

Materiał pobrany ze strony [walidacja.ibe.edu.pl/metody](http://walidacja.ibe.edu.pl/metody)

# Skills audit

## Characteristics

The **skills audit** identifies and analyses the knowledge, skills and social competences of a person, including his/her aptitudes and motivations, in order to develop a plan for career development or further learning.

### Box 1. What are competences

According to the Glossary of the Integrated Qualifications System, the term "competences" means the broadly understood ability to take specific actions and perform tasks using acquired learning outcomes and one's own experiences. Depending on the context, competences may include, for example, the scope of the activity performed, the scope of decision-making powers, substantive preparation for the performance of a specific task, predispositions of the individual, his/her aptitudes and previous experience.

Competences are based to a large extent on specific learning outcomes, but transcend them. For this reason, these terms do not have the same meaning, even though they are sometimes used interchangeably.

The skills audit is a collection of methods, including, among others, various types of [structured interviews](#).

In the first place, a skills audit allows the strengths and weaknesses of a person to be determined and enables possible paths for further development to be identified. It can also be the first step in the validation process because it allows learning outcomes to be identified and documented (i.e. provides the evidence for their confirmation).

Selecting the skills audit to identify and document learning outcomes largely depends on a candidate's aims. The audit will be especially useful for persons who are not sure of their potential or believe that they need help in determining their further development. It can also be useful for those who want to return to the labour market or retrain.

Although the [French model](#) often serves as the exemplary skills audit, there is no single scenario for its implementation. At least three stages of conducting a skills audit can be distinguished:

1. an interview (or series of interviews) with a counsellor – sometimes supplemented with e.g. observation, additional tests or questionnaires – in order to identify the candidate's learning outcomes;
2. gathering evidence to support the hypothesis that the learning outcomes have been achieved;
3. creating a plan for further development.

The audit requires working with a counsellor, self-reflection, honest answers to questions and efforts to gather evidence to confirm achieved competences. Therefore, it is crucial that a good relationship is developed between the counsellor and the candidate and mutual agreement is reached on the goals set by the candidate and the ways in which they are to be accomplished.

### Box 2. The skills audit as a set of methods and as a specific tool

Materiał pobrany ze strony [walidacja.ibe.edu.pl/metody](http://walidacja.ibe.edu.pl/metody)

In many European countries, e.g. the Netherlands, Germany and the United Kingdom, the term "skills audit" is defined as activities performed in order to broadly identify and document learning outcomes, often undertaken by employment services.

In other countries, such as France and Wallonia (Belgium), it is a specific tool, used independently of validation, which allows the identification of competence gaps, a plan for further learning, and possible career paths for a specific person. This audit is performed by properly trained people, often in centres dedicated to such activities.

In Poland, the skills audit method was developed in 2015 and described as part of a project entitled "Developing the national qualifications system – pilot implementation of the national qualifications system and its promotional campaign", conducted by the Educational Research Institute in partnership with the Regional Labour Office in Kraków (more information can be found [here](#) and [here](#)).

## The validation stages in which the use of the method is recommended

The skills audit is recommended for the stages of identifying and documenting learning outcomes.

The results of the audit can also be considered at the assessment stage, using the [analysis of evidence and declarations](#).

## Scope of the learning outcomes that can be confirmed using the method

Information on the scope of the learning outcomes that can be identified and documented through a skills audit is for guidance only.

It should be remembered that the choice of a given method must always be based on an analysis of the learning outcomes for a given qualification.

The skills audit can be used to identify and document knowledge, skills and social competences at all PQF levels.

## Strengths and weaknesses of the skills audit

Strengths

Weaknesses

Materiał pobrany ze strony [walidacja.ibe.edu.pl/metody](http://walidacja.ibe.edu.pl/metody)

- |  |  |
|--|--|
| <ul style="list-style-type: none"><li>• allows for the comprehensive identification of knowledge, skills and social competences of a given person, also when he/she is not aware of his/her achieved learning outcomes</li><li>• one can use the skills audit to identify and document a broad scope of competences (it can potentially include all the learning outcomes achieved by a given person) or a narrow one (only in relation to the learning outcomes relevant to a particular qualification)</li><li>• enables the knowledge, skills and social competences acquired outside of formal education to be identified and documented</li><li>• the candidate obtains information about his/her learning outcomes and how he/she can effectively use and develop them</li><li>• the candidate receives support in preparing the evidence for his/her achieved learning outcomes (documented) from the person performing the audit</li></ul> | <ul style="list-style-type: none"><li>• it is a time-consuming and potentially expensive method for the candidate – it requires at least several meetings with a counsellor, which may generate additional costs, e.g. for commuting or validation fees</li><li>• it is an expensive method for the awarding body/consulting institution – in addition to meeting several times with the candidate, depending on the purpose of the audit, the counsellor may also prepare recommendations on the candidate's further path of study and career; this entails the need to remunerate the counsellor and provide a room in which the audit can be conducted</li><li>• the skills audit is not a method for assessing learning outcomes</li></ul> |
|--|--|

## Limitations of using the method

The skills audit meets, by definition, the needs of candidates – the scale and depth of acquired knowledge, skills and social competences can be determined, regardless of how they were obtained. However, the need for several meetings with a counsellor may increase the time needed for validation (e.g. due to difficulties in arranging meetings).

The skills audit can be used to achieve various goals. In order to perform it in the best way possible, personnel with the appropriate skills must be involved. This may limit the group of institutions that could use this method. In addition, awarding bodies may choose to use it only in a narrow scope (identifying and documenting the learning outcomes required for specific qualifications) or use other methods instead.

The skills audit is particularly useful for persons who are unemployed, inactive, threatened by unemployment or seeking retraining. For this reason, the use of this method should be low-cost or even free for the candidate. However, this factor may discourage awarding bodies from using it. In many European countries, the use of the audit is subsidised, conducted by state institutions or entities from the third sector.

The fact that the skills audit is not used in the assessment stage may limit the recommendation of this method by entities describing qualifications. However, identifying and documenting learning outcomes may shorten and optimise the validation process, because it can (among other things):

- estimate the candidate's chances of success (identify strengths and weaknesses) and postpone the assessment process if further learning is required; the institution can then save resources and at the same time reduce the risk of discouraging the candidate, who will then not apply for validation;
- document learning outcomes, which can be particularly useful if the method of analysing evidence and statements is used at the assessment stage.

## Required human, organisational and material

Materiał pobrany ze strony [walidacja.ibe.edu.pl/metody](http://walidacja.ibe.edu.pl/metody)

## resources

In performing the skills audit, the participation of a person who knows how to conduct it, for example, a properly trained validation counsellor, is recommended. This person should have knowledge, skills and social competences in:

- the purpose, process and tools used in the skills audit;
- drawing conclusions on the basis of interviews conducted about the candidate's learning outcomes;
- accurately indicating the types of documents and deliverables that can prove that the candidate has acquired the relevant knowledge, skills and social competences;
- preparing opinions on the strengths and weaknesses of the candidate and recommendations for further action;
- the types of evidence and statements allowed by the awarding body, and assistance in their selection and preparation;
- the sector in which the validation is being conducted.

The following resources are required to perform the audit:

- a room for conducting interviews in privacy,
- appropriate tools and forms (e.g. interview forms, competence sheet, consultant's opinion template or audit report template),
- a computer – if individual documents are completed electronically.

The costs of using the skills audit can be categorised as follows:

- preparation of the tool (unless the institution uses ready-made templates, e.g. tools developed by IBE and the Regional Labour Office in Kraków) and its improvement;
- human resources – the amount of these costs will depend on the number of people performing the audit, their training and the number of candidates;
- technical means (e.g. a computer to complete individual forms) – depending on the internal arrangements of a given institution;
- storage of audit results – depending on the internal arrangements of a given institution.

## Possibilities of combining the skills audit with other methods

The skills audit uses techniques that belong to the [structured interview](#), such as the biographical interview and behavioural interview. In addition, it is also possible to use an [unstructured interview](#).

By performing a skills audit, other methods of identifying and documenting learning outcomes do not have to be used.

The information obtained from the audit at the identification and documentation stages can contribute to the [analysis of evidence and statements](#) at the assessment stage.

## Example techniques

A technique is a way of doing a particular task in a given method, used to collect and analyse data proving that a person has achieved the learning outcomes.

Materiał pobrany ze strony [walidacja.ibe.edu.pl/metody](http://walidacja.ibe.edu.pl/metody)

Interview (unstructured interview, not very focused) – see [unstructured interview](#)

Biographical interview – see [structured interview](#)

Behavioural interview – see [structured interview](#)

## Guidelines for using the skills audit

### Example from Poland

The following example was developed on the basis of material from the [Skills Audit Method](#).

Name	The skills audit developed by the Educational Research Institute and the Regional Labour Office in Kraków
Country	Poland
Context of its development	<p>The Regional Labour Office (RLO) in Kraków is a member of the Małopolska Partnership for Lifelong Learning, and therefore participates in many initiatives relating to lifelong learning and validation.</p> <p>In 2013–2015, it was a partner in the project “Developing the national qualifications system – pilot implementation of the national qualifications system and its promotional campaign” implemented by the Educational Research Institute. The Skills Audit Method was produced as part of the project’s work on guidelines for identifying and documenting learning outcomes. Since then, the method has been used and improved by employees of the Kraków RLO.</p>
Name of the qualification	The skills audit method can be applied to every qualification.
A brief description of the method used	<p>The skills audit developed in the project is understood as a way of identifying and documenting learning outcomes - the knowledge, skills and social competences - acquired in the learning process.</p> <p>The skills audit can be used in the validation process as one of the tools for identifying and documenting learning outcomes. This applies both to the situation in which the person entering the process intends to attain a qualification (or part of it), as well as the situation in which the candidate intends to confirm individual learning outcomes that are not part of a specific qualification.</p> <p>Principles of using the skills audit:</p> <ol style="list-style-type: none"> <li>1. participation in the process is completely voluntary;</li> <li>2. all decisions regarding the direction and scope of activities are taken by the candidate;</li> <li>3. the candidate has the right to full information about the process;</li> <li>4. the candidate has the right to receive feedback, including an indication of further development opportunities;</li> </ol>

Materiał pobrany ze strony [walidacja.ibe.edu.pl/metody](http://walidacja.ibe.edu.pl/metody)

	<p>5.the process is adapted to the candidate's abilities and needs (e.g. change of place of residence, losing or getting a job); 6.the candidate has the right to privacy.</p>
<p>Used individually or with the assistance of a counsellor</p>	<p>The audit should be performed by a suitably prepared counsellor.</p>
<p>Factors underlying the choice of the method</p>	<p>The aim of the RLO Kraków staff was to identify the knowledge, skills and social competences of their clients, as well as to advise them of further educational and professional development. It was decided that the best way to achieve this goal would be to use the skills audit.</p>
<p>The procedure</p>	<p>The skills audit used by RLO Kraków has the following stages:</p> <ol style="list-style-type: none"> <li>1.analyse the candidate's application form (can be completed individually or with the help of a counsellor),</li> <li>2.conduct a biographical interview with the candidate,</li> <li>3.conduct a behavioural (competence) interview with the candidate,</li> <li>4.counsellor prepares the skills audit.</li> </ol> <p>The first stage is the analysis of the application form completed by the candidate (alone or with the involvement of a counsellor). This allows an initial determination to be made of the purpose of the consultancy and the scope of support expected by the candidate. It also provides the counsellor with information to properly prepare the next stage of the audit, e.g. it allows questions to be formulated about issues that the candidate should further explain, supplement or clarify for the biographical interview.</p> <p>The biographical interview involves collecting information about the candidate regarding, among others, his/her course of education, professional experience and non-professional activities. It is the first key stage in the audit because it affects:</p> <ul style="list-style-type: none"> <li>• the assessment of the quality of the whole process by the candidate,</li> <li>• the motivation of the candidate to engage in subsequent activities,</li> <li>• the openness of the candidate to provide information, and thus the scope of the behavioural interview.</li> </ul> <p>The tool for conducting a biographical interview as part of the audit is a set of sample and auxiliary questions for each of the candidate's areas of activity.</p> <p>The next stage of the audit is the behavioural interview. Within this stage, selected specific events are analysed based on the description of behaviour and its results. Thus, conclusions about the learning outcomes achieved by the candidate are based on the experiences he/she describes.</p> <p>Just as in the biographical interview, the counsellor prepares a set of questions before meeting with the candidate. The scope of the questions is based on the information obtained during the biographical interview.</p> <p>The behavioural interview form contains three areas:</p> <ul style="list-style-type: none"> <li>• professional experience,</li> <li>• personal area,</li> <li>• key life experiences and events.</li> </ul> <p>At the very beginning, the counsellor informs the candidate about the purpose and course</p>

Materiał pobrany ze strony [walidacja.ibe.edu.pl/metody](http://walidacja.ibe.edu.pl/metody)

	<p>of the behavioural interview. Then he/she asks questions from the three areas mentioned above and then determines the scope of documenting the learning outcomes achieved by the candidate. This is intended to stimulate the creativity and motivation of the candidate, needed for the next stage of the process, which is documenting the learning outcomes.</p> <p>Behavioural interviews in the skills audit are conducted on the basis of the STAR model, which determines the manner and order of asking questions. Scaling (0-100%) was also introduced as a quantitative measurement.</p> <p>The last stage is the preparation of the skills audit sheet. This has a dual function – it is both a tool and a document.</p> <p>As a tool, it allows information to be compiled that has been collected during the interviews. However, as a document containing a summary of achieved learning outcomes, it can be used to develop a plan for further development or as the basis for an in-depth identification and documentation of achieved learning outcomes.</p> <p>The skills audit sheet systematises information on:</p> <ol style="list-style-type: none"> <li>1. identified learning outcomes,</li> <li>2. links with specific situations and actions of the candidate,</li> <li>3. evidence that can be used to document achieved learning outcomes.</li> </ol> <p>The scope of this information is determined by the validation goal that the candidate has specified in the application form. It can be helpful in determining further actions – independently by the candidate or with the support of a counsellor. In addition, the candidate receives feedback based on the data in the skills audit sheet.</p>
<p>Result of the validation process</p>	<p>The effects of applying the skills audit method include:</p> <ul style="list-style-type: none"> <li>• increasing awareness of the candidate's potential (knowledge, skills, social competences),</li> <li>• determining possible paths for further development.</li> </ul> <p>Participation in the skills audit also has an impact on further motivating the candidate to continue his/her development.</p>
<p>Organisational and material resources</p>	<p>The skills audit should be developed with the support of a validation counsellor. He/she should:</p> <ul style="list-style-type: none"> <li>• have the appropriate background in conducting interviews and constructing questions,</li> <li>• specialise in the sector which is associated with the learning outcomes being confirmed.</li> </ul> <p>The candidate receives an application form. The counsellor, on the other hand, has biographic and behavioural interview forms and a skills audit sheet.</p> <p>The audit requires at least 3 meetings of the candidate with the counsellor. Each of them should last about 1.5-2 hours. Appropriate conditions for these meetings must be ensured (including those that allow for privacy).</p>
<p>Limitations of use</p>	<p>The skills audit described above is currently applied only by the Kraków RLO.</p>

Materiał pobrany ze strony [walidacja.ibe.edu.pl/metody](http://walidacja.ibe.edu.pl/metody)

## Example from a foreign country

The following example is based on the publication [Foreign validation systems. Overview of solutions](#) (Gmaj et al., 2017)

Name	<i>Bilan de compétences</i>
Country	France
Context of its development	<p>The skills audit has been used in France since the 1980s. Initially, it served employers as an aid in formulating a learning plan in a given workplace or adapting employees' competences to a new workplace structure. As of 1991, each employee has the right to have a skills audit performed.</p> <p>In addition to the standard audit, there is an in-depth skills audit – bilan de compétences approfondi (BCA). Its purpose is to develop an individual entry plan to the labour market of the candidate. It was developed mainly for unemployed persons, as well as for those over 50 years of age, disabled workers, women returning to the labour market, for example, after maternity leave, people who are not fluent in French, etc.</p>
Name of the qualification	Not applicable – in the French system, the skills audit is used to identify and document knowledge, skills and social competences of a given person regardless of the qualification.
Brief description of the method used	The skills audit is a tool allowing professional and social competences to be identified.
Used individually or with the assistance of a counsellor	<i>Bilan de compétences</i> is always performed by a trained counsellor.
Factors underlying the choice of the method	According to a 2002 law, each person can undergo the process of identifying their competences. The skills audit is one of the methods that can be used for this.
The procedure	<p>The skills audit takes place in three stages:</p> <ul style="list-style-type: none"> <li>• the initial phase – takes the form of a conversation between the counsellor and a given person; its purpose is to define and analyse the needs of the candidate and provide information on the next steps, methods and techniques that will be used, and discuss the principles of using the results and drawing conclusions;</li> <li>• the research phase – depending on the findings from the initial phase, an analysis is performed of the motivation and interests of a given person, identification of social skills and competences, and – if necessary – general knowledge. Then the possibilities for further professional development are indicated. The tools and methods used in this phase depend on the individual arrangements. The most commonly used are: <ul style="list-style-type: none"> <li>◦ psychometric tests,</li> <li>◦ questionnaires (e.g. Holland's Self-Directed Search tool, competence questionnaire),</li> <li>◦ analysis of work result samples,</li> <li>◦ list of professional interests;</li> </ul> </li> <li>• conclusions – during the interview with the candidate, the results of the research phase are presented, factors that have an impact on its further development are identified, and the next steps are presented, for example, supplementing</li> </ul>

Materiał pobrany ze strony [walidacja.ibe.edu.pl/metody](http://walidacja.ibe.edu.pl/metody)

	competences or attaining qualifications.
Result of the validation process	The process ends with the counsellor writing a report. It must contain information on the circumstances of submitting the application for the audit, its purpose, conditions (including sources of financing), the candidate's competences and the plan for further development.
Organisational and material resources	<p>The skills audit is always performed by a counsellor trained in the use of this method and all its tools.</p> <p>The length of time required to perform the skills audit varies depending on the candidate. It should not exceed a total of 24 hours, spread over a minimum of 3 weeks, and a maximum of 3 months. In turn, the in-depth skills audit lasts a maximum of 6 weeks, while the number of meetings depends on individual needs. The employee is entitled to paid vacation during the time required to meet with the counsellor.</p> <p>At the request of the employer, a skills audit can be performed in small groups. In this way, the results are enriched by the group's contribution and joint discussion on individual projects and professional plans. To conduct such an audit, additional methods of working with a group are used to facilitate the exchange of information and to strengthen the motivation of individual participants.</p>
Limitations of use	The skills audit is performed only in dedicated centres by properly trained counsellors, which limits its availability.
Additional comments	<p>The candidate has no obligation to share his/her results with anyone, at the same time, they can be used as he/she sees fit.</p> <p>If an employer proposes that an employee have a skills audit conducted and he/she refuses, this cannot be grounds for dismissal.</p>

## Bibliography

Białek, M., Brudny, M., Matysiak, W. and Wykrotka, M. (2014a). *Opis metody i narzędzia do identyfikacji efektów uczenia się zgodnie z metodologią bilansu kompetencji [Description of the methods and tools to identify learning outcomes in accordance with the skills audit methodology]*. Kraków: Wojewódzki Urząd Pracy [unpublished material].

Białek, M., Brudny, M., Matysiak, W. and Wykrotka, M. (2014b). *Wstępne wytyczne dla procesów identyfikacji i dokumentacji efektów uczenia, obejmujących metody i narzędzia [Preliminary guidelines for the identification and documentation of learning outcomes, including methods and tools]*. Kraków: Wojewódzki Urząd Pracy [unpublished material].

Bodzińska-Guzik, E., Gmaj, I., Grzeszczak, J. and Leyk, A. (2015). *Metoda bilansu kompetencji [Skills audit method]*. Warsaw: Instytut Badań Edukacyjnych. Downloaded from: [http://biblioteka-krk.ibe.edu.pl/opac\\_css/doc\\_num.php?explnum\\_id=962](http://biblioteka-krk.ibe.edu.pl/opac_css/doc_num.php?explnum_id=962)

Cedefop (2014). *Terminology of European education and training policy. A selection of 130 key terms*. Luxembourg: Publications Office.

Gmaj, I., Grzeszczak, J., Leyk, A., Pierwieniecka, R., Tauber, M. and Walicka, S. (2017). *Zagraniczne systemy walidacji: przegląd rozwiązań [Foreign validation systems: an overview of solutions]*. Warsaw: Instytut Badań Edukacyjnych.

Materiał pobrany ze strony [walidacja.ibe.edu.pl/metody](http://walidacja.ibe.edu.pl/metody)

Downloaded from: <http://kwalifikacje.edu.pl/wp-content/uploads/publikacje/PDF/zagraniczne-systemy-walidacji.pdf>

Gosseume, V. and Hardy-Dubernet, A. Ch. (2005). Bilans de compétences. Et Bilans de compétences approfondis: vrais ou faux jumeaux? [Skills audit. And in-depth skills audit: true or false twins?] Première Synthèses, Février, 07.1.  
Downloaded from:

[https://dares.travail-emploi.gouv.fr/IMG/pdf/publication\\_pips\\_200502\\_n-07-1\\_bilan-des-competences-et-bilan-des-competences-appfondis.pdf](https://dares.travail-emploi.gouv.fr/IMG/pdf/publication_pips_200502_n-07-1_bilan-des-competences-et-bilan-des-competences-appfondis.pdf)

Educational Research Institute (2017) Dobra praktyka w zakresie walidacji efektów uczenia się. Francja. Kwalifikacja: Fryzjer [Good practice in the field of the validation of learning outcomes. France. Qualification: Hairdresser] Warsaw: Instytut Badań Edukacyjnych.

Pierwieniicka, R. (2015). Metody używane w walidacji efektów uczenia się uzyskanych poza edukacją formalną w wybranych krajach [Methods used in the validation of learning outcomes achieved outside formal education in selected countries] [unpublished text].

Sławiński, S. (2017). Słownik Zintegrowanego Systemu Kwalifikacji [Glossary of the Integrated Qualifications System]. Warsaw: Instytut Badań Edukacyjnych.

### **Websites:**

Cedefop. European Inventory on the validation of non-formal and informal learning [database];

<http://www.cedefop.europa.eu/en/events-and-projects/projects/validation-non-formal-and-informal-learning/european-inventory>