

ITALY

National Piloting Report

(ILPO55: *Output 8, Activity 4 O8-A4*)

Effebi Association

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1. Introduction

1.1 The ILPO55 project: objectives and results

The European project ILPO55 is a three-year European project, funded with the support of the European Commission, through the Erasmus+ Programme.

The aim of this project is to create an Intergenerational Learning Partnership - ILPO55 (involving education & training providers, employers and employees) that will support the employability and will reduce the skills mismatch of the over 55 employees from the Financial Services Sector (FSS), and also new/existing employees. The project set-up the ILPO55 Reference Framework which addresses the over 55 individual needs with a 360° perspective.

Some of its main objectives are:

- assess individual competencies (knowledge, skills, competences);
- identify personal and professional goals;
- support over 55 individuals in planning their future career/work experiences; give advice regarding the existing opportunities for the validation of competencies and recognition of prior learning;
- provide support for further education and training of the over 55 individuals (based on the training needs identified in relation to the personal and professional career development objectives).

Moreover, the project conducted at the creation of two Professional Qualifications (Adult Trainer and Social Responsibility Facilitator) and related training programmes that can be valorised by the over 55, both within the FSS and in other professional sectors.

1.2 Piloting objectives

The ILPO55 project foresees a “piloting stage” of the products created in order to validate them also through the concrete engagement of selected over 55 (10 per Partners’ country) employed in the field of the Financial Services Sector (FSS).

Taking part in the piloting experience gave participants the opportunity to better understand their personal employability situation and provided them concrete support to improve their position in the internal and external labour market.

For the national piloting activities of the ILPO55 Reference Framework, as already mentioned, Uninettuno and Effebi Association from Italy identified 10 over 55 individuals (5 each Partner’s

organisation) within the FSS and invited them to develop a step by step personal employability portfolio and to follow a blended training module of one of the two ILPO55 Professional Qualifications.

The piloting stage consisted in two main phases:

Phase 1: October 2016 - November 2016.

- the 10 over 55 employees tested three of five tools and instruments of the ILPO55 European Framework to analyse their competencies and create their own employability portfolios and build their own professional development plans.

Phase 2: November 2016 - February 2017

- the 10 over 55 individuals/country have been involved in following a short blended training module through an on-line platform regarding one of the two professional qualifications developed in the project:
 - ✓ *Adult training*: the aim of this qualification is mainly to provide knowledge, skills and competences required to effectively plan, prepare, deliver and evaluate training sessions (see attached presentation of the Adult trainer course description - Italian version in *Annex 1*)
 - ✓ *Social Responsibility Facilitator*: the aim of this qualification is to help the over 55 employees within the Financial Services Sector to understand the importance of Social Responsibility. (see attached presentation of the Social responsibility Facilitator course description Italian version in *Annex 2*)

Uninettuno and Effebe Association chose respectively two different modules of the two qualifications:

Uninettuno: *Adult trainer* - Unit 2: Technology enhanced training (see attached Adult trainer-Unit2 - Italian version in *Annex 3*)

Effebe Association: *Social Responsibility Facilitator* - Unit 1: Introduction to Social Responsibility in the Financial Services Sector (see attached SFR-Unit1 - Italian version in *Annex 4*)

They translated the two Units in their own country languages, selected and contacted a trainer defining with him/her the blended delivery methods (e-learning and classroom), defined the training course contents and materials and scheduled the training activities.

SECTION 1 – Effebi Association’s piloting experience

2. Methodological approach and instruments

Be involved in the piloting experience gave to the 10 Italian selected over 55 a better understanding of their personal employability situation and concrete support to improve their position in the labour market.

The piloting stage of ILPO55 project aimed at checking, with the support of the selected individuals from the FSS, the European Reference Framework and its tools, and the two new Professional Qualifications created in the project.

According to our experience, it has divided in two main different phases:

- 1. Phase 1 (step 1 and 2) - from 30th October 2016 to 30th November 2016:** identifying and selecting 5 over 55 individuals employed in a relevant institution in the FSS and testing 3 of 5 instruments and tools developed within the ILPO55 Reference Framework;
- 2. Phase 2 (step 3) - from 26th January 2017 to 15th February 2017:** guiding the 5 over 55 in following a training module of one of the ILPO55 Professional Qualifications.

Phase 1 (step 1 and step 2)

Effebi Association contributed to the recruitment of 5 over 55 employed in a relevant institution of the FSS contacting banks and other financial institutions among its affiliated Members. This first step was finalized through an official invitation by email (using an agreed template) highlighting the main objectives of the project and the relevance of the piloting process.

Phase 2 (step 3)

After the completion of the phase 1 of the piloting process, Effebi informed the 5 over 55 individuals about a second phase during which they would be involved in following a short blended training module of one of the two ILPO55 Professional Qualifications developed by the project, in particular: **Social Responsibility Facilitator – Unit 1: Introduction to Social Responsibility in the Financial Services Sector**

To conclude the piloting stage we then organized a National Consultation Seminar. A panel of stakeholders from the FFS attended the event to assess the relevancy and usefulness of the ILPO55 framework and transferability opportunities.

3. Stakeholders involved

BNL BNP Paribas, from Rome, accepted to take part in the piloting experience and the Human Resource manager selected 5 motivated over 55 employees that could benefit from this experience.

Effebi contacted and provided them with detailed information related to the piloting stage (activities and timing) in which they would be involved.

The following 5 selected over 55 individuals undertook the piloting stage:

Organisation	Name-Surname	Gender	Role	Actual situation	Professional objectives
BNL BNP Paribas	Massimo Castelnovo	Male	Deputy Head Asset Management	Working	Programs of cooperation, External and internal customer relationship, Trainer
	Carlo Bertucci	Male	Coordinator of monitoring territorial risks	Pre-retired	No further professional career objectives
	Anna Caferri	Female	Human Resources Manager - Corporate	Working	Market retail sector, Bank organizational model
	Marialuisa Mura	Female	Change Management and Education & Quality (financial education projects)	Working	Customer marketing, Customer satisfaction Professional development in Corporate Social responsibility
	Antonella Giaffreda	Female	Human Resources Manager – Retail	Working	Corporate sector, Trade unions relationships, Adult Trainer

4. Assessment of the ILPO55 Framework

4.1 Three Methods and seven Tools

As already mention in the chapters above, the phase 1 of the piloting stage consisted in inviting the 5 selected over 55 to test 3 instruments and tools developed within the ILPO55 Reference Framework.

Effebi tested the 3 following instruments and tools:

- Competence evaluation questionnaire ;
- Professional development plan;
- Interviews.

Phase 1 (*step 1 and 2*) - from 30th October 2016 to 30th November 2016

1. **Competence evaluation questionnaire:** Effebi provided by e-mail the competence questionnaire evaluation to each participant inviting them to duly fill it in and to send it back to Effebi (30th October 2016 - 15th November 2016) - (see attached competence evaluation questionnaires filled in – (*Annex 5*))
2. **Make your own professional development plan:** after receiving all the completed questionnaires, Effebi sent to each participant a professional development plan template inviting them to fill it in (16th November 2016- 25th November 2016) - (see attached professional development plans filled in – (*Annex 6*))
3. **Face to face interviews:** to assess the results of the above steps the 5 over 55 individuals have been invited for a face to face interview lasting around 45'/each. They took place in the headquarter of BN BNP Paribas in Rome on the 29th of November 2016.

Feedback and suggestions:

Competence evaluation questionnaire

Submitting this tool to the 5 over 55 employees had the specific aim to outline a clear picture and insight of the knowledge, skills and competences of the selected individuals.

It helped us in making a first quick analysis on the individual level of the following competencies:

- management skills
- technical skills
- social skills
- personal skills
- information and communication technologies skills.

We can sum up that, in general, they all have good management, social and personal skills and they most need to implement the technical ones, and some would also enhance the linguistic/digital competencies.

Finally they all gave us positive feedback regarding the competency questionnaire as they considered it an extremely valid and useful instrument to assess their own skills and competencies and to emphasize their strengths and weaknesses.

Professional development plan

Concerning the “professional development plan”, it was considered a too long and even complex tool. The 5 over 55 employees completed it but they told us about several doubts and difficulties in providing their suggestions and contribution on the last part of the template related to the completion of a possible “action plan”. Overall, they asked to specify how to assess the extent to which the agreed course of action could achieve the stated goals.

Furthermore, as they are over 55 and they don't see themselves in the direction of a new professional future career, they found difficulties in listing more than one goal concerning further opportunities for development

Interviews

The 5 over55 appreciated a lot the interviews hence they expressed their preference on this last tested tool among the three previously proposed.

During the interview we analysed and commented, together with the interviewees, the results of the previous tools he/she completed: the competency questionnaire and the professional development plan.

This last tool - even thanks to our intervention - gave them the possibility to focus on the competences and skills they acquired during their whole professional experience and to also better understand their role within the organisation as their position with regard to the intergenerational cooperation and their effective potentials in this field.

We also encouraged them in reflecting on their personal professional goals and on how could be the more appropriate way to achieve them.

They all underlined the need to make an interview with an expert of Human Resources (tutor or coach) adding the important consideration that the results of an interview can easily change depending on the venue of the above mentioned interview (internal or external to the organisation in which they are employed)

They finally suggested us to provide them with more specific input and guidelines.

4.2. Training activities

To guide individuals to the second and final phase of the piloting process Effebi was involved in the initial activities related to the preparation of the blended training module for:

- selecting and contacting an expert trainer from BNL BNP Paribas explaining him/her the piloting phases and objectives;
- defining the blended delivery methods (e-learning and classroom) based on the chosen unit of one of the two ILPO55 Professional Qualifications (Social Responsibility Facilitator - Unit 1: Introduction to Social Responsibility in the Financial Services Sector);
- defining the training course contents and materials according to the existing ILPO55 training manual;
- setting the schedule of the training (15 guided learning hours: 11h classrooms and 4h on-line)

Finally, the 5 Over55 individuals already involved in the first phase were invited to follow a short blended training course on “Introduction to Social Responsibility in the Financial Services Sector”.

Brief Unit description:

Financial Institutions can be considered as important components of the worldwide economic system. Such entities provide consumers and commercial clients with a wide range of banking and financial services. The number of people affected by activities of financial organisations tends to be very large and normally entails long term relationships. After the 2008 financial crisis, many were concerned about the decline in confidence in financial services institutions.

This unit therefore introduces learners to the general notions and definitions of Social Responsibility as applied to the Financial Services Sector. Importance will be given to the need for trust, accountability, transparency and particularly the issue of governance; which is critical in different areas including the legal, ethical and economic elements.

Requirements:

- Diploma or other professional qualification in social services and environment sectors;
- professional experience (min. 5 years in the sector)

Learning Outcomes:

On completion of this unit the learner will be able to :

- Analyse and evaluate the pertinent CSR activities integrated to business and non-business as applied in the Financial Services Sector.
- Recognise and select the benefits of Social Responsibility for business.

Phase 2 (step 3) - from 26th January 2017 to 15th February 2017:

The trainer uploaded on the internal BNL BNP Paribas Platform “*My Development Platform*” the course contents and the materials for the on-line training session also indicating a time-scheduling for each:

E-Learning (4hours) - titles of the modules

1) CSR

- First lecture - 1h e 45’
- Second lecture - 30’

2) Responsabilità ed Etica

- Responsabilità ed Etica - 1h

3) Competenze Comportamentali

- La comunicazione: un ponte tra me e gli altri - 30’
- PI05 Come costruire e mantenere una rete di relazioni - 2h

4) Inclusion

- Spot formativo - Diversity - 30’
- Age Diversity - 30’
- Inclusion Management - 30’

The **classroom** session (11hours) has been arranged at the BNL BNP Paribas training centre in Rome (Villa Pestalozzi) for 13th and 14th February 2016. The Agenda, as annex of this Report (see attached in *Annex 7*), provides a clear overview of the contents presented during the classroom sessions.

Some photos of the classroom session and even screenshots of the e-learning materials are provided as annex of this Report (see attached in *Annexes 8 – 9*).

During the entire training session a combination of lectures, discussions, working group, relevant up-to-date case studies had been used as well so as to produce fruitful discussion.

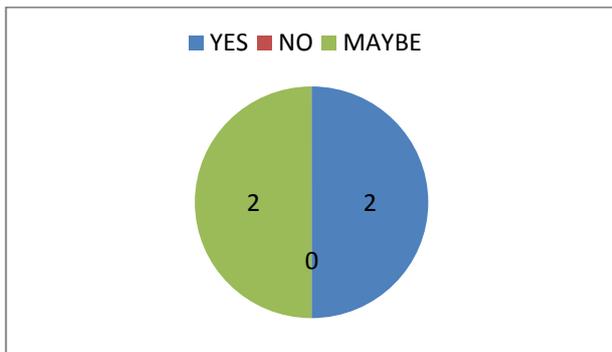
The training activities lasted three weeks. Most of the course contents and materials were in Italian, some also in English. Nevertheless, all the 5 participants had a good level of English and found no difficulties in undergoing the training.

Finally, each participant was requested to complete an online satisfaction questionnaire whose results are collected and illustrate here below.

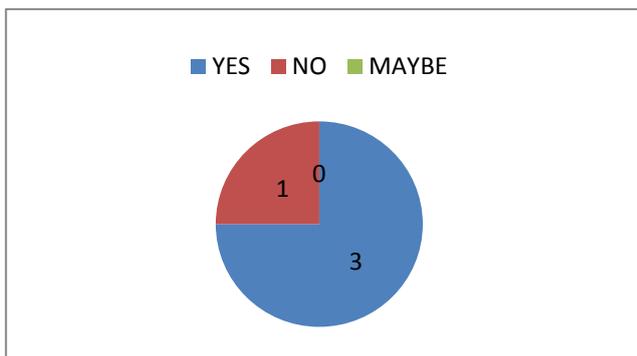
Only 4 of 5 individuals undertook the questionnaire.

Survey findings:

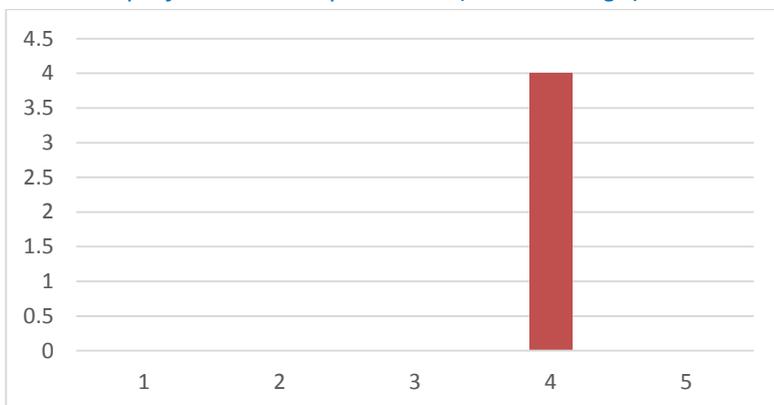
1 - Do you feel that the project activities and results are relevant to your professional development and employability?



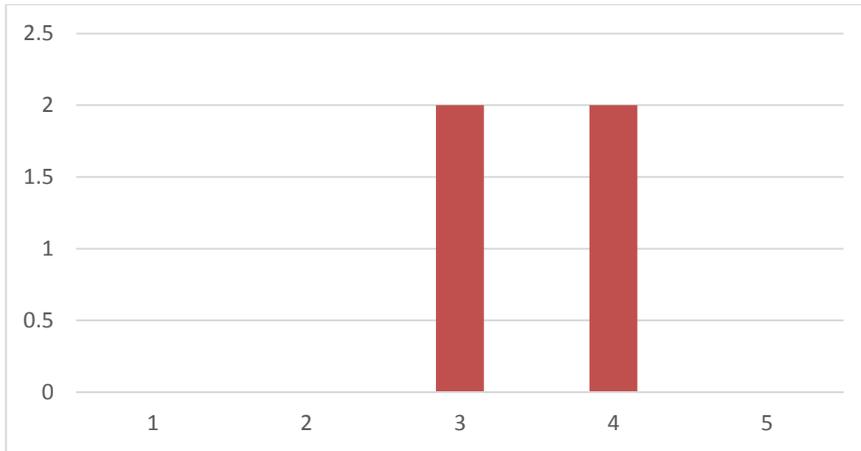
2 - Would you be interested in acquiring any of the two qualifications following the completion of the ILPO55 project?



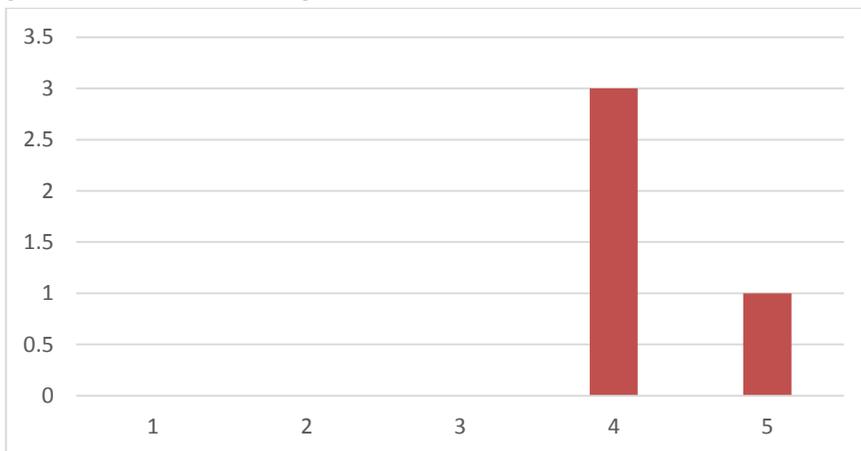
3 - Rate the relevance of the ILPO55 Framework and Qualifications for motivating and valorising the over 55 individual professional competencies. (1 low – 5 high)



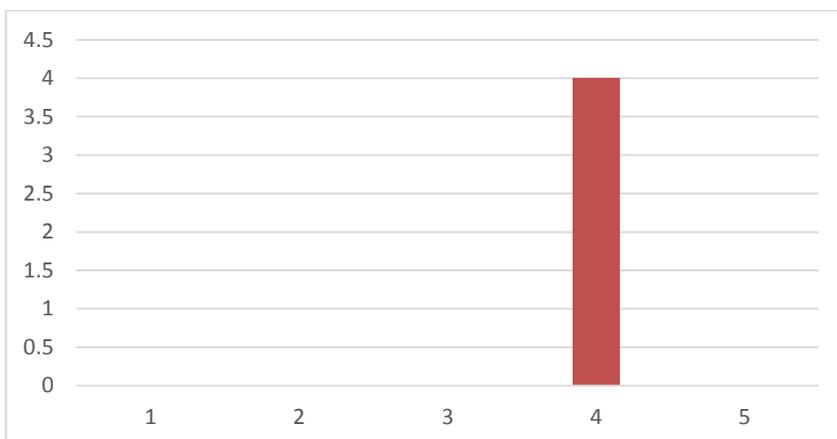
4 - Rate the relevance of the ILPO55 Framework and Qualifications for re-newing/upgrading the skills of over 55 individuals. (1 low – 5 high)



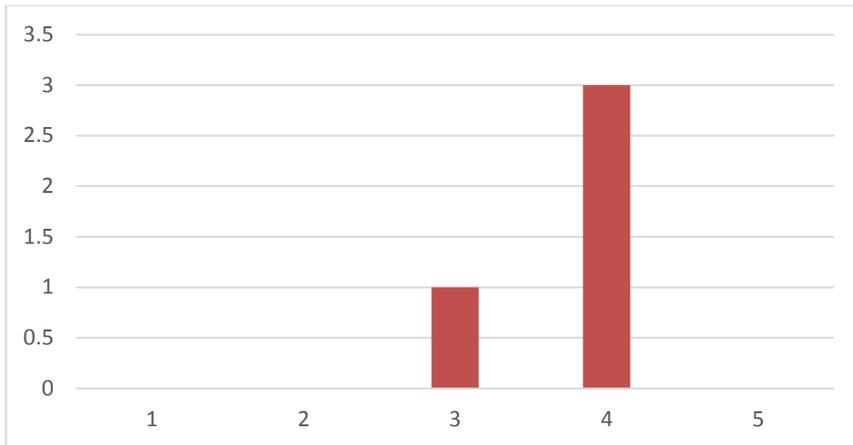
5 - Rate the relevance of the ILPO55 Framework and Qualifications for enhancing the cooperation between generations (1 low – 5 high)



6 - Rate the relevance of the ILPO55 Framework and Qualifications for using the over 55 capacities for internal training of young employees or for tutoring (1 low – 5 high)



7 - Rate the relevance of the ILPO55 Framework and Qualifications for using the over 55 capacities for improving the social responsibility actions conducted by the organization (1 low – 5 high)



The fulfilled paper-based assessment questionnaires are an annex of this Report (see attached in *Annex 10*).

At the conclusion of the piloting experience Effebi Association, on behalf of ILPO55 Consortium issued a Certificate of Participation for each participant. The Certificates are an annex of this Report (see attached in *Annex 11*).

4.3. Consultation workshop

The national consultation workshop took place in Milano on the 26th of January 2017. It has been conducted by Effebi team; it targeted twelve participants (stakeholders) from the following financial institutions:

- UBI Academy
- Intesa Sanpaolo
- Credito Valtellinese
- Carige Banca
- Banca Popolare di Vicenza
- BNL BNP Paribas
- Banco BPM
- Banca Popolare di Sondrio
- Deutsche bank
- BPER Banca
- Associazione Effebi

The participants' list of the National Consultation Workshop in an annex of this report (see attached in *Annex 12*)

The main aim of this event was to introduce some relevant stakeholders working in the FSS to the project main objectives, outputs and results, in particular, focusing on the specific deliverables related to the ILPO55 European Framework and the 2 Qualifications developed within the project.

Therefore, this event aimed also to raise awareness among the participants on the importance of intergenerational activities as a tool to foster age management.

Participants were actively involved in the discussion related to the above topics. This helped us in gathering several interesting and useful inputs and feedbacks:

The main reflections made by the participants were:

- overall the ILPO55 Framework is a good instrument to address age management and intergenerational cooperation with a 360° perspective, although some specific tools could be more user-friendly: in particular the e-portfolio.
- The two qualifications proposed are considered to be good opportunities for the over 55 individuals in the FSS. It was however underlined the need to concentrate more on recognition of prior learning, as an evaluation method for obtaining the certificates.
- The interview, in particular was very much appreciated, being considered a flexible instrument to be used for acquiring qualitative input regarding both competencies and skills and individual's objectives and aspirations in the professional field.

5. Conclusion and recommendations for the ILPO55 Framework/Qualifications/Training courses.

During the different piloting and consultation activities, Effebi collected feedback from different stakeholders: over 55 individuals, HR experts, Trainers and Mentors. Most of the reactions were positive and demonstrated grate appreciation for the ILPO55 Framework and the two proposed qualifications, since they provide a comprehensive approach for managing active ageing and intergenerational cooperation in the FSS, in Italy.

In addition, some of the Effebi Members (Banking Institutions) declared their interest in taking further the project results and implement them in their organization. One bank actively collaborated with Effebi involving their employees in the piloting phase and supporting the development of the training programme, hosting it on their internal training platform.

The main recommendations received during these activities are:

- a. some specific tools should be more user-friendly: in particular the e-portfolio;

- b. for obtaining the two qualifications it is necessary to concentrate more on recognition of prior learning, as an evaluation method for obtaining the certificates;
- c. the 'professional development plan' was considered to be rather complex and therefore, they suggested to provide further guidance especially for the last part regarding the action plan;
- d. the interviews were very much appreciated and the only recommendation was to provide the guidance regarding their implementation within or outside the organization where the over 55 individuals work, since they believe the results might differ.

SECTION 2 – Uninettuno’s piloting experience

2. Methodological approach and instruments

We selected for the piloting experience 5 Italian over 55 to give to them a better understanding of their personal employability situation and concrete support to improve their position in the labour market.

We divided the the piloting experience in two main different phases:

- 1. Phase 1 (step 1 and 2) - from 15th November 2016 - to 6th February 2017:** identifying and selecting 5 over 55 individuals employed in financial institution and testing 3 of 5 instruments and tools developed within the ILPO55 Reference Framework;
- 2. Phase 2 (step 3) - from 15th February 2017 to 30th March:** guiding the 5 over 55 in following a training module of one of the ILPO55 Professional Qualifications.

Phase 1 (step 1 and step 2)

Uninettuno to recruit the 5 over 55 employed asked the availability to different banks in Rome. Unfortunately, they gave a negative response. So Uninettuno asked by email the availability to other banks, in particular, to different Cooperative banks. So, Uninettuno presented to the Board of Directors the project, the group, the partners, the objectives, the instruments, the methodology and the web site of the Uninettuno International Telematic University.

Phase 2 (step 3)

After the completion of the phase 1 of the piloting process, Uninettuno informed the 5 over 55 individuals about a second phase during which they would be involved in following a short blended training module.

3. Stakeholders involved

Uninettuno contacted and provided them with detailed information related to the piloting stage in which they would be involved.

The following 5 selected over 55 individuals undertook the piloting stage:

Organisation	Name-Surname	Gender	Role	Actual situation	Professional objectives
BCC Castellana Grotte	Vincenzo Ferrandino	Male	Manager of credit area	Working	Career and salary development in credit area
	Nicola Iaia	Male	manager of technological system	Working	No further professional career objectives
	Mario Maselli	Male	customer service worker	Working	Market retail sector
	Giovanna Cisternino	Female	manager of payment area	Working	Professional payment area
	Flora Girardi	Female	manager of administrative office	Working	No further professional career objectives

4. Assessment of the ILPO55 Framework

4.1 Three Methods and seven Tools

Uninettuno tested the 3 following instruments and tools:

- Competence evaluation questionnaire;
- Professional development plan;
- Interviews.

Phase 1 (step 1 and 2) – from 15th November 2016 - to 6th February 2017

4. **Competence evaluation questionnaire:** Uninettuno provided by e-mail the competence questionnaire evaluation to each participant inviting them to duly fill it in and to send it back to Uninettuno (15th November 2016 - 14th December 2016) - (see attached competence evaluation questionnaires filled in – Annex 13)

5. **Make your own professional development plan:** after receiving all the completed questionnaires, Uninettuno sent to each participant a professional development plan template inviting them to fill it in (14th January 2017- 1th February 2017) - (see attached professional development plans filled in – *Annex 13*)
6. **Face to face interviews:** to assess the results of the above steps the 5 over 55 individuals have been invited for a face to face interview lasting around 1 hour each. They took place in the headquarter of BCC in Castellana Grotte (26th January 2017 to 6th February 2017 (see attached interviews filled in – *Annex 14*)

Feedback and suggestions:

Competence evaluation questionnaire

The results of the instruments we used revealed that the main points of the over 55 individuals were:

- 1) Social skills, in particular dialogue and persuasion capacity, organizational awareness, relationship building and networking, impact and influence, team leadership, social commitment, market orientation, participation in cooperation programme.
- 2) Personal behavioural skills, in particular, self control, flexibility, organizational commitment, team working and collaboration, time management, initiative creativity.

They don't have the same abilities with regard to:

- 1) Management skills, in particular, strategic planning and formulation, strategy implementation, performance management in terms of planning, conducting, follow up and assessment.
- 2) Technical skills, in particular, bank skills, conducting meetings, project development, strategy formulation and implementation.
- 3) Information and communication skills, in particular, office tools, e- learning, social media tools, presentation with new PPT social tools, skype, excel.

We can sum up that, in general, they all have good social and personal skills and they most need to implement the technical and management ones.

The individuals appreciated the instrument, thinking that it was very useful to understand what they really wanted. They gave some suggestions to improve the questionnaire.

Professional development plan

Concerning the “professional development plan”, it was considered an useful tool, but more difficult than the questionnaire. The feedback was that they believed to have a good position and they wanted to remain in the Cooperative bank and to increase their skills.

Interviews

The 5 over55 appreciated the interviews and the women showed more availability and friendliness than men.

During the interview we analysed and commented, together with the interviewees, the results of the previous tools he/she completed: the competency questionnaire and the professional development plan. Most of them told that had good relationship with colleagues and seniors and that their qualities were: availability, reliability, obstinacy and precision. All of them had positive achievements and only three remembered their failures.

4.2. Training activities

Uninettuno explained to the 5 over 55 the second and final phase of the piloting process and invited them to follow the on line courses. The contents of the courses have followed the needs of participants as showed by the interviews, in particular, with regard to Information and communication skills.

The participants have followed the course: **Technology Enhanced Learning (Adult Trainer)** with 10 lessons:

- 1) Data analysis using Excel
- 2) The network and the Google's world
- 3) Google and social networks
- 4) Word
- 5) Powerpoint
- 6) Wordpress. How to make a blog
- 7) Personal Information Technology
- 8) The evolution of Information Technology
- 9) Windows
- 10) Enterprise digital technology and Financial Services Social Responsibility Facilitator** with 4 lessons:
 - I. Introduction to Social Responsibility in the Financial Services Sector;
 - II. The role of Internal and External Stakeholders;
 - III. Strategies and tools for Corporate Social Responsibility Implementation;
 - IV. Professional Knowledge, Skills and Competences for the Social Responsibility Facilitator.

We gave to the participants didactic materials.

4.3. Consultation workshops

On the 3rd of April 2017 we made the consultation workshop with the participants in Castellana Grotte in the Cooperative bank. The aim was the discussion of the contents of the course. All the individuals appreciated it very much (*Annex 15*)

5. Conclusion and recommendations for the ILPO55 Framework/Qualifications/Training courses.

The reactions of the participants were very positive. The individuals were very happy because they the courses helped them to improve their IT abilities. They said that the lessons were very clear, too. The BCC told that wanted to promote the project on Facebook. The main recommendations received during these activities are:

- A. the 'professional development plan' and the questionnaire were considered a very useful instrument;
- B. the interview was considered a very useful and good instrument;
- C. the courses were appreciated very much;
- D. the e-portfolio was considered quite difficult.

6. Appendix List:

1. [Annexes\1. Adult trainer course description ITA.pdf](#)
2. [Annexes\2.Social responsibility Facilitator course description ITA.pdf](#)
3. Annex 3 Adult trainer - Unit 2: Technology enhanced training (Italian version)
<http://www.uninettunouniversity.net/it/cyberspaziolaureapiano.aspx?faculty=°ree=234&planid=428&idIndirizzo=0>
<http://www.uninettunouniversity.net/it/cyberspaziolaureapiano.aspx?faculty=°ree=235&planid=430&idIndirizzo=0>
4. [Annexes\4. Social Responsibility Facilitator Unit1 ITA.pdf](#)
5. [Annexes\5. Competence evaluation questionnaires.pdf](#)
6. [Annexes\6. Professional development plans.pdf](#)
7. [Annexes\7. Agenda of the piloting training course .pdf](#)
8. [Annexes\8. Photos of classroom session.pdf](#)
9. [Annexes\9. Screenshots of e-learning materials.pdf](#)
10. [Annexes\10. Self-evaluation questionnaires.pdf](#)
11. [Annexes\11. Piloting phase - Certificates of Participation.pdf](#)
12. [Annexes\12. Participants list National Consultation Workshop.pdf](#)
13. Annexes\13. Competence evaluation questionnaires AND pdf Professional development plans.pdf
14. Annexes\15. Interviews.pdf
15. Annexes\13. Photo of Consultation workshop.