

SPAIN

National piloting report

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

Project Number 2014-1-MT01-KA202-000539-P2

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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:

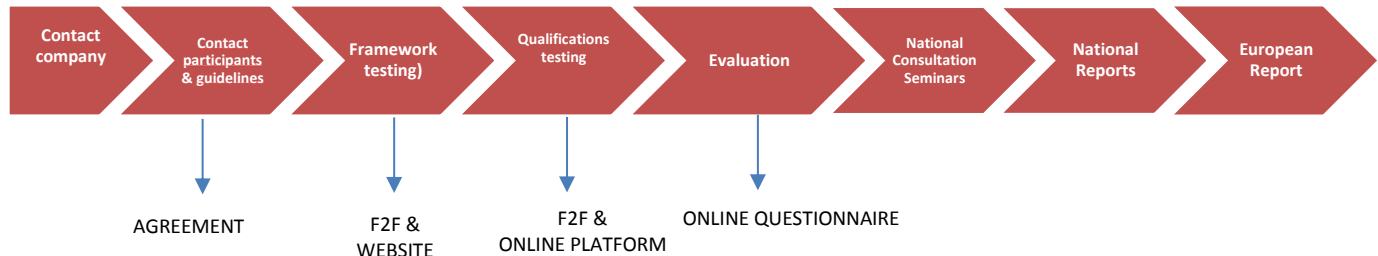
UNINETTUNO: *Adult trainer* - Unit 2: Technology enhanced training (see attached Adult trainer-Unit2 - Italian version in *Annex 3*)

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.

2. Methodological approach and instruments

IEF followed the piloting stage process as designed by all the consortium and considering the next stages:



Contact companies: A list of banking companies with whom IEF usually collaborates as a training provider was invited to participate in the piloting stage. These companies were:

- BBVA
- LA CAIXA
- BANC SABADELL
- BANCO SANTANDER
- CAJASOL

Once the main Human Resources managers agreed on the participation of some of their employees over 55, we contacted and invited them to participate in testing the following European Framework Tools:

1. Competence Questionnaires: they were sent by IEF to the participants.
2. Interviews: An expert from IEF reviewed all the results of the questionnaires and prepared the interviews. Some of them were f2f and other using Skype or Telephone. Most of them lasted 45 minutes each and served as basis to further develop the career plans.
3. Career plans development: These plans were created by each of the participants with the support of IEF facilitator.
4. Training on Social Responsibility Facilitator: The participants were invited to follow an online training on this qualification, basically on the “strategies for Social Responsibility” which most of them stated were very interesting for them.
5. National Consultation Seminar: A panel of stakeholders attended this seminar to assess the relevancy and usefulness of the ILPO55 framework and transferability opportunities.

3. Stakeholders involved (provide information on the background of individuals such as: gender, role/position in the company, professional objectives, etc)

The following participants undertook the piloting stage of the European Framework tools:

| Participant | Situation | Role | Gender | Professional Objectives over 55 (To become....) |
|------------------|-------------|-----------------------|--------|--|
| Francesc Montoya | Pre-retired | Business Manager | Male | Trainer Coach |
| Francisco Galván | Working | Project Manager | Male | Trainer European project manager |
| Jordi Mabras | Pre-retired | Institutions Manager | Male | Trainer Facilitator Entrepreneurial projects board |
| Jordi Sullà | Pre-retired | Manager | Male | Trainer Coach |
| José Pedro Guart | Pre-retired | Office Deputy Manager | Male | Consultant |

4. Assessment of the ILPO55 Framework

4.1 Three Methods and seven Tools

As mentioned above, IEF tested the following tools:

- Competencies Questionnaire
- Interviews
- Career development plan

Regarding the Competency Questionnaire, the participants found it useful a concrete but most suggested it could have been in an online format and even a self-evaluation tool.

The interview format is easily adaptable to different interview forms, such as f2f or online and it was considered by the facilitator as a basis to exchange information with the participant, review the results of the competencies questionnaire and settle the fundamentals of a future professional (career) development plan.

Finally, the so called “career development plan” was considered a long tool. Most of them would have preferred to use an objective-based template or balance scorecard, as they are used to that in the professional environment. They didn’t feel comfortable with the term “career” as they stated they are over 55 and they don’t see themselves in the mood of a career as such. They preferred “professional development plan”.

4.2 Training activities

IEF agreed with the ILPO55 coordinator to carry out the training in an online format. Using IEF Moodle platform, the Social Responsibility Facilitator course was fully uploaded but participants carried out unit 3: Strategies & tools for Social Responsibility.

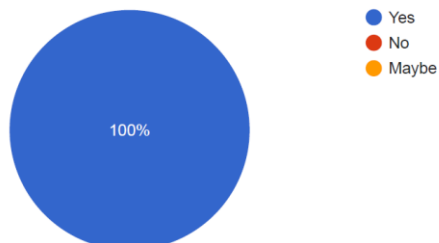
The training lasted two weeks and the participants were the ones invited previously to test the European Framework.

As the entire project materials were in English, we added some materials IEF already uses for Social Responsibility lectures to reinforce ILPO55 tools in other language. Nevertheless, all the participants had a very good level of English and found no difficulties in undergoing the training.

Finally, we asked the participants some feedback on the process with the following results:

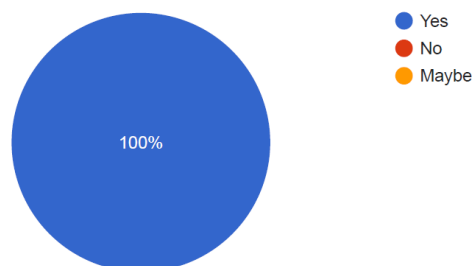
1. Do you feel that the project activities and results are relevant to your professional development and employability?

(6 respuestas)



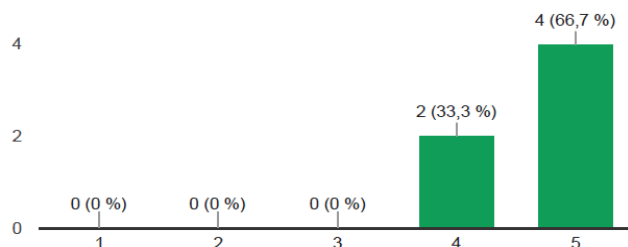
2. Would you be interested in acquiring any of the two qualifications following the completion of the ILPO55 project?

(6 respuestas)



3. Rate the relevance of the ILPO55 Framework and Qualifications for motivating and valorising the over 55 individual professional competencies.

(6 respuestas)



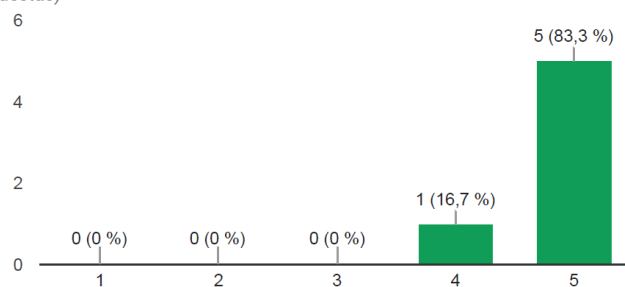
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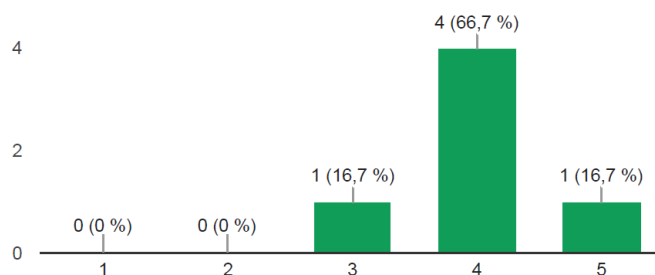
4. Rate the relevance of the ILPO55 Framework and Qualifications for re-
newing/upgrading the skills of over 55 individuals.

(6 respuestas)



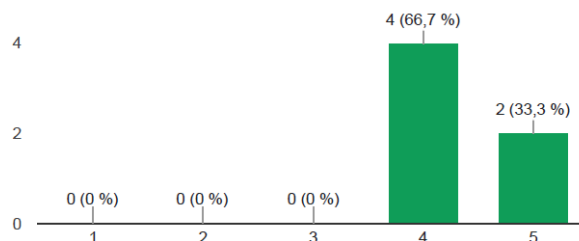
5. Rate the relevance of the ILPO55 Framework and Qualifications for
enhancing the cooperation between generations

(6 respuestas)



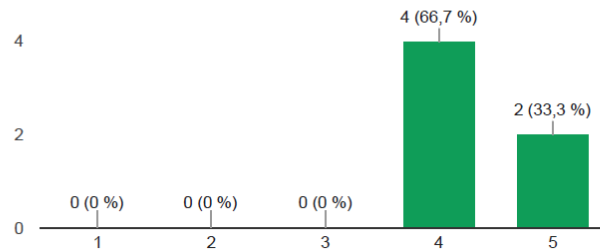
6. Rate the relevance of the ILPO55 Framework and Qualifications for
using the over 55 capacities for internal training of young employees or
for tutoring

(6 respuestas)



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

(6 respuestas)



5. Consultation workshops

The national consultation workshop took place in Barcelona, on the 2nd May 2017. Conducted by IEF team, it targeted eight participants (stakeholders) from the following financial services:

- Banks
- Trade Unions

The role of the participants was very relevant to build dialogue and future ideas on the usefulness of the model and how to sustain and transfer it:

- Human resources directors
- Training managers
- Trade unions
- Consultants
- Coaches
- Financial assessors

The seminar was very constructive with several inputs given by the participants, such as:

- The importance on intergenerational activities as a tool to foster age management.
- The current situation in Spain is different from the one we found at the beginning of the project. Banks are trying to capitalise human resources and introducing elements to retain them as much as possible. These elements can be teleworking, intergenerational activities, job shadowing, training, and others related to social

responsibility that could make over 55 be interested in sharing expertise and the companies understanding the value of people.

- The importance of prior recognition as a tool to ensure that over 55 can benefit from the European Qualification Framework in order to be better prepared for either internal activities or external consultancy or training.
- The ILPO55 Framework was pointed out as an important reference model to encourage and motivate over 55 to continue their professional career. All of the participants considered it very clear and useful.
- The qualifications are interesting. The Adult trainer is already a “professional certificate” in Spain so they considered the materials could be used for these trainings.

This is the list of participants to the National Consultation Seminar:



Erasmus+



ILPO55
Intergenerational
Learning Partnership
Over 55



NATIONAL WORKSHOP ILPO55

| NAME | COMPANY INSTITUTION | COUNTRY | EMAIL | Signature |
|----------------------|------------------------|---------|--|---|
| Salvador Farres | Banc Sabadell | Spain | farres@bancsabadell.com |  |
| Maria José Martínez | BBVA-CX | Spain | maria-jose.martinez@bbva.com |  |
| Miguel Ángel Esteban | SECPB | Spain | maesteban@secpb.com |  |
| Lluís Romeu | Voluntarios 'la Caixa' | Spain | lluisromeu@voluntarioslacaixa.org |  |
| Josep Masuet | RH Consellers | Spain | jmasuet@rhconsellers.com |  |
| Ana García Galván | Arquia Banca | Spain | ag.fl@arquia.es | |
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| | | | | |

It's important to highlight a 50% of these participants were already involved in the first stage of the ILPO55 project, during the focus groups carried out in 2014 for the Needs and Gaps analysis.

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As top managers, they state the project is very interesting as it tackles one of their main concerns in managing people in the banking sector, focusing on over 55. They consider it's extremely transferable to their institutions.



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The final results on the event can be seen in this summary of answers (extracted from the questionnaires):

Evaluation of Project Activities and Results

Do you feel that the ILPO55 Reference Framework and the two qualifications i.e. *Expert Adult Trainer*, and *Financial Services Sector Social Responsibility Facilitator*, are relevant for age management and training settings within your organisation?

All the participants stated YES.

Rate the relevance of the ILPO55 Framework and Qualifications for:

| | |
|--|---------------|
| 1. Motivating and valorising the over 55 individual professional competencies. | Very relevant |
| 2. Re-newing/upgrading the skills of over 55 individuals. | Very relevant |
| 3. Enhancing the cooperation between generations. | Relevant |
| 4. Using the over 55 capacities for internal training of young employees or for tutoring | Very relevant |
| 5. Improving the social responsibility actions conducted by the organization. | Very relevant |

Rate the tools Forming part of the ILPO55 Framework

| | |
|---|---------------|
| 1. Mentoring Plan | Very relevant |
| 2. E-Portfolio | Relevant |
| 3. Competence Evaluation Questionnaire | Very relevant |
| 4. Interview | Relevant |
| 5. Career Development Plan | Very relevant |
| 6. Recognition of Prior Learning | Relevant |
| 7. Self-Reflection Exercise | Relevant |
| 8. Expert Adult Trainer Qualification | Relevant |
| 9. Financial Services Sector, Social Responsibility Facilitator Qualification | Very relevant |

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

6.1 Conclusions:

- A very useful and clear framework with user-friendly instructions.
- The contents are well defined for all the framework and are attractive for the project's target and stakeholders.
- High level of transferability of the framework, tools and training activities.
- The importance on intergenerational activities as a tool to foster age management.
- The importance of prior recognition as a tool to ensure that over 55 can benefit from the European Qualification Framework in order to be better prepared for either internal activities or external consultancy or training.
- The ILPO55 Framework was pointed out as an important reference model to encourage and motivate over 55 to continue their professional career. All of the participants considered it very clear and useful.
- The website is very clear and all the tools are available in different languages.

6.2 Recommendations:

- Although the participants consider that prior recognition is important, they are not interested in obtaining any "official" qualification but very interested in following the training to be updated and capable for a future professional career.
- Automate the tools with online technologies.
- Offer the trainings in an eLearning platform.
- Create a training of trainers programme for both Adult trainer and Social Responsibility facilitator.