



BILAN DE COMPETENCES: EUROPEAN QUALITY CRITERIA



CRITERION 1: PURPOSE OF BILAN DE COMPETENCES

The purpose of the *bilan de compétences* is to define a career project integrated into the socio-professional environment of the beneficiary.

- 1.1. For employees as well as for jobseekers, the *bilan de compétences* is a privileged approach for the elaboration of the project of personal and professional evolution. It allows him to anticipate changes, define an action plan and, in the case of its use within a company, to position himself clearly.
- 1.2. The *bilan de compétences* provides to everyone the opportunity to identify, define, demonstrate and evaluate their qualification and their skills and competences acquired through work, training or social experiences.
- 1.3. The use of the *bilan de compétences* presupposes that the beneficiary is questioning the conditions of his inclusion to the labour market or of his professional development.
- 1.4. The *bilan de compétences* should help identify the factors that facilitate or hinder the realisation of the career project, describe the main phases of its realisation or identify the prerequisites for the realisation that need to be worked on by the beneficiary (with external assistance if necessary).
- 1.5. If the gap between the skills required by the project and those of the recipient necessitates a training, a training plan should be developed and considered as one of the phases of the professional project.
- 1.6. The beneficiary must be able make choices in terms of action plan, which involves the development of alternative scenarios.
- 1.7. The *bilan de compétences* takes into account the socio-economic environment of the recipient as well as data related to the labor market.

CRITERION 2: PRINCIPLES

The beneficiary is an actor of his *bilan de compétences*. He is a subject, not an object of expert analysis.

- 2.1. This criterion helps to clearly distinguish the *bilan de compétences* from assessment or recruitment procedures. Being an actor of its *bilan de compétences* means to gradually elaborate one's own solutions while being accompanied. The use of questionnaires and psychological assessment tools should be rooted in this dynamics. If the assessment in relation to occupational standards or competence models takes place at some point in the process, it should never be a prerequisite for any action, and cannot therefore be the cornerstone of the service.
- 2.2. The beneficiary expresses and formalises his commitment to realise a *bilan de compétences* as part of an agreement that defines the objectives and the course of the procedure.
- 2.3. The beneficiary is followed by an assigned counsellor. His name must be specified in the agreement for the realization of the *bilan de compétences* or in a technical annex.
- 2.4. The service takes into account the diversity of the public and the specificity of each request.
- 2.5. The phases of the *bilan de compétences* are discontinuous and respect the rhythm of the appropriation by the beneficiary.
- 2.6. The course of the *bilan de compétences* includes the time of personal work and individual production by the beneficiary. Individual activity nourishes the exchanges with the counsellor.
- 2.7. The tools and procedures used must allow the beneficiary to:
 - . take ownership of the results of the investigation phase
 - . to dispose of all of the information that allow him to make choices about his career and the means and actions to realise his project.

CRITERION 3: INTRODUCTORY INFORMATION

The introductory and information phase precedes the realisation of the *bilan de compétences*.

- 3.1. This criterion identifies and defines a specific and structured step prior to the realisation of a *bilan de compétences* and its goal is to inform the person about the objectives, the course and the methods used.
- 3.2. This step is realised prior to beneficiary's definitive commitment to the process of *bilan de compétences*.
- 3.3. All necessary resources (human and material) to achieve the most accurate understanding of the objectives and methods of the *bilan* by the beneficiaries are used.
- 3.4. This step allows the person to reflect on the decision whether to engage or not in the *bilan de compétences*.
- 3.5. This step can be performed directly by the centre of *bilan* or delegated to another organisation. The centre then ensures the quality of the information given to the beneficiary.

CRITERION 4: GENERAL ORGANISATION

Bilan de compétences includes three distinct phases, each of them includes at least one face to face interview.

- 4.1. The *bilan de compétences* consists of three distinct phases:
 - A preliminary phase of analysis of needs
 - An investigation phase
 - A phase of conclusions
- 4.2. The average duration of the procedure (the time in which the beneficiary is present in the centre) should be between 14 and 24 hours , in order to take into account the beneficiary's needs and facilitate the process of appropriation .
- 4.3. The preliminary phase should verify the compatibility of the service and the needs of the concerned person,
- 4.4. The time between the demand for a *bilan de compétences* and its beginning should be at most of one month in order to prevent a loss of motivation of the beneficiary.
- 4.5. The duration of the *bilan de compétences* must be (except in special cases) between 4 and 8 weeks .
- 4.6. The preliminary phase should be individual and conducted in an interview must lead to the conclusion of an individual agreement/contract, whose contents should clarify the general and operational objectives , approaches and means of the *bilan de compétences*, the mutual commitments of the provider and the beneficiary (including the duration), and the form and the transmission of the final report.
- 4.7. The investigation phase should enable the beneficiary to gain some insight concerning his evolution: identify the triggers of the search for a change, better understand his values, interests and aspirations, assess his personal and professional knowledge, skills and abilities , identify his transferable skills, identify his resources and potential.
- 4.8. All investigation must have a direct link with the purpose of the *bilan de compétences*.
- 4.9. The *bilan de compétences* includes at minimum four interviews including at least one in each phase.

CRITERION 5: CONCLUSIONS

The conclusion phase should produce a final report that is handed to the beneficiary.

- 5.1. The phase of the conclusion :
 - comprises at least one individual interview conducted by the assigned counsellor
 - summarizes the intermediate findings,
 - identifies factors relevant to the project,
 - provides one or more scenarios (career project and action plan), or, if applicable, identify the elements on which the beneficiary will work, because they are prerequisites for the realisation of any career project
 - leads to the elaboration of a individual file that contains detailed results and a final report, these elements can be a part of a competence portfolio,
 - the language used in the personal file must be clear and understood by the recipient.

- 5.2. Written under the sole responsibility of the guidance provider, the final report must contain :
 - the circumstances of the *bilan* (context, expressed needs and objectives) and the main phases of the process
 - skills , abilities, aptitudes, knowledge and motivations developed and to be developed according to the envisioned career projects
 - information about the career project and an action plan in the medium term. If necessary, the document will specify the factors that will have positively influence to the professional development , the formulation of a specific project or the steps to be realised before such project can be developed. Any information unrelated to the project should not be included in the final report.
 - if applicable, comments and reflections of the beneficiary.

- 5.3. The counsellor must facilitate the integration and the appropriation of the contents of this document by the beneficiary. They should be communicated by himself, or with his consent, for a more broad usage.

CRITERION 6: RECOGNITION AND ACCREDITATION

The *bilan de compétences* contributes to the recognition or validation of results of informal or non-formal learning.

- 6.1. The *bilan de compétences* should give anyone the opportunity to identify, express, demonstrate and evaluate the elements of his qualification and his skills acquired through work, training or social experience.
- 6.2. The *bilan de compétences* is not a validation/accreditation of prior learning, but can contribute to recognition and / or validation/accreditation: The centre shall maintain the necessary links with the institutions involved in the field of recognition and validation/accreditation of prior learning.
- 6.3. The centre should help the recipient, if he desires, to elaborate a competence portfolio for the process of the validation/accreditation of prior learning, if this approach exists in the given country.
- 6.4. The beneficiary shall be informed on how to manage and update his competence portfolio as well as about the opportunities for recognition and validation of prior learning in the context of the local environment. This information should be contained in his personal file.
- 6.5. The elements of this portfolio will be integrated in the personal file of the *bilan de compétences* in the form of removable documents that are dated and individualized.
- 6.6. These may include: the results of the *bilan de compétences*, the production of specific personal results such as Curriculum Vitae or a life story, detailed training certificates issued by training institutions, degrees and titles obtained, the credit units, units acquired through partial validation/accreditation, the results of testing, evaluation of professional qualifications, certificates, etc.

CRITERION 7: MULTIDISCIPLINARY COMPETENCES AND PRACTICES

The staff of the centre of *bilan de compétences* has skills that guarantee a multidisciplinary view.

- 7.1. The basis of expected skills includes at least:
 - skills connected to the welcoming and informing beneficiaries.
 - skills related to career guidance and counselling.
 - knowledge of the theoretical field related to the practice of *bilan de compétences*.
 - knowledge of the system of occupations and qualifications.
- 7.2. Given the broad scope of the *bilan de compétences*, the multi-disciplinarity may be provided by a network of external partners that can complement the in-house resources. In order for these resources to be available to each counsellor according to the needs of the beneficiary, this network needs to be formalized. In case of using external partners, the centre ensures the quality of the service provided.
- 7.3. Each counsellor should have clear, operational and shared knowledge of key concepts of *bilan de compétences* (skills, performance, competences, abilities, motivations, employability, certification, validation, certification, qualification, etc..).
- 7.4. With regard to ethics and competences linked to the use of certain assessment methods, the counsellor must be able to reach to at least one practitioner with the title of psychologist.
- 7.5. Counsellors must necessarily take into account the psychometric quality of assessment tools they use: validity, reliability and sensitivity.
- 7.6. Although psychometric assessment is a valuable contribution in terms of information about the capabilities and individual characteristics of the person, it cannot in any case be sufficient in itself. It must be complemented by other types of investigations directed more towards the identification of behavioural processes that may pave the way for better diagnostics of the operating modes of the individual.
- 7.7. The procedures and tools used must be consistent with the objectives and tailored to the specific audiences.
- 7.8. The centre should be technically able to perform the *bilan de compétences*, regardless of the expertise, hierarchy level and occupational field of the beneficiary or take into account its specific area of expertise and welcome exclusively the public of that specific sector.
- 7.9. The centre has the information resources needed to confront the professional project to the real world of work and labour market. These resources can be internal or external. In the latter case, specific partnerships with organized resource centres and other local organizations able to provide this service should be formalised.

CRITERION 8: FURTHER TRAINING OF COUNSELLORS

The centre provides the necessary means for training and professional development of counsellors.

- 8.1. The individual skills and competences of counsellors being clearly identified, the time of exchange and analysis of professional practice is an excellent way to develop the quality of internal and external resources, the reliability of the methods and techniques used and the respect ethical requirements. These exchanges should result in written results that can be further used.
- 8.2. The need to update their skills and acquire new ones implies the existence of a training plan based on real analysis of the training needs of staff, which requires the implementation of assessment practices.
- 8.3. The transfer of professional practice and skills involves the establishment of an internal monitoring system.
- 8.4. The centre uses the *Quality Assurance system for Bilan de compétences* in order to further develop the skills of counsellors within the common framework.

CRITERION 9: RESEARCH AND DEVELOPMENT

The centre ensures continuous development of methods and practices based on monitoring and research.

- 9.1. The centre is actively searching for information about all research that may be taken into account in its practices.
- 9.2. The centre develops research projects and implements activities aimed at the development of quality and new approaches for a better diversification of its career guidance services.
- 9.3. To this end, the Centre develops actions promoting:
 - the creation and development of a toolbox, scientific studies and different repositories,
 - the exploitation of experiences and innovative actions
 - the organisation of thematic exchanges promoting the enrichment of practices and knowledge transfer.
- 9.4. The centre may also promote the complementarity and coordination with other organizations involved in guidance or in direct link with business or occupational sectors

CRITERION 10: FOLLOW-UP

The centre carries out the follow-up of the beneficiaries and controls the process and the results.

- 10.1. The counsellor ensures that at the end of the *bilan* the beneficiary has all the information necessary to make the best use of the results of its *bilan de compétences* in his future job search, mobility or access to training.
- 10.2. The centre may provide additional support services, monitoring of the beneficiary or help him take contact with another organization that may participate in the realisation of the recommendations in the final report.
- 10.3. The centre implements the procedures and the means necessary to assess the impact and results of the *bilan de compétences*. It defines an assessment procedure using quantitative and qualitative observable indicators.
- 10.4. The centre ensures the financial viability of the service.
- 10.5. The centre establishes and formalizes procedures for archiving accordingly to the legal provisions of the concerned country.

CRITERION 11: LOCAL DEVELOPMENT AND NETWORKING

The counselling is based on the strategic management that takes into account the policies of local development as well as the needs of the labour market and companies. It proposes guidance in the perspective of the lifelong career path.

- 11.1. The centre identifies and mobilizes external expertise: the centre is able to identify and solicit a network of external counsellors or resource persons.
- 11.2. The centre takes into account the policies of institutional authorities in the fields of employment, lifelong learning and guidance. The centre knows the institutional actors in the fields of employment, training and guidance. The centre maintains contacts with institutions and / or their representatives working with local decision-making bodies for economic development. The centre perform actions in connection with the development of the economy and labour market. The centre contributes to the discussion and implementation of the policies of institutional players in the field of employment.
- 11.3. The centre has strong links with the economic and social environment: close cooperation (integration of business networks, professional and / or social organizations) between the centre, enterprises and social actors, promoting good mutual understanding and enhancing the reliability and credibility of the guidance services. The centre works with companies, professional and / or institutional organizations, on the implementation of measures to promote labour mobility, career security and HR management.
- 11.4. The centre has branches or other presence in the territory in order to facilitate the access of beneficiaries. This local service can also rely on digital information technologies. The centre is organized to facilitate the access of any person, excluding all forms of discrimination.
- 11.5. The centre has local, regional and national implications, through participation in networks and the development of partnerships on a local, national and European level: The centre is integrated into local, regional, national partnerships, the centre knows the key services and actors of other counselling services.