

BILAN DE COMPÉTENCES

IN THE CZECH REPUBLIC

2013

International cooperation for innovations and quality

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Content

Introduction	7
Part I: Bilan de compétences and international co-operation project	9
1 What is “bilan de compétences” in the Czech conditions?	11
2 Theoretical foundations of the bilan de compétences.....	13
3 Bilan de compétences in the Czech Republic – history and presence	14
3.1 Implementing bilan de compétences in the employment services.....	14
3.2 Development of bilan de compétences provision system in 2000-2011	18
3.3 From idea to project	21
3.4 Project “Bilan de Compétences for Job Seekers: exchange of international experiences and application of new findings in the Czech Labour Office practice”	22
3.5 Conclusion.....	25
4 Benefits of international co-operation within the scope of the Bilan de compétences project	26
4.1 First meeting	26
4.2 Second meeting	28
4.3 Third meeting.....	30
4.4 Forth meeting	31
4.5 Fifth meeting	33
4.6 Sixth meeting	34
4.7 Conclusion.....	35
5 Possible use of the bilan de compétences in human resource management	37
Part II: Bilan de compétences in EU countries and its providers.....	39
6 Bilan de compétences in EU countries: project partner and other FECBOP members presentation	41
6.1 Belgium: Le Laboratoire d’Ergologie appliquée, asbl	41
6.2 France: CIBC Bourgogne Sud	42
6.2.1 French system of bilan de compétences provision	44
6.3 Italy: CIOFS-FP PIEMONTE	45
6.3.1 ePortfolio.....	46
6.4 Italy: En.A.I.P. Piemonte	47
6.5 Germany: Bildungsinstitut PSCHERER gGmbH	50

6.5.1	The provision of bilan de compétences	50
6.5.2	Used methods and processes.....	52
6.5.3	The bilan de compétences in Germany.....	54
6.6	Romania: Institute of Education Sciences	55
6.6.1	The Romanian provisions of the bilan de compétences	56
6.7	Slovak Republic: Central Office of Labour, Social Affairs and Family of the Slovak Republic.....	58

Part III: Project outcomes63

7 Project objectives and their fulfilment in project outcomes65

8 The Czech Methodology of bilan de compétence68

8.1	Introduction	68
8.2	What is bilan de compétences?.....	68
8.3	Process of bilan de compétences provision	70
8.3.1	Length of bilan de compétences with one client.....	71
8.3.2	Establishing a contract and specification of assignment	72
8.3.3	Specifics of group work	73
8.3.4	Client information collection.....	73
8.3.5	Provision of client counselling aid.....	75
8.3.6	Preparation of Final Report	75
8.3.6.1	Final Report	76
8.3.6.2	Summary of Final Report.....	77
8.4	Personnel and technical requirements of bilan de compétences.....	78
8.4.1	Qualification requirements of the counsellor	78
8.4.2	Consultation premises and technical background	79
8.4.3	Diagnostic equipment	79
8.4.4	Documentation management	82
8.5	Quality in providing bilan de compétences	83
8.5.1	Feedback from clients	83
8.5.2	Feedback from ordering party.....	84
8.6	2.6 Rules for Receiving and Settlement of Complaints, Notices and Submissions	84
8.7	Methodology annexes	85
8.7.1	Annex No. 1: Time allocation of individual activities in <i>bilan de compétences</i>	85
8.7.2	Annex No. 2: Recommended Structure of Client's Declaration and Consent prior to Performance of <i>bilan de</i> <i>compétences</i>	86
8.7.3	Annex No. 3: Recommended Structure of Final Report.....	87
8.7.4	Annex No. 4: Recommended Structure of Summary of Final Report	89
8.7.5	Annex No. 5: Assessment questionnaire following completion of <i>bilan de compétences</i>	91

8.7.6 Annex No. 6: Quality Criteria and Standards of bilan de compétences Counsellor	93
9 Why DIAROS?	96
9.1 Database system	96
9.2 DIAROS system	96
9.3 DIAROS system construction	96
Part IV: Proposed scheme of professional training in bilan de compétence in the Czech Republic.....	99
10 Concept of professional training in bilan de compétences	101
10.1 Introduction	101
10.2 Draft of professional training of practitioners acting within domain of the Czech Association for bilan de compétences	101
10.3 Forms of training.....	103
10.4 Descriptions of selected training modules	105
10.4.1 Basic Level.....	105
10.4.1.1 Introduction to <i>bilan de compétences</i>	105
10.4.1.2 Basic Counselling I (Introduction)	107
10.4.1.3 Basic Counselling II (Theoretical Base)	108
10.4.1.4 Basic Counselling III (Client's Personality).....	109
10.4.1.5 Basic Counselling IV (Career Counselling)	109
10.4.1.6 Basic Counselling V (Methodology for Work with Client Data).....	110
10.4.1.7 Bilan de compétences for HR Practice	112
10.4.1.8 Recognition of Results of Informal Education and Related Tools.....	113
10.4.2 Specialization Level.....	114
10.4.2.1 Counselling Tool <i>bilan de compétences</i>	115
10.4.2.2 Basic Course DIAROS I (Program Operation)	116
10.4.2.3 Basic Course DIAROS II (Results Interpretation)	118
11 Supervision in bilan de compétences	120
Part V: The Czech Association for Bilan de Compétences.....	121
12 Introduction.....	123
13 Charter of the Czech Association for bilan de compétences, o.s.....	124
14 Ethical Code of a member of the Czech Association for Bilan de Compétences	133
14.1 Accountability	133
14.2 Moral and legal aspects	134
14.3 Competences	134

14.4 Confidential information	135
14.5 Client's benefits and rights	135
14.6 Professional relations	135
14.7 Using of diagnostic methods	136
14.8 Research.....	136

15 Quality charter of the Czech Association for bilan de

compétences	137
15.1 Bilan de compétences implementation process	137
15.2 Final report.....	138
15.3 Staffing and technical matters of bilan de compétences	138
15.4 Ethics, handling confidential information, legislation	138
15.5 Quality control	138

List of used literature	140
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INTRODUCTION

You are holding in your hands a Collection of materials that has been put together within the scope of a Human Resources and Employment Operational Programme project called " *Bilan de Compétences* for Job Seekers: exchange of international experiences and application of new findings in the Czech Labour Office practice". The project was carried out by the Guidance Services Support Unit of the National Training Fund, o.p.s. during 2012-2013.

Main objective of the project was based on exchanging practical as well as theoretical experience in various aspects of *bilan de compétences* aiming at innovations the existing methods of career guidance and counselling and suggesting conditions allowing their effective application within the practices of the Labour Office of the Czech Republic. The individuals involved in the project included leading experts in the field of *bilan de compétences*, international partners who use similar systems of work as well as Labour Office employees.

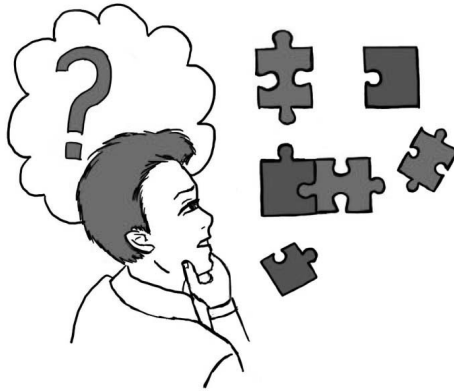
The project scope included creating an innovated Methodology of *Bilan de Compétences* but, primarily, establishing the Czech Association for *Bilan de Compétences* aiming at associating the implementers of this service, defending their interests and, above all, guaranteeing the quality of providing the *bilan de compétences* in the Czech Republic.

This Collection is one of the project outcomes having been prepared for the participants of the final international project conference as well as other individuals interested in the particular matters. The authors have put it together in a way allowing the paper to become an essential material for all experts (as well as other interested individuals) focusing on the *bilan de compétences*.

The Collection structure includes the determination and description of what the *bilan de compétences* actually is as well as a historical excursion going back to the beginnings of the *bilan de compétences* in the Czech Republic, outline of the method development, summary of international findings obtained during the course of the project and comparison of different approaches used in various countries. The second part of the paper includes a brief introduction on the systems for providing the *bilan de compétences* in some of the European countries. The third part is dedicated to the actual project outcomes and includes the complete Czech version of Methodology of *Bilan de Compétences*. The forth part contains concept of professional training in *bilan de competence* with supervision as an integral part of continuous professional training. The fifth part introduces the aforementioned Association for *bilan de compétences* and documents related to its activity.

On behalf of the team of authors, I hope the paper will provide you with plenty of new and interesting information you can use in your line of work.

Pavčina Maříková, Project Manager

**Three notes on translation:**

- We apologize to all who are in this Collection of materials looking for English translation of the term "bilan de compétences". We could not find its sufficient equivalent and therefore we remain with the French wording of this awesome comprehensive career guidance and counselling method.
- In the Czech Republic the „bilan de compétences“ is from 1999 called "bilanční diagnostika" and this term is set also by the Act No. 435/2004 Coll. on Employment. English translation of "bilanční diagnostika" is "balance diagnostics" which evokes physical / neurological examination of balance disorder. Advantage of using the French and Czech term is a clear understanding of what is going on because it is a unique term set by law, while various English translations combining terms like competence, competency, skills, career, guidance, counselling, assessment, audit, etc. should be misleading.
- Translation was prepared by a professional translation company, nevertheless, a professional language review was not done.

Zuzana Freibergová

PART I: BILAN DE COMPÉTENCES AND INTERNATIONAL CO-OPERATION PROJECT

1 WHAT IS “BILAN DE COMPÉTENCES” IN THE CZECH CONDITIONS?

Jarmila Divišová

The *bilan de compétences* is career guidance and counselling methodology focusing on providing employment opportunity assistance to an individual consistently with their predispositions. In the Czech Republic It is applied by psychologists¹ who, by means of the psycho diagnostic methods, counselling interview and counselling schemes, endeavour to help the client accomplish optimal utilization of clients' capabilities, skills, interests and motivation particularly in their professional life.

The *bilan de compétences* helps the clients understand themselves better, increases their motivation and activity as well as improves their self-confidence and self-assessment. The *bilan de compétences* aims at clients being able to utilize their capabilities and skills for the purpose of further education and actually step into their practical professional and social life.

We do not mention the stages and procedures of *bilan de compétences* here as their details are included in the Methodology forming a part of this Collection (see Chapter 8). We would, however, like to highlight the counselling interview importance for practicing the *bilan de compétences*. Asking the client questions in a way so that they do not feel misguided, insulted or locked behind a wall of silence, is a real craft. It is necessary to consider all risk factors that can induce client's unwillingness to co-operation based on a presumption that most of the clients do not have a personal experience with a psychologist and overcoming barriers and obstacles requires the psychologist to be open and honest and take unfeigned interest in the client.

When undergoing the *bilan de compétences*, the client should be in a good mood to continue the co-operation but, at the same time, feel that we sympathize with their problems and, together, we can work towards a change. The time spent together can be an intensive experience for both, the client as well as the psychologist.

One very important part of the *bilan de compétences* involves joint searching for the optimal solution, developing a plan for achieving a particular objective, selecting a suitable retraining course, further education, work experience, etc. It is important to keep in mind that the success is particularly determined by client's potentials. The role of the psychologist conducting the *bilan de compétences* is only advisory and supportive. The client is always the active subject seeking a solution to their situation.

The *bilan de compétences* is primarily used by job seekers and candidates, however, its scope of application is wider, particularly in case when companies are planning

¹ In French approach the *bilan de compétences* is usually provided by multidisciplinary team not only by one psychologist.

restructuring and re-staffing or being interested in improving the adaptation process of new employees; when selecting a suitable course of study, starting a business or completely changing the occupation as well as during selection procedures or other forms of searching for employees for particular positions.

The *bilan de compétences* takes approximately 20 hours and, throughout the entire time, the clients work under the supervision of the psychologist who is an expert in the field. Following the completion of counselling activities, the client will receive a detailed Final Report containing personal and professional history, objective results summary of *bilan de compétences*, personality predispositions and recommendations for taking further steps towards optimal employment opportunity. The Final Report is always discussed with the client, it becomes their property and may only be used to their benefit and with their consent. All client's personal details are protected in accordance with the Personal Data Protection Act.

Upon *bilan de compétences*, the criteria of safety and mutual trust between the psychologist and the client should be met. As psychologists, we can use our ability to listen, support, empathize with the problem as well as discover new views to sufficiently help the client in their development, however, the most valuable element we invest in the counselling activities is our humanity.

2 THEORETICAL FOUNDATIONS OF THE *BILAN DE COMPÉTENCES*

Ivana Slavíková

It is understood that the theoretical foundations of the *bilan de compétences* primarily involve Donald Super's Career Development Theory which is based on the processes of growth and learning that form, develop and change professional behaviour. Super characterizes the professional behaviour as individual's long-term (lifelong) capability to resolve current issues in the context of occupation and work.

Creating the Czech *bilan de compétences* system was largely inspired by the French model. The differences between both models are based on certain diversities in terms of the approach towards the competences: The French model puts greater emphasis on the competences in the sense of particular client's expert knowledge and skills while the Czech one emphasizes the competences in the sense of client's individual traits, interpersonal tendencies and ability to cope with requirements of various environments. Accordingly, the Czech model is rather focused on helping the client in understanding the wide range of their personality predispositions for the optimal employment opportunity while the French one puts greater emphasis on educating the client in regards to the ways of utilizing and presenting one's professional competences (educational approach).

On the Czech national level, the theoretical and methodological foundations of the *bilan de compétences* were particularly laid by:

- Activities of Prague's Institute for Human Labour that existed under changing social circumstances between 1930s and 1950s particularly focusing on the professional counselling. It was significantly psychometric-oriented and its activities were related to the development of psychological tests and special interest questionnaires. The names particularly associated with it belong to Jan Doležal, Josef Stavěl and František Hyhlík.
- The counselling services provided by the Educational and Psychological Counselling Centre since 1970s (school facilities providing children, youth and their parents and teachers with psychological and special education counselling services related to education).
- Oldřich Mikšík's (1930-2009) Personality Theory understanding the human personality as a dynamic interactive system.
- The psychological personality diagnostic tools based on the aforementioned Personality Theory.

3 BILAN DE COMPÉTENCES IN THE CZECH REPUBLIC – HISTORY AND PRESENCE

Pavína Maříková

3.1 Implementing bilan de compétences in the employment services

The *bilan de compétences* is based on the French model, however, it is adapted to the circumstances in the Czech Republic and presented under the name of “*bilanční diagnostika*”.

The method implementation in the public employment services is based on the Czech Government Resolution No. 418 on the National Employment Plan dated on 5th May 1999. In Pillar I. “Employment support”, Measure No. 1.8 entitled “Implementing measures to increase the rate of employment of long-term unemployed job seeker focusing on members of the Roma community,” the point of Method of application, among other things, says: “Establishing a unified nationwide network of *bilan de compétences* centres” to ensure optimal accord of requirements on an individual as a man power and their potentials.” The actual implementation was ensured by means of the Czech Government Resolution No. 640 on measures for supporting employment of individuals being hard to place on the labour market (focusing on the Roma community members) dated 23rd June 1999 which says: “The Government approves measures addressing the employment issues of individuals being hard to place on the labour market, particularly ... between 2nd and 31st December 2000, ensuring functional network of *bilan de compétences* centres for optimal harmonization of labour market requirements and realistic potentials of job seekers,...” The task performance has been assigned to the 1st Deputy Prime Minister and the Minister of Labour and Social Affairs.

The first concept of the Czech work methodology for the *Bilan de compétences* Centres was drafted by Josef Opočenský together with Jiří Král in autumn 1999 under the title of “Methodology for *bilan de compétences* Centres.” The authors primarily based their work on the experience of French experts, namely Rémy Lecolazet, gained during their internship in Chambéry in August 1999. The aforementioned document containing 21 pages included a detailed description of the *bilan de compétences* centres network, recommendations for client selection, diagnostic techniques and outcomes as well as basic information on professional training of

bilan de compétences centres employees. Its appendices presented the Final Report and Individual Action Plan structures.²

The network of *bilan de compétences* centres was established by means of Notice No. 3/2000 of the Employment Services Administration of the Ministry of Labour and Social Affairs titled “Methodological Network of the Labour Office *bilan de compétences* Centres” (effective from 1st February 2000). The networks consisted of one source and one support site in each NUTS 2 region; accordingly, a total of 15 Methodological Centres have been established.³ At the same time, to ensure the network functionality a work group was appointed in Department 42, Employment Services Administration of the Ministry of Labour and Social Affairs, consisting of Head of Departments 421 (Milena Blatníková) and 422 (Petr Kaplan) and representatives of the Methodological Centres.

The aforementioned Notice included another important piece of information saying that “... the *bilan de compétences* services may be provided by Labour Offices as well as external companies which, however, need to meet the basic conditions stipulated...”

The main tasks of the Methodological Centre included:

- Continuous verification of Methodology of *Bilan de Compétences* used;
- Supervisory activities when interpreting the diagnostic techniques of the catchment area;
- Drafting and verifying of new methods applied;
- Professional assistance to the *bilan de compétences* centres of the Labour Offices within the catchment area;
- Assistance in the preparation of agreements concluded between the Labour Offices and external providers of *bilan de compétences* services, including the supervision of their content;
- Information service for *bilan de compétences* centres;
- Supervision over particular technical outcomes of activities performed by external providers of the *bilan de compétences* services for the needs of Labour Offices; and

² Individual Action Plan (IAP) – Originally a voluntary tool for working with job seekers that included the procedure and time schedule of performing various measures to improve the employment opportunities on the labour market. It was implemented as a trial within the scope of pilot projects after 2000 and it has been stipulated as an option (voluntary) by the Employment Act since 2004; as of 1st January 2009, it has been a requirement for all job seekers after 5 months of registration.

³ Source + support sites for each region: Decin + Teplice; Plzen-mesto + Tabor; Rakovník + Píbram; Pardubice + Hradec Kralove; Zdar nad Sazavou + Brno-mesto; Zlín + Šumperk; Ostrava + Karvina; Prague.

- Continuous monitoring of professional readiness of employees providing the *bilan de compétences* services at the *bilan de compétences* centres of Labour Offices in the catchment areas.

The implementation into the practices of the Labour Offices⁴ was carried out by means of a document titled “*Bilan de compétences* Centres in Labour Offices” from March 2000 which was produced by Department 42 – Consultancy and Mediation of Employment Services Administration of the Ministry of Labour and Social Affairs (managed by M. Blatníková) using the above mentioned Methodology of Opočenský.

In the Introduction, this essential methodological document defined the need for *bilan de compétences* services. It also said that “the *bilan de compétences* is an efficient method of unemployment prevention, however, at the same time, it represented quite a challenging issue in terms of time, human resources and financial requirements. That was why its utilization within the employment services focused on the group of clients in which there is no potential for successful employment within the scope of normal recruitment and career guidance and counselling activities.” In regards to the actual activity content, it mentioned that “the *bilan de compétences* activity involves working with the client on a highly professional and individual level although some of its parts can be carried out in a group.”

In chapter on methodological management is primarily stated that “the *bilan de compétences* system management requires that all centres integrated in the network used the same, comparable methods and, at the same time, took similar approaches to resolving the individual issues.” It also emphasized that “the conditions for effective functioning and development of the entire *bilan de compétences* system within the scope of employment services involved activities in the areas of methodology and standardization...” By virtue of authorization of the Employment Service Administration of the Ministry of Labour and Social Affairs, the activity was carried out by the Methodological Centre of the Děčín Labour Office.

Another important point involved introducing a requirement for using the DIAROS system.⁵ The reason being the proven quality and applicability of the complex of psycho diagnostic methods and their software support as well as the standardization option and, above all, keeping records of all individuals assessed with features

⁴ The Labour Offices were established as independent sites in individual districts under the methodological guidance of the Ministry of Labour and Social Affairs at the beginning of 1990s. They were only merged as the Labour Office of the Czech Republic on 1st April 2011.

⁵ The note in the Methodology says: “DIAROS is a diagnostic testing battery used for comprehensive assessment of successfulness and failures of employees with diverse professional focus, including the successfulness and failures in engaging in employment. It was also verified within the scope of the grant project titled ‘Active Employment Policy in the Czech Republic and Comprehensive Social and Psychological Intervention’ (GA CR 406/97/0588) which took place in 1997-1999.”

allowing searching and creating new group standards. At the same time, it emphasized that, during *bilan de compétences*, other standardized psycho diagnostic methods as well as projective- and counselling and educational approaches should be used in addition to the DIAROS system.

The *bilan de compétences* centre clients were primarily defined by the document as the group of Labour Office clients who wanted to and were able to work, who co-operated with the employment services and in whose cases, for various reasons, the other forms of career guidance and counselling assistance had not been successful to a sufficient extent. The document contained the characteristics of 5 different groups of clients including “long-term unemployed clients; clients with various types of medical handicaps; clients who need to have a particular type of retraining assessed for suitability, employees selected for the most suitable positions within various organizations on the basis of employer’s requirements and clients in need of help when planning their professional career.” It described the particular procedures specific for the *bilan de compétences* in each of the client groups.

The Methodology further stipulated that the outcome of the *bilan de compétences* activity should primarily include the Final Report (assessment and recommendations on further actions). With client’s consent, the entire report should be presented to the requester of the *Bilan de compétences* services (a recruiter, Labour Office advisor or employer) and, at all times, to the client as well. The reports should be filed and archived for the purpose of subsequent client guidance while guaranteeing protection of personal data confidentiality against unauthorized parties.

Among other *bilan de compétences* outcomes, the document listed the Individual Action Plan, i.e. “schedule of required progressive steps (intermediate goals) client’s activities creating conditions for re-entering the labour market” and the documents for assessing successfulness of the *bilan de compétences* centre (for evaluating the services provided).

The document also described in detail the requirements for personnel and technical support of the source, support as well as external sites (e.g. at source sites, it presumed at least 1 psychologist, 1 advisor, possibly even a physician, at least 1 room for the psychologist and 1 larger room for working with a group of clients, both equipped with required accessories). The final part addressed the matter of further professional training of employees performing the *bilan de compétences*, including the reasons for requiring such professional training. Completing the employee training was supposed to be based on the module system the basis of which involved the input module (objectives, management organization, system communication streams and work methods), legislative module (employment legislation), possibly even an extended course of understanding the Active Employment Policy tools and lecturing and presentation skills module; it also mentioned Job-club activity and training modules. The aforementioned system of vocational training should continue to be updated with periodical casuistic seminars.

As indicated by the above mentioned description, the system of *bilan de compétences* centres has been designed in a thorough and comprehensive manner. The model was based on the experience gained in France where a similar network of sites already existed. However, the French legislative basis within the system of further professional training and the funding system are entirely different from our conditions. That, too, was the reason for never entirely achieving number of objectives proposed in the document titled “*Bilan de compétences* centres in Labour Offices.”

3.2 Development of bilan de compétences provision system in 2000-2011

The service began to be provided to the Labour Office clients within the scope of the *bilan de compétences* centres network and under initial methodological guidance of the Employment Service Administration of the Ministry of Labour and Social Affairs (delegated to J. Král – Head of the Děčín Labour Office). Among other things, as early as October 2001, it was also integrated in the “OKprace” information system as a new *bilan de compétences* module.

Within the scope of the grant project of the Ministry of Labour and Social Affairs No. GK MPSV-01-51/01, Josef Opočenský together with Jiří Král compiled professional course module for providers of *bilan de compétences* and related fields. The handbooks have been presented to the submitter, however, the courses have never been integrated in the professional training system for the Labour Office employees.

Further professional training has been provided in the form of occasional individual or group consults with J. Král. In 2000-2009, several dozen Labour Office as well as external psychologists were trained in various forms. Despite the above mentioned methodological document also mentioning external providers participating in training events, this was not allowed during the following years.

Around 2000, the Labour Offices employed several dozen psychologists who, following the training, focused on the *bilan de compétences*. There were 36 of them in 2005 – accordingly, every other Labour Office employed a psychologist.

In 2000-2003, the project of PHARE 2000, “Development of *bilan de compétences* and follow-up career guidance and counselling for disadvantaged groups on the labour market in the region of Severozápad” on which both aforementioned psychologists co-operated. In addition to the methodological work and training, the project also involved carrying out 420 *bilan de compétences* for the clients and seminars for potential *bilan de compétences* method users in the corporate sector. Accordingly, the *bilan de compétences* was also provided outside the Labour Offices.

In 2002, a register of external *bilan de compétences* providers was started. The register list was administered by the Employment Services Administration of the Ministry of Labour and Social Affairs which, following the verification of requirements for the providers (education, work experience, equipment), issued a license for

performing the *bilan de compétences* Services for the Labour Offices (so-called Registration Sheet). The lists included individuals as well as legal entities and contained the organization name (or individual's name), registration number, address, telephone number, expert supervisor's/psychologist's name and date of authorization.

The numbers of trained psychologists, both external as well as internal, have continuously grown. In 2005, a total of 31 external providers and 34 psychologists working at the Labour Offices were on records. By 2009, the number of external providers rose to 54. However, the number of psychologists registered was somewhat higher as some of the organizations had several expert supervisors. That way, together with the Labour Office psychologists, they provided coverage for most of the districts in the Czech Republic.

In 2009, the Legal Department of the Ministry of Labour and Social Affairs discovered that issuing the licenses for providing *bilan de compétences* services to the Labour Offices is not governed by Act No. 435/2004 Coll. on Employment or Decree No. 518/2004 Coll. by means of which the Employment Act is implemented. Therefore, the licenses issued prior to that have expired and no new ones have been issued.⁶

Effective from 7th September 2009, the new Normative Guideline No. 29/2009, "Procedure of providing *bilan de compétences* as an advisory tool at the Labour Offices" came into force reflecting the fact that the external *bilan de compétences* providers were being selected by means of tenders pursuant to Act No. 137/2006 Coll. on Public Procurement. Among other things, the guideline defined professional and technical qualification requirements obligatory for the Labour Offices within the scope of the tender documentation in relation to selecting the external *bilan de compétences* supplier, and updated the network of Methodological Centres. Its appendix included the "Work Methodology for *bilan de compétences*," which was an updated and significantly shorter version of the document titled "*Bilan de Compétences* Centres in Labour Offices."

The innovated Methodology newly contained a brief description of the actual activity upon providing the *bilan de compétences*, including the following details:

- Information entry stage;
- Data collection;
- Individual interview;
- Creating a strategy; and
- Final individual interview.

The recommended time allocated to working with the client was 16 hours + 2-4 hours for interpretation and drawing the report for the Labour Office. The recommended scope of group work was 10 hours. The client-owned Final Report further continued to represent the outcome of the *bilan de compétences*. The Labour Office receives a shorter version with recommendations by which both, the client as well as the

⁶ Source: <http://portal.mpsv.cz/sz/zamest>, obtained on 4th April 2011

counsellor, should abide. The Charter of Quality, being a complex of criteria meeting of which may be a subject to inspection, also forms a part of the Methodology.

Contrary to the first Methodology, this one did not characterize the *bilan de compétences* clients and activities recommended; the outcomes were described in a briefer manner and the personnel and technical support at the site and provider education were not defined at all. Another change involved the option of choosing between using the DIAROS diagnostic system or other software similar in terms of testing, quality and techniques which, as a matter of fact, made DIAROS no obligatory.

The provision of external services has also undergone further changes. In relation to the new legislative regulation – the Public Procurement Act⁷ – the method of entering into contracts with external providers of *bilan de compétences* changed, too. The Labour Offices has to start calling for tenders. This procedure has been accompanied by a significant administrative burden that was particularly transferred onto the Counselling Department employees.

The situation has deteriorated following a significant organizational change which took place in 2011. The individual Labour Offices were merged in one central Labour Office of the Czech Republic. Its organizational structure consists of the Directorate-General, Regional Branches and a network of Contact Offices which has been formed from the former District Labour Offices, their branches, field offices and other locations serving the purpose of providing state social security support.

At the same time, money-saving measures have been implemented within the scope of which number of employees of the Labour Office of the Czech Republic has been laid off⁸ – many of them being counsellors and psychologists. As a result of the change, the number of psychologists at the Labour Offices dropped to a minimum. Due to the other changes that have led to classifying a majority of the Labour Office employees in the category of “Employment Officers,” it is no more possible to establish the actual number of psychologists using the Labour Office organizational structure. According to estimates, there were approximately 10 of them in 2011 (covering the entire country).

The responsibility for public procurement has been passed onto the employees of the regional branches organizing the tenders for the entire region (which involved an above-threshold tender and, accordingly, a significantly higher administrative complexity and larger burden). Provision of the *bilan de compétences* (as well as many other career guidance and counselling services) was ever more shifting to the

⁷ Act No. 40/2004 Coll. on Public Procurement replaced by Act No. 40/2004 of the Digest on Public Procurement.

⁸ For illustration: According to the Czech Press Agency coverage on 13th August 2013, in 2009, the Labor Offices employed a total 8,450 employees and, at the end of 2010, it was (following the increase in the amount of agenda associated with the payments of social security benefits) just 6,150 employees.

external companies which, in some cases, unfortunately had issues with regards to the quality of services provided. The term as well as system of working with the client were devaluing (other work methods, less demanding in terms of time and expertness, we also presented as *bilan de compétences*); there was a lack of new information, methodological guidance, further (continuous) professional training of the *bilan de compétences* providers as well as opportunities for exchanging experience. There was an evident interest in international findings and updating the existing Methodology.

3.3 From idea to project

Autumn 2010 saw the creation of a plan to create a project that would focus on these matters and, immediately, a work group was established to help with the technical aspects of preparing the project. It consisted of Jiří Král, Josef Opočenský, Michal Karlický, Jiří Jedelský, Tomáš Burián and the employees of the Guidance Services Support Unit of the National Training Fund (Zuzana Freibergová, Pavlína Maříková). Shortly after that, a questionnaire survey was carried out among the registered *bilan de compétences* providers and psychologists of the Labour Offices for the purpose of verifying the objective situation.

One of the questionnaire objectives involved mapping the opinions on establishing a new organization which would cover the provision of *bilan de compétences* and, using its own rules, ensure and guarantee the quality of services provided. Among other things, this would simplify the activity of the Labour Office which, when securing this type of counselling, would be provided the same-quality services with a guaranteed content and essentials by both, the internal as well as external providers.

Approximately 40 individuals had been addressed in the form of an electronic questionnaire and 25 psychologists responded. The analysis results implied the following essential facts:

- A significant part of the respondents were not satisfied with the methodological management and guidance; others indicated they were non-existent.
- 71% of the service providers were satisfied with the method of working with the client; one quarter were dissatisfied (various reasons listed below).
- According to the *bilan de compétences* providers, the biggest problem lies in low awareness and weak motivation in the clients (this answer was indicated by 63% of respondents), lack of comparable findings from colleagues (58%), lack of further education options, missing feedback (54% each) and other issues.
- 46% of respondents were dissatisfied with the way the Labour Office selected clients for the counselling scheme; 38% were satisfied. The reasons of dissatisfaction particularly involved (non-)motivation of clients referred for

bilan de compétences by the Labour Office and their (un)suitability for the purposes of *bilan de compétences*.

- When performing the actual tasks, the providers would see the best way of help in an opportunity to participate in workshops or casuistic seminars (92% of positive answers); opportunity to participate in educational activities, new papers, sharing experience via a specialized website (71% each), higher-quality of clients selection carried out by the Labour Office (63%), more engagement on the part of superior authorities and new international experience (58% each).
- The opinions on establishing the Association of *bilan de compétences* counsellors were unambiguously positive (92% of affirmative answers).

Many also immediately suggested objectives or activities that it should perform so that it, for example, becomes a place for co-operation and exchange of information; so that it has inspection and educational mechanisms, determines rules and defend rights of its members.

The results only confirmed the hypotheses of the work group members and the fact that the system of *bilan de compétences* implementation needs to be innovated and its quality improved. Due to that, a project was created within the scope of the Human Resources and Employment Operational Programme during 2011; its implementation was approved in spring 2012.

3.4 Project “Bilan de Compétences for Job Seekers: exchange of international experiences and application of new findings in the Czech Labour Office practice”

The project of “*Bilan de Compétences* for Job Seekers: exchange of international experiences and application of new findings in the Czech Labour Office practice” was carried out between 1st April 2012 and 30th November 2013. The project was supported by the Human Resources and Employment Operational Programme by means of Call 51: International co-operation in the field of employment. It was carried out by the Guidance Services Support Unit of the National Training Fund, o.p.s.

The project team consisted of the following individuals: Head of the Project – Pavlína Maříková, Project Manager – Ivana Slavíková and a specialist – Zuzana Freibergová. The expert work group consisted of: Jiří Král, Josef Opočenský, Jiří Jedelský, Jarmila Divišová and Michal Karlický.

The following 5 international partner organizations engaged in the project:

- **Centre Interinstitutionnel de *bilan de compétences* (CIBC) Bourgogne Sud** (Chalon-sur-Saône, France) – An organization established in 1986 which has been

providing the *Bilan de competence* and creating methodologies for other identically focused centres in France and, through various projects, even within the EU. They are a member of the French National Association of *Bilan de Compétences* Centres as well as the international FECBOP federation. They predominantly provide their services to the clients of local employment services and employers.

- **Bildungsinstitut PSCHERER GmbH (BIP)** (Lengenfeld, Germany) – A company which has been providing the *Bilan de compétences* together with a comprehensive choice of career guidance and counselling services on the local level as well as within the scope of large projects for more than 15 years.
- **Laboratoire d'Ergologie appliquée, asbl (LEA)** (Brussels, Belgium) – A site which has been focusing on professional career counselling since 1923. The company employs psychologists trained in CIBC in France. The provide counselling to employed as well as unemployed nationals, engage in research projects and co-operate with regional public employment services in Brussels. LEA is a member of the international FECBOP federation.
- **Central Office of Labour, Social Affairs and Family** (Bratislava, Slovakia) – A state organization ensuring the performance of public administration in the field of social affairs and employment services. It manages, coordinates and provides methodical guidance to 46 Labour Office in Slovakia.
- **Institutul de Științe ale Educației** (Bucharest, Romania) – A scientific and research institute established in 1990 which focuses on the educational research as well as counselling services for which it creates information and support resources. The matters of *Bilan de compétences* were addressed within the scope of projects carried out in 2002 and 2006.

The primary objective of the project was an international exchange of experience in the field of providing *bilan de compétences* within employment services that will be reflected in an innovation of the methods and procedures of working with clients (job seekers) in order to, in accordance with the Europe 2020 strategy objectives, achieve a level comparable to the EU countries; it also included suggestions on conditions of effective application of the findings within the practices of the Labour Office of the Czech Republic.

In 2012 and 2013, the project team gradually achieved the following intermediate goals:

1. Creating a national thematic network and linking it to the international network;
2. Creating conditions for unifying the *bilan de compétences* provision and development and innovation of its methods, procedures and standards;
3. Increasing the *bilan de compétences* quality and professionalism of *bilan de compétences* providers;

4. Raising *bilan de compétences* awareness of expert as well as wider public and supporting *bilan de compétences* education among clients as well as personnel of the Labour Office of the Czech Republic.

The project concept included the proposed thematic areas which were discussed during 10 project events (6 international workshops, three national seminars and the final international conference):

- Nature and role of *bilan de compétences* in the Czech Republic and abroad;
- Methodical guidance, record keeping, supervision, quality assurance;
- Professional training within the *bilan de compétences* system;
- Diagnostic tools and central technical support;
- *Bilan de compétences* Association;
- Tenders.

Various aspects of these topics were gradually discussed with the international partners during the six two-day international workshops; new insight was gained. The benefits of these activities are summarized in Chapter No. 4. National seminars were held following each pair of workshops whereas their first day was particularly intended for the counsellors of the Labour Office discussing issues and topics related to the activities of the Labour Office and provision of *bilan de compétences* and the second day was intended for psychologists providing *bilan de compétences*.

The members of the project team, the expert groups and representatives of the Labour Office Directorate-General and the Ministry of Labour and Social Affairs participated in three specialist internships with the international partners of the project. They visited Laboratoire d'Ergologie appliquée in Brussels (Belgium), Bildungsinstitut PSCHERER in Lengenfeld (Germany) and CIBC Bourgogne Sud in Chalon-sur-Saône (France). At the same time, they always also visited other institutions using or providing *bilan de compétences* (Labour Offices and counselling and educational institutions) in the particular country and gained an insight into functioning of other systems of career guidance and counselling activities. This information was used for preparing the innovated methodologies, project outcomes and other documents.

The activities on the national level resulted in establishing the **Czech Association for Bilan de Compétences** and its integration in the international association of La Fédération Européenne des Centres de Bilan et d'Orientation Professionnelle (FECBOP).

The Association was registered by the Ministry of Internal Affairs of the Czech Republic in April 2013 and, at the 3rd seminar held in June 2013, the constituent General Assembly was held – further information is available on the Association web site (www.asociace-bilancni-diagnostiky.cz). The Association activity will particularly involve provision and development of the *bilan de compétences*, educational

activities for the implementers and other interested individuals and the service quality control.

The main outcome of the project primarily involves creating the conditions for wider and unified application of *bilan de compétences* tools under the auspices of the *bilan de compétences* Association, outcomes of the individual key activities and new or innovated methodological documents (Methodology of *bilan de compétences*, educational concept and contents of education courses, membership and inspection rules, etc.).

3.5 Conclusion

The *bilan de compétences* remains a part of the services provided by the Labour Office (Pursuant to Section 105(2) of the Employment Act as amended, the regional branches of the Labour Office may, upon an agreement, provide career guidance and counselling through specialist facilities which also include the *bilan de compétences* centres). However, the employment services went through a substantial reorganization in April 2011 (all existing Labour Offices in the district level were merged in one central Labour Office of the Czech Republic). This changed the organizational structure of all regional sites (today called Walk-in Sites) which are now managed through the regional branches. The career guidance and counselling services were centralized under the regional branches of the Labour Office. This has resulted in restrictions on provision of the counselling services and experts being laid off – currently (2013), the last few psychologists still work at the Labour Offices (an accurate number is not available). Some of the regions make inquiries about *bilan de compétences* within the scope of tenders for externally provided counselling services, however, the conditions specified in the project documentation vary from region to region. The external counselling services are not provided in regions that have not finalized any tenders.

However, there is hope for improvement...

4 BENEFITS OF INTERNATIONAL CO-OPERATION WITHIN THE SCOPE OF THE BILAN DE COMPÉTENCES PROJECT

Ivana Slavíková

One of the objectives of the international co-operation project involved discussing the individual aspect of the *bilan de compétences* and their implementation with international partners. The six international thematic workshops were held for that purpose. The workshops were held in Prague and Kutna Hora and, in addition to the project team, the participants included the international partners of the project, psychologists who provide *bilan de compétences* in the Czech Republic, employees of the Labour Offices from around the Czech Republic and the representatives of the Ministry of Labour and Social Affairs. The following text provides a general summary of topics discussed during the workshops and selected findings obtained on the topics from our partners being active providers of the *bilan de compétences* and members of the European Federation of Centres of Career Guidance and *bilan de compétences* – FECBOP (hereinafter referred to as the “Federation”),⁹ namely Serge Rochet and Tomáš Šprlák from France, Jacques Hofmans and Natacha Winners from Belgium, Regina Hentschel, Timo Zimmer and Doreen Mucke from Germany.

4.1 First meeting

The 1st International workshop focused on the bases, beginnings and development of the *bilan de compétences* in our country; on the way the quality system and methodological management of the *bilan de compétences* were set up in the Czech Republic at the beginning of the Millennium and the way in which the project implemented should help in ensuring the quality of the *bilan de compétences* even under the current circumstances which have significantly changed since it was implemented in the Czech Republic. The international partners have provided a lot of information on functioning of the Federation and the basis of *Bilan de compétences* in the way they are implemented in France, Belgium and Germany.

The Federation is based in Vichy, France and provides two types of membership (effective and associated). It associates various types of organizations providing the *bilan de compétences* in France (National Association of CIBC representing 81 institutions), Italy (17 institutions), Belgium (1), Germany (1), Greece (1), Slovakia (2) and the Czech Republic (Počítačová služba, s.r.o.). These organizations co-operate in the field of professional orientation, career counselling, formal recognition of

⁹ Further information available at <http://www.fecbop.eu/>

expertise and skills and *bilan de compétences*. The Federation promotes a unified approach and unified methodological principles of *bilan de compétences* on the European level, guarantees the quality of the *bilan de compétences* and awards the certificates of quality to the institutions providing the service in the EU countries. Obtaining the FECBOP certificate of quality is subject to the organization undergoing quite a complex external audit performed by the Federation within the scope of which it meets the quality criteria specified (a significant part of the 2nd workshop focused on the criteria introduction; this is discussed below). The certificate maintenance subsequently requires regular recertification, i.e. the external audits are performed again after a certain period; first every 3 years and later every 5 years.

Despite certain differences between the bilan in the Czech Republic („bilanční diagnostika“) and the *bilan de compétence*, the quality criteria specified by the Federation are identical for both models of counselling activities and they were also taken into account within the scope of the documents drafted as parts of the project. The aforementioned differences between both counselling activity models are primarily based on certain diversities in terms of the approach to competences and do not affect the service quality. The *bilan de compétences* puts greater emphasis on the competences in the sense of particular client's expert knowledge and skills.¹⁰ By contrast, the „bilanční diagnostika“ puts more emphasis on the competences in the sense of client's individual traits, interpersonal tendencies, intellectual potential and ability to cope with stressful situations and adapt to new circumstances and changes. Accordingly, the „bilanční diagnostika“ is rather focused on helping the client in understanding the wide range of their personality predispositions for the optimal employment opportunity while the *bilan de compétences* puts greater emphasis on

¹⁰ The concepts of the *bilan de compétences* in France and Belgium as well as in Germany work with a multidimensional approach to competences. In France and Belgium, the theoretical level distinguishes between a) cognitive competences, b) functional competences (i.e. performed in a particular job) and c) personality and social competences that, despite being related to the work performance, do not represent the performance factors. The competence structure used in practice is simpler: the competences are suited “to the client,” i.e. in a specific and explicit manner allowing the client to link them to their work activities (e.g. language-, technical-, organizational competences, etc.). Using this simple structuring allows easier creation of the tools which can be used when working with the client and, on the contrary – when the client describes their specific competences within the aforementioned structure, they can, of course, be divided in more of a general manner and in accordance with the above mentioned theoretical distinction. The main competence groups used in Germany include the groups of professional-, methodological- and personality competences. Unlike France and Belgium, Germany does not use a fixed competence catalog or inventory when working with the client. Our German colleagues have rationalized the situation by the fact that specific new and important competences belonging to one of the aforementioned groups keep being discovered.

educating the klient in regards to the wals of utilizing and presenting one's professional competences (educational approach).

4.2 Second meeting

The topic of the 2nd international workshop involved the system of ensuring the *bilan de compétences* quality. As mentioned above, the workshop included the detailed introduction to the criteria and quality management system of the *bilan de compétences* in the Federation, including the specifics of individual countries in which the active Federation members operate. In relation to the quality issues, the discussion addressed the role of the future professional association of *bilan de compétences* provider in the Czech Republic the establishment of which represented one of the project objectives.¹¹ Our Belgian partners introduced the details of criteria by means of which the Federation defines the *bilan de compétences* quality. The large number of criteria includes three main ones:

- The client is a subject of their *bilan de compétences* and the *bilan de compétences* process cannot be implemented without their action. This requires them to be motivated to the co-operation and capable of creating a positive self-reflection throughout the course of the co-operation with the psychologist and other experts. Accordingly, the *bilan de compétences* is a procedure that can only be performed on the basis of client's co-operation; it is not just about the expert working, all parties involved need to participate in an active manner.
- The *bilan de compétences* procedure consists of three stages – preparation stage (assessing client's current situation, mapping their needs and objectives and introducing the client to the *bilan de compétences* process objectives and methodologies used throughout its course); investigation stage (identifying client's competences with regards to their career opportunities and their own career management) and synthesis stage (summarizing both previous stages, discussion with the client on the previous results of the *bilan de compétences* process and co-operation between the counsellor and the client upon drafting the plan of further client's activities). The quality criteria also include a rule stipulating that, for the *bilan de compétences* process quality, all three stages are equally important.
- The outcome of co-operation between the expert and the client includes a definition of client's competence profile in relation to their career opportunities. This essentially involves client's career project which is based on their actual capabilities, skills, motivation, interests, career plans, etc. while taking into account the objective options, i.e., for instance, the labour market situation in

¹¹ The constituent General Assembly of Association for *bilan de compétences* was held in Kutna Hora on 21st June 2013. See more in Part V and www.asociace-bilancni-dagnostiky.cz.

case of an unemployed client and, in case of an employee, the needs of their employer and reasons for which the employer has requested the *bilan de compétences* for their employees.

The first and second criteria listed are explicitly included in the *bilan de compétences* and the *bilan de compétences* as well as any counselling process. Implementing the process, whether focused on the field of education, family or employment, is not possible without client's active interaction. The three above mentioned stages of *bilan de compétences* are not solely specific to it either; these stages (modified according to the counselling service objective) also form an essential part of every counselling process and its result is largely dependent on their appropriate balance.

For the purpose of the *bilan de compétences* and the *bilan de compétences*, the third quality criterion is more specific than the previous two criteria; it can even be applied to some other career counselling models. The competence profile usually involves descriptions of predisposition and eventual reserves for client's further development with respect to the options of achieving their career goals. It can also include recommendation regarding the suitable direction of further education, list of specific tasks and activities that must be carried out in order to seize the optimal career opportunity, etc. Their main objective involves helping the client in being able to assess their own potentials and utilize the skill for the purpose of independent management of their own career.

In addition to the three main criteria, the Federation also assesses the objectivity of the procedures used, i.e. the methods and information resources used must be reliable and suitable for the *bilan de compétences* (the methodological issues were focused on during the following, 3rd workshop which also included discussion on the objectivity of the methods used; see below). According to the Federation, the next sign of quality involves securing clients' feedback: The clients usually evaluate the course and usefulness of the *bilan de compétences* immediately following its completion and, subsequently, the current situation of the client is investigated 6 months later. Quite a detailed questionnaire securing the feedback from our *bilan de compétences* clients has been included as one of the Appendices of the Methodology of *Bilan de Compétences* that was produced within the scope of the project and the adherence to which is a requirement of the effective membership in the Association for *bilan de compétences*.

The Federation also assesses the quality depending on the continuous further professional training and supervision by professionals providing the *bilan de compétences* as well as the development of innovations. In this field, our newly established Association has been building on some of the elements of the *bilan de compétences* methodological management system from the time of their implementation in the Czech Republic and already started performing both of the tasks; the DIAROS Corporation participates in innovating the methods for the *bilan de*

compétences, too.¹² The Federation also takes into account the multidiscipline approach of the *bilan de compétences* provider who guarantees the option to choose various points of view (the Belgian and French partners of the project ensure the multidisciplinary nature through external associates; in case of the German partner, the internal *bilan de compétences* consultants include experts in various assisting professions – psychologists, social educators and sociologists). Unlike the *bilan de compétences*, the *bilan de compétences* is primarily a specialist psychological counselling service. It is determined by the aforementioned diversities in terms of the approach to competences as well as differences in the nature of the services provided in France, Belgium and Germany prior to or following the *bilan de compétences* and services provided within the scope of the Active Employment Policy in our country.

4.3 Third meeting

The third international workshop focused on the *bilan de compétences* tools and Introducing the System Methodology of the *bilan de compétences* in the Czech Republic, including the options provided by the DIAROS testing battery and the DiarosWin software, and sample results of one of the surveys the performance of which has been allowed by the database included in the computer software.¹³ DIAROS particularly provides detailed information on client's individual traits, their emotional stability, interpersonal tendencies, and ability to cope with requirements of various environments, their ambitions and sources of positive or negative motivation. The interpretation of the data obtained by means of this tool within the scope of the mutual context is supplemented by the information obtained directly from the client, through observing their behaviour, by analysing their products, etc. All these findings form a great basis for co-operation between the counsellor and the client focusing on seeking options of resolving client's situation. The DiarosWin computer software working with the DIAROS battery allows collection of data on the individual clients for the purposes of surveying, updating, extending and specifying the standards. According to the Methodology of *Bilan de Compétences*, using DIAROS or its main part – the SPARO test – when collecting the data on the client participating on the *bilan de compétences* is considered obligatory. It is very beneficial to supplement the data obtained by using SPARO with other tests of the DIAROS battery, particularly SIPO, which identifies client's interpersonal tendencies, needs and value orientation in relation to other individuals, and SUPSO, which

¹² The DIAROS corporation (<http://www.diaros.hyperlink.cz/>) is the copyright holder for O. Miksik's unique diagnostic system consisting of the DIAROS testing battery and the DiarosWin computer software.

¹³ Opocensky, J. (2008b). Profile of *Bilan de compétences* client selected from among job seekers: Research report. Prague: National Training Fund.

focuses on subjective experience as well as external manifestations of client's mental conditions.

The workshop included an introduction to the role of psycho diagnostics within the scope of the *bilan de compétences* in France and Germany. The representative of the French partner emphasized that the data obtained through the diagnostic tools were considered one of the parts of the wider image of the client and factors affecting their career decisions. They mentioned some of the risks associated with overestimating the psychological diagnostic results¹⁴ as well as conditions of effective usage of psycho diagnostic methods upon the *bilan de compétences*. They also described selected tools for diagnosing motivation, personality characteristics and cognitive capabilities used during the *bilan de compétences* in France.¹⁵ Our German partners introduced the sophisticated methodology of the entire *bilan de compétences* process in Bildungsinstitut Pscherer GmbH (hereinafter referred to as "BIP") which, depending on the job nature, use structured observation, individual interviews, feedback for the client, group work, product analysis, testing by means of standardized psycho diagnostic tools, structured forms of self-assessment customized to the target groups (the so-called Individual's Inventory), testing of practical competences and preparing clients' career projects focused on identifying competences required for performing the preferred occupations as well as improving their understanding of the regional labour market. The discussions particularly focused on the other Czech psycho diagnostic tools, or those adapted to the Czech conditions, suitable for the purposes of the *bilan de compétences*; on options of competence analysis in the Czech environment as well as various ways of understanding the multidisciplinary nature of the approach towards the client.

4.4 Forth meeting

The topic of the 4th international workshop involved professional training of the *bilan de compétences* providers and Labour Office counsellors who select the clients for *bilan de compétences* or work with its results. A concept of a new professional training system for our *bilan de compétences* providers was introduced and discussed

¹⁴ Among the other risks, they particularly mentioned the analytical control („emprise analytique“) as an asymmetrical relationship between the counselor and the client in which the client only perceives themselves as the assessment subject who is not and cannot be actively involved in the assessment process; the fortune-teller syndrome („Tell me who I am and what I am supposed to do with my life“) and the risks associated with testing as a possible source of support for client's dependency and/or source of counselor's false authority.

¹⁵ In addition to the diagnostic tools spread around Europe the majority of which have also been produced and published in Czech versions (e.g. NEO PI-R, MBTI, 16PF, Raven, etc.), they also described some of the original French tools the adaptation of which the *Czech Association for Bilan de Compétences* will pursue.

representing one of the project outcomes and, among other things, also taking into account the suggestions of Czech and international participants present at the fourth workshop. The descriptions of this system and selected professional training modules representing its parts have been published in a separate article included in this Collection. The discussions also addressed the counsellors who select the clients for the *bilan de compétences* and continue working with them. A part of the agenda focused on the National System of Occupations, National System of Qualifications¹⁶ and options of using these two systems for determining the position of *bilan de compétences* providers in the Czech legislation.

The German colleagues presented the results of a joint national project titled “Open method of the coordinating process of Improving the Quality of Education, Career Counselling and Employment” and focused on creating counsellor’s competence profile in more of a general manner representing the scope for the development of specific counsellors’ profiles for various areas of work.¹⁷

¹⁶ National System of Occupations: <http://www.nsp.cz/> National System of Qualifications: <http://www.narodni-kvalifikace.cz/>.

¹⁷ The competence profile introduced during the workshop consists of the following competence groups: General Competences (U), Competences for Designing Counselling Processes (P), Competences for Providing Information (R), Competences for Professional (Self-)Reflection (B), Organizational Competences (O) and Social Competences (G). The General Competences describe the activity as a professional requirement. U1 refers to providing information, U2 to ensuring the transparency of the counselling services and processes, U3 to acting on the basis of ethical principles and U4 to the development of and assuring quality of counselling services. The Competences for Designing the Counselling Processes describe the professional requirements in the field of suggesting an individual approach towards clients and include: P1 – ability to establish counselling relationships, P2 – clarifying client’s order and entering into a contract with the client, P3 – analysis of the situation and possible resources and P4 – suggesting prospective solutions. The Competences for Providing Information belong with skills focused on applying educational and psychological findings that include: R1 – Writing a curriculum vitae and developing job-seeking skills, R2 – integration of knowledge on the personality development, R3 – assessing client’s social background, R4 – taking into account the variability of clients’ needs. The competences for professional self-reflection focus on the development of the professional approach in the counselling context. They are associated with the permanent interaction between the self-reflection and development of professional conduct and defined as B – (self)reflection of the counselling activity. The Organizational Competences focus on planning and developing the organizational structures for counselling services including: O1 – strategy planning and development, O2 – organizational forms and processes taking place within the organization, O3 – (further) development of the organization structure, O4 – utilizing and finding resources, O5 – co-operating with other institutions and creating social networks. The Social Competences describe the requirements from the perspective of appropriate application of skills associated with the social circumstances such as legal parameters, educational systems and opportunities, economy and the labour market. They are

Our French partner's representative introduced the bases of a very complex, ambitious and demanding system of professional training of *bilan de compétences* providers being prepared and its role within the scope of Federation's quality criteria. Then, together with their Belgian partner, they introduced the current design of the system, including the unresolved issues and potential problems upon its implementation. The system has been developed for the scope of the collective (institutional) context and on the basis of the initial assessment of the "collective competences" (i.e. competences of all employees participating in the *bilan de compétences* implementation within the scope of the particular company) in the following fields: Psychology and Test Methods, Education, Competence Portfolio, Knowledge of Economy Terms, Labour Market and Employment Policy, System of Professional Qualifications, Educational System, Knowledge of Local Economic Environment, Knowledge of Local Educational Opportunities and Documentation. The initial assessment of employees' competences therefore implies the structure of the professional training modules focused on adding and extending the collective competences of the particular institution aspiring to meet the quality criteria. The professional training focuses on specific counsellors' skills and those who enrol are not required to possess a specific qualification. The system is highly modular and flexible. The following basic modules the content and extent of which can be modified depending on the professional focus and competences of the target group were described during the workshop: Module 1 – Introduction, terms, *bilan de compétences* principles; Module 2 – Methods, assessment tools, competence analysis, interview conduct and labour market; Module 3 – Final report, competence portfolio, behaviour analysis; Module 4a – Specialization (long-term unemployed and handicapped individuals, managers, company founders, etc.); Module 4b – Quality control. The matters were discussed as to whether and how this system of professional training can be customized, e.g. for individual providers of *bilan de compétences*, *bilan de compétences* or career counselling. FECBOP is interested in engaging in its development as many providers as possible as its objective is to make it adaptable for various national contexts thus helping to ensure a unified quality framework throughout Europe.

4.5 Fifth meeting

The 5th international workshop focused on establishing the thematic network associating the national subjects providing the *bilan de compétences* and its interconnection with the international network; accordingly, the main topic involved establishment of the Czech Association for *Bilan de Compétences* which is in progress. A major part of the workshop took place in the form of work rooms; in each of them, one of the following topics were discussed: Statutes of the *bilan de compétences*

classified as G1 – integrating knowledge on social circumstances and G2 – determining social objectives.

Association, Tasks of the *bilan de compétences* Association, Condition and rules of the Czech Association for *Bilan de Compétences* Membership and Counsellor's Profile (*bilan de compétences* implementer) and their competences. These work rooms saw many suggestions which were used for preparing the association documents (See www.asociace-bilancni-diagnostiky.cz) as well as in other project outcomes.

At the beginning of their report, our French partner's representative introduced three main types of networks promoting the subjects co-operating on various levels (specialist network for the particular activity, interdisciplinary and institutional networks) and rules that must be followed to ensure the networks function systematically. Based on that, they then explained the sophisticated management system of the French CIBC network¹⁸ and its functioning on the disciplinary-, interdisciplinary- as well as institutional levels, including links to the representatives of the regions, employers' organizations, unions and other social partners. They also went into quite a detail when introducing the organizational structure of FECBOP the functional management of which is ensured by the Federation President, one site, a coordinator and secretariat; the strategic management is ensured by the European Certification Committee. The thematic work groups play an important part in the organizational structure of the Federation. FECBOP is open to all institutions operating in the field of career counselling, to research centres, academic facilities and professionals abiding by the European quality principles of the *bilan de compétences* as well as to representatives of the economic entities. However, only members holding the certificate of quality mentioned at the beginning of this article have the right to vote. Two of the main topic the Federation is currently dealing with particularly involve the quality of implementing the *bilan de compétences* and expertise of teams that provide the service.

4.6 Sixth meeting

The last, 6th international workshop that took place under the title of Project Benefits saw summarization of the findings and information from all previous workshops and, at the same time, introduction of and discussions on suggestions for the project outcomes.¹⁹ The newly addressed issues were associated with tenders for providers of job seekers' *bilan de compétences* called for by the regional branches of the Labour Office. The resolution to the current situation involves creating a unified base document for preparing the tender documentation for these procedures so that, in the future, it is ensured that the *bilan de compétences* carried out on the basis of these tenders meet the required quality criteria.

¹⁸ Centre interinstitutionnel de Bilan de Compétences (Interinstitutional Skill Audit Centers).

¹⁹ The project outcomes discussed at the workshop are listed in the other parts of this Collection and/or published on the website of the Association for *bilan de compétences*.

Our French partner's representative introduced the legislative aspects of the *bilan de compétences* provided in France; our Belgian partner's representative compared the French model of the *bilan de compétences* with the model implemented by the partner organization of our project, Laboratoire d'Ergologie appliquée (LEA) based in Brussels. In France, the *bilan de compétences* forms a part of the lifelong education to which each national is entitled by law. Pursuant to the French Labour Code (Code du travail), each employer is required to invest a part of their company budget into the lifelong learning; the amount is dependent on the total number of employees and the financial means are used to create independent funds (OPCA, OPACIF, FPSPP) from which the educational projects, including the *bilan de compétences* are funded. Every employee has the right to request the *bilan de compétences* once every 5 years. In case the *bilan de compétences* is recommended to the employee, the cost of the service is covered by the Government. Code du travail determines the principles, funding, content and progress, implementation requirements as well as duties and requirements for the *bilan de compétences* providers.

15 years ago, Belgium, too, had the Ministry of Labour produce a bill based on the French model, however, its financial requirements were too high. The LEA *bilan de compétences* are funded from multiple sources: The Government funds the *bilan de compétences* for unemployed individuals, private individuals pay for the service themselves and companies use it when working with human resources. Currently, the emphasis is put on work LEA does for companies that, thanks to the *bilan de compétences*, obtain documents relevant for making managerial decisions in the human resources area (e.g. for inplacement, outplacement, preparation of educational projects, etc.).

4.7 Conclusion

Among all the project activities, it was the international workshops that represented the biggest contribution to meeting the project objectives which involved exchanging the theoretical as well as practical experience in the field of providing *bilan de compétences* and creating the thematic network connecting the national subjects providing the *bilan de compétences* to the international network of *bilan de compétences* centres. The workshop reports and discussions were also related to a number of other topics which are not listed in this article or there is just a brief reference to them; all project outcomes included in this Collection were also subjects to the discussions. The choice of information included in this article is also limited in terms of space we were able to dedicate to the workshops and, of course, by text author's subjective view of the importance of individual areas and particular topics discussed. However, in addition to the information obtained, the workshop benefits particularly involved the opportunity to meet in person and establishing co-operation with a number of excellent counselling experts and amazing people. All workshop participants and, especially, our project partners from France, Belgium, Germany, Romania and Slovakia deserve a huge thanks for their interest in the *bilan de*

compétences matters and the project success and for a great atmosphere they helped creating during the workshops.

5 POSSIBLE USE OF THE BILAN DE COMPÉTENCES IN HUMAN RESOURCE MANAGEMENT

Zuzana Freibergová

Bilan de compétences is a modern method applicable in strategic human resource (HR) management in most of its tasks. *Bilan de compétences* does not substitute it but provides objective findings that constitute necessary HR management base. Using the methods and tools of psychological assessment the competencies, personality characteristics and assumptions are assessed from which objective conclusions and recommendations the HR management can use when deciding on the placement of the “right person for the right working place”.

Bilan de compétences is targeted to the current needs of HR management as well as their employees helping to define the current situation and identifies potential of HR development of skills, personal and social characteristics, planning for career growth towards the inner satisfaction of accomplishment, to approximate or even to identify individual interests and the interests of the organization.

Bilan de compétences is used especially in companies whose aim is to maintain and increase competitiveness, and which HR management is focused on the acquisition, support and development of skills of employees because their potential, knowledge, experience and skills are the heart of competitive advantage. All companies can profit from *bilan de compétences* regardless of their size, form of the establishment that plan restructuring or redeployment of working positions for example when introducing new technologies.

Using the results of *bilan de compétences* in personnel work is broad, including:

- selection of new employees,
- evaluation of current staff,
- management of internal (horizontal and vertical) and external mobility of current employees,
- formation of teams and healthy interpersonal relationships,
- planning of training.

Outcomes of *bilan de compétences* are useful in above mentioned areas especially if the company is not just to have or obtain the required number of appropriately skilled workers, but also workers interested and motivated for the interests and goals of the organization, whose individual interests are to the maximum extent consistent with the interests of organization and whose values are not in conflict with the value of the organization and its culture.

PART II: BILAN DE COMPÉTENCES IN EU COUNTRIES AND ITS PROVIDERS

6 BILAN DE COMPÉTENCES IN EU COUNTRIES: PROJECT PARTNER AND OTHER FECBOP MEMBERS PRESENTATION

6.1 Belgium: Le Laboratoire d'Ergologie appliquée, asbl

Jacques Hofmans

Natacha Winners

Since its inception in 1923, the Laboratoire d'Ergologie appliquée has always worked in the field of adult guidance. Attached to the time at the Institute for Advanced Studies in Belgium (Free University of Brussels), he was the first Belgian organisation to create a structure training guidance counsellor and was a pioneer in the field of industrial psychology and psychometrics. His research at that time found many applications in the industrial sector in Europe.

Today, the Laboratory practice the French methodology of *bilan de compétences* after one provided by CIBC French colleagues in the 90 training. His participation in numerous European projects has allowed him to gain a main control in the field. The Laboratory has contributed to the study of quality in adult guidance, the development of a specific methodology for guidance in setting up a business and as well as for incoming primary The Laboratoire d'Ergologie appliquée, asbl, is a founding member of the European Federation of Centres of Vocational Assessment and Orientation (Fédération Européenne des Centres de Bilan et d'Orientation Professionnelle – FECBOP)

It is the only Belgian structure to hold the European Quality Label in terms of skills assessment issued by the European Federation.

Its action on *bilan de compétences* is realized in four areas:

- partnerships with the job centre of the Brussels Capital Region (Actiris): *Bilan de compétences* for job seekers over 45 years and *bilan de compétences* in connection with the preparation of a professional project
- for individuals questioning their management career or seeking a career re
- the staff of a business federation
- out placement for which the laboratory is accredited by the Department of Employment of the Brussels Capital Region.

In addition, it performs orientation consultations for young adults that are seeking to reorient and many psychological tests as part of the selection process and recruitment of staff.

With three psychologists, the Laboratory has made in 2012 about a hundred *bilan de compétences* and consultations as guidance

His new short-term project is to provide Francophone structures practicing adult guidance training in *bilan de compétences* labelled by FECBOP.

6.2 France: CIBC Bourgogne Sud

Serge Rochet

Tomáš Šprlák

The CIBC Bourgogne Sud was created within the experimentation of the *bilan de compétences* guidance methodology in France in 1986. It is a founding member of the National Federation of CIBCs and of the European Federation of Centre of Career Guidance and *bilan de compétences*. The French National Federation has over 80 members and it provides methodological framework and quality assurance for *bilan de compétences*- it delivers French quality label for other guidance centres. The CIBC Bourgogne Sud is a well-known actor of public policies for employment and guidance for labour market insertion. Since 1995, the CIBC Bourgogne Sud has been directly involved in transferring methodologies and/or creating centres of guidance either for EU or non-EU partners. The CIBC Bourgogne Sud has initiated the national path of quality of French CIBC as well as of the European path of quality “Labellisation Qualité Europe *bilan de compétences*”.

Today, the CIBC Bourgogne Sud has 5 centres in Burgundy with its headquarters in Chalon-sur-Saône. It employs over 20 consultants providing services in these fields:

- Guidance and counselling in career development (*bilan de compétences*)
- Recognition and validation of competences (Validation des acquis de l'expérience)
- Quality assurance (awarding quality certification to guidance and training centres on national and European level)
- Training and educational activities (recruitment, HR, coaching, mobility...)
- Research and development (creation of guidance centres and adaptation of *bilan de compétences* methodologies to different contexts, national and international cooperation)

The *bilan de compétences* approach provision at CIBC Bourgogne Sud

Bilan de compétences is a complex guidance methodology designed for all types of beneficiaries. It allows the identification and valorisation of personal and professional skills and competences, aptitudes and potential, interests and motivations. Its

objective is to define a strategy of professional development, construct an individual training pathway, prepare an Accreditation/Recognition of Experiential Learning, support and accompany external or internal job mobility and describe and present one's skills and competences.

The *bilan de compétences* is a three-step process that typically lasts 6 to 8 weeks (16 to 24 hours of individual and collective sessions). The duration and the content of the *bilan de compétences* depends largely on the type of the beneficiary and on the financing body. The CIBC Bourgogne Sud provides its services mainly to employed people in search of a career conversion and the programme is financed by the collecting funds in the framework of the lifelong learning system. The CIBC Bourgogne Sud has a yearly reception of more than 1600 clients requiring career guidance.

The typical course of a *bilan de compétences* consists of three phases:

1st phase: Confirms the commitment of the beneficiary, after informing him about the conditions of the process, as well as methods and tools used. After analysing the initial demand, objectives are defined and contractualised.

2nd phase: This phase is the heart of the *bilan de compétences* process. It allows, according to the objectives that were defined during the previous phase, to:

- Identify and analyse interests and motivations, skills, knowledge, different areas of expertise, strengths and areas for improvement
- Learn more about the professional and economic environment (current situation of the company, the labour market, different occupations, training opportunities, etc.)
- Determine possibilities and hypothesis of professional and personal development

This phase involves the expertise of qualified professionals trained for the use of appropriate methods and tools. Different methods of psychological assessment can be used (questionnaires of values and interests, personality tests, performance tests), but they should always be defined in agreement with the client and correspondingly to his initial demand.

3rd phase: This is the final phase in which the beneficiary and the counsellor work on:

- the results of the investigation phase (second phase) and the synthesis report
- the identification of success factors or threads concerning the realisation of the career project
- the definition of the main steps for the implementation of the career project

A Final Report is the result of this last phase. This document may contain other information (circumstances of the *bilan de compétences*, acquired skills and skills and competences that should develop in order to successfully realize the project and an action plan).

6.2.1 French system of bilan de compétences provision

The *bilan de compétences* was born in France in a broader context of the lifelong learning and the dialogue with the social partners. After the restructuring of the steel industry, the concept of lifelong learning was formalized by a series of laws in the early 1970s. The employment policy has since then supported the development and the retention of skills throughout life.

The methodology of *bilan de compétences* results from the will of the social partners to build a coherent tool that would allow organizations and employees in particular to make a point about their acquired knowledge, skills and competences. The first centres of *bilan de compétences* emerged in 1986 with a mission to experiment and develop the practice. 15 experimental centres were implanted in 10 regions. The positive findings of the evaluation of this experiment lead to the generalization of the experience and the creation of one CIBC per every French department. The national network of Inter-institutional centres of *bilan de compétences* (CIBC) was created (1989).

The development of the methodology was supported by different organizations, such as the National Employment Agency (ANPE), lifelong learning providers (AFPA), National Education, employers' associations and trade unions. Their goal was to build a coherent system not only from the methodological, but also the institutional point of view. Different benefits were sought after by different institutional partners:

- Trade unions: lifelong learning as a way for the person to effectively manage her career path
- Employers: lifelong learning as a way to give a more realistic and clear view to workers about the needs of companies
- Local self-governments: assuring territorial development by anticipation local labour market evolutions.
- State: lifelong learning as a way towards more qualified labour force and more efficient division of labour

The *bilan de compétences* was adopted in the interprofessional agreement of 3 July 1991. This agreement marks an important moment in the development of the French system of lifelong learning. In the article 32-1 appears for the first time the concept of individual leave for *bilan de compétences*, with the objective "to allow any employee during his professional life to undergo a *bilan de compétences* independently of the training actions carried out on the initiative of the employer." This section specifies that the final document of the *bilan de compétences* is meant for "the exclusive use by employees."

Since 1991, the *bilan de compétences* has become a right of employees. Thanks to a system of private and public funding, the practice is widespread and more than 200 000 *bilan de compétences* are carried out each year in France. With the uncertain economic environment, companies increasingly use *bilan de compétences* as a major

tool for management of jobs and skills, as well as mobility and employee transitions management.

In 2002, the *bilan de compétences* was adapted to the needs and requirements of the National Employment Agency (ANPE) and a new service called “*bilan de compétences approfondi*” (advanced *bilan de compétences*) was created. This opened the access to the *bilan de compétences* to jobseekers.

Today, the *bilan de compétences* is financed from different sources. Every company employees must pay a portion of its personal expenses to implement a training plan - minimum budget threshold is set by the Labour Code (0.9% of payroll, 0.4% if less than 10 employees). This money is collected to independent funds (collectors: OPCA, OPACIF, FPSPP) for the funding of individual training and education projects. Professional branch agreements set these thresholds generally well beyond this amount. Big companies go generally beyond the limits of agreements branches. In order for an employee to be eligible for a *bilan de compétences*, he has to fulfil certain criteria (usually 24 month of activity -consecutive or not- during the last 5 years, of which 1 in the present company). Then his *bilan de compétences* can be funded (maximum once every 5 years) within his individual leave for *bilan de compétences*. The employee can choose his own provider of the service. The quality of the provided services is assured via a system of quality certification – the public collector funds play a major role in finding an equilibrium between the cost and the quality of the services. The National Federation of CIBCs plays a major role in further development of the methodology, but since several years, the CIBCs have to compete with different providers on a very competitive and relatively open market.

Since 1995, CIBC has responded to numerous requests from European partners about the dissemination of the methodology of the *bilan de compétences*. Without regulated framework and quality criteria, European partner organizations have asked the National Federation of CIBC to provide a regulatory practices for *bilan de compétences*. This request led to the establishment of the quality management system “Europe *bilan de compétences*” and the creation of the FECBOP in 2005.

6.3 Italy: CIOFS-FP PIEMONTE

Maria Cecchin

CIOFS-FP Piemonte It is a non-profit Association founded in 1967 and promoted by C.I.O.F.S., Corporate Body recognized by the Presidential Decree n° 1105 dated 20th October 1967 and updated with the Presidential Decree n° 635 in 28th July 1969.

It networks with other 14 Regional Associations, coordinated by the Headquarters located in Rome.

It operates in Piemonte through a Regional Office, 11 accredited operative centres (for the delivery of guidance and training activities), distributed in 5 Provinces (Torino, Alessandria, Asti, Vercelli, Novara) and a guidance and Skills Audit Centre

(BIL.CO), accredited by the European Organisation CIBC (Centre Interinstitutionnel de *bilan de compétences*). The Regional Office coordinates the 12 regional centres, takes care of the training of trainers, offers administrative, technical and planning support and activates connections and contacts with national and European organisations and networks.

C.I.O.F.S. – F.P. Piemonte offers three typologies of services: Training (initial and continuing vocational training), Guidance (assessment, educational guidance, career development, counselling, information management, research and evaluation, placement,...) and Services in support of territory and enterprise development, according to the Salesian educational style and through the activation of the following functions: Research, Planning, Training, Documentation, Information, Tutoring, Evaluation, Quality.

C.I.O.F.S. – F.P. Piemonte promotes internships, conventions, transnational exchanges, research and work-oriented services. Beneficiaries of all these activities and services are: adolescents, young people, women, unemployed people, immigrants, prisoners, dropouts, immigrants from outside the EU. It interacts with a wide network of local and European partners in the development of Equal, Interreg and Leonardo da Vinci projects and with national organisations, and in particular with ISFOL (Institute for the development of vocational training of workers) in carrying out projects and researches focussed on different themes: guidance, skills audit (*bilan de compétences*), accreditation of guidance centres, training methodologies,...

Since 1998 C.I.O.F.S. – F.P. Piemonte has consolidated activities of pedagogical simulation, with 15 firms connected in regional, national, European network; since 1999 it has started testing of self-directed learning in pedagogical atelier, since 2000 it has started the planning and the testing of Simulation Laboratories connected to guidance, in 2001 it qualified and tested Skills audits, by obtaining the accreditation for the centre and for its counsellors. In last years the Association has developed important experiences and materials in applying new technologies to didactic methodologies (e.g. virtual laboratories), in carrying out continuous training of trainers/operators and in participating in European projects.

6.3.1 ePortfolio

The ePortfolio is an ICT tool created by CIOFS / FP Piemonte for people and companies. The counselees can describe, narrate their work experiences using a simple and flexible ICT tool. They can choose to use ePortfolio in a public or private way. Therefore any information can be published or remain reserved for exclusive use. The program helps the counselees to become self-reliant with regard to information gathering (files, images, videos). It also support job search by creating a job profile profitable in the labour market .Companies could search by specific criteria, then access to counselees' pages and decide to contact them for a job interview. The instrument is aimed to: young people doing or completing training courses or paths of vocational guidance in CIOFS FP PIEMONTE; people who need the

instrument and are available for short training to understand how it works. ePortfolio is also intended for companies, interested in use of a ICT "Job Opportunities" tool guaranteed from CIOFS / FP Piemonte. The training to learn this ICT tool takes about 10 hours divided in three steps. The first phase includes a presentation of the instrument and his methodology to guide the counselees to reconstruct their job path and to define their professional project. The second step is about the construction of ePortfolio, in which the counselee write the results into the mini website, filling up ePortfolio (from the scratch to the publishing on the web) .The third phase provides individual vocational counselling to refine the mini websites. Also every completed ePortfolio will be remotely monitored after 3-6 months.

6.4 Italy: En.A.I.P. Piemonte

Raffaella Cozzani

WHO WE ARE

En.A.I.P. Piemonte (En.AIP) is an important reference point in the Piedmont Region in the framework of vocational training and counselling for the development of human capital. En.AIP was founded in 1954 as a social non-profit company participating in the National En.A.I.P. network, promoted by ACLI in 1951. The objectives are the enhancement of human resources and the priority areas are vocational training, guidance, support in the labour market insertion and job creation, international co-operation and European projects.

ACTIVITIES

- GUIDANCE, COUNSELLING AND SKILLS AUDITING
Paths and services to focus one's personal and professional objectives.
- TRAINING FOR COMPANIES
Public or private funded training to create value and increase competitiveness through the development of human capital.
- VOCATIONAL TRAINING
One, two and three-year vocational training courses for youngsters after compulsory schooling.

Italian language and active citizenship workshops for foreigners attending initial training paths.

One-year workshops for students (aged 14-16) attending secondary school and for youngsters (attending 16-18), who have completed compulsory schooling, but haven't acquired neither a qualification nor a leaving-school certificate.
- SPECIALISATION VOCATIONAL TRAINING
Paths to enable individuals with leaving-school certificates or degrees to acquire high-level skills which can be immediately used in the labour market.

- LIFELONG TRAINING
Evening refreshing courses addressed to both companies and individuals interested in learning, growing and improving their future.
- INTERNSHIPS AND WORK PLACEMENTS
Individual programmes to test professional insertion projects through a direct knowledge of the labour market.
- INTERNATIONAL CO-OPERATION
Projects carried out in Third Countries (RDC, Senegal, Burundi, Benin, Morocco, Cape Verde, in order to improve the local

Vocational training systems and labour market policies.

For more information visit the web site www.enaip.piemonte.it

In keeping with its principles and values En.AIP reliance on the development of Human Resources and on a more effective and efficient organisation, with the objectives of promoting the meeting between the people and the labour market, to act as a link between the needs of the individual and the demands of companies and to offer through the Service "*bilan de compétences* ", a fundamental tool for enrichment and development addressed to every segment of the population.

Since 2005, the year of its foundation, En.AIP has been an active member of the European Federation of Centres of Budget and Vocational Guidance (FECBOP). All operating centres of En.AIP accredited for *bilan de compétences* meet the 10 criteria of the European Quality Charter of the Bilan and offer space, tools and qualified personnel for the design and implementation of career guidance and *bilan de compétences*. There is a toolkit that has been prepared and filed in accordance with quality procedures of the organization.

The work of the advisory group of the *bilan de compétences* also covers the development, implementation / upgrade of the tabs and grids used in paths structured guidance and Bilan. The toolkit of the *bilan de compétences* accompanies the beneficiary from the first meeting with the consultant until they get to the validation of the summary document and the construction of the professional project. The *bilan de compétences* is configured as technical guidance counselling that considers the analysis of skills as a possibility for the subject, to improve the marketability of their skills on the labour market from the awareness of their skills and motivation and definition of a professional project consistent with their expectations and real opportunities offered by the labour market. In this respect, the model is structured in 3 main moments that accompany the beneficiaries in the development of a project and an action plan which will make them more effective in the management of working times of change:

- Preliminary phase in which the professional goals of the beneficiary are investigated.
- Investigation phase in which the professional interests, personal characteristics, skills are investigated.

- Final phase where you build the project training/professional and action plan realistic and achievable

The table No 1 summarizes and synthesizes the tools used, their characteristics and the phase of the *bilan de compétences* in which they occur.

Figure No. 1: Tools used in *bilan de compétences*

What	How	When
Contract Bilan	Formulation of mutual responsibility and assumption of obligations between the beneficiary and consultant of Bilan	At the beginning of the path after the verification of voluntariness
Interview on work history, training and skills acquired	Individual meetings lasting at least 1,5 hours	During the entire course of Bilan are provided for at least 4 individual interview
Card support the analysis of the skills and personal and professional resources	Card crafts, professional profiles, job opportunities	In the investigation phase in the vicinity of the interview on paper and on building the skills of the professional project
Autobiographical itineraries	Narrative thinking, life stories, self-evaluation	Investigative phase
Personality tests, evaluation of behavioural skills, motivations, professional interests, professional values, attitudes	Individual and/or collective use	Investigative phase
Portfolio of competences	Auto assisted filling in	During the path
Group techniques	Observations of attitudes	Investigative phase

The average length of a *bilan de compétences* (considering the time the beneficiary spends at the Centre for the activities of individual, group or interview) is 18 hours. The duration varies from a minimum of 14 to a maximum of 24 hours, in order to take into account the specificity of each recipient and encourage a process of appropriation. At the end of the path of *bilan de compétences* there is a satisfaction questionnaire that is handed out to the beneficiary during the last meeting dedicated to the Summary Document

In the experience of En.AIP the main target group to whom the *bilan de compétences* has been addressed are unemployed individuals (as well as young adults) within the projects financed.

Due to the current situation of economic contraction that Italy has experienced in the last 3 years (2010-2013) En.AIP achieved 608 *bilan de compétences* carried out within the regional project for the planning and management of measures to upgrade the skills for working women and men affected by the economic crisis in the implementation of the State-Regions 12/2/2009.

6.5 Germany: Bildungsinstitut PSCHERER gGmbH

Regina Hentschel

Doreen Mucke

Timo Zimmer

Bildungsinstitut PSCHERER gGmbH (BIP) was founded in 1990 as a limited company, not working for profit. The headquarters located in Saxony in a little town named Lengenfeld. At the moment we have about 140 employees in 11 branches. We work in a wide regional area crossing the border into other federal states of Germany, but also into various European Countries. The philosophy of the BIP includes 3 parts: Education, Consulting and Development. In the field of education we offer vocational education and further education in different sectors. For example education in economy or administration or in our vocational college for technology. We also offer vocational preparation, orientation and integration. The second part of our philosophy is consulting. We offer consulting for example for the application and management of EU supported projects and for the arrangement of transnational co-operations and networks. The third and last part of our philosophy is development. Since 1993 we have participated in various projects with funding from Saxony or the European Union. For example EQUAL, INTERREG and various projects under the lifelong learning programme Leonardo da Vinci.

To come back to the first part of our philosophy “education” a large and important part for integration and orientation plays the Competence Balance – Bilan de Compétences (*bilan de compétences*).

It is used to identify and valorise key competences, aptitudes, possibilities and motivations of the participants to define their professional strategy and to support them attaining their goals. It is a really successful method for vocational integration. During the last few years we placed 2.000 of 5.000 participants in new jobs.

6.5.1 The provision of bilan de compétences

Searching for appropriate processes to identify competencies, BIP have had intensively studied the French model „*bilan de compétences*“ since 1999. The Training for professionals in the field *bilan de compétences* was carried out and we

were officially certificated in the year 2000, 2003 and 2008 under the quality guidelines set by the national network of the French Centres of Competence Balance (CIBC). The *bilan de compétences* was adapted to work with different target groups, in different extensions, and was appropriately adapted to the regional situation. The implementation is carried out within the framework of projects, which allow a combination of *bilan de compétences* and subsequent Coaching. That means the process of the goal pursuit can be monitored and supported. Best practise examples exists for e.g. the target groups (long term) unemployed people, youths, founder of new businesses, junior staff, returners in the job, immigrants and older workers.

What is the *bilan de compétences*?

- *bilan de compétences* is a method developed in the human resource management. It is used to define an individual and most objective review of persons, regarding to more or less existing competences.
- Informs about the possible vocational developments of the customers, in dependence of existing potentials and actual frameworks.
- But it is also a special philosophy, how a person can be seen a kind of training for the participant, because he has to find answers of important questions: Who I am? What do I know? What do I want? What to do to achieve my goals?
- Self-confidently actions and individual learning are main ideas of the *bilan de compétences*, too. And therefore the motivation of the persons.

Basic principles of the *bilan de compétences*

- *Bilan de compétences* is a pedagogical method. The counsellors and teams analyse, what are the strengths of the individual, but also which improvement potential exist regarding to vocational perspectives.
- *Bilan de compétences* is a procedure, where active participation is needed. It is not only the work of an expert. All participating persons are actively working in.
- *Bilan de compétences* is a transparent method – together with the participant all steps are explained and discussed.
- *Bilan de compétences* is an objective procedure, the course of action is detailed defined. The used materials and methods are reliable and appropriate for the *bilan de compétences*.

The *bilan de compétences* should enable the participants

- To achieve a clear picture of the own identity (existing knowledge and abilities, attitudes, motivations, marks of personality and behaviours) to clearly realise existing strengths and weaknesses and asses them regarding to the labour market.
- Building upon this to plan a realistic vocational future and respectively check the plans and also
- Build up motivation to face new professional requirements due to existing competences.

Who knows about the own abilities, strengths, possibilities for development, behaviours, structures of thinking, attitudes and therefore about the own personality, raises the opportunities to return to the labour market. There is no job or apprenticeship immediately at the end of the *bilan de compétences*, but the knowledge about realistic vocational goals and therefore possible pathways.

This goal is only achievable through an active collaboration of the participant. He must be willing and able to meet self-critical, to question the own abilities, behaviours and habits, to recognize the need for change and to derive goals for the own actions.

The realisation of a *bilan de compétences* is carried out in 3 phases:

Phase 1 – analysis of needs

- Definition of the goal
- Definition of the action plan
- Signing contract

Phase 2 – analysis of the actual status

- Data collection
- Structuring the dates
- Psychometric analysis
- Behaviour analysis

Phase 3 – information and summary

- Summary of the won dates
- Work out the vocational perspectives
- Presentation and hand out of the summary sheet

6.5.2 Used methods and processes

Participants of a *bilan de compétences* have to know in advance the measure, which specific procedures and methods are used within a *bilan de compétences*. This transparency is important because the participants also have to agree with the methodical procedure. Agreement to the method means to be ready to contribute a large individual work in the process of self-knowledge and in the development of their own personal plans.

It means also to accept the look into the work by a stranger. Fears and doubts against the methods are understandable, but can be minimized by the transparency. The individual results of the *bilan de compétences* are principally kept in confidence.

The following procedures are used in the personal *bilan de compétences*:

▪ **Individual interviews**

The individual interviews are an important part of the *bilan de compétences*. Thus, among others the initial interview is used to get to know the participants, to build up

confidence and to discuss their current situation and their vocational goals. It forms the essential basis for a successful design of phase 2 – analysis of the actual status. On the basis of the personal survey and the test results an orientation interview is carried out with every participant. Of course the result (summary sheet) is discussed together with the participant.

▪ **Intensive individual work of the participant**

In the field of the individual work of the participant it is to develop the personal survey, as well as to analyse the individual situation. This requires a honest and self-critical view of the participant. Building on that the participants develop together with the counsellor, realistic vocational aims and perspectives, as well as concrete steps for implementation.

▪ **Tests and questionnaire procedures**

The tests and questionnaire procedures are used for researching the personality, the vocational interests and aptitudes. In dependence of the assessed person, the following methods are used:

- Bochumer Inventar zur berufsbezogenen Persönlichkeitsbeschreibung (BIP)
- Bochumer Inventar zur berufsbezogenen Persönlichkeitsbeschreibung -6 Faktoren (BIP-6F)
- Allgemeiner Interessen-Struktur-Test (AIST)
- and others

▪ **Partner and group work**

These methods are used while the observation exercises. In various group discussions, it is observed how the individuals deal with the other group members. Furthermore it is observed, whether and how they find the balance between the pursuit of own interests and aims and the commitment to the objective of the group. Observed is also, how confident and engaged someone acts in the group and how he convinces others with arguments.

▪ **Requirements of the participants**

- principle of voluntary participation
- readiness of the participants to an actively work
- competence balance is a kind of training, in which the individual learns to recognize itself better, to take responsibility for oneself, to be less passive, to act independently

▪ **Results of the *bilan de compétences***

The results of the *bilan de compétences* are written down in the summary sheet, which is discussed together with the participant.

This summary starts with a description of the possible vocational fields. The already existing professional requirements (qualifications, skills, professional experience) are coordinated, presented in the summary and supplemented by favouring personal and

social skills. These information are complemented, with recommendations for further developing, which regard to professional as well as personal and social aspects. Furthermore the framework conditions are named. These conditions have to be considered when starting to work.

This summary sheet is intended primarily for the participants, but can also be forwarded to the client of the *bilan de compétences*. For forwarding the appropriate conditions must be clearly defined, and must be written down in the agreement for carrying out the *bilan de compétences*.

As an attachment to the summary sheet, an action plan by the counsellor together with the participant is developed. It includes all necessary steps and activities which must be done by the participant to realise his vocational intention, and also a time framework.

▪ Quality Standards

The *bilan de compétences* is carried out according to quality standards, which were developed by the FECBOB (Fédération Européenne des Centres de Bilan et d'Orientation Professionnelle) and are checked regularly. This standards content the following regulations:

- The vocational intention will always be planned with regard to the social and vocational environment.
- The *bilan de compétences* lives by the active role of the participant.
- Transparency of aim and methods towards to the participant
- Compliance of the procedure in 3 phases
- The *bilan de compétences* ends in issuing of a summary sheet
- The *bilan de compétences* contributes to the recognition of knowledge, abilities and skills
- The institution implementing has multi-disciplinary skills
- Continuous training of the counsellors who carry out the *bilan de compétences*
- Continuous further development of the uses methods
- Possibility of limited accompaniment of the participants, even after the *bilan de compétences*

While the implementation of the *bilan de compétences*, this rules are strictly observed and used.

6.5.3 The bilan de compétences in Germany

There are several providers of so called “Competence Balance” in Germany. At closer inspection, it can be recognised that these providers publish or use no quality standards for the implementation of the *bilan de compétences*. The reason is that the term “*bilan de compétences*” is not protected by law, and also cannot be protected by trademark law.

Therefore, the implementation of *bilan de compétences* after the French model, and carried out in an institution, which is certified according to the French quality criteria, plays a particularly significant role.

6.6 Romania: Institute of Education Sciences

Speranța Țibu

Marcela Călineci

Elena Ciohodaru

The Institute of Education Sciences (IES) is a public organisation, founded in 1990. The Institute is affiliated to the Ministry of National Education and its basic activity is financed by the public budget. As a national institute for research and development in education, IES aims to put forth the education policies and decisions by the scientific studies and data, to analyse needs and issues of the educational system in Romania, to participate on international research projects in the field of education. It is organized in five departments: Theory of Education, Curriculum, Educational Counselling and Management, Educational Policies. Today, IES is developing projects and partnerships in co-operation with national and European institutions, such as: European Commission, UNICEF, UNESCO etc.

The department of Educational Management and Counselling organizes the researches at national level in the field of guidance and counselling and assures methodological resources for the national network of educational guidance and counselling practitioners. Our activities comprises: facilitating the access to data about education and training opportunities at national and European level, publishing guidebooks and other methodological resources in the field of guidance and counselling, supporting the European dimension of educational and vocational training, organizing professional visits, placements, conferences, seminars, debates, workshops, surveys and needs analysis in the field of education, vocational guidance and training.

Within the *bilan de compétences* project, IES collaborated with the Municipal Centre for Assistance and Educational Resources in Bucharest (CMBRAE). The centre coordinates the guidance and counselling network of school counsellors acting in the Bucharest pre-university schools. In Romania, there are 42 such coordinating centres, one in each county, called CJRAE. The CJRAE network was established by the Order of Ministry of Education in 2005. Nevertheless, the guidance and counselling activities have been carried out since 1991. Within 1995 and 1998 the first 6 interschool counselling offices were founded and since then, the network has constantly grown up, comprising in 2009/2010 school year 340 offices and 244 specialists.

The mission of CMBRAE is to develop skills and attitudes of students, parents and teachers in a relationship based on respect, confidence and responsibility, in order to increase beneficiaries' chances for personal and professional success. The main

activities of the CMBRAE comprise individual and group counselling, conducting studies on themes like violence prevention, learning motivation, bullying, computer and TV, self-esteem etc., organizing workshops and conferences, running educational projects, developing educational materials (guides, brochures). CMBRAE has developed various ESF projects on themes like: career counselling, life management skills, ICT skills for specialists, learning style and temperament, communication strategies, youth against violence etc.

6.6.1 The Romanian provisions of the bilan de compétences

Bilan de compétences is a method relatively well known in Romania. A lot of resources developed by local effort or by international partnerships devoted space for describing it.

The project Professional Orientation of Youth in Disadvantaged Areas (OSPZD) offered the opportunity for three countries (Romania, France and Hungary) to develop between 2000 and 2002 an important resource for teachers, managers, school counsellors and pupils from socio-economical disadvantaged areas. The main product of the project was a handbook and 27 training modules on career counselling theme like: key competences needed on the labour market, self-knowing, communication and conflict negotiation, evaluation of guidance and counselling activities, entrepreneurship etc. The chapter “Methods, techniques and instruments” was written by Jean Claude Porlier – INETOP France and it addresses synthetically, also the *bilan de compétences* method. The handbook was one of the first resources in Romania dealing with guidance and counselling methods, therefore it opened new horizons and raised the interest in international cooperation and research in this area.

Career Counselling for Adults is a publication released in 2003, in Romanian language. The authors are researchers from the Institute of Education Sciences Bucharest and the publication is targeted to the Romanian guidance and counselling practitioners, who form a community under development at that time, with a great need to have access at international methodologies, instruments and resources. Among other interesting topics, the book allotted two pages for a general presentation of the method, with a focus on the stages involved in undertaking a *bilan de compétences*. The book is freely available at <http://www.ise.ro/wp-content/uploads/2002/08/Consilierea-carierei-adultilor.pdf>

The Compendium of Methods and Techniques to be Used in Guidance and Counselling was developed between 2004 and 2006 by a body of authors with practical and research experience in guidance and counselling. The Compendium followed a huge training programme financed by the World Bank which took place in Romania between 2000-2001 through which Romanian counsellors from education, employment and youth sectors have been trained in using the Danish model and paradigms of career counselling. The Compendium was published first in Romanian language (2006). After one year, the English version was distributed to the entire

Euroguidance network, in order to share our experiences also with international colleagues. Within the book, Angela Muscă – researcher at IES Romania presented in detail the *bilan de compétences* method: history, theoretical fundaments, presentation of the method, the role of the counsellor, the target groups, case studies and examples, evaluation of the strengths and weaknesses of the method.

Within their initial preparation, the students following the Masters in Guidance and Counselling in Romania are often accustomed with the theoretical aspects of the *bilan de compétences* method.

Nevertheless, in the daily practice of the guidance and counselling services from the public system, the method is used neither in education, nor in the employment offices.

It seems that the private initiatives are much more aware of the strengths of this method and more advanced in offering services based on *bilan de compétences*. Some examples can be found (in Romanian language) at the following addresses:

<http://www.mmginternational.ro/ro/grhVanzari.php>

<http://consilierultauincariera.ro/bilant-de-competente/>

<http://www.studiopera.eu/serviciile-oferite/>

Recently the Buzau Agency for Employment engaged in an international project named KOMPASS, together with partners from Germany, Bulgaria and Hungary. The objective of this project is to train professionals from RO, BG and HU, under the expertise of trainers from Germany and under the supervision of European Federation of Centres of Career Guidance and *bilan de compétences* (FECBOP) for a mastery of the "*bilan de compétences*" method according to European standards and allow them to obtain the European certification "Quality EU *bilan de compétences*." This approach is part of the issue of social and professional integration of Roma populations, which constitute a major component of the mobility of labour between the three countries and Germany. The duration of the project is of 2 years (2012-2014) and it is supported by the Lifelong Learning programme Leonardo da Vinci.

The objectives of this project is to allow a transfer of innovation from Germany to Romania, Hungary and Bulgaria related to the use of the *bilan de compétences* method, as well as the adaptation of this instrument to the project target group: the Roma population. The project envisages also the training of 4 multipliers from RO, BG and HU in order to become evaluators and to train, in their countries, another 110 practitioners.

At the Buzau Employment Office, the target group will consist of 40 unemployed Roma people which will be able to examine their nonformal and informal competences through the *bilan de compétences* method. The Roma community is an important minority group in Romania and in Buzau county, and the employment level within it is very low. The unemployed people of Roma ethnicity from Buzau county have a low educational level and they still practice some traditional occupations

which do not suppose formal learning, but they are transmitted from generation to generation. The project tries therefore to proactively help the unemployed Roma citizens from Buzau county to overcome the difficulties in finding a job and thus rising their own and their families economic level. More information about the project can be found at: <http://www.pscherer-online.de/www/phpwcms/index.php?kompass>.

6.7 Slovak Republic: Central Office of Labour, Social Affairs and Family of the Slovak Republic

Helena Furindová

In accordance with the law (Act No. 453/2003 Coll. on Public Administration Authorities in the Fields of Social Affairs, Family and Employment Services and changes and amendments made to particular acts), the Central Office of Labour, Social Affairs and Family with its seat in Bratislava (hereinafter referred to as the "Head Office") ensure execution of public administration in the fields of social affairs, family and employment services. The entire organization, including all subordinate organization units and sections, employs 11,955 employees (7,683 at 46 Offices of Labour, Social Affairs and Family on the local level, 3,562 employees at 77 orphanages and 355 employees at the Head Office).

The Head Office is the public administration authority performing statutory duties directed inside the structure and outwards within the scope of relationships with other institutions, organizations and public. Its main roles in the area of employment services include management, supervision and methodological co-ordination of public administration executed by the Offices of Labour, Social Affairs and Family (hereinafter referred to as the "Offices"). In addition to activities focusing on the Offices, the client sees as the most important the activities of the Head Office in the area of development and consultancy upon implementing national and other projects focused on improving the labour market situation as well as employment recruitment for Slovak nationals in other European Union countries, issuing licenses for non-governmental providers of employment services (employment recruitment for payment, supported employment agencies, temporary employment agencies, social enterprises, etc.), best practices scheme on the second level, processing clients' suggestions and requests.

The Head Office is responsible for executing public administration in the areas of:

a) Employment services within the scope of the following activities:

- Keeping records of unemployed nationals seeking work;
- Keeping records of available jobs;
- Recruiting for a suitable employment;
- Providing consultancy services;
- Education and training for the labour market;
- Implementing an active policy on the labour market;

- Increased attention to employing specific groups of nationals;
- Preparing and implementing projects co-financed by the European Social Fund;

b) Social affairs and family within the scope of the following activities:

- Government provided social support;
- Social assistance;
- Help for nationals in material need;
- Psychology and counselling services;
- Compensating severely disabled individuals and assessment activity;
- Social and legal protection of children and social care.

The employment services represent a system of tools for supporting and assisting the job seekers in looking for suitable employment options, changing employment, filling vacancies and applying active measures on the labour market paying particular attention to groups of handicapped nationals.

One of the key tools of employment services involve professional consultancy services focused on resolving client's issues associated with employment, harmonizing their personality predispositions and requirements for performing a particular employment, influencing job seeker's decision making and behaviour as well as on their social and work adaptability. Professional consultancy services are provided within the scope of individual counselling (e.g. counselling interview, anamnestic interview, Individual Action Plan, psychological counselling, selection for education and training for the labour market, reviewing job seeker's competences) or group counselling (e.g. social and psychological training, intensive counselling course).

It proves necessary to nationally implement and use other useful work methods such as reviewing competences, which is particularly useful when selecting and placing job seekers in labour market educational and training events as well as other suitable tools of active policy within the scope of regional as well as national projects and schemes. Professional, reliable and thorough review of competences, producing skill-, qualification-, personality predisposition- and work potential profiles with respect to suitability of employment on the labour market as well as determining eventual obstacles and barriers in employment; these are inevitable preconditions for increasing the efficiency of professional consultancy services and educating the clients of the Offices.

In the past, the professional consultants and mediators at the Offices were, in addition to the basic training, trained in using the assessment and development centre method as well as certain diagnostic methods. However, high fluctuation and reducing the number of employees at the Offices disrupt the continuity of the professional training and consultants' methodical guidance causing us to keep starting over again.

Several years ago, an external supplier conducted a survey focused on long-term unemployed job seekers and their employment options on the labour market. The results have proven that more than a half of them do not have the competences and motivation required for employment on the labour market. It is, therefore, necessary to constantly work with the unemployed in this respect.

The opportunity to engage the Slovakian employment services in the Job Seeker's Competence Review project implemented by the Czech partners allowed us to gather basic information on the *bilan de compétences* processes in individual countries participating in the project, particularly the employment services in the Czech Republic and France, which was the cradle of the entire system.

Due to the fact that the job seeker's *bilan de compétences* is one of the newly prepared activities involved in working with job seekers within the scope of the Slovakian employment services and no training has been organized for the professional consultants regarding this activity so far, the Offices do not currently use it too often.

In 2012, the professional consultants at the Offices provided the *bilan de compétences* to 188 clients; most of them, 149, were long-term unemployed job-seekers (79.25%).

This, too, is a reason for the Head Office to engage in a new project within the scope of the Leonardo project in the near future; particularly in the "Qual-n-Guide" project – Competence-based career guidance in employment services through European quality criteria starting this autumn.

The Head Office sees the project importance in further professional development of the Office employees providing professional counselling and education and training for the labour market; in transferring know-how, gathering and subsequent use of new information, skills and methods when working with the job seekers. This should ultimately reflect in increasing the quality of professional consultancy services provided, particularly by widening the choice of consultancy tools and improving the efficiency of the counselling process strategy; in improving opportunities for further education of job seekers by means of highly qualified employment selection or education and training for the labour market as well as in supporting innovations of the existing system of professional education for the Office employees. The project importance should be apparent at the national level.

Within the scope of modernizing employment services, selected groups of job seekers will have their individual profiles created within the scope of professional and career counselling and for the purpose of selecting suitable employment or education and training for the labour market. The other target group consists of the Office employees working in the field of professional counselling who will be trained on using the *bilan de compétences* method. Having a long-term impact, the method will be used throughout the entire Slovak Republic so, it will be necessary to provide licensed and certified education for the Office consultants focusing on this area.

The new concept of improving the quality of employment services, which has been continually implemented by the Head Office since May 2013, involves a strengthened and transformed three-zone system of working with the clients, their profiling and special services provided to them.

In the near future, the Slovakian employment services plan to innovate and automatize the system of working with and monitoring vacancies and filling them, particularly in the form of harmonizing requirements and demands on the labour market (matching). Subsequent implementation of innovative approaches to working with clients in the area of consultancy will be carried out, particularly including the individual potential analysis, using assessment methods and development centres, Skill Assessment, etc.

PART III: PROJECT OUTCOMES

7 PROJECT OBJECTIVES AND THEIR FULFILMENT IN PROJECT OUTCOMES

Pavína Maříková

The main objective of the *Bilan de compétences* project was to create conditions for international exchange of experience in the area of performing *bilan de compétences* in the employment services. This objective was achieved namely via international workshops and foreign internships. Both the Czech and foreign experts exchanged during these events their knowledge and experiences, which contributed to enrichment of all present. The acquired findings were used not only in drafting the project outcomes but also by the foreign partners and other participants in these events.

In order to achieve the main objective, several partial objectives were stipulated and fulfilled during the course of the project. These included:

1. Establishment of a national thematic network and connecting it to the international network – the Czech Association for *bilan de compétences* was established (for more details see chapter V. The Czech Association for *bilan de compétences*), and a submission to be accepted in the FECBOP international federation was filed.
2. Creation of terms and conditions for unification of *bilan de compétences* performance – the new Methodology of *Bilan de Compétences* clearly defines requirements and terms and conditions that are binding for the regular members of the Czech Association for *bilan de compétences*, which shall oversee compliance therewith.
3. Development and innovation of *bilan de compétences* methods, procedures and standards – the new Methodology takes into account development of this counselling service, the current terms under which it is provided and acquired international experiences.
4. Increasing quality of *bilan de compétences* – the new Methodology and other documents (Quality Chart, Ethical Code) set the minimum standards for performance of *bilan de compétences* and mechanisms to ensure their observance by the regular members of the Czech Association for *bilan de compétences*.
5. Increasing proficiency of the *bilan de compétences* providers in the Labour Office of the Czech Republic – in order to acquire regular membership in the Czech Association, the applicant shall submit necessary professional training and practical experience; the Association rules further impose an obligation of continuous professional training to all regular members, and the Association shall

organize such professional training based on Concept of professional training in the *bilan de compétences*, drafted within the Project (see Chapter 10).

6. Unification of requirements for external services of *bilan de compétences* performed for the Labour Office of the Czech Republic – a sample tender documentation for public contracts for this service shall be drafted for the Labour Office, together with the new Methodology.
7. Increasing awareness of *bilan de compétences* among the professional and general public – the professionals were informed not only at events conducted within the Project but also via articles in the press, conference papers, seminars, promotional materials (Project poster), and also via the Project website (www.nvf.cz/bilancni-diagnostika) and the Association website (www.asociace-bilancni-diagnostiky.cz). We continuously built a contact database used for distribution of information. In order to spread the *bilan de compétences* services outside the Labour Office, we prepared an information booklet “*bilan de compétences* in HR practice”, intended namely for HR specialists in companies and organizations.
8. Supporting edification with respect to *bilan de compétences* among the clients and employees of the Labour Office of the Czech Republic – the Labour Office employees were notified of and invited to Project events, namely seminars and the conference, which were both attended in plenty; for the clients of the Labour Office we prepared an information booklet “*Bilan de compétences* for Work Applicants and Candidates”, which was distributed to all regional offices of the Labour Office in the amount of several hundred pieces for each region (according to manifested interest). The Labour Office employees shall receive the booklet “*Bilan de compétences* in Practice” containing not only the information on *bilan de compétences* and its course but also on selection of suitable candidates, their preparation and motivation, possibilities of further work and use of the *bilan de compétences* Final Report, about the issue of tenders for *bilan de compétences* providers and drafting tender terms and conditions and requirements (the booklet shall be used in seminars for the Labour Office to be performed within the Project extension).

The Project outcomes may be split into several groups. Firstly, they consist of own creation of thematic network – i.e. the Czech Association for *bilan de compétences*. Secondly, there is information provided to the supported individuals via the Project events. The third group of outcomes consists of a file of text documents (printed materials).

The reasons for establishment, form, objectives and rules of the Association for *bilan de compétences* are specified in more detail in Part V. hereof; this entire Part is dedicated to the Association.

As regards the second group of outcomes, we should namely state the number of supported individuals, i.e. persons participating in the Project events. We reached the

planned number of 142 persons. However, in total almost 400 individuals interested in *bilan de compétences* participated in our events. These included namely the employees of the Labour Office of the Czech Republic (including the representatives of the General Directorate) and psychologists performing *bilan de compétences* or interested in this method. The Project events were also attended by representatives of the Ministry of Labour and Social Affairs, education and research institutions, universities, non-profit organizations, and other professionals from the whole Czech Republic. The participants of each Project event received files with working materials. We further ensured awareness of the Project not only via the website (www.nvf.cz/bilancni-diagnostika) but also via articles in specialized press and via papers in several conferences.

The text outcomes include namely the Methodology of *Bilan de Compétences*, Concept of Professional training in the *bilan de compétences* Area, including descriptions of selected training modules, information booklet and brochures, anthologies of papers from individual workshops and seminars (files of working materials intended for participants in these events) and this Collection issued on the occasion of international z conference held at the end of the Project.

The most important outcome from this group is the Methodology of *Bilan de Compétences*. This Methodology was drafted based on experience with performance of *bilan de compétences* during the last 12 years, experience and procedures used in the countries of the Project partners, also in consideration of the requirements for unity and possibility to ensure quality control. The Methodology, which is binding for regular members of the Association for *bilan de compétences* and which should become a basis for public tenders in the Labour Office, forms the content of the following Chapter in this Part of the Collection. In comparison to the previous methodology specified in normative direction No. 29/2009, using test batteries of the DIAROS system again becomes a mandatory part of *bilan de compétences*. The reasons why are explained in a brief Chapter “Why DIAROS?”, which follows the Methodology.

The next Part No IV entitled Concept of Professional Training System in *Bilan de Compétences* introduces a draft of professional training in the *bilan de compétences* prepared as an open modular system, enabling addition of further up-to-date and new themes. The Chapter also includes a description of training modules, already prepared for implementation.

8 THE CZECH METHODOLOGY OF BILAN DE COMPÉTENCE

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8.1 Introduction

The Czech Methodology of *bilan de compétences* was prepared as a part of an international co-operation project entitled “*Bilan de Compétences* for Job Seekers: exchange of international experiences and application of new findings in the Czech Labour Office practice” No. CZ.1.04/5.1.01/77.00070, financed from the ESF and the state budget of the Czech Republic through Operational Programme Human Resources and Employment (1st April 2012 – 30th November 2013).

The partners of Career Services Support Unit of the National Training Fund, o.p.s. were the following institutions:

- France – Le Centre interinstitutionnel de *bilan de compétences* (CIBC) Bourgogne Sud
- Belgium – Le Laboratoire d'Ergologie Appliquée, asbl
- Germany – Bildungsinstitut Pscherer gGmbH (BIP)
- Rumania – Institutul de Științe ale Educației
- Slovakia – Ústredie práce, sociálnych vecí a rodiny

8.2 What is bilan de compétences?

Definition:

Bilan de compétences is a career guidance and counselling methodology using complex diagnostic methods and aimed at optimum use of competences of an individual in his/her career plan.

Bilan de compétences is a method of counselling work where a psychologist (counsellor, provider) trained at its performance of *bilan de compétences* together with the client²⁰ seek a path or alternative solutions for the most suitable use of skills,

²⁰ The *bilan de compétences* client is an individual.

abilities, competences, interests and motivation of the client for his/her most suitable integration in working activities. This objective is achieved by using a wide range of career guidance and counselling methods and procedures, a certain series of group and individual meetings and data collection using psycho-diagnostic methods.

Bilan de compétences ensues from the **French methodology bilan de compétence**, implemented into the Czech career guidance system in 2000 based on Government Resolution No. 640/1999.²¹ Provision of *bilan de compétences* is governed by the Act on Employment²² and Decree No. 518/2004 Coll.,²³ which states in its Section 22 that “*bilan de compétences* focuses on complex assessment of abilities and competences of an individual in connection to his/her future career plan”.

The *bilan de compétences* method ensues from the theoretic base of personality psychology, work psychology, psychology counselling, career counselling and human resources management. It systematically uses the tools of psychological, pedagogical and social diagnostics in order to assess the client's individual potential. It uses a wide range of information on offer and demand on the labour market, and it requires the counsellor to have knowledge of requirements for various work positions and standards to be demonstrated by the prospective employee.

The *bilan de compétences* process always focuses on the client. The client is an active subject entering the *bilan de compétences* with a certain objective – an assignment²⁴, and in cooperation with the psychologist or other experts searching for solution for his/her situation. The counsellor starts from the specification set by the ordering party²⁵ assigning *bilan de compétences*. Together with the client they search for a solution of the assignment with respect to relative contentment of the client with the proposed solution, respecting the basic definition of counselling: “**Counselling is a help for self-help**”. The client gradually realizes his/her working potential, revises

²¹ Government Resolution dated 23 June 1999 No. 640, on Measures for Supporting Employment of Individuals Hard to Place on the Labour Market (in Consideration of Members of the Romani Community).

²² Act No. 435/2004 Coll., on Employment.

²³ Decree No. 518/2004 Coll. dated 23 September 2004 Implementing the Act No. 435/2004 Coll., on Employment.

²⁴ The assignment contains conscious and unconscious troublesome or regular situations and objectives, brought by the client in the counselling process, whereas the client needs to orientate in or wishes to achieve these situations and objectives. The client's assignment is usually more specific than the assignment from the ordering party, and it may change or become more specific during the counselling work.

²⁵ The party assigning *bilan de compétences* may be the client or, in the case of a work applicant or candidate, the Labour Office Of the Czech Republic, in case of an employee his/her employer.

his/her ideas of possible position on the labour market and reinforces his/her ability to guide his/her career, or another possible assignment of the ordering party.

The main prerequisite of efficient course and achievement of the *bilan de compétences* objective is a positive motivation of the client to get involved in the work, his/her motivation to be led during the *bilan de compétences* process and also to be willing to make decisions on his/her future career plan, and subsequently to fulfil such decision.

Bilan de compétences is suitable for most of adolescents and adult population regardless of their gender, age, education or social statute. The only exception applies to persons with mental inadequacy or persons with no motivation to change their social statute and to work. It is efficient namely with persons highly motivated to work, find, acquire and keep a working position that is determined to change.

The *bilan de compétences* is successful in case the client undertaking the *bilan de compétences* comes to:

- Realization of his/her personal potential and possible reserves for further development;
- Better orientation in his/her abilities and competences, his/her motivation to a certain working position and possibilities to use interests and competences for development of his/her further career;
- Improvement of his/her self-esteem and motivation to work;
- Improvement of ability to assess his/her own competences and to use this assessment for successful searching for new working opportunities;
- Decision on further professional training;
- Identification of his/her optimal involvement in the working team.

8.3 Process of bilan de compétences provision

Bilan de compétences is a time consuming process consisting of a certain series and procedures of group²⁶ and individual meetings, data collection, analysis, synthesis and interpretation of acquired findings.

Selection of individual methods and procedures ensues from the nature of the client's assignment and the ordering party's instructions; these may be oriented namely to the following three issues and various combinations thereof:

- **Employment** (e.g. finding a job vacancy, changing occupation, changing working position, horizontal and vertical mobility inside an organization);

²⁶ Recommended are groups of 8–12 clients.

- **Education** (e.g. further education, re-qualification, increasing qualification, recognition of results of informal education);
- **Enterprise** (e.g. commencing self-employment activities, establishing a company, enterprise, firm).

Bilan de compétences is recommended to be implemented in several stages. This Chapter provides examples of four stages. Following establishment of first contact and identification of the client's assignment, the basic information on the course and individual steps of *bilan de compétences* are handed over; the client's assignment may then be re-defined (stage one). This is followed by collection of data about the client via diagnostic methods and individual and group meetings (stage two). Stage three is dedicated to counselling aid for the client in searching for possibilities of own professional future and development; here the consultant and the client use results of analysis and synthesis of information collected in the previous stage, and interpretation of their mutual relations. In stage fourth the Final Report comprising basic findings and recommendations is prepared.

The stages are connected with each other but when working with a client, they are usually not visibly distinguished or performed in separate blocks. Namely in the initial meetings, usually performed in groups, we need to realize that success of the *bilan de compétences* consists in the motivation area and also depends on social skills of the psychologist performing the *bilan de compétences*. In order to create a good relationship with the client we need a non-directive approach but also a certain level of creativity; most of the clients have never endured a psychological examination, this situation is new to them and therefore we need to expect various demonstrations of alarm, anxiety and uncertainty.

8.3.1 Length of bilan de compétences with one client

In concluding an agreement on *bilan de compétences* between the provider of *bilan de compétences* and the ordering party one of the important facts is duration of *bilan de compétences* performance. The total duration includes sum of hours devoted to direct counselling for the client (both individual and in groups) and hours necessary for individual work of the counsellor.

To set the duration of *bilan de compétences* performance is very difficult because it depends not only on assignment of the ordering party but primarily on the client's assignment. The more specific the client's assignment, the easier it is to define the necessary tools for data collection, their analysis and interpretation, and the easier it usually is to find optimum solution. In case the client is unsure about what he/she really wants and the assignment is uncertain, or if the situation is complicated e.g. by health disablement, the collection of data, working therewith and searching for optimum solution is more complicated and more time consuming.

Framework definition of duration has certain rules (see Annex No. 1 in chapter No. 8.7.1):

- a) Standard duration of **direct work with the client of *bilan de compétences* is 16 hours per client**. In isolated cases it may be cut down to 13 hours or extended up to 18 hours, depending namely on the nature and complexity of the client's/ordering party's assignment.
- b) **Scope of group activities of *bilan de compétences* is by default maximum of 50% of the duration of direct work**, i.e. if the *bilan de compétences* required 16 hours of work with the client, group activities should not exceed 8 hours.
- c) Standard duration **of individual work of the counsellor is 8 hours**. However, it may also be shorter or longer (5–9 hours), depending on complexity of the client's assignment and other related factors. Individual work of the counsellor consists namely of selection and preparation of suitable diagnostic tools and information materials, preparation of scenarios for group or individual meetings, assessment of diagnostic tools and interpretation of acquired results, diagnostic consideration, Final Report and Summary of Final Report drafting.

The standard total duration of *bilan de compétences* performance consisting of both direct and indirect work of the counsellor is thus 24 hours per client. This time dotation may decrease or increase depending on the ordering party's assignment and complexity of the client's assignment, but it should never be below 18 hours.

8.3.2 Establishing a contract and specification of assignment

The first contact of the counsellor and the client depends on who is the ordering party and for how many persons this person assigned the *bilan de compétences*. In case it is assigned for several persons, the first contact with the client is usually on a group meeting, followed by individual interviews with each client.

The objective of both individual and group meetings within the first stage is to establish personal contact, create the atmosphere of trust between the counsellor and the client and specify the **client's assignment – objective** sought by the client. One of the tasks is also a collective assessment whether *bilan de compétences* is the correct method to resolve the situation, which the client wished to be aided in resolving. For that it is necessary that the client be acquainted with the course of individual stages, objectives of the methods to be used during the work, what outcomes will be prepared and what level of coordination is expected of him/her for successful completion.

The counsellor shall ensure that the client understands the whole process and its course, is motivated to realize his/her possibilities and perform the activities focused on increasing his/her chances to find a place on the labour market, and he/she is willing to cooperate with the counsellor. The process shall also have an effect on initiative, activity and personal involvement of the client. During the group work it is necessary to work in a manner, so that all clients in the group understood the process objective and based thereon actively participated in the collective work.

The client's assignment may be aimed e.g. at:

- Assessment of future career possibilities;
- Recognition of advantages and reserves;
- Better orientation in himself/herself and his/her potential for performance of the preferred job;
- Clarification of professional motivation and assessment of possibility to use own interests and skills for further professional career;
- Development of feeling of personal efficiency and skills in managing own career plan;
- Support for re-involvement in the working process and increase of qualification;
- Reinforcement of self-esteem and increase of motivation to employment etc.

Following clarification of the client's assignment the counsellor notifies the client of further steps, requests his/her consent with these steps and they agree on the dates for individual meetings.

8.3.3 Specifics of group work

Group work has many advantages. However, it requires specific skills of the counsellor. Besides communication skills this means namely above-standard orientation in interpersonal communication and relationships. The ability to get a conflict in the group under control also in many aspects differs from work with one client and taxes the counsellor with very different requirements.²⁷ A counsellor working with a group should be able to captivate, know the methods for group work, be able to analyse a group, prepare and plan a group meeting in accordance with the set objective, use relationships dynamics originating in the group for supporting self-cognition of the clients and as a control mechanism (motivation to work) or for arousing timid clients to activity. The objective is that each member of the group developed his/her skills to manage own career and had sufficient room for resolving own situation.

8.3.4 Client information collection

This stage comprises collection of data about the client perceived subjectively and ascertained objectively during the individual and group meetings.

²⁷ LANGER, T. *Techniky skupinového poradenství*. Centrum pro vědu (Center of Science), Univerzita Jana Amose Komenského Praha. 2008. Available at old.nvf.cz/spps/dokumenty/skupinove_poradenstvi.pdf <6 May 2013>

The counsellor has available standard and non-standard diagnostic tools and methods simplifying creation of personality profile of the client in relation to his/her professional career. These methods include tests of both general and specific skills, personality and self-assessment questionnaires, inventories and scales, projective and semi-projective methods, structured forms for records from monitoring and interviews etc. Use of individual diagnostic methods is governed by the mandatory rules.²⁸

Performance of *bilan de compétences* is subject to an informed consent of the client with this service. The counsellor shall notify the client of the purpose of each used diagnostic tool in advance, attend to mental hygiene of the client during administration of the tests, enable the client to withdraw from testing at any time, and namely present the client with acquired results and their interpretation in a form understandable for the client. The counsellor shall be in no case the bearer of “secrets” about the client. On the opposite, the counsellor’s task is to help the client to get to know and understand himself/herself better. A psychological examination forms part of the whole counselling process of *bilan de compétences*.

The scope and focus of the discovered information depends not only from the ordering party’s assignment, but also from the **client’s assignment** in the first place. The basic information acquired about the client usually contains both his/her history and current situation. This includes namely:

- Personal data (age, contact details).
- Social history (we only ascertain information necessary from the career point of view) and the current social situation (family background, residing premises...).
- Health state with respect to possible working limitations.
- Education and qualification (formal education and informally acquired knowledge and skills, competence, which could be developed and used in another profession).
- Interests, free time activities (focusing on acquired knowledge and skills and possibility to use them in the career plan).
- Professional history and current situation of the client on the labour market (professional history, number and duration of employments, number and duration of unemployment periods, reasons for change of occupation/work, favourite/disliked working activities, important events in professional life, motivation to work and motivators to search for work, current situation of the client on the labour market, what led to it and why he/she wishes to change it...).
- Psychological profile of the client with respect to possibilities for his/her optimum professional application (individual character, personality specialties, handling the

²⁸ See e.g. Standardy pro pedagogické a psychologické testování. Praha 2001. Testcentrum. ISBN 80-86471-07-1.

requirements of the surrounding, interpersonal tendencies, values orientation and its sources, level of intellectual competences and specific cognitive competences (e.g. memory, attention etc.), life contentment and what affects it, sources of positive or negative motivation...).

In identification of formerly acquired knowledge and skills we may rely on the client's CV, the National System of Occupations (<http://www.nsp.cz/>) and the National Qualifications System (<http://www.narodni-kvalifikace.cz/>) and other resources.

The selection which information shall be ascertained as well as the choice of means and tools for data collection depends solely on the counsellor. The exception is a mandatory use of the SPARO test, which forms part of diagnostic battery and the DIAROS database system (see in detail in Chapter 8.4.3).

The client's assignment may be revised with the client during data collection, because the client may change the assignment or specify it in more detail as a result of ascertained findings.

8.3.5 Provision of client counselling aid

The counsellor uses the acquired findings in the work with the client, which follows the stage of data collection and which is focused on providing aid to the client in searching for various alternatives of his/her career objectives, employment possibilities and development. The counsellor helps the client to clarify and organize information on his/her abilities, characteristics, motivation, and possibilities to use his/her interests, skills etc. in planning further career. In accordance with the client's assignment the counsellor may help the client in this stage also e.g. with stipulating a specific career objective, provide possible outcomes for creation of a career plan²⁹ etc. However, the primary objective of this stage is to help the client to be able to objectively assess his/her personality potential and in the future even use these skills for independent management of own career.

8.3.6 Preparation of Final Report

Bilan de compétences in itself is a valuable process leading the client to reinforcement of his/her skills for management of own career. Its concrete outcome is the **Final Report** with objective findings intended for the client, and **Summary of Final Report** intended for the ordering party.

Individual discussion about both reports with the client forms part of *bilan de compétences* and should last at least one hour (see Annex No. 1 in chapter No. 8.7.1).

²⁹ The career plan forms a list of specific and actual tasks and activities foreseeable at the moment in order to achieve the set career objective.

8.3.6.1 Final Report

Final Report from *bilan de compétences* focuses on positive recommendations for further employment on the labour market and professional development. It is intended solely for the client and therefore must be written in a manner understandable for the client, contain actual and positive information which may form a base for future career, be an informatively valuable document, whereas the client participated on its content, so that the client will have a reason to keep the report and return to it.

The Final Report from *bilan de compétences* consists of the following parts (recommended structure is in Annex No. 3):

1) Identification Data

Here state:

- Name and surname of the client, his/her date of birth, place of residence;
- Name and surname of counsellor;
- Name of the company, in which name was the *bilan de compétences* performed;
- Place and date of commencement and completion of *bilan de compétences*.

2) Ordering Party's Assignment and the Client's Assignment

The ordering party, who may be the Labour Office, employer or the client, usually states in the assignment relations of the requested performance of *bilan de compétences*. Here the counsellor specifies a brief characteristic of this assignment. In case the ordering party is the Labour Office or employer, the counsellor shall further briefly describe own assignment of the client (what the client expected of *bilan de compétences*, what questions he/she had when entering *bilan de compétences*). In case the client's assignment changed during performance of *bilan de compétences*, the counsellor also specifies the final assignment.

3) Current Situation of the Client

Brief and understandable information related to the person of the client and his/her situation on the labour market.

4) Personal and Family History of the Client

State only the basic historical data, which may affect the client's employment, enterprise or education.

5) Education and Work History of the Client

Formal education and informally acquired knowledge and skills, professional history including relationship to performed working activities, reasons for change of occupation or work, important events in professional life etc.

6) Health State of the Client

Specify health limitations in relation to requirements of preferred employment.

7) Objective Finding (Psychological Profile of the Client)

Summary of findings from the psychological examination, having the character of a psychological report. Findings are written in a language understandable for the client and positively formulated. The focus is on information, which helps the client to orientate in his/her pre-requisites for optimum placement on the labour market and in possibilities of own further development.

8) Conclusion and Recommendations for the Client

The conclusion summarizes the most important findings. The recommendations ensue from these findings with respect to the client's assignment. The conclusion and the recommendations shall be formulated positively; their objective is to motivate the client for to search for optimum employment and possible further education.

The Final Report shall state the date, full name of the counsellor and bear an imprint of seal.

The Final Report from *bilan de compétences* is property of the client. It is executed in one counterpart handed to the client by the counsellor. The client shall sign that he/she was acquainted with the Final Report, agrees with its conclusions and recommendations, and received it.

8.3.6.2 Summary of Final Report

The Summary of Final Report from *bilan de compétences* is intended for the ordering party. The summary may not contain confidential information about the client if publishing of such information could harm the client, unless the client requested stating of such information.

The Summary of Final Report shall contain at least the following items (recommended structure is provided in Annex No. 4):

1) Identification Data

See the Final Report.

2) Assignment

Relations of the requested performance of *bilan de compétences* specified in the ordering party's assignment.

3) Current Situation of the Client

Data selected from the Final Report for the client (without sensitive data and information designated by the client as confidential).

4) Education / Qualification, Experience and Main Competences of the Client

Brief summary of information about education and experience of the client, his/her personal potential, knowledge and abilities related to the preferred possibilities of further career.

5) Conclusion and Recommendations for the Client

See the Final Report.

6) Recommendations for the Ordering Party

Recommendations for the ordering party should be specific and should be in accordance with the recommendations for the client.

Summary of Final Report containing date, full name of the counsellor and imprint of seal is delivered to the ordering party based on the client's consent or via the client. The client signs that he/she was acquainted with the content of the Summary of Final Report and he/she consents to the summary being delivered to the ordering party.

8.4 Personnel and technical requirements of bilan de compétences

8.4.1 Qualification requirements of the counsellor

Bilan de compétences is a complex guidance process requiring its provider – the counsellor – specific education, knowledge, skills, competence and experience:

The counsellor providing *bilan de compétences* shall comply with quality standards for *bilan de compétences* counsellor:

- Be a university graduate with master degree in psychology, accredited under the Act on Higher Education Institutions.
- Have experience in psychological diagnostic and counselling of at least three years.
- Be trained and know how to use psycho-diagnostic and counselling methods for *bilan de compétences*.
- Legally own diagnostic tools for *bilan de compétences*.

AND ALSO:

- Undertake the entrance course for new providers of *bilan de compétences* or demonstrate that he/she has corresponding knowledge and competence by passing an oral exam in the extent of the entrance course.
- Regularly and actively participate in education activities held by the Association for *bilan de compétences* or other providers of further education.

- Identify himself/herself with the provisions of the Quality Chart and other methodology materials of the Association for *bilan de compétences* and to act in compliance therewith.

8.4.2 Consultation premises and technical background

The environment for group and individual meetings affects their course. Therefore, it is advisable to perform them in sufficiently large and friendly premises. These premises shall comply with the general mandatory hygienic and fire prevention standards (namely the Act on Public Health Protection and the Act on Fire Protection, as amended). It is also necessary to ensure their information safety: confidential information provided by the clients should not be overheard by third parties, and the documentation should be secured in accordance with the Act No. 101/2000 Coll., on Personal Data Protection and on Amendment of Certain Acts, as amended. According to this Act, the provider of *bilan de compétences* (company or psychologist performing *bilan de compétences* as entrepreneur) shall be also registered with the Office for Personal Data Protection as administrator of personal and sensitive data about the clients.

8.4.3 Diagnostic equipment

During collection of data about the client the counsellor systematically uses psycho-diagnostic and other tools (both standard and non-standard). Their selection is fully within the competence of the counsellor with one exception, which is **MANDATORY use of the DIAROS database system**, or a part thereof – the SPARO test. Using **SPARO** is considered to be necessary minimum.

Diagnostic tools must be selected with respect to the client's assignment and his/her ability to perform the requested assignment. The objective of *bilan de compétences* is not clinical examination of normality of a personality. The primary tool is interview; tests are intended for structuring the whole process.

It is necessary to be particular about all used means, tests, methodical materials, software equipment etc. **being demonstrably acquired legally** and used only by the person, who is specifically educated and trained for this purpose.

Basic Modules of DIAROS Database System:

- **SPARO** – represents a basic tool of the DIAROS diagnostic battery. SPARO identifies basal structure and auto regulation dynamics, integration and psychic stability of the client. It was proved, that this tool might unfold personality potential for endurance or failure with respect to working requirements, social and other interactive context and influences affecting the client (detailed characteristics of the SPARO test forms Annex No. 7).
- **SIPO** – questionnaire focused on underpinning interpersonal tendencies, needs or value orientation in relation to people, who are in actual interactive relationship

with the client in various life, situation, working, family or other socially exposed contexts.

- **SUPSO** – test identifying subjective experience and external demonstration of psychic states of the client. Individual measured components of the questionnaire are peace, energy, despondence, distress, depression, resentment or impulsivity.
- **DUSIN** – test focused on identifying level of life contentment of the client in relation to the basic areas of ordinary life, broken down into seven categories (material security, cultural self-realization, work, family, health, social relationships in various interactive contexts, basic existential moments).

The selection of further psycho-diagnostic tools and methods used during performance of *bilan de compétences*:³⁰

a) Tests of General and Specific Skills Important for Overall Assessment of Potential for Performance of Some Occupations:

- **Raven's Progressive Matrices** – one-dimensional nonverbal test of intellectual abilities arising from the concept of intelligence as a general ability to deduce, discover mutual connections and extrapolate relations (i.e. intelligence as a “g” factor).
- **Intelligence Structure Test IST** – a complex test of intellectual abilities for both individual and group use; it measures verbal, numeric and figural intelligence and the overall level of intellectual abilities. The last version – IST 2000 – has, in comparison to previous versions, also a second part focused on identifying knowledge (verbally, numerically and figurally coded), and thus also enables to distinguish fluid and crystalline intelligence. IST 2000 also enables to test separately short-term memory, which may be efficiently used in case of some clients.
- **Vienna Matrices Test (VMT)** – one-dimensional nonverbal test of intellectual abilities stemming, like Raven's test, from the theory of intelligence as a “g” factor.
- **Attention Test d2** – test identifying the rate and accuracy of work in distinguishing similar visual stimuli (with discrimination of details), and thus enabling assessment of individual performance of attention and concentration.

³⁰ This selection of tools and methods forms an outcome of questioning provided by the Guidance Services Support Unit of the National Training Fund, performed in 2012 among psychologists performing *bilan de compétences*. These psychologists named them together with the SPARO, SIPO, SUPSO and DUSIN tests as the most frequently used in performing *bilan de compétences*.

b) Tools for Diagnostics of Personality Occupation Characteristics and Motivation to Work:

- **Bochum Personality Inventory – BIP** (inventory of occupation characteristics of personality) is oriented to diagnostic of personality potential decisive for success at work. The total of 14 personality dimensions is allocated to four different areas of occupation potentials, which are Occupational Orientation, Occupational Behaviour, Social Competences and Psychological Constitution.
- **Achievement Motivation Inventory – LMI** is focused on identifying characteristics participating in achievement motivation in practical professional context. It consists of 17 dimensions (scales), which are persistence, compensatory effort, dominance, pride, engagement, eagerness to learn, confidence in success, preference for difficult tasks, flexibility, independence, flow, self-control, fearlessness, status orientation, internality, competitiveness and goal setting.
- **Occupation Selection Questionnaire and Professional Career Planning – DVP** is based on comparison of own interests and skills of the client with the offer and working possibilities. The base for the concept of the questionnaire is formed by six code types of working activities under J. Holland (RIASEC).

c) Questionnaires Focused on Identification of More General Personality Characteristics

- **NEO Five Factor Personality Inventory (NEO FFI) and NEO Personality Inventory (NEO-PI-R)** – questionnaires based on five-factor model of personality, providing data about the so called Big Five, i.e. five general and widely conceived personality dimensions, which are Neuroticism, Extraversion, Openness to Experience, Agreeableness and Conscientiousness.
- **Eysenck Questionnaires** stem from personality theory, which describes structure of temperament via three dimensions anticipated to be independent on each other (extraversion, neuroticism and psychoticism, or possibly obstinacy). The Eysenck Personality Questionnaire (EOD) enables monitoring of two independent dimensions – extraversion (versus introversion) and neuroticism (emotional lability versus stability), and also an L scale or the social desirability scale (tendency to appear in better light). The Eysenck Revised Questionnaire (EPQ-R) works with all three dimensions and its results are interpreted on six scales (extraversion versus introversion, obstinacy versus superegocontrol, emotional lability versus emotional stability, high versus low L, high versus low addictiveness and high versus low tendency to criminality).

d) Projective Methods

- **Unfinished Sentences** – verbal associative technique with a number of variances; in *bilan de compétences* is most often used the Sacks and Levy

version (60 unfinished sentences, which may be in assessment divided into 15 areas, e.g. relation to family, authorities, own past, future, abilities etc.)

- **Baum Test** (*drawing a tree test*) is one of the most often used drawing projective techniques; drawing of a fruit tree may e.g. predicate emotional maturity, disturbances in emotional or social area, and other various characteristics of personality dynamics. The test evaluates a number of attributes of the whole drawing as well as details.
- **Lüscher Colour Test** works with preferences and rejection of certain colours presented to the client. It is usually used as a complementary technique, may provide a picture more of actual psychic or psychosomatic state or of emotional tune of the client.

e) Product Analysis

Product is any construction, produced intentionally or originating unintentionally. The test usually analyses CVs, dream records, handwriting in general, literary or visual art, automatic “scrabbling” produced by people e.g. in meetings, diaries, letters and other products if relevant from the view of the objective of performed *bilan de compétences* (with respect to the client's assignment). As in case of monitoring or diagnostic interview this method is qualitative; for facilitating of recording and structuring data it is recommended to prepare specific recordings sheets.

8.4.4 Documentation management

Management of documentation about the clients is an integral part of *bilan de compétences* and its quality mirrors the level of proficiency and forms a business card of every qualified expert. This documentation comprises data about the clients protected under the Act No. 101/2000 Coll., on Personal Data Protection, which must be complied with. Personal data are processed in both documentary and electronic form in the extent necessary for performance of *bilan de compétences* and preparation of the Final Report.

The documentation contains namely:

- Declaration of the client that his/her current psychic state enables participating in *bilan de compétences* (see Annex No. 2 in chapter No. 8.7.2);
- Consent to archiving of personal data signed by the client, including providing the term of archiving of such data (see Annex No. 2 in chapter No. 8.7.2);
- All necessary findings about the client acquired during performance of *bilan de compétences*, including findings acquired via diagnostic methods;
- In case of preparation of Summary of Final Report, also a copy of this summary signed by the client confirming consent with the summary content and consent with delivering the summary to the ordering party.

Next to the Act mentioned above the counsellor in managing documentation about the clients shall comply with the Ethical Code of the Association for *bilan de compétences*. The counsellor shall keep all documents about the clients safely stored and protected from misuse by third parties but only for the duration of consent of each individual client with archiving his/her personal data. Following expiration of this term the counsellor shall discard all documents about the client.

8.5 Quality in providing bilan de compétences

Performance of *bilan de compétences* requires compliance with the basic documents of the Czech Association for *bilan de compétences*, which are this Methodology, the Quality Chart and the Ethical Code.

Quality of *bilan de compétences* is affected by factors in the input, during the process and in the output:

- In the input:
 - The counsellor shall comply with the qualification requirements (see Chapter 7.4.1);
 - Performance of *bilan de compétences* requires dignified consultation premises complying with the hygienic and fire prevention regulations and ensure information safety (see Chapter 7.4.2);
 - The counsellor shall have the prescribed and other diagnostic equipment for performance of *bilan de compétences* (see Chapter 7.4.3).
- Performance of *bilan de compétences* must comply with the methodology (see Chapter 7.3.1-7.3.4).
- Outcomes from *bilan de compétences* must comply with the methodology (see Chapter 7.3.5).

Quality criteria and standards to be complied with by the counsellor of *bilan de compétences* are specified in Annex No. 6. In case the counsellor meets these requirements, he/she also fulfils the **criteria for regular membership** in Association for *bilan de compétences*, o. s.

The Association for *bilan de compétences* cannot affect the quality of *bilan de compétences* provided by **other subjects**; however, the Association may prepare an expert opinion on the provider and his/her performed services at request and for consideration in accordance with the current Association price list.

8.5.1 Feedback from clients

Acquiring feedback from the clients forms a part of the quality system; the counsellor performs it. This measure is for the benefit of all parties involved (counsellor, client

and ordering party). This prevents, to a certain level, possible complaints of the clients / ordering parties. For this purpose we use unified feedback questionnaire (see Annex No. 5 in chapter No. 8.7.5), which enables comparison of results and increases validity of findings focused on mapping the clients' of *bilan de compétences* needs in general and needs of specific groups of clients. The feedback is ascertained from all clients following undertaking *bilan de compétences*.

8.5.2 Feedback from ordering party

Ascertaining feedback from the ordering parties is also very important. We usually do not use the form of a feedback questionnaire but a personal contact.

8.6 2.6 Rules for Receiving and Settlement of Complaints, Notices and Submissions

The Council of the Association for *bilan de compétences* settles the complaints under the Rules set by this Association. A complaint may be filed:

- In writing at the delivery address of Association for *bilan de compétences*, o. s.;
- Via electronic mail to the contact e-mail address (specified at the Association website).

The Council of the Association for *bilan de compétences*, o. s. (Council) authorized one of the members of the Council (the Administrator) to settle the complaints. Data about the complaints are administered in accordance with the Act No. 101/2000 Coll., on Personal Data Protection.

The procedures for complaints settlement differ with respect to whether claimant is signed or anonymous and whether the complaint pertains a certain counsellor.

Complaints are considered to be a possible incentive for development and improvement of *bilan de compétences* quality.

8.7 Methodology annexes

8.7.1 Annex No. 1: Time allocation of individual activities in *bilan de compétences*

BenchmarK duration (in hrs.) <i>Bilan de compétences Stage</i>		Individual client ³¹		Group of clients ³²	
		min. hrs. ³³	max. hrs. ³⁴	min. hrs.	max. hrs.
1) Establishing contact and specification of assignment, commencing data collection					
	- Group meetings	-	-	2	2
	- Individual meetings	3	4	1	2
	Subtotal 1) per client	3	4	3	4
2) Data collection					
	- Group testing and meetings	-	-	4	6
	- Individual testing and meetings	6	8	2	2
	Subtotal 2) per client	6	8	6	8
3) Counselling aid					
	- Group meetings	-	-	-	-
	- Individual meetings	3	5	3	5
	Subtotal 4) per client	3	5	3	5
4) Consulting the Final Report					
	- Group meetings	-	-	-	-
	- Individual meetings	1	1	1	1
	Subtotal 6) per client	1	1	1	1
Total 1) - 4) per client		13	18	13	18
The psychologist's work per each client not entered above (preparation of scenario and diagnostic tools, information assessment, preparation of Final Report and Summary of Final Report)		6	9	6	9
Total per client		19	27	19	27
Of the above for group work		-	-	7	10

³¹ **Individual client** = means an individual assignment for *bilan de compétences* for only one client.

³² **Group of clients** = means an assignment for performance of *bilan de compétences* for several clients together.

³³ **Min. hrs.** = duration in case of highly motivated client who knows what he/she wants and only needs to confirm his/her plans.

³⁴ **Max. hrs.** = duration in case of a client unemployed for a long time or otherwise complicated.

CLIENT'S DECLARATION AND CONSENT PRIOR TO PERFORMANCE OF *bilan de compétences*

Residing at:

Ordering Party:³⁶

- Physically or mentally exhausted;
- Under influence of alcohol or medicine;
- Extraordinarily disturbed.

in (year):

In Dated Signature

³⁶ Name of the institution ordering *bilan de compétences* for the client.

8.7.3 Annex No. 3: Recommended Structure of Final Report³⁷

FINAL REPORT FROM *bilan de compétences*

The report is intended solely for the client.

***Bilan de compétences* Client**

Name, Surname, Title:

Date of Birth:

Residing at:

***Bilan de compétences* PROVIDER**

Name, Surname, Title of the Counsellor:³⁸

Ordering Party:³⁹

PERFORMANCE OF *bilan de compétences*

Date of Commencement and Termination:

Place:

Assignment of the Ordering Party and Assignment of the Client
Current Situation of the Client:
Personal and Family History of the Client:
Education (Formal and Informally Acquired) and Existing Work Career of the Client:

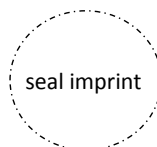
³⁷ This form is intended to be processed electronically, and the person processing the content shall optimize the extent of individual parts (rows in the MS Word table).

³⁸ Psychologist performing *bilan de compétences* with the client (provider of BC).

³⁹ Name of the institution ordering *bilan de compétences* for the client.

Health State of the Client:
Objective Findings:
Conclusions and Recommendations for the Client:

Name and surname of counsellor, signature
Date



Delivery of Final Report from *bilan de compétences*

This Final Report was consulted with me, I agree with the conclusions and recommendations hereof and I confirm delivery hereof.

Name and surname of client, signature
Date

8.7.4 Annex No. 4: Recommended Structure of Summary of Final Report⁴⁰

SUMMARY OF FINAL REPORT FROM *bilan de compétences*

The summary is intended for the ordering party.

***Bilan de compétences* Client**

Name, Surname, Title:

Date of Birth:

Residing at:

***Bilan de compétences* PROVIDER**

Name, Surname, Title of the Counsellor:⁴¹

Ordering Party:⁴²

PERFORMANCE OF *bilan de compétences*

Date of Commencement and Termination:

Place:

Assignment:

Current Situation of the Client:

⁴⁰ This form is intended to be processed electronically, and the person processing the content shall optimize the extent of individual parts (rows in the MS Word table).

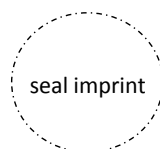
⁴¹ Psychologist performing *bilan de compétences* with the client (provider of BC).

⁴² Name of the institution ordering *bilan de compétences* for the client.

Education, Experience and Main Competence of the Client:
Conclusions and Recommendations for the Client:
Recommendations for the Ordering Party:

Name and surname of counsellor, signature

Date



Consent with Delivery of Summary of Final Report from *bilan de compétences* to Ordering Party

I was acquainted with the Summary of Final Report and I consent to delivery of the summary to the party ordering the *bilan de compétences*.

Name and surname of the client, signature

Date

8.7.5 Annex No. 5: Assessment questionnaire following completion of *bilan de compétences*

ASSESSMENT QUESTIONNAIRE FOLLOWING COMPLETION OF *bilan de compétences*

1) How do you assess the contribution of *bilan de compétences* for...

Please, mark a number on the 1-5 scale.

	high contribution			any contribution	
a) Your employment	1	2	3	4	5
b) Your motivation to work/study	1	2	3	4	5
c) Your self-esteem	1	2	3	4	5
d) Your personal life	1	2	3	4	5

Here you may provide reasons or details for your answer:

.....

2) In each of the following items please state the level of your contentment (by circling a number corresponding to your assessment). On the right side you may add comments.

1	2	3	4	5
<i>Completely content</i>	<i>Quite content</i>	<i>Half content</i>	<i>More discontent</i>	<i>Completely discontent</i>

Assessed Issues	Contentment Assessment	Comments
1) Work of the counsellor:		
Relationship with counsellor	1 - 2 - 3 - 4 - 5	
Understanding your needs (reasons for undertaking BC) by the counsellor	1 - 2 - 3 - 4 - 5	
Approach of the counsellor in individual meetings	1 - 2 - 3 - 4 - 5	
Approach of counsellor in group meetings	1 - 2 - 3 - 4 - 5	
Overall contentment	1 - 2 - 3 - 4 - 5	

Assessed Issues	Contentment Assessment	Comments
2) The course of individual stages of <i>bilan de compétences</i>		
Course of individual interviews with counsellor	1 - 2 - 3 - 4 - 5	
Course of group work	1 - 2 - 3 - 4 - 5	
Course of work with questionnaires and tests	1 - 2 - 3 - 4 - 5	
3) Usability and understandability of outcomes:		
Final Report:		
- Usability	1 - 2 - 3 - 4 - 5	
- Understandability	1 - 2 - 3 - 4 - 5	
Recommendations:		
- Usability	1 - 2 - 3 - 4 - 5	
- Understandability	1 - 2 - 3 - 4 - 5	
4) Premises where the <i>bilan de compétences</i> was performed:		
Premises quality	1 - 2 - 3 - 4 - 5	
5) Information you learnt about yourself during <i>bilan de compétences</i>:		
What I learnt about myself.	1 - 2 - 3 - 4 - 5	

3) Here you may provide further comments, assessment, notes or proposals for improving our work:

.....

.....

.....

.....

.....

.....

Thank you for completing.

8.7.6 Annex No. 6: Quality Criteria and Standards of bilan de compétences Counsellor

1)	Expert knowledge, skills and experience of the counsellor	
	Quality Criteria	Quality Standard
a)	Achieved qualification	- The counsellor has corresponding university degree. (See Chapter 4.1)
b)	Three years of experience	- The counsellor may provide evidence of at least three years of experience in psychological diagnostics and counselling.
c)	Theoretical grounds	<ul style="list-style-type: none"> - The counsellor successfully passed the entrance course for new performers of <i>bilan de compétences</i> or demonstrated corresponding knowledge and competence passing an oral exam. - The counsellor knows the basic legislation related to the area of employment and education.
d)	Practical professional skills	<ul style="list-style-type: none"> - The counsellor undertook trainings in work with the diagnostic tools generally used for <i>bilan de compétences</i>. - The counsellor undertook a training course for processing Final Reports from <i>bilan de compétences</i>.
e)	Further professional development	- The counsellor monitors news in his/her field, participates in professional events and further education, in accordance with the current development continuously innovates his/her professional competence.
f)	Information background	<ul style="list-style-type: none"> - The counsellor knows new diagnostic and intervention methods and possibilities of their use in <i>bilan de compétences</i>. - The counsellor knows providers of other expert services to be contacted or recommended to clients if necessary. - The counsellor knows the overall situation and development of the labour market. - The counsellor knows specifics of the labour

		market in regions where is <i>bilan de compétences</i> performed or he/she is able to acquire sources of information on regional specialties of the labour market.
g)	Ethic principles	<ul style="list-style-type: none"> - The counsellor knows the basic ethic principles and adheres to the Ethical Code. - The counsellor can describe the basis of work with confidential and sensitive personal data, including the legislative framework.

2) Counselling process in <i>bilan de compétences</i>		
	Quality Criteria	Quality Standard
a)	Using psycho-diagnostic methods	<ul style="list-style-type: none"> - The counsellor can administer, assess and interpret results of diagnostic tools suitable for <i>bilan de compétences</i>. - The counsellor can provide selection of psycho-diagnostic methods with respect to the client's assignment. - The counsellor can evidence legal acquisition of diagnostic tools. He/she owns the SPARO test from the DIAROS diagnostic battery.
b)	Work with information on the client	<ul style="list-style-type: none"> - The counsellor can assort and analyse information acquired from the client and information on the client acquired via psycho-diagnostic methods. - The counsellor can interpret acquired information in mutual relations and with respect to the client's assignment. - The counsellor can lead the client to reflexion of identified connections.
c)	Group counselling	<ul style="list-style-type: none"> - The counsellor mastered specific skills for work with a group of clients.
d)	Work with information on the labour market	<ul style="list-style-type: none"> - The counsellor can assess information on the labour market with respect to possibilities of individual clients. - The counsellor can lead the client to independent orientation in data about offer and demand in the area of work and education.

3) Documentation management and identifying effects of own work		
	Quality Criteria	Quality Standard
a)	Documentation management	- The counsellor manages the documentation in accordance with the <i>bilan de compétences</i> methodology.
b)	Final Report and Summary of Final Report	- In preparation of the Final Report intended for the client and the Summary of Final Report intended for the ordering party the counsellor proceeds in accordance with the <i>bilan de compétences</i> methodology.
c)	Contentment of clients	- The counsellor ascertains contentment with the process and results of all clients following completion of <i>de compétences</i> .
d)	Contentment of ordering parties	- The counsellor communicates with the ordering parties about their opinion on the quality of the provided services of <i>bilan de compétences</i> .

9 WHY DIAROS?

Jiří Král

In performance of the *bilan de compétences* Project under the Human Resources and Employment Operational Programme we often discussed in workshops and seminars the issue of methods, namely the declared mandatory use of the DIAROS system. We will try to answer this question and provide reasons for this measure.

We have three main reasons for using the DIAROS system. They all are of the same importance.

9.1 Database system

Methods contained in the DIAROS system are supported by a database system enabling a very sophisticated work with the “client's” records. It enables to create groups in accordance with all monitored characters and code the data into six-figured groups defining the client's occupation. It also enables to create so-called ad hoc groups – i.e. according to any criteria, which the group may on the opposite help define in the conceptual apparatus. The system provides a possibility to test a “group” statistically against the “general public”, two “groups” against each other, calculate analysis or variations. It enables to process a correlation analysis of scales of selected tests.

In the counselling area we may examine e.g. topological differences of professional groups, typical profiles for process management etc.

9.2 DIAROS system

It was used as a mandatory method already in the first period of performance of *bilan de compétences*, when the BC was performed mainly for MLSA (LO). In this period we created a functional system of process management and *bilan de compétences* quality.

Today we have available data of approx. 8,000 individual *bilan de compétences*. These data may be used for assessment of changes and further development of *bilan de compétences*. Continuing use of the DIAROS system is therefore in the interest of the *bilan de compétences* system.

9.3 DIAROS system construction

We consider *bilan de compétences* a paramount method of counselling work. Abroad, it is usually denoted as “skills audit”. “Competence” in the most general meaning of the word is an ability (or skill) to perform a certain activity, but there also exist a number of descriptive systems of competences. What is for us – as we understood

and still understand *bilan de compétences* – important is the question on what base is “competence” developed? The answer is easy – based on basal regulation of psychics. So in studying “competences” we get to a lower (in the meaning of basic) level for creating “competences”. Besides, DIAROS focuses problematic personality structures, personal sources of success and failure in work and personal connections, sources and results of unemployment.

In relation to infiltrating the structure and dynamics of “problematic personality” from the view of its abilities and reality of its placement in active working process we take up the acquired results with specific orientation on conflict between requirements to actively participate in the working process and personality potential to manage them efficiently. Therefore it is a specific approach to the “working process and its performer” relationship.

The approach of the psychologist is important. He/she is not oriented to causes and sources of complicated employment on the labour market or sources and causes why a certain individual cannot find work or was discharged in the first place, but only to one aspect and source: the relationship between the personality potential, characteristics and abilities, and success or failure on the labour market, in order to detect problematic individuals, personality sources, results, possibilities and ways for optimizing interventions and information measures, mediating and namely counselling and requalification nature (Mikšík, 2005).

PART IV: PROPOSED SCHEME OF PROFESSIONAL TRAINING IN BILAN DE COMPÉTENCE IN THE CZECH REPUBLIC

10 CONCEPT OF PROFESSIONAL TRAINING IN BILAN DE COMPÉTENCES

Josef Opočenský

Jiří Král

10.1 Introduction

When drafting any system and bringing it to life its authors always have in mind its practical operation as perfect as possible. Despite this, even the best of systems may be applied in practice by a not-the-most-suitable method because it is subject to many external factors, e.g. economic possibilities, time consumption but mainly human factor.

Therefore the authors of this concept approach the whole issue knowing that should the system of counselling services operate in practice optimally, the human factor must be actively influenced. This may be very conveniently applied via education activities for all individuals participating in the system.

If the issue is establishment of a system for counselling activities work, especially for *bilan de compétences*, the concept of education in this area must comprise not only education of employees implementing *bilan de compétences* but also those, who select clients for the *bilan de compétences* programs and even those, who use the results from *bilan de compétences* and work with the clients in subsequent counselling programs. This means career counsellors in all areas of their competence.

We must emphasize that **education is not only acquiring new findings but it is also a tool for system management.**

10.2 Draft of professional training of practitioners acting within domain of the Czech Association for bilan de compétences

In order to fulfil the current requirements for the training system we started from a well-tested philosophy

“MODULAR OPEN CONCEPT IN THREE LEVELS”

What does it mean?

OPENNESS consists of setting the concept so that it is prepared and able to amend the education system by new findings and new needs, possibly arising during the development and operation of the system. These may be not only new methods, but also new findings of marginal fields of knowledge, new needs arising from the society

development, necessity to resolve partial specific problems of particular groups of clients etc. Openness is also manifested in anticipated possibility to purchase services (e.g. lecturers) outside the Association for *bilan de compétences*.

MODULAR means that the whole system is based on individual modules prepared for specific target groups and particular issues, but the modules are not connected with each other by any mandatory link-up. Each module is an independent unit. Individual modules may be assembled according to the clients' needs into a particular course or another education activity. The Association for *bilan de compétences* also expects a possibility to perform individual modules specifically developed for education of counselling employees, namely with respect to career counselling. A combination of individual modules enables to create integrated education activities according to the needs of the ordering party.

TRIPLE LEVEL is defined by both focus of individual modules and depth of discussed issues. This also defines the target group to a certain level.

1) BASIC Level – is intended for individuals newly entering the Association for *bilan de compétences* but it is also open for persons (non-members of the Association) interested. For career counsellors in all areas of counselling services, employees in HR departments and employment agencies, school counsellors etc.

This level comprises e.g. the following:

- Basic introduction to the *bilan de compétences* system;
- Introduction to selection of suitable clients;
- Introduction to subsequent counselling activities used by persons who undertook *bilan de compétences*;
- Information about the methods of working with the Final Report from *bilan de compétences*;
- Theoretical basis for counselling;
- Issue of methodology.

2) SPECIALIZATION Level – is intended namely for increasing level of proficiency of regular members of the Association, i.e. providers of *bilan de compétences*, but the modules in this part of the education system may be also open for specialists – career counsellors working outside the Association for *bilan de compétences*, counsellors at the Labour Office, school counsellors etc.

It includes e.g. the following issues:

- Information on the labour market;
- Preparation of Final Reports;
- Management of interviews with various types of clients;
- Training for work with new diagnostic and counselling methods;

- Work with the method of the DIAROS battery (database support);
- Interpretation of psycho-diagnostic methods;
- Foreign experiences.

3) Level – UPGRADE EDUCATION ACTIVITIES – serve for securing experience exchange and development of the system, unification of activities within the Association for *bilan de compétences* namely by organizing:

- Case study seminars;
- Workshops;
- Conferences;
- Education of specialists for development of the system;
- Ensuring supervision.

Individual modules may be combined as needed or requested by the participants or ordering parties. All levels of the education system are penetrable according to current conditions and needs of individual target groups. For illustration see figure No. 2.

10.3 Forms of training

In drafting system of education of employees in *bilan de compétences* we may consider several possible education methods:

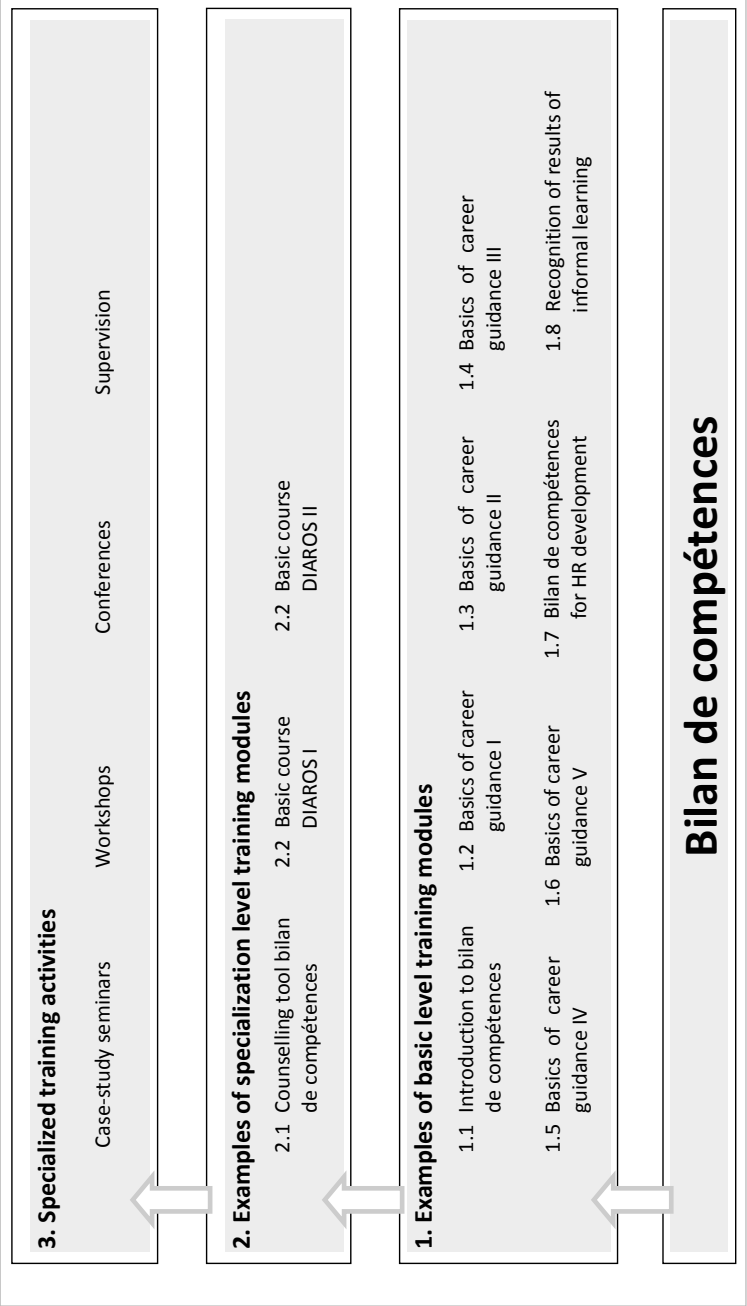
- **training oriented** – attended in person, based on interactive methods,
- **conference and seminary** – attended in person, based namely on acquiring new findings and knowledge,
- **e-learning**,
- **combined**.

The education forms will be applied according to the content of individual education events, but in the beginnings of operation of the education concept we expect namely implementation of forms of education events attended by the participants in person from several reasons:

- Mutual meeting of the participants in the system;
- More detailed discussion about problematic stages and parts of the system, its improvements;
- Possibility to share personal experience;
- Unification of system functions.

Subsequently we may easily transfer to other education forms.

Figure No. 2: Graphic draft concept of professional training in the *bilan de compétences*



10.4 Descriptions of selected training modules

Josef Opočenský

Jiří Král

Ivana Slavíková

Zuzana Freibergová

10.4.1 Basic Level

The modules of the basic level provide a basic overview of *bilan de compétences* and counselling. Undertaking them provides a basis but not the expert knowledge and skills required for performance of *bilan de compétences*. These are only acquired in the specialization level.

The basic pre-requisite for entering the education modules of the basic level is motivation of the participant to increase his/her expertise.

The themes in modules 1 and 7 are focused on *bilan de compétences*. Modules 2–6 introduce the basics of counselling which form an integral part of *bilan de compétences*. Module 8 provides basic information on objectives, methods and procedures for recognition of informal education, which should be known by the counsellors.

10.4.1.1 Introduction to *bilan de compétences*

a) Target Groups

- Associated members of the Association for *bilan de compétences* (hereinafter the ABDg) wishing to become regular members of the ABDg.
- Career and occupation counsellors who:
 - o Select the clients for *bilan de compétences*;
 - o Use its outcomes in their counselling work with the client (during the first choice, change of occupation, change of employer).
- Employees in HR departments selecting their employees for *bilan de compétences* and use its outcomes in their work.

b) Reasons Leading to Undertaking the Module

In order to increase effectiveness of selection of the clients for *bilan de compétences*, further use of outcomes from *bilan de compétences* and drafting the following counselling processes, it is necessary to introduce the target group with the basic principles, methods and procedures in *bilan de compétences*, differences from other career and occupation counselling methods and the manner of using the outcomes from *bilan de compétences*.

c) Education Objectives of the Module

Introducing the target group with the *bilan de compétences* counselling method, possibilities to use it for the benefit of the client and the overall logic of the *bilan de compétences* counselling service.

d) Subject Areas of Education

- Definition of *bilan de compétences*;
- Theoretical and methodology outcomes of *bilan de compétences*;
- Relation and differences between *bilan de compétences* and psychology of work;
- Methodology of *bilan de compétences*, Quality Chart and Ethical Code of the *bilan de compétences* provider;
- Development of *bilan de compétences* in the Czech Republic and its application in career counselling, employment services and enterprises;
- *Bilan de compétences* practice abroad;
- ABDg and advantages of using the services of its regular members in providing *bilan de compétences*;
- Taxonomy of suitability of clients for *bilan de compétences*;
- Procedure of work with the client in *bilan de compétences* and time parameters;
- Outcomes from *bilan de compétences* and how to work with them;
- Methods for ascertaining feedback on quality of the provided *bilan de compétences* from the clients. Procedure for managing complaints, notices and submissions.

e) Duration of the Module

The course is planned for 16 lessons. This time dotation may be modified according to specific needs of the target group in the extent of 8 to 24 lessons.

f) Education Forms and Methods

The course shall primarily use motivating and activating participative methods focused on the self-experience base, accompanied by classic lecture, demonstration and practical training.

g) Lectured By

Regular members of ABDg having experience in the area of implementation and management of the *bilan de compétences* counselling system.

h) Expert Guarantor of the Module

PhDr. Josef Opočenský

10.4.1.2 Basic Counselling I (Introduction)

a) Target Groups

- Psychologists commencing performance of counselling practice.
- Career and occupation counsellors from all areas of activity (Labour Office, schools, public clinic, employment agencies etc.), who need to acquire a basic overview of the counselling issue and process.
- Employees of HR agencies interested in counselling in order to improve the quality of their own services on the labour market.

b) Reasons Leading to Undertaking the Module

The issue of selection and change of employment is today one of the very fast growing fields in counselling. This branch is very frequent among schools, in the Labour Office activities, in employment agencies, public clinics etc. These activities often involve teachers, lay counsellors and professionals from other areas who lack the basic overview of counselling and the counselling process.

c) Education Objectives of the Module

The education objective is introducing to the participants the issue of counselling as a branch, to present the objectives and stages of the counselling process and other basic information.

d) Subject Areas of Education

- Definition of counselling as a branch, including differential definition; the position of counselling in the academic branches system;
- Objectives, principles and stages of the counselling process, its preparation and planning;
- The ordering party's and the client's assignment and specification thereof;
- Overview of methods and tools of counselling work;
- Typology of clients and different approaches to dealing with the client;
- Requirements for the counsellor's personality;
- Overview of content of the following modules of the basic and specialization levels.

e) Duration of the Module

The expected duration of the module is 8 lessons; this extent may be modified according to specific requirements of the target group.

f) Education Forms and Methods

The course shall primarily use motivating and activating participative methods accompanied by classic lecture, demonstration and practical training.

g) Lectured By

Regular members of ABDg having long-term experience in the area of counselling.

h) Expert Guarantor of the Module

PhDr. Rudolf Roub

10.4.1.3 Basic Counselling II (Theoretical Base)**a) Target Group**

- Psychologists commencing performance of counselling practice.
- Career and occupation counsellors from all areas of activity (Labour Office, schools, public clinic, employment agencies etc.) interested in theoretical base of counselling.
- Employees in HR agencies interested in theoretical base of counselling.

b) Reasons Leading to Undertaking the Module

Education needs are the same as in the Basic Counselling I (Introduction) module with one difference – the module is suitable for representatives of target groups who lack the theoretical basis of the field.

c) Education Objectives of the Module

The objective is introducing to the participants the selected theoretical findings from the area of personality psychology and psychotherapy.

d) Subject Areas of Education

- Overview of selected theories in personality psychology.
- Overview of main psycho-therapeutic systems used in the area of counselling and in approach to the client.
- Critical assessment of theories and systems and their usability in the counselling process.

e) Duration of the Module

The expected duration of the module is 8 lessons; this extent may be modified according to specific requirements of the target group.

f) Education Forms and Methods

The course shall primarily use motivating and activating participative methods accompanied by classic lecture, discussion, demonstration and practical training.

g) Lectured By

Regular members of ABDg having long-term experience in the area of counselling and other experts from the area of counselling.

h) Expert Guarantor of the Module

PhDr. Ivana Slavíková

10.4.1.4 Basic Counselling III (Client's Personality)

a) Target Groups

- Career and occupation counsellors from all areas of activity (Labour Office, schools, public clinic, employment agencies etc.) wishing to deepen their knowledge of theories on client's personality.
- Employees in HR agencies wishing to deepen their knowledge of theories on client's personality.

b) Reasons Leading to Undertaking the Module

Education needs are the same as in the Basic Counselling I (Introduction) module with one difference – the module is suitable for representatives of target groups who lack knowledge of theories on the client's personality.

c) Education Objectives of the Module

The main objective is introducing to the participants lacking deeper education in psychology the basics of personality psychology and to provide them with basis for understanding the behaviour of the clients to whom they provide their services.

d) Subject Areas of Education

- Basic personality elements (abilities, skills, interests, emotions, temperament, motivation, will, behaviour) and their dynamics.
- Main personality theories in the counselling process.

e) Duration of the Module

The expected duration of the module is 8 lessons; this extent may be modified according to specific requirements of the target group.

f) Education Forms and Methods

The course shall primarily use motivating and activating participative methods accompanied by classic lecture, discussion, demonstration and practical training.

g) Lectured By

Regular members of ABDg having long-term experience in the area of counselling and other experts from the area of counselling.

h) Expert Guarantor of the Module

PhDr. Ivana Slavíková

10.4.1.5 Basic Counselling IV (Career Counselling)

a) Target Groups

- Psychologists commencing performance of counselling practice.
- Career and occupation counsellors from all areas of activity (Labour Office, schools, public clinic, employment agencies etc.) interested in deepening

their theoretical knowledge and practical skills in the career counselling area.

- Employees in HR agencies interested in deepening their theoretical knowledge and practical skills in the career counselling area.

b) Reasons Leading to Undertaking the Module

Education needs are the same as in the Basic Counselling I (Introduction) module with one difference – the module is suitable for representatives of target groups who lack the theoretical base for providing career counselling.

c) Education Objectives of the Module

Introducing to the attendees the basic findings in the career counselling theory.

d) Subject Areas of Education

- Historic overview of origin and development of career counselling in the Czech Republic.
- Development theory of F. Parsons and D. Super, Holland's theory of interests and occupation, socio-dynamic theory of Vance Peavy, their critical assessment and usability in counselling.
- Using tests in the career counselling area, their interpretation, problems and mistakes in using them.
- The most often mistakes in the approach of the counsellor to the client and dangers arising from these mistakes, negatively affecting the result of the counselling process.

e) Duration of the Module

The expected duration of the module is 8 lessons; this extent may be modified according to specific requirements of the target group (number of participants and technical equipment).

f) Education Forms and Methods

The course shall primarily use motivating and activating participative methods accompanied by classic lecture, discussion, demonstration and practical training.

g) Lectured By

Regular members of ABDg having long-term experience in the area of counselling and other experts from the area of counselling.

h) Expert Guarantor of the Module

PhDr. Jiří Král

10.4.1.6 Basic Counselling V (Methodology for Work with Client Data)

a) Target Groups

- Psychologists commencing performance of counselling practice.

- Career and occupation counsellors from all areas of activity (Labour Office, schools, public clinic, employment agencies etc.) interested in deepening their theoretical knowledge and practical skills in work with the client's data.
- Employees in HR agencies interested in deepening their theoretical knowledge and practical skills in work with the client's data.

b) Reasons Leading to Undertaking the Module

Education needs are the same as in the Basic Counselling I (Introduction) module with one difference – the module is suitable for representatives of target groups who lack the theoretical base for providing career counselling.

c) Education Objectives of the Module

The main objective of the module is introducing to the target group the methodology problems in acquisition, assessment and correct interpretation of results from psychological and pedagogic tests and other client's data.

d) Subject Areas of Education

- Forms and methods of data acquisition, their generalization, transversal and longitudinal research.
- Construction of tests and questionnaires and preparation of standards.
- Basics of statistical methods for data assessment and descriptive characteristics (selection, modus, median, standard deviation, distribution, gross and weighted scores etc.).
- Principles for creation and testing assumptions.
- Issues of test data interpretation.

e) Duration of the Module

The expected duration of the module is 8 lessons; this extent may be modified according to specific requirements of the target group (number of participants and technical equipment).

f) Education Forms and Methods

The course shall primarily use motivating and activating participative methods accompanied by classic lecture, discussion, demonstration and practical training.

g) Lectured By

Regular members of ABDg having long-term experience in the area of counselling and other experts from the area of counselling.

h) Expert Guarantor of the Module

PhDr. Ivana Slavíková

10.4.1.7 Bilan de compétences for HR Practice

a) Target Groups

- Psychologists commencing performance of counselling practice.
- Providers of *bilan de compétences* without experience of application of *bilan de compétences* in HR management.
- Career and occupation counsellors providing their services in HR management.
- Employees in HR agencies interested in using *bilan de compétences* in HR management.
- Employees of HR departments interested in increasing efficiency of HR management activities.

b) Reasons Leading to Undertaking the Module

A rather extensive experience of *bilan de compétences* providers illustrates beneficial effect of *bilan de compétences* applied by economic subjects in HR management, namely in selection, recruitment, training, distribution and relocation, assessment and motivation of employees. These are the main HR management activities necessarily performed by every enterprise (economic subject) wishing to be successful on the market and to succeed in the competition. It is absolutely irrelevant how large the subject is. Within the HR management activities structure the *bilan de compétences* may considerably aid to recognition of individual employees, to indicate their possible development directions and also to efficient use of these employees potential for the benefit of the employer.

c) Education Objectives of the Module

The primary objective of the education activity is introducing to the participants the *bilan de compétences* counselling system and its efficient use in HR management and related activities.

d) Subject Areas of Education

- Possibilities, objectives and limits of *bilan de compétences* in HR management.
- System of organization and securing the *bilan de compétences* service.
- *Bilan de compétences* in HR management activities.
- Introduction of foreign and local experience in using *bilan de compétences*.

e) Duration

The expected duration of the module is 8 lessons; this extent may be modified according to specific requirements of the target group (number of participants and technical equipment).

f) Education Forms and Methods

The course shall primarily use motivating and activating participative methods accompanied by classic lecture, demonstration and practical training.

g) Lectured By

Regular members of ABDg having long-term experience of working with the above methods of *bilan de compétences*.

h) Expert Guarantor of the Module

PhDr. Jiří Král

10.4.1.8 Recognition of Results of Informal Education and Related Tools**a) Target Groups**

Experts without the knowledge of recognition of results of informal education methods from the following groups:

- Providers of *bilan de compétences*.
- Career and occupation counsellors.
- Psychologists commencing performance of counselling practice.
- Employees in HR agencies.
- Employees of HR departments.

b) Reasons Leading to Undertaking the Module

The providers of the “*bilan de compétences*” counselling service, career and occupation counsellors, perform consultancy work with the clients also with respect to identification of possibilities to increase the client's employability via change of occupation, addition of knowledge and skills, increasing or acquiring new qualification. In order to manage this issue it is necessary to know the process of recognition of results of informal education governed by the Act No. 179/206 Coll. on Verification and Recognition of Results of Further Education (<http://www.msmt.cz/vzdelavani/dalsi-vzdelavani/overovani-a-uznavani-vysledku-dalsiho-vzdelavani>), possibilities to use the information collected in the National System of Occupations (<http://www.nsp.cz/>), the National Qualifications System (<http://www.narodnikvalifikace.cz/>), tools of the type positions integrated system (Jobtip, Work Positions Catalogue, Database of Further Education – <http://www.istp.cz/>) and other suitable on-line tools, such as the integrated portal of the Ministry of Labour and Social Affairs (<http://portal.mpsv.cz/>), the portal Czech Future Skills (<http://www.budoucnostprofesi.cz/>) etc.

c) Education Objectives of the Module

The objective of the module is to deepen knowledge and skills necessary to guide the client during his/her independent searching for possibilities and opportunities to change occupation, adding knowledge and increasing or acquiring new

qualification using the process of verification and recognition of results of informal education, National System of Occupations, National Qualifications System and other on-line tools specified above.

d) Subject Areas of Education

- Introduction to the Act No. 179/2006 Coll. and its application in recognition of results of informal education, interconnection of requalification courses and this act and its anchoring in the Trade Licensing Act.
- Practical mastering of providing consultancy and guiding the client in his/her consideration how to have verified and recognized the results of further education under the Act No. 179/2006 Coll.
- Mastering the work with the National System of Occupations and National Qualifications System and their use in providing career counselling / *bilan de compétences*.
- Practical mastering of work with the above on-line tools.

e) Duration of the Module

The expected duration of the module is 8 lessons; this extent may be modified according to specific requirements of the target group (number of participants and technical equipment).

f) Education Forms and Methods

The course is a combination of lectures and practical training using computers with Internet connection, which enable the students to master the work with the above on-line databases and tools.

g) Lectured By

Members of ABDg having corresponding knowledge of the methods issue.

h) Expert Guarantor of the Module

Ing. Zuzana Freibergová

10.4.2 Specialization Level

The specialization level courses are primarily intended for members of the Association for *bilan de compétences* who feel the need to deepen their knowledge in the area of counselling, psychological diagnostics, career counselling etc. The Association for *bilan de compétences* may also offer the courses to other subjects (e.g. special counsellors of the Labour Office, employees of counselling institutions not directly involved in *bilan de compétences* but interested in understanding the *bilan de compétences* nature in order to use *bilan de compétences* in the counselling process more efficiently). These courses may be modified exactly according to the objectives of groups for which they are performed. The courses of the specialization level serve for deepening of specific knowledge and skills necessary for successful management of the *bilan de compétences* process by both the providers of *bilan de*

compétences and counsellors using *bilan de compétences* in their work with the client.

10.4.2.1 Counselling Tool *bilan de compétences*

a) Target Groups

- Regular members of Association for *bilan de compétences*.
- Associated members wishing to acquire full membership.
- Psychologists and other career counsellors from various areas interested in using *bilan de compétences* (hereinafter the BC) in their own counselling work.
- Employment officers providing special counselling at the Labour Office of the Czech Republic.

b) Reasons Leading to Undertaking the Module

The objective of the system for implementation of the “*bilan de compétences*” counselling service is a unified approach to the provided service, the clients, ordering parties, material equipment and personnel for provision of the service, including legally acquired methodology tools. All this is specified in the material “*Methodology of Bilan de Compétences*”, which states the terms and conditions, manners and methods of work but also qualification criteria for the *bilan de compétences* providers, and the method and form of outcomes from *bilan de compétences*. However, the provider of BC shall:

- Be acquainted with the intentions of the ordering party and any needs and requirements of the clients participating in the *bilan de compétences* counselling program;
- Be also acquainted with the methods for interpretation of results;
- Be acquainted with the local labour market;
- Be acquainted with the necessity of education activities of the Association for *bilan de compétences*;
- Respect specifics of the target group for which is the *bilan de compétences* performed;
- Be acquainted via feedback with other activities of the client following performance of *bilan de compétences*, i.e. also with the form of acquiring these data.

c) Education Objectives of the Module

Introducing to the participants necessary requirements (see above), coordinating procedures and approaches in performance of *bilan de compétences* respecting specifics of target group of the *bilan de compétences* participants (methodology tools, duration, outcomes from *bilan de compétences*, subsequent monitoring of the client's future etc.).

d) Subject Areas of Education

- Assignment of the ordering party and the client and ascertaining client's needs.
- Methods of interpretation of data about the client and results of the diagnostic examination.
- Regional and local labour market.
- Own professional growth of the *bilan de compétences* counsellor, innovation and maintaining knowledge and skills.
- Specifics of the target group for which is the *bilan de compétences* performed.
- Quality of *bilan de compétences*, methods and forms of acquiring feedback from the clients and ordering parties.
- Subsequent use of counselling and other methods and tools.

e) Duration of the Module

The expected duration of the course is 16 lessons; this extent may be modified according to specific requirements of the course participants in the extent of 8 to 24 hours.

f) Education Forms and Methods

The course shall use motivating participative methods focused on own experience, classic lectures, practical training, demonstration of examples, case studies.

g) Lectured By

Regular members of ABDg having experience in the area of implementation and management of “*bilan de compétences*” counselling system with practical lecturing experience.

h) Expert Guarantor of the Module

PhDr. Josef Opočenský

10.4.2.2 Basic Course DIAROS I (Program Operation)**a) Target Groups**

- Graduates with a master degree in psychology interested in active performance of *bilan de compétences*.
- Members of the Association for *bilan de compétences* (hereinafter the ABDg) meeting the conditions of regular membership in the ABDg.

b) Reasons Leading to Undertaking the Module

Performance of the “*bilan de compétences*” counselling service is specified in the material “Methodology of *Bilan de Compétences*”. This material specifies the exact terms and conditions, manners and methods of work; it further specifies qualification criteria for the *bilan de compétences* providers, method and form of

outcomes from *bilan de compétences*. One of the pre-requisites of performance of *bilan de compétences* by ABDg is mandatory use of so called backbone method, which is the SPARO questionnaire from the DIAROS diagnostic system. This system is supported by a sophisticated PC program for assessment of individual methods contained in the system and database support for further processing of source data acquired using individual methods for the benefit of development of the *bilan de compétences* methodology.

c) Education Objectives of the Module

The main objective of the education activity is to create and deepen competences necessary for work with the DIAROS methodology on the level of work with the supportive database program, entering data for individual methods, statistical processing of data, creation of specific groups of clients by their coding, and printing results. The course comprises practical training of database creation, data entering and their further processing.

d) Subject Areas of Education

- DIAROS Win. Introduction to the program, its installation and preparation for routine operation. Creating databases, using passwords.
- Method for entering clients in the database file.
- Standards of general public and referential standards.
- Use of group coding XXX XXX.
- CASE-STUDY Module: entering and editing protocols of probands, numeric and graphic presentment and print of case information, searching for protocols.
- STATISTICS 1 Module: T-Test (comparison of group with standards of general public or a specific group, comparison of two selected groups against each other), analysis of variance.
- STATISTICS 2 Module: correlation analysis of scales in selected tests.
- Practical examples of using the DIAROS system.

e) Duration of the Module

The expected duration of the course is 8 lessons; this extent may be modified according to specific requirements of the course participants up to the maximum extent of 14 lessons (depending on the number of participants and the technical equipment).

f) Education Forms and Methods

The course shall primarily use motivating and activating participative methods focused on the self-experience base, accompanied by classic lecture, demonstration and practical training.

g) Lectured By

Regular members of ABDg having long-term experience with working with the specified methods in *bilan de compétences*.

h) Expert Guarantor of the Module

PhDr. Jiří Král

10.4.2.3 Basic Course DIAROS II (Results Interpretation)**a) Target Groups**

- Members of the Association for *bilan de compétences* (hereinafter the ABDg) meeting the conditions of regular membership in the ABDg.
- Graduates with a master degree in psychology interested in active performance of *bilan de compétences*.

b) Reasons Leading to Undertaking the Module

Performance of the “*bilan de compétences*” counselling service is specified in the material “Methodology of *Bilan de Compétences*”. This material specifies the exact terms and conditions, procedures and methods of work; it further specifies qualification criteria for the *bilan de compétences* providers, and method and form of outcomes from *bilan de compétences*. One of the pre-requisites of *bilan de compétences* performance by ABDg is mandatory use of so called backbone method, which is the SPARO questionnaire from the DIAROS diagnostic system. This system is supported by a sophisticated PC program for assessment of individual methods contained in the system and database support for further processing of the source data acquired using individual methods for the benefit of development of the *bilan de compétences* methodology.

c) Education Objectives of the Module

Creation and deepening of competences necessary for work with the DIAROS methodology on the level of work with individual system methods. Basic interpretation of the 1st and 2nd degree factors.

d) Subject Areas of Education

- Tests of the DIAROS system and training in using them:
- **SPARO** (SPIDO) 2nd degree factors, use of typology, 1st degree factors, definition and use for analysis of psychic regulation of personality, reflexion in the psychology of work branch, factors interpretation.
- **BAROM** standards and their use for juvenile clients in the area of professional counselling.
- **SIPO** questionnaire of interpersonal values, definition of factors, interpretation and use for career counselling.
- **DUSIN** contentment and frustration questionnaire, concept and method of assessment, interpretation and use in career counselling.
- **SUPSO** questionnaire for subjective assessment of current psychic state, concept of evaluation of current psychic state, questionnaire construction, interpretation and use in career counselling.

e) Duration of the Module

The expected duration of the course is 8 lessons; this extent may be modified according to specific requirements of the group (number of participants and the technical equipment).

f) Education Forms and Methods

The course shall primarily use motivating and activating participative methods focused on the self-experience base, accompanied by classic lecture, demonstration and practical training.

g) Lectured By

Regular members of ABDg having long-term experience with working with the specified methods in *bilan de compétences*.

h) Expert Guarantor of the Module

PhDr. Jiří Král

11 SUPERVISION IN BILAN DE COMPÉTENCES

Jarmila Divišová

Supervision in the area of *bilan de compétences* may be considered very important; it should be perceived as a benefit, the whole process should develop to contentment of the supervised expert – the counsellor, psychologist performing *bilan de compétences*. Supervision should serve him/her to understand, calm, be more certain in work, change unsuitable schemes, find new ways to resolve problems; it should also help the supervised person to manage stress better. Supervision also supports learning as a permanent process, enables to connect theoretical knowledge with specific skills, and motivates the counsellor for further work on himself/herself.

Supervision is a service for the counsellor and all what belongs in its framework should serve for the benefit of his/her needs. In this process the supervised person and supervisor together search a mutual accord, non-hierarchic relationship, which is safe, respecting and opening new possibilities.

Supervision is one of the forms of professional preparation but it mainly is a mean for personal and professional growth. It should offer an opportunity to safely look around and find the limits of the counsellor's abilities and possibilities to aid the client. It should also help the counsellor to find solutions in hard-to-resolve cases.

Some aspects of quality supervision

- It enables the psychologists to reflect their own work;
- It teaches them to assess various methods of their professional work, to understand the clients better; better realize own reactions and response to the clients, understand dynamics of own relationship to the clients;
- It leads to finding new possibilities to resolve problems and situations, which the psychologists encounter in their work with the clients.

What can be expected from supervision

- See more alternatives, find inspiration;
- Find better solutions;
- Achieve support and encouragement (occasional caress);
- Acquire experience that everything may be discussed;
- Acquire impulses to own development;
- Receive constructive critic.

Reflexion of own work under the guidance of a qualified supervisor becomes one of the pillars of further professional growth of the psychologists.

Group supervision of psychologists performing *bilan de compétences* focused namely on their case work with the clients should be held on a regular basis. Group form could also help to develop an atmosphere supporting flexibility where the psychologist would be willing to accept new ideas and adjust to them and to changes via a shared vision.

PART V: THE CZECH ASSOCIATION FOR BILAN DE COMPÉTENCES

12 INTRODUCTION

Ivana Slavíková

One of the main objectives of the *bilan de compétences* project was creating a thematic network interconnecting the *bilan de compétences* providers and other subjects acting in the benefit of this counselling service in the Czech Republic, and preparation for integrating the national network created in similarly focused European organizations. The activities focused on achieving the first of the objectives resulted in establishing the Czech Association for *bilan de compétences*, o.s. The Association was registered by the Ministry of Foreign Affairs of the Czech Republic on 22nd April 2013 and its constituting General Assembly took place on 21st June 2013 within the scope of 3rd national seminar held as a part of the project. The Association is a non-governmental organization the main objective of which involves supporting the development and guaranteeing the quality of *bilan de compétences* services. With its establishment, conditions have been created for both, adhering to a unified standard of the services throughout the Czech Republic being based on the Methodology of *Bilan de Compétences* produced within the scope of the project, as well as for improving professionalism of *bilan de compétences* implementers and other individuals providing related counselling, information and facilitating services; for development and innovation in the field of *bilan de compétences* and, last but not least, for continuing international co-operation and exchange of experience with providers of similarly focused services abroad.

Apart from the Methodology of *Bilan de Compétences* (Chapter No. 8) and the *bilan de compétences* professional training system (Chapter No. 10), the principal documents of the Association particularly include its Articles of Incorporation, Code of Ethics and Quality Charter.

The Association website can be found at www.asociace-bilancni-dagnostiky.cz

13 CHARTER OF THE CZECH ASSOCIATION FOR BILAN DE COMPÉTENCES, O.S.

I. Name, registered office and postal address

1. **Name of Association:** **Associate bilanční diagnostic, o. s.**
Association for bilan de compétences, o.s.
In abbreviation **ABDg** (further only
"Association")
2. **Association registered office:** Trojmezí 177/51, 190 00 Praha 9
3. **Postal address:** Národní vzdělávací fond, Středisko podpory
poradenských služeb, Opletalova 25, 110 00
Praha 1
4. **Registered by:** Ministry of the Interior of the Czech Republic
On 22. 4. 2013 under No. VS/1-1/93002/13-R
IČO/VAT 01619641

II. Association status

1. Association is a voluntary, non-government, non-profit, independent organization associating members on the basis of their common interest and established in compliance with Act No. 83/1990 Coll., on Association of Citizens.
2. The Association associates consultants and other persons serving for the benefit of *bilan de compétences*⁴³ who provide psychological, pedagogical and career consultancy, including other related consulting, information and facilitation services for clients for whom the stated services are intended.
3. The Association is a legal entity operating nationwide.
4. The Association was set up for business purposes pursuant to Section 18(3), (4), (6), (7) and (8) of Act No. 568/1992 Coll., on Income Taxes, as amended. However, in compliance with the Articles of Association (see Chapter XV paragraph 2c) and when needed, the Association can also pursue consulting, expert and educational activities.

⁴³ *Bilan de compétences* is a consulting process; pursuant to Decree No. 518/2004 Coll. implementing Act No. 435/2004 Coll., on employment, it "... focuses on the complex examination of person's abilities and skills in relation to his/her future employment."

III. Association's goals

1. The Association's goal is, in particular, to guarantee the quality of *bilan de compétences* services and promote common interests of persons operating in the area of *bilan de compétences*, while respecting the sovereignty of its members and realizing the need for mutual help in the improvement of cooperation amongst members and their position in consulting services.
2. To this effect, the Association strives to:
 - a) present and promote members' common interests,
 - b) apply ethical consulting principles in the area of *bilan de compétences*,
 - c) support the development and the quality of psychological and career consultancy in the area of *bilan de compétences* and other related consulting and information services,
 - d) involve its members in regional, national and international projects,
 - e) mediate information and experience amongst members,
 - f) develop specific forms of providing consulting balance-diagnostic services in the economic sphere and managing human resources,
 - g) inform the public about consulting services in the area of *bilan de compétences*,
 - h) support and develop lifelong learning (courses, training, seminars, conferences, etc.) of *bilan de compétences* providers and other consultants.

IV. Membership

1. Only natural persons above 18 who agree to the Association's Articles of Association and goals, observe these Articles of Association and respect resolutions of the Association's bodies can become members of the Association.
2. The membership in the Association has three categories:
 - a) **Full member** may be a natural person implementing *bilan de compétences* services in the Czech Republic.
 - b) The full member:
 - i. must prove that his/her education, professional training and practice correspond to the criteria set forth in the *bilan de compétences* Implementer Qualifications Conditions,
 - ii. must commit himself/herself to unconditional observing the rules set by the *bilan de compétences* Quality Charter and the Association's Code of Conduct.
 - c) **Associated member** may be a natural person or a legal entity which has not yet fulfilled the conditions of full membership or does not strive to be the full member. The purpose of the associated membership is both the achievement of full membership and a wider professional cooperation in the accomplishment of Association's goals and missions.

- d) **Honorary member** may be a significant person that has contributed to the development of *bilan de compétences*. Any of the Association's members can submit a proposal to the Association's Council for awarding honorary membership. The Association's Council will submit the proposal to the General Assembly. Honorary members have no obligations and rights, except for those expressly awarded to them by the Articles of Association.
- 3. The admittance of members to the Association is decided on by the Association's Council on the basis of a written application.
- 4. The membership is created on the date of the member being admitted.
- 5. The membership ceases to exist:
 - a) upon member's death,
 - b) by a failure to pay the membership fee by the set date,
 - c) upon member's written resignation from membership addressed to the Association's Council,
 - d) upon cessation of the Association,
 - e) by the General Assembly expelling the member from the Association .
- 6. A membership certificate is a confirmation issued, to this effect, by the authorized member of the Association's Council, the form of which is decided by the Association's Council.
- 7. The register of applications and members is kept by the Association's President or the Council's member authorized by the President. The forms of the applications and data necessary for individual types of membership are set by the General Assembly. The member database is treated in compliance with the Personal Data Protection Act.

V. Full Members' Rights and Obligations

- 1. Members are entitled, in particular, to:
 - a) take part in the Association's activity,
 - b) elect Association's bodies,
 - c) be elected in Association's bodies,
 - d) have recourse to the Association's bodies with their proposals and complaints and ask for these bodies' standpoints .
- 2. Any member is obliged, in particular, to:
 - a) observe the Association's Articles of Association,
 - b) actively participate in the accomplishment of Association's goals,
 - c) conscientiously fulfils his/her functions in the Association's bodies,
 - d) pay the membership fees set by the General Assembly,
 - e) take care that Association's interests and reputation are not harmed,
 - f) follow the *bilan de compétences* methodology and the *bilan de compétences* Quality Charter when implementing the *bilan de compétences*,

- g) full member is also obliged to notify the Association's Council, once every 2 years, of his/her professional consulting activity as set by the General Assembly,
- h) continuously educate himself/herself in the area of applying *bilan de compétences* and career consultancy.

VI. Honorary and Associated Members' Rights and Obligations

1. Honorary and associated members have the same rights and obligations as full members, except for the obligations stipulated in Article V paragraph 2 f) and g) and the right to participate in the voting where their vote is merely consultative. If an honorary or associated member becomes member of the Association's Council, his/her vote is on a par with the vote of a full member.

VII. Association's bodies

1. The Association's bodies are:
 - a) General Assembly
 - b) Association's Council
 - c) Professional Guarantors – Heads of individual professional sections of the Association
 - d) Account Inspector
 - e) President
 - f) 1st a 2nd Deputy President
 - g) Secretary
2. The competence of the Association's individual bodies is regulated below.
3. Only members of the Association may run for the Association's bodies. The candidate's consent is necessary before the election.
4. The Association's bodies are obliged to discuss, at its earliest meeting, any members' proposals delivered to them and notify the members of the result of the discussion.

VIII. General Assembly

1. The General Assembly is the Association's highest body.
2. The General Assembly is composed of all members of the Association.
3. The General Assembly is convened by the President or the Council's member authorized by the President as needed, but at least once every two years.
4. An invitation with the proposed agenda must be received by every member 30 days before the General Assembly takes place at the latest.
5. The General Assembly will also meet if at least one third of the Association's members or the Association's Council requests it in writing, within fourteen days from the request at the latest.

6. The General Assembly, in particular:
 - a) decides on changes to the Association's Articles of Association,
 - b) approves the Association's annual report, the Association's financial statements and annual income statements,
 - c) elects or discharges members of the Association's Council,
 - d) decides on the cancellation of membership and on the change of a membership type,
 - e) decides on the cancellation of the Association,
 - f) decides on the number of members of the Association's Council,
 - g) sets membership fees.
7. The General Assembly is attended by a quorum if at least one tenth of all members are present.
8. Each member has one vote. All full members' votes are equal; honorary and associated members' votes are only consultative.
9. The General Assembly adopts decisions on the basis of the voting. A decision is adopted if a simple majority of the present members votes for it.
10. The agenda of the General Assembly must be part of the invitation to it. General Assembly is managed by the President or the member of the Association's Council authorized by the President.
11. If needed, the Association's Council may also ask members to provide their opinions on the proposals submitted to the General Assembly for approval, in writing, for example, via email or the online questionnaire. A decision is adopted if a simple majority of the full members who have expressed their opinions on the respective matter vote for it.

IX. Association's Council

1. The Association's Council is the Association's highest body in the period amongst General Assembly.
2. The specific number of members is decided by the General Assembly on the basis that the representatives of all professional sections are included. The membership in the Council is created at the General Assembly on the basis of a proposition from any member.
3. The service period of Council's members has five years. A member may be re-elected.
4. The Council elects from its members:
 - a) the President,
 - b) two Deputy Chairmen,
 - c) the Secretary,

who are the Association's statutory representatives; the President is the Association's highest representative.

5. Association's all statutory representatives are authorized to act and sign on behalf of the Association. Two statutory representatives must always sign on behalf of the Association, one of whom must be the President or the Deputy President.
6. The Council, in particular:
 - a) coordinates the Association's activity,
 - b) processes documents for decision by the General Assembly,
 - c) decides on the admittance of Association's members.
7. Only the Association's members who have not been convicted of an intentional crime and have moral and professional prerequisites for the due and responsible fulfilment of the obligations of members of the Association's Council may become members of the Council.
8. The membership in the Council ceases to exist:
 - a) upon expiration of the service period,
 - b) by the Council's decision to terminate the Council's member's service period prematurely, due to the inactivity, the lack of cooperation or the repeated absence, (both justified and unjustified) at Council's meetings.
 - c) upon member's death,
 - d) by the resignation from the service made by a written notice to the Council,
 - e) upon discharge by the General Assembly,
 - f) upon final conviction of an intentional crime.
9. If the number of Council's members falls below the limit set by the General Assembly, the Council may admit new members to complete the number of members in the Association's Council. New members of the Council must be elected, or the reduction of the number of members in the Council must be decided, at the closest General Assembly.
10. The Council meets if needed, but at least once a quarter-year. The Council may also meet through an online audio/video conference.
11. The Council assumes the competence of the General Assembly if no General Assembly attended by a quorum meets within eighteen months despite repeated, at least triple, calls for its convening.
12. The Council is attended by a quorum if at least half of its members is present.
13. Every member of the Association's Council has one vote.
14. A Council's decision is adopted if the absolute majority of the Council's present members vote for it. If the voting ends in a draw, the vote of the Association's President will decide. The minutes of a Council's meeting are signed by the President and one of the Council's members.

X. Professional Sections

1. Members of the Association can create professional sections.
2. The professional section's activity must not be contrary to the Association's activity and interests. If the Association's Council discovers such contradiction, it is entitled to decide on possible changes or the cancellation of the professional section.
3. As for their creation, existence and development of their activity, professional sections fully fall within the Association's internal organizing.
4. After a professional section is established, its members will elect its President and deputy President and set the conditions members of the professional section must observe. They will prepare an activity plan and notify the Association's Council without delay of the establishment of a professional section, its activity and members, or possibly of any other facts relating to its existence.
5. Professional sections are convened by their chairmen.
6. Any member of the Association who meets the membership conditions for the given professional section may apply for membership in the professional section.
7. The President and the deputy President of the relevant professional sections are authorized to ask the Association's Council to approve the representation of their professional section in dealings towards state bodies and other bodies and organizations.

XI. Auditor

1. The Auditor is the Association's control body. Once a year, it reviews the Association's business management and property and checks whether the property is efficiently used in compliance with the Association's budget, the decision of the Association's bodies and in compliance with the generally binding laws of the Czech Republic.
2. The Auditor submits a written report to the General Assembly. It provides the Association's President with a written report amongst General Assembly's sessions.
3. The Auditor is elected by the General Assembly.

XII. President

1. The President implements Council's decisions and, in particular, represents the Association externally, acts on its behalf, recruits Association's employees and decides on Association's common matters. The scope of President's powers is set by the Council.
2. The President convenes and manages Council's meetings.
3. The President is elected by the Association's Council.

4. The President is responsible for implementing Council's decisions, keeping the accounting and taking care of a fluent course of the Association.
5. The President prepares documents for meetings of the Association's Council or authorizes another member of the Council to do so.

XIII. Deputy President

1. The Council appoints two Deputy Chairmen from its members.
2. The 1st Deputy President represents the President of the Association at the time of the President's absence. The 2nd Deputy President is charged, in particular, with communicating with the public.
3. The Deputy Chairmen's competencies are set by the Council.

XIV. Secretary

1. The Council establishes the service of a secretary who is to ensure the Association's activity.
2. The Secretary is appointed and discharged by the Council from its members.
3. The Secretary keeps the register of members and implements certain administrative acts of the Council. Secretary's other competencies are determined by the Council.

XV. Management principles

1. The Association manages personal and real estate property.
2. The sources of the property are, in particular:
 - a) gifts and contributions from legal entities and natural persons,
 - b) revenues on the property,
 - c) income on the activities in the accomplishment of Association's goals,
 - d) membership fees,
 - e) subsidies from the budget of the state, regions and municipalities,
 - f) funds obtained from grants.
3. The obtained funds serve to cover the costs (expenses) associated with Association's activities.
4. The Association keeps the accounts in compliance with Act No.563/1991 Coll., on Accounting, as amended.
5. The responsibility for business management is vested in the Council which submits the business management report, including the financial statements drawn up by the RCD, to the General Assembly once a year.
6. The business management is implemented according to the annual budget approved by the General Assembly.

7. Members of the Association are not liable for Association's obligations with their property.
8. Results of the Association's activity and business management are disclosed in the Association's Annual Report for every calendar year, approved by the Association's Council by 30 June of the following year at the latest.

XVI. Cessation

1. The Association ceases to exist:
 - a) upon voluntary dissolution or consolidation with another association on the basis of a General Assembly's decision,
 - b) upon dissolution on the basis of a final decision of the Ministry of Interior.
2. If the Association ceases to exist by voluntary dissolution, the General Assembly will decide on the method of settling the property.

XVII. Final provisions

1. Based on a decision of the General Assembly, the Association can issue the Association's rules of organization and procedure or any other documents relating to the *bilan de compétences* and the conditions of its provision by Association's members.
2. The Association issues the annual report.
3. In compliance with the goals of its activity, the Association is entitled to have recourse to state bodies with respect to the discussed and approved petitions.

14 ETHICAL CODE OF A MEMBER OF THE CZECH ASSOCIATION FOR *BILAN DE COMPÉTENCES*

Preamble

The main task of the Code is to determine the rules for members of the *bilan de compétences* Association, to set up desirable standards and to grant the level of services they provide.

Basic principles:

1. Accountability
2. Moral and legal aspects
3. Competences
4. Confidential information
5. Client's benefits and rights
6. Professional relations
7. Using of techniques
8. Research

14.1 Accountability

- Member (implementer of *bilan de compétences*) undertakes accountability for the methodological correctness of formulated tasks, selection of psycho-diagnostic and consultancy methods and their appropriate use, analysis and elaboration of the Final Reports.
- Member strives to avoid distortion or inappropriate use of the psychological outcomes.
- Member carries out *bilan de compétences* taking into account the fact that his/her conclusions and recommendations can affect the life of his/her clients and other persons.
- Member must first clear out with all interested parties and actors what they expect from *bilan de compétences* and how they will participate in and use the psychological findings.
- Member endeavours to avoid relations, which can impair objectivity of the obtained data or raise a conflict of interests.

- Member as an individual is accountable for observing the highest standards of his/her profession.
- Member must ensure that those who work under his direct guidance observe the same standards.

14.2 Moral and legal aspects

- In his/her acting and behaviour the member accepts the existing social standards and is aware of the possible effects of his/her public behaviour.
- Member carries out *bilan de compétences* to benefit an individual and the society, in the spirit of respecting each man and woman's personality, life and health.
- Member treats the clients tactfully and with understanding and respects their privacy and intimacy.
- Member respects individuality of each person without view of his/her origin, ethnicity, race or skin colour, age, health condition, economic situation, religious or political beliefs and without view of the part the client plays in the overall society.
- Member ensures that diagnostic methods are not used by incompetent persons. He/she is also aware that copying or distribution of psycho-diagnostic tests and methods without a written consent of their issuer is a criminal offence.

14.3 Competences

- Member accurately presents his/her professional competences, education, training and practice.
- Member uses only such diagnostic and consultancy methods for which he/she has professional competences.
- Member maintains and develops his/her professional competences. He/she is aware of the limits of his/her competences and of the limitations ensuing from the psychological discipline and from psychological consultancy.
- Member recognises the need of continuous education and is open to new procedures, methods, changes in expectations and values.
- Member is aware of the fact that personal problems and conflicts can impede professional performance. Therefore he/she does not accept any work during which his/her personal problems could lead to insufficient performance or harm to the client.

- Member ensures that the final *bilan de compétences* report is accurate and not simplifying.

14.4 Confidential information

- Member's duty is to respect confidential information on each client received from the client or from persons participating in the consultancy activities during his/her psychological practice. He/she can disclose such information to third parties only with the consent of the client, with the exception of situations when nondisclosure of such information could lead to a harm to the client or other persons.
- In written or oral reports he/she provides only information relating to the aims, which were achieved by means of the provided services and he/she uses his/her best endeavour to avoid inadmissible breach of the client's privacy.
- When maintaining records and Final Reports he/she takes all measures to avoid breach of the information confidentiality.

14.5 Client's benefits and rights

- Member of the Association acts so that he/she protects the dignity and human rights of his/her clients.
- When providing consultancy services, the client has the right to security, strict confidentiality and keeping of the professional secret.
- Before initiation of each session a member must give the client clear information on the nature of the provided service, used procedures and risks ensuing from non-provision of the service.
- Conditions of *bilan de compétences*, professional competences and qualification of the member providing such service must be clear to the client from the beginning of the given service provision. Any occurring changes must be discussed with the client before initiation of *bilan de compétences*.
- *Bilan de compétences* is provided only subject to the client's written consent.
- Member is aware of his/her duties towards the client and the effects of his influence on the client. Trust and dependency of the clients shall not be misused in any way.

14.6 Professional relations

- Member acts with due care of the needs, competences and commitments of his/her colleagues within psychology and other disciplines. He/she respects the duties of his/her colleagues and institutions or organizations with which

such colleagues cooperate, takes into account tradition and practice of other professional groups and cooperates with them.

- Member does not disseminate rumours, intrigue or damage reputation of his/her colleagues.
- When a member learns about an ethical breach of another member, he/she shall notify the Board of Directors of the Association of such fact.

14.7 Using of diagnostic methods

- When using diagnostic methods a member (psychologist) endeavours to support the benefits of the client in the maximal extent. He/she supports cooperation of clients during the psychological examination by giving details of the character and purpose of the diagnostic methods used during such examination.
- He/she protects outcomes of the psychological examination against misuse. He/she respects the client's right to get familiarized with such outcomes, their interpretation, as well as with the bases for the member's conclusions and recommendations.
- Member strives to protect the tests and other diagnostic tools against misuse. He/she avoids using of diagnostic tools by unskilled persons and does not provide such persons with patronage or supervision.

14.8 Research

- When planning and preparing a research each member shall duly consider its ethical admissibility and on the grounds of such considerations and with the decision to carry out or participate in the research activities he/she executes related activities with respect and interest in the subject of such research.
- When carrying out a research a member respects and protects dignity and benefits of its participants.
- Information gained on a participant during research is confidential unless agreed otherwise in a preliminary agreement.

15 QUALITY CHARTER OF THE CZECH ASSOCIATION FOR BILAN DE COMPÉTENCES

The Quality Charter is produced in the interest of clients to whom the *bilan de compétences* is provided; contractors who outsource the *bilan de compétences* for their clients; and implementers who provide the *bilan de compétences*. Its objective is to ensure unified outcomes of the *bilan de compétences* and high level of their quality and practical usability. It includes a set of criteria adherence to which is subject to inspection by the *Czech Association for Bilan de Compétences* (hereinafter referred to as “ABDg”).

The Quality Charter is based on the Articles of Incorporation of ABDg, Methodology of *Bilan de Compétences* of ABDg and Code of Ethics of ABDg.

Each ABDg member providing *bilan de compétences* services commit to abide by the Quality Charter. At the same time, abiding by the Quality Charter is a condition for achieving regular ABDg membership.

The Quality Charter includes 5 points referring to basic areas affecting the quality of providing the *bilan de compétences*.

15.1 Bilan de compétences implementation process

- The *bilan de compétences* implementation process determined by the ABDg Methodology.
- The *bilan de compétences* is, first and only, a counselling process and service provided to a client.
- The responsibility for producing the *bilan de compétences* lies with the psychologist trained in the field of *bilan de compétences* (the *bilan de compétences* implementer) who closely co-operates with other specialists to the benefit of the client.
- The client is always the main focus of *bilan de compétences*. The *bilan de compétences* implementer's role is only advisory and supportive while the client is an active element of the *bilan de compétences*.
- The *bilan de compétences* performed must be significantly individual to each client.

15.2 Final report

- Any conclusions and the Final Report must be discussed with the client in detail during an individual interview.
- Each client must have a realistic career plan drawn, which is included in the Final Report. The clients themselves are responsible for its implementation.
- The Final Report must conform to the ABDg Methodology.
- The Final Report becomes client's property and may only be used to their benefit and with their consent.

15.3 Staffing and technical matters of bilan de compétences

- Staffing and technical matters are determined by the ABDg Methodology.
- The *bilan de compétences* implementer is fully open to their environment from which they draw the latest findings while being capable of independent presentation of their summary.
- The *bilan de compétences* Implementer endeavours to improve the quality of services provided, particularly by means of continuous education of all participants, by actively obtaining the latest findings and participation in professional events related to the *bilan de compétences*.
- For any resources, tests, methodological tools, software, etc. used, a legal way of acquisition must be demonstrable.

15.4 Ethics, handling confidential information, legislation

- The *bilan de compétences* implementer abides by the ABDg Code of Ethics.
- The *bilan de compétences* implementer is obliged to protect confidential client information.
- When performing the *bilan de compétences*, the implementer is obliged to strictly observe all legal standards and legislation of the Czech Republic.

15.5 Quality control

- The *bilan de compétences* implementer is obliged to ensure the quality of service provided and its continuous monitoring and improvement.

- To improve the process quality, the *bilan de compétences* is a subject to technical and material control that may be performed by the entity in accordance with the ABDg rules only.

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