










Skills Audit

A toolkit for voluntary, community and
social enterprise sector organisations



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What is a Skills Audit?

Introduction

Looking at the skills of staff, management committee and volunteers is an important part of organisational development. It is also something that many organisations in the Voluntary, Community and Social Enterprise (VCSE) sector feel they need support with.

This pack is designed to encourage groups to use skills audits. It will provide you with a variety of tools that you can use and adapt to the needs of your organisation or organisations you are working with.

What is a skills audit?

- A skills audit (also called Training Needs Analysis or TNA) is a process an organisation carries out to assess individual staff, management committee and volunteers' learning needs.
- It is used to find out about **ALL** the knowledge and skills your staff or volunteers and board members have, not just those needed for their current role in the organisation.
- It provides the organisation with information about training and development needs.
- A skills audit can take place once a year and can be done as part of an appraisal process, supervision or whichever process you feel most comfortable with.

Why do a skills audit?

You can use the information to help:

- Develop individual and organisational learning plans.
- Inform your annual training budget and prioritise individual training.
- Set other budgets.
- Show that the organisation is considering its staff and is committed to helping staff, volunteers and management committee do their job more effectively.
- Identify skills that staff have that you didn't know about.
- Improve staff morale, motivation and performance.
- Feed into further career opportunities.
- Have a more effective team.

How is it best to approach a skills audit?

1. Identify a lead person.
2. Have a briefing with line managers.
3. Have a meeting with all staff, volunteers and management committee members explaining the process.

It is important that the lead person and line managers use this introduction and the guidelines to approach the briefing with staff in a positive manner.

If the skills audit process starts without a full and positive explanation of the likely benefits to individuals and the organisation, it may lead to a lack of commitment with the process among staff and volunteers or to a feeling of stress and lowered self-esteem, the opposite of what is intended.

If people don't know why they are doing it then they may not be enthusiastic about it.

Issues you need to consider:

Carrying out a skills audit is useful even though staff members may move on to other jobs.

However:

- Don't promise anything you can't deliver.
- Make sure it's not just a paper exercise.
- Draw up your own clear criteria for prioritising the training needs within your organisation.
- Give your staff, management committee and volunteers clear instructions.
- Confidentiality - make sure you let people know what information will be shared with others
- Make sure you timetable in how long it will take.
- Enjoy the process - it's worth it!

How do you carry out a skills audit?

The information in this pack shows one method you could use. A skills audit can take place in a variety of ways through:

Induction	Development/learning needs for the job are identified.
Questionnaires	All staff are given an annual feedback form where training needs are identified.
Supervision	A question on training could be built into your supervision form/contract.
Appraisals	Individual employees and line managers identify skills gaps.
Team away day	The team works together to identify learning needs.
Team meetings	Often areas are highlighted that force the team to look at development needs, for example, changes in legislation.

How do we meet the needs identified? There are many different ways of providing learning opportunities. Attending a training course may not always be the most effective option for learning. Step 7 of this pack identifies some alternative methods.

What happens once the skills audit has been completed?

- Carry out the training that has been identified
(there is help to find suitable training in this pack)
- Review how the process has worked
- **Do it again** - It is a continuous process that needs to be reviewed as per organisational changes and staff development needs.

Over the next few pages, we'll take you through the process step by step. Try it out, you'll be surprised what you find out about people and it will benefit the organisation in the long term.

Skills Audit Step by Step Guide



Step 1 – Getting Started

Who is going to lead on the skills audit?	Name:	Comments:
Which staff will be involved in the process?	Names:	Comments:
How are we going to manage confidentiality?		
What resources do we have?		
How can we get commitment from our staff?		
What is (are) our realistic timescale(s)?	Date	Hints: 1. Work backwards (From the end date) 2. Use existing paperwork (staff appraisals, business plan, strategy, job descriptions, new contracts, etc.)
To review new activities for organisation		
To meet with staff and review individual skills needs		
To complete the organisational learning plan		
When do we want the process finished by?		

Step 2 - What Skills does the Organisation need?

(When complete this needs to be taken forward to individual meetings and organisational plan.)

Thinking of your activities over the coming year what new skills are required? (For example legislation/compliance/new projects.) Do you have any specific objectives that need to be met?

Area of work development	Skills needed	Who is going to do this?
<p><i>Example: Writing an annual report</i></p>	<p><i>Editing, Proofing, Design skills</i></p>	

New area of work development	Skills needed	Who is going to do this?

Name:

Line Manager:

Confidential

Step 3 – My Skills and Development Needs	Step 4 – Discussion with Line Manager
1. Management Skills: People [Including - leadership skills, staff supervision, teamwork, team building, time management, crisis management, managing conflict /disagreements, stress management.]	
My Skills:	Manager comments (<i>any action needed such as take forward to individual learning plan</i>):
My Development Needs:	
Management Skills: Work [Including - planning & managing organisational learning, project management, organising own workload, planning and managing change, problem-solving, developing policies, implementing policies, monitoring and evaluation of projects, monitoring and evaluation of own work, identifying the differences that you want the work of your organisation to make.]	
My Skills:	Manager comments:
My Development Needs:	

2. Administration / IT

[Including – touch-typing and word-processing, spreadsheets, databases, outlook calendar, email, contacts, creating files, website searches, developing articles, newsletters, reports]

My Skills:

Manager comments:

My Development Needs:

3. Communication skills

[including – marketing strategy, developing publicity, dealing with the media, assertiveness, negotiation & influencing, networking, letter-writing, report-writing]

My Skills:

Manager comments:

My Development Needs:

4. Organisational knowledge and practice

[Including - knowledge of organisational mission/aims/objectives, developing policies, knowledge of organisational policies and how they work, knowledge of local and national support agencies related to our work]

My Skills:

Manager comments:

My Development Needs:

5. Development Skills [Including – answering enquiries/sign-posting, equality & diversity awareness, specialist knowledge e.g. children/older people, research skills, training skills, facilitation skills, charring skills, presentation skills, event organising, management committee roles & responsibilities, charity law, performance improvement, business planning, understanding local government framework]	
My Skills:	Manager comments:
My Development Needs:	
6. Funding and Finance Skills [Including – giving funding advice, using funding advice packages, bid-writing, developing fundraising strategies and policies, full cost recovery, budgeting, invoicing, payroll, accounting systems, record-keeping for accounts, income generation, commissioning, procurement, tendering, merging]	
My Skills:	Manager comments:
My Development Needs:	
7. Human Resources [Including – recruitment & selection, interview skills, disciplinary & grievance procedures, anti-discrimination legislation, law relevant to the organisation, first-aid, sickness & absence policy, health & safety at work, employment contracts, working with volunteers]	
My Skills:	Manager comments:
My Development Needs:	

8. Any other skills you feel you need for your personal development or to carry out your role more effectively?

<p>My Development Needs:</p>	<p>Manager comments:</p>
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9. Any skills you have that have not been identified?

<p>My skills:</p>	<p>Manager comments:</p>
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Step 5 – Individual Learning Plan (ILP) - CONFIDENTIAL

To be discussed and completed by each member of staff with their line manager
(Bring forward any actions from Step 4)

Name Job Title Line Manager

Skills Development / Need:	Learning Activities: (How? / Where?)	Individual / Organisational benefits to be gained:	Timescale:	Comments:
<i>Example: Writing report skills</i>	<i>On the job training</i>	<i>Readable and accessible reports</i>	<i>1 month</i>	
<i>Minute Taking Skills</i>	<i>?</i>	<ul style="list-style-type: none"> <i>Gains skills to be more efficient in minute taking</i> <i>Accurate reporting of meetings</i> 	<i>1 month (preferably before next trustee meeting)</i>	

Skills Development / Need:	Learning Activities: (How? / Where?)	Individual / Organisational benefits to be gained:	Timescale:	Comments:

Step 6 – Organisational Plan

(Summary of all Staff ILPs – Step 5)

(These fields can be completed at a later stage)

Training Requirement	Reason (Why the organisation needs the training?)	Who	Timescale	Method	Provider	Cost (Funding)
<i>Example: Writing report skills</i>	<i>Reporting to Funders/Trustees for monitoring purposes</i>	<i>Fred</i>	<i>1 month</i>	<i>On the job training</i>	<i>In house</i>	<i>Staff time</i>
<i>Minute Taking</i>	<i>Accurate and efficient reporting of meetings</i>	<i>James</i>	<i>1 month</i>			
<i>Adobe Indesign</i>	<i>To produce PR materials for organisation</i>	<i>Sarah</i>	<i>4 months</i>			
<i>Microsoft Office Skills</i>	<i>Increase efficiency in using computers</i>	<i>All staff</i>	<i>3 months</i>			
<i>Forward Planning Skills</i>	<i>To produce organisational business plan</i>	<i>Director</i>	<i>1 Year</i>			
<i>Fundraising</i>	<i>To find sources for fundraising</i>	<i>Director</i>	<i>6 months</i>			

<i>Fundraising</i>						
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Training Requirement	Reason (Why the organisation needs the training?)	Who	Timescale	Method	Provider	Cost (Funding)

Step 7 – Where Next?

What type of learning is suitable?

- Coaching and mentoring
- On the job training
- Secondments (internal/external)
- Specific project work
- Experience in a different role or job
- Reading books, magazines, newspapers etc
- Visits to other organisations
- Shadowing people in your own organisation and other organisations
- Internal training
- External training
- E-Learning

Is funding available?

- Fit4funding (The Charities Information Bureau) www.fit4funding.org.uk/
- Skills for care www.skillsforcare.org.uk/funding/funding.aspx
- Cash online www.cash-online.org.uk
- Train to Gain and the Third Sector - Opportunities for the third sector to access support for training and developing paid staff and volunteers. www.traintogain.gov.uk/Helping_Your_Business/sectorspecificskills/
- Funding guide to workforce development for voluntary and community organisations working with Children and Young People (NAVCA) www.navca.org.uk/publications/fundingguide/

Where to go for help?

- **Ladder4learning** - Offers information and advice related to workforce development in the voluntary, community and social enterprise sector in South West and South East England.

Website: www.ladder4learning.org.uk/

Tel: **Helpline 01225 792505**

- **Voscur** - Supports voluntary and community action and offers training and learning opportunities in Bristol and surrounding areas.

Website: www.voscur.org

Tel: **Sophie Bayley on 0117 909 9949**

- **Train to Gain**

Website: www.traintogain.gov.uk/

Tel: Businesslink 0845 600 9 006

- **Skills Third Sector**

Website: www.skills-thirdsector.org.uk/

- **LSC Third Sector Site**

Website: thirdsector.lsc.gov.uk/

- **Apprenticeships**

Website www.apprenticeships.org.uk/

- **National Council for Voluntary Organisations (NCVO)**

Website: www.ncvo-vol.org.uk

Tel: **0800 2 798 798**

- **UK Workforce Hub**

Website: www.ukworkforcehub.org.uk/hr/training-needs-analysis

Tel: **0800 2 798 798**

- **National Association of Voluntary and Community Action (NAVCA)**

Website: <http://www.navca.org.uk/>

Tel: 0114 278 6636

- **Children's Workforce Development Council (CWDC)**

Website: www.cwdcouncil.org.uk/

Tel: **0113 244 6311**

Contact your local voluntary and community sector support organisation that may also be able to help. The NAVCA website has a listing of support organisations in your area <http://www.navca.org.uk/liodir/>.

Step 8 - Training



See page 23 for ideas of training

Step 9 – Learning and Development Evaluation

Evaluate any learning and development activity identified and undertaken as a result of the skills audit. This information can be taken forward to the next skills audit.

Learning or Development	Objectives	Implementing the learning	Evaluation
<i>Example: 1 day report writing course</i>	<i>Write the annual report</i>	<i>Managed to write the report without any help</i>	<i>Really useful course</i>

Step 10 – Skills Audit Evaluation

It is important to reflect on the skills audit process and use the knowledge gained for future skills audits.

Yes No

1. Do you have an organisational learning plan linked to the overall strategic planning of your organisation?

2. Do you have a clear map of existing skills and knowledge among staff within the organisation?

3. What was successful about the skills audit?

4. What would you do differently on the next skills audit? (include reasons if you ticked no to questions 1 and 2)

5. What actions do you need to take forward to the next skills audit?

Congratulations you have now completed the skills audit. Well done!

If you need any help with this skills audit please contact:

Ladder4learning

email: ladder4learning@learningcurve.org.uk

Tel: 01225 792505

Voscur

email: info@voscur.org

Tel: 0117 909 9949

Thank you for using this Skills Audit which was produced in January 2010 by Voscur and ladder4learning.

