

Romania

National Piloting Report

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

ANUP-International

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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, ANUP-International from Romania identified 10 over 55 individuals 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 – December 2016.

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

Phase 2: November 2016 - March 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 – Romanian 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 Romanian version in *Annex 2*)

ANUP-International chose: *Adult trainer* - Unit 3: Mentoring (see attached Adult trainer-Unit3 - Romanian version in *Annex 3*)

ANUP-International translated the Unit 3 in Romanian language, 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.

2. Methodological approach and instruments

Be involved in the piloting experience gave to the 10 Romanian selected over 55 a better understanding of their personal employability situation and concrete support to improve their position in the labour market. It was also the expression of their interest to acquire new

knowledge and competences in the domain of mentoring giving some of them the possibility to coach soft skills, so necessary for our society, not only in FSS sector.

In this manner the 10 over 55 professionals showed their interest for 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 15th October 2016 to 12th December 2016:** identifying and selecting 10 over 55 individuals employed in relevant institutions in the FSS and testing 4 of 5 instruments and tools developed within the ILPO55 Reference Framework(Self Evaluation Questionnaire, Interview, career plan and e-portfolio)
- 2. Phase 2 (step 3) - from 10th January 2017 to 20th March 2017:** guiding the 10 over 55 in following the training module of Mentoring - Unit 3/Adult Trainer -ILPO55 Professional Qualifications.

Phase 1 (step 1 and step 2)

We addressed invitations to the most relevant banks and financial services that we knew from the Consultation Seminar of July 2015.

Invitations were addressed individually, by mail, after a phone call in advance, either to recommended persons, or to banks at their HR department.

We presented the project, target group, objectives and what is the methodology in the phase of piloting.

Apart the institutions, we addressed invitations to professionals who were recommended by friends from banks.

Phase 2 (step 3)

After the completion of the phase 1 of the piloting process, ANUP-International informed the 10 over 55 individuals about a second phase during which they would be involved in following a short blended training module on Mentoring of the two ILPO55 Professional Qualifications developed by the project, in particular: Adult Trainer – Unit 3: Mentoring

To conclude the piloting stage we then planned and organised 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

Here the sent invitations where:

1. BCR(the biggest commercial bank in Romania),
2. BRD (Societe generale),
3. Intesa San Paolo ,

4. CEC Bank (the only State bank in Romania),
5. ING Bank,
6. BNR (National Bank of Romania),
7. ASE (the University of Economic Studies-the largest University in Romania for this sector),
8. Victoria Preoteasa, former director of the Romanian Banking Institute, (now retired) for the position of trainer.
9. ISF Institute of Financial Studies, training the personnel working in assurances
10. ASF Financial Supervisory Authority, supervision of stock markets and conduct of business
11. Trade Union of the banks
12. Association of Romanian Banks (ARB)

The following persons showed their availability to test the methodology :

Organisation	Name/surname participant and email	Gender// Age	Role
1.CEC Bank	Amalia Ionescu	F 54	Branch Deputy manager of CEC Bucuresti Bank
2. Retired	Victoria Preoteasa	F 65	Former director at the Romanian Banking Institute In this project as trainer for the mentoring course
3.Retired	Gabriela Tudor	F 65	Former President of CEC Bank
4.BNR (Romanian National Bank)	Radu Sibinescu	M 55	Senior Officer for Communication and media
5.Municipality of Bucharest – department for patrimony and monuments	Carmina Alexiu	F 55	Head of economic and financial department
6. Ministry of Labour – Unit for Project Implementation	Catalina Pavlu	F 63	Head of economic and financial department
7.BRD –Romanian Bank for Development	Magdalena Calangiu	F 51	HR -Manager , trainer of mentoring
8.ISF - Institute of Financial Studies	Zega Machedon Anton	M 61	Director deputy of the training department
9. ASF -Financial Supervisory Authority	Iliescu Lidia	F 58	Referent
10. Intesa Sanpaolo Bank	Gabriela Alexianu	F 60	Branch manager
11. Freelancer research domain economics	Irina Dumitriu	F 58	Expert in training

Some comments on the characteristics of the sample :

- 11 females, 2 males
- all the members of the group have or had managing position (top and middle)
- all of them have training experiences either top level, or branch level.
- 1 is of the Romanian National Bank
- 2 of training departments from banking and financial services

Notes:

- The only bank that *officially* answered at the invitation was BCR, they motivated that they have no personnel with this age, and they have no policy for this age category.
- The only bank that recommended a person was **CEC Bank**.
- The Institute **of Financial Studies** was recommended by Mrs. Victoria Preoteasa; they showed their availability for the ILPO55 project.

4. Assessment of the ILPO55 Framework

4.1 Four Methods and seven Tools

As already mention in the chapters above, the phase 1 of the piloting stage consisted in inviting the 10 selected over 55 to test 4 instruments and tools developed within the ILPO55 Reference Framework.

ANUP-International tested the 4 following instruments and tools:

- Competence evaluation questionnaire ;
- Career development plan;
- Interviews
- e –Portfolio

Phase 1 (step 1 and 2) - from 15th October 2016 to 12th December 2016

- 1. Competence evaluation questionnaire:** ANUP-International provided by e-mail for 4 individuals, or face to face for the other 7 ones the competence questionnaire evaluation to each participant inviting them to duly fill it in and to send it back till 10 th of November 2016 - (see attached competence evaluation questionnaires filled in – *Annex 4*)
- 2. Face to face interviews:** to assess the results of the evaluation questionnaire, the 10 over 55 individuals have been invited for a face to face interview lasting 60-120 ' /each. They took place, in Bucharest, at ANUP-International office between 15 October -15 November 2016.
- 3. Make your own career development plan:** after receiving all the completed questionnaires,

ANUP-International sent to each participant a career development plan template inviting them to fill it in (15th November 2016- 30th November 2016) - (see attached career development plans filled in – (Annex 5)

- 4. E-Portfolio:** to assess the results of the above steps 4 /10 participants filled in the e-portfolio provided by NIBE. People were interested to fill in the e-portfolio, as they did not use such an electronic instrument for assessing their competences , but the access on the e platform was very difficult and unfriendly.

Feedback and suggestions:

According to this scheme in the first phase we have completed the following instruments belonging to the European Framework. All guided materials were translated into Romanian language and were filled in on line :

1. Interviews : 10 persons
2. Competence Questionnaires : 11 persons
3. E-portfolios : 4 persons (we had a lot of problems in accessing the Dutch e-portfolio)
4. Career plans : 6 persons

We interviewed the candidates before the filling of the career plan, as we wanted to know the persons, their preoccupations, expertise and openness to our project. In the same time we used this opportunity to introduce the project and its objectives. Each interview lasted between 1-2 hours.

Then we introduced them in the competence questionnaire, so that we reduced a little bit their inhibition vis –a-vis the on line technique of working, which was a real obstacle for most of them, especially for the retired persons.

Concerning the evaluation questionnaire

The structure of the questionnaires has the following chapters:

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

We noticed that all the participants have good management, social and personal skills and they most need to implement the digital ones.

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.

Concerning the Interviews

All the 10 interviewed professionals appreciated a lot the interviews; it was the most preferred instrument of evaluation.

During the interview we analysed and commented, together with the interviewees, the results of the evaluation questionnaire and we facilitated the understanding of the career development plan.

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

They finally suggested us to provide them with more specific input and guidelines. This would have facilitated them in transferring their rich experience as trainers.

Concerning the “career development plan”

It was considered too long. 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. But mostly of them showed the interest for the mentoring course as it gives the possibility to improve and to use it in the future for their professional development as trainers.

Concerning the e-portfolio

They considered that the instrument on line is very useful for their personal development as trainers, but the access on the platform discouraged most of them, so that we finally had only 4 filling in candidates.

4.2. Training activities

Stage 2: from the 10th January 2017r to the 2o March 2017

	Italy	Malta	Spain	Netherlands	Romania
Adult trainer UNIT 3 Mentoring 15h f2f 35 online					X

The Course for Mentoring has been translated into Romanian language and the most successful result was that Mrs. *Victoria Preoteasa*, former director of the Romanian Banking Institute accepted to have the role of trainer. Together with her and based on her solid experience in adult training we maintained the structure of the course, but intervened a lot on emotional intelligence and additional information in this respect.

We also used a lot of Romanian materials translated from Goleman's books, as well as English materials, as our learners are used to read fluently in English. (See attached Bibliography –in the (Annex 6).

The face to face training session was held on the 13.01.2017, from 16-20.

For the online training, a set of 7 themes of the mentoring course was developed and posted on the Moodle of ANUP-International's website. Each theme has got the references and an application where the participant is invited to solve tasks. At the end they are supposed to present a short mentoring pilot program.

The course: Mentoring /Adult trainer Qualification

Planning of the course: 15hours face to face +35 hours on line

A. Face to face session (15 hours)

Theme: Emotional Intelligence –power of Good

B. Online Meeting with 7 themes (35 hours)

- *Theme 1. A general view about mentoring (4 hours)*
- *Theme 2. How to identify and select a mentor (4 hours)*
- *Theme 3.Types of mentoring (6 hours)*
- *Theme 4. How to create a mentoring pilot program (6 hours)*
- *Theme 5. How to measure the results of a mentoring program (4 hours)*
- *Theme 6. Benefits of the mentoring program beyond the internal organizational regulations (6 hours)*
- *Theme 7. Design of a pilot mentoring program –Practical project (5 hours)*

(See attached Mentoring Course planning - in (Annex 7)

During the entire training session of six weeks a combination of lectures, discussions, working group, face to face on the Moodle took place. A lot of supplementary materials were given to students, in Romanian as well as in English.

Within the face to face session, the 10 learners were introduced in the online Moodle by the administrator of ANUP-International: registration, how to access materials, how to communicate with the group, how to solve the team tasks assumed during the course. Learners registered in 4 working groups on the 6 themes of the course. During a month and a half the administrator of the site and me, we were managing the Moodle.

Some observations issuing from the face to face session, as well as from the on line experience:

- commitment for the participation in the mentoring activity

- very few people reacted at the on line tasks (3 from the already 6 registered)
- there is no experience in working on line and consequently there is a fear
- for some people it appears to be very hard to work on line
- some of the people found the experience completely new and very innovative
- some quotations from the “blitz” evaluation we made within the face to face session : **innovative, new information, interesting, challenging, mobilising, unexpected.**
- proposal from the **Institute for Financial Studies** to have a long time cooperation with ANUP-International and permission to use these materials for the course of trainers. We signed a cooperation protocol in this respect.

We also have been confronted with differences of mentalities between generations and sometimes this was an obstacle in finding bridges for the mentoring process.

A special situation was registered with the **Financial Supervisory Authority** which asked our cooperation and showed the need for courses for mentoring, as there is a recent request from the EU for such courses.

The participants at the course addressed us congratulations for the chosen subject, course materials, trainer and selected people. Everything was of high quality and the experience of the selected people was impressive, they appreciated in the oral evaluation of the course. Everybody felt that he/she belonged to a special qualitative group. They wanted to meet also after the piloting phase comes into its end.

Certificates of attendance have been given to the 10 attendees. (See attached Certificates of attendance - in *Annex 8*)

4.3. Consultation workshop

The aim is to share with FSS stakeholders the products created and piloted by individuals to analyse the level of usefulness, transferability and applicability.

We contacted, by a visit, the **Romanian Association for Banks (ARB)**, the general manager, Mr. Constantin Barbu, and sent an invitation where we presented the ILPO55 project: partners, objectives, target group and results in terms of European Framework and the 2 Qualifications. He suggested to also contacting the **sectorial committee of banking and insurances** which is the governmental body responsible for the qualifications and continuous training of the staff.

The banks belonging to this professional association do not encourage our 55+ target personnel, says Mr. Barbu, so we did not have representatives of the network through this official way of contact.

Then we also addressed the representatives from the following banks, financial services with whom we had contacts at the face to face session:

1. BRD (Societe generale),
2. Intesa San Paolo ,

3. CEC Bank (the only State bank of Romania),
4. BNR (National Bank of Romania),
5. ASE (the University of Economics Study),
6. Victoria Preoteasa, former director of the Romanian Banking Institute, (now retired) for the position of trainer.
7. ISF Institute of Financial Studies, training the personnel working in assurances
8. ASF Financial Supervisory Authority , supervision of stock markets and conduct of business
9. IBR (Romanian Institute for Banking)
10. Sectorial Committee of the banking and insurance sector .

At the meeting the following stakeholders were present:

1. Savu Emanuela, IBR, training manager ,
2. Kets Micaela , IBR, head department for standards and RPL
3. Amalia Ionescu , CEC Bank
4. Zega Machedon Anton , ISF (Institute for Financial Studies) , deputy manager of the training department
5. Radu Sibinescu, BNR (National Romanian Bank), manager PR department
6. Gabriela Tudor , retired, former general manager of CEC Bank
7. Preoteasa Victoria , Trainer and former general manager of IBR

The participants' list of the National Consultation Workshop in an annex of this report (see attached List of the participants at the national consultation seminar – in (*Annex 9*)

The agenda of the Seminar was respecting the proposal of MCAST

Ileana Boeru presented on a PPT the main points of interest of the project: partners, objectives, focus group. References were made to the needs and gaps analysis.

Then the presentation of the European Framework ILPO55 was shown to the participants: it was explained that at the moment only 4 of 7 instruments were tested in Romania: questionnaire, interview, e-portfolio and career plan.

Mrs. Preoteasa presented the learning units of each of the 2 qualifications. A special accent was put on the mentoring course, the face to face session and the 7 themes on the Moodle platform. As the group was not so big (8 persons) we discussed the materials one by one and the following comments and observations were made:

1. General comments on the mentoring activity and age management

1. As the personnel of 55+ in the Romanian banks are in continuous decrease a **reverse mentoring was** proposed from the young generation towards the most experienced one. The phenomenon existing now in the Romanian banks is that there is an orientation towards competence. But the market grew, new generation, especially that working at the front office, is mostly interested on high salaries and they leave a bank in favour of another one that offers 20% more as salary. In the sale sector which is demanding more personnel,

they are requested to have a certain portfolio of potential clients, very difficult to achieve. So, the chase for profit and more clients is more evident than the need for competence. “So competence is not so attractive than volume”, says a participant at the seminar.

2. Another reality of our time is that old jobs disappear and new jobs are to be implemented; mostly those related to the sale techniques, in accordance with the growing market of sales. Charles Handy in his book entitled “The Second Curve” shows that in the next 50 years 40 jobs will disappear. The new orientation of jobs is towards administration and data security.
3. The accent is put on the experience, and this is the characteristic of the older generation.
4. An employee with a lower salary costs more than one experienced (less is more). “Young people can be more involved in transferring the ICT techniques to the experienced generation”, says another participant .

There is a need for the intergenerational relation, on the change of knowledge and competences, and this has to become an element of the policy and much more open to the media.

1. Comments on the European Framework instruments

- **E-Portfolio:** good and useful instrument, IBR appreciated it
- **suggestions :** -
 - pg.9 to erase point “ Financial resources managed “
 - pg. 10 to add: capacity of working under stress ambition and motivation
 - pg 11 to introduce the definition of competence from the EQF, in order to have a common understanding
- **Questionnaire,** a very good instrument
- **Interview,** a good and necessary instrument
- **Professional development plan,** a good and useful instrument, it has to be shortened.

3. Comments on the 2 qualifications

- A general suggestion was made for a person who wants to become a trainer, a facilitator in the sector: it has to have a necessary authority to implement the project and its products.
- “The departments of HR within banks and financial services have to be informed about the ILPO55 project and its outputs. They can organize courses after these materials” was the opinion of a participant.
- The unit learning materials are useful; they may be adapted for the national banking context.
- They are also a basis in designing professional standards for the 2 qualifications. In Romania the occupation of mentor is registered in the National Register of occupations, but the standard is too old (elaborated in the '90). So, based on the materials we have from ILPO55 we can elaborate a professional standard. The course for mentor has been appreciated by the IBR and will be promoted by them as a separate course.

- The IFS (Institute for Financial Studies) will introduce the module of mentoring in their course for adult trainer.

5. Evaluation sheets of the seminar

All 7 participants rated with 5 and 4 Section A. Section B was rated by all the participants with Yes, the European Framework and the 2 qualifications are relevant for the training of age management and are interested to use them.

For Section C, 1 participant rated with 3 the updating of competences and skills of the 55+. All the others with 5 and 4.

Section D 5/7 of the participants rated with 5 and 4, 2 rated self-reflection and RPL with 3.

At “other comments” one participant suggested for the learning modules from the 2 qualifications to use examples from the financial-banking practice. (Annex 10 see the evaluation questionnaires of the participants at the Consultation Seminar)

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

Proposals

Mrs Ionescu Amalia and Mr. Zega Machedon for promoting the 2 qualification at the following banks:

- Romanian Bank
- ARB-department of HR
- BANca Transilvania
- Alpha Bank

Mrs. Victoria Preoteasa proposed the following as a conclusion of the Consultation Seminar:

- A protocol of cooperation with HR departments of banks and other financial institutions
- An enlargement of the already existing learning group with new experienced members
- Making a DEMO of the results of the project which intends to show the advantages of the involved institutions.

6. Appendix List:

- 1) [Annex 1: Adult trainer - Course Description RO](#)
- 2) [Annex 2: Social responsibility Facilitator course description RO](#)
- 3) [Annex 3: Course Adult trainer Unit 3 Mentoring RO](#)
- 4) [Annex 4: Competence evaluation questionnaires RO](#)
- 5) [Annex 5: Career development plans RO](#)
- 6) [Annex 6: Bibliography Mentoring Course RO EN](#)
- 7) [Annex 7: Mentoring Course planning RO EN](#)
- 8) [Annex 8: Certificates of attendance RO](#)
- 9) [Annex 9: Participants List - National consultation Seminar](#)

- 10) [Annex 10: Evaluation questionnaires Consultation Seminar RO](#)
- 11) [Annex 11: Agenda of the National Consultation Workshop RO](#)
- 12) [Annex 12 : Photos from the classroom session and consultation seminar](#)
- 13) [Annex 13: Screenshots of e-materials posted on the moodle RO](#)