Embalmers conference on 19 June 2010.</td><td></td><td></td><td></td></tr>
</table>

APPENDIX B – FUNERAL SERVICES OCCUPATIONS AND QUALIFICATIONS IN DEMAND

ANZSCO Code	Occupation	Training Package Qualification	Justification/evidence
451399	Funeral director (embalmer) Funeral director	Certificate IV in Funeral Services (Embalming) Certificate IV in Funeral Services	According to the Australian Institute of Embalming, there are 173 qualified and registered embalmers in Australia. Due to the current lack of qualified embalmers, the Australian industry is recruiting from overseas to meet ongoing demand. This has been achieved in some measure by employing New Zealand citizens who do not have visa restrictions. With the continued population ageing, the number of deaths is projected to continue increasing throughout the remainder of the century at around 0.6% to 0.7% a year. However, between 2022 and the late 2030s deaths are projected to increase more rapidly (up to 2.7% a year in 2032). This is seen to be a result of the ageing population and in particular the progression into older age groups of those born during the post World War II 'baby boom'. From 134,800 deaths in 2006—07, deaths are projected to more than double by 2056, and reach around 411,400 in 2101.

ENDNOTES

1 Service Skills Australia, Environmental Scan 2010

2 ABS 3235.0 Population by Age and Sex, Regions of Australia, 2009

3 ABS 3222.0 Population Projections Australia, 2006 to 2101

4 ABS 3302.0, Australia, 2009; please note that by international convention, the death figure excludes any actual deaths of Australians overseas, but includes overseas visitors who died in Australia. In 2009 there were 295 deaths registered in Australia of persons usually resident overseas.

5 ABS 3222.0 Population Projections Australia, 2006 to 2101

6 ABS 3222.0 Population Projections Australia, 2006 to 2101

7 ABS 3412.0 Migration, Australia 2008-09

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21 ABS 8165.0 Counts of Australian Businesses, including entries and exits, June 2007. Due to changes in the output of this ABS release from October 2010, it is no longer possible to present data at an Industry Subdivision level

22 IBISWorld Funeral Directors, Crematoria and Cemeteries in Australia: Q9524, October 2010

23 ABS 3302.0 Deaths, Australia, 2009, Table 10: Deaths, Year of occurrence, Age at death, States and territories—1999 to 2009; please note that there is under-coverage of Indigenous deaths in most states and territories, hence Indigenous age-specific death rates presented in this publication are likely to be underestimates of the true rates

24 ABS 3302.0 Deaths, Australia, 2009, p.10; please note that there is under-coverage of Indigenous deaths in most states and territories, hence Indigenous age-specific death rates presented in this publication are likely to be underestimates of the true rates

25 IBISWorld Funeral Directors, Crematoria and Cemeteries in Australia: Q9524, October 2010

26 Courier Mail, ‘Death – the buck stops here’, October 2009

27 http://www.parliament.nsw.gov.au

28 http://www.docep.wa.gov.au/Corporate/Publications/Current_Reviews/Regulation_of_prepaid_funerals.html

29 NCVER Vocational Course enrolment and completions 2003 to 2007; information collected by NCVER encompasses TAFE institutes, some universities, secondary schools offering VET, industry organisations, Adult Migrant Education Scheme providers, private enterprises in receipt of government funding for training, agricultural colleges, community education providers and other government providers, but no private training organisations which do not receive government funding. (NCVER Australian vocational education and training statistics: Explained, updated March 2008)

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