

OUTPUT 8

NATIONAL PILOT REPORT

NIBE SVV – THE NETHERLANDS



Hilversum, 12th May 2017

Aart Verrips NIBE SVV

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1. INTRODUCTION

1.1 Context

The Lisbon Strategy of March 2000, takes note of the relationship between demographic factors, employment and economic growth in the European countries. The ageing population in Europe is associated with profound structural changes in the economy and labor market. To overcome the unemployment crisis, begun in the early 80's, many European countries have used early retirement as a tool that has brought hundreds of thousands of workers over 55 at the exit from the labour market. In particular, the European banking sector was heavily affected by these processes, starting from the mid 90's. To improve the employability of the over 55 workers, the focus should be both on promoting training measures for older unemployed and employed individuals, directly linked to specific jobs.

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 will set-up the ILPO55 Reference Framework which will address the over 55 individual needs with a 360° perspective. Moreover, the project aspires at creating two professional qualifications (Adult Trainer and Social Responsibility Facilitator) and training programs that can be valorized by the over 55 both within the FSS and in other business sectors).

The project brings together 10 partners from 6 European countries, forming a transnational cooperation partnership with a balanced regional geographical representation of the Erasmus+ area.

NIBE SVV (part of NCOI Group) - a widely recognized educational organization providing professionals in the Dutch banking, insurance and investment sectors with training, education, exams, conferences and publications - is the Dutch partner in the project.

1.2 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.

1.3 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 Effebe 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 Effebi 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*)

Effebi 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. TARGET GROUP, PILOT SAMPLE AND PLANNING

2.1. Target group

NIBE SVV invited the following (27) banks and (7) insurance companies to participate in the pilot.

1. ABN AMRO Bank
2. Amsterdam Trade Bank
3. Anthos Bank
4. ASN Bank
5. Bank of America
6. Bank of China
7. Bank of Scotland
8. Bank Ten Cate & Cie
9. Banque Chaabi du Maroc
10. BNG Bank
11. BNP Paribas
12. BNY Mellon
13. Citco Bank Nederland
14. Citibank
15. Deutsche Bank
16. HSBC
17. ING Bank
18. JP Morgan Chase Bank
19. Kas Bank
20. Leaseplan Bank
21. NIBC
22. Nederlandse Waterschapsbank
23. Rabobank
24. Regiobank
25. SNS Bank
26. Triodos Bank

27. Van Lanschot Bankiers
28. Achmea
29. Aegon
30. Allianz
31. Delta Lloyd
32. NN
33. Univé
34. Voogd & Voogd

The majority of the invitations (see Annex 1) were sent to the HR department of the banks and insurance companies, in some cases a particular contact person was approached directly.

Apart from some general information about the project, including a link to the project website, it was clearly mentioned that we targeted on 10 over 55 professionals from whom we required feedback on (I) the European Framework and (II) Unit 2 [Technology Enhanced Learning] of the Adult Training course.

2.2. Pilot sample

The following 10 over 55 professionals participated in the Dutch pilot:

Company	Name	Role	Gender	Age
ABN AMRO	Ed Gonlag	Senior Manager	Male	58
ING	Paul van Vuuren	Director Wholesale	Male	57
Rabobank	Eric Passchier	Manager Lending	Male	56
SNS Bank	Carry Douve	Training Manager	Female	59
BNG Bank	Yvonne Bloem	Training Manager	Female	58
Triodos Bank	Bettina van Wetten	Senior Manager	Female	56
NIBC	Olav de Bruijn	Senior Manager	Male	63
Achmea	Marco Geboers	Project Manager	Male	56
Delta Lloyd	Klaas Valk	Knowledge Manager	Male	57
Voogd & Voogd	Helly Buursma	Wholesale Expert	Female	58

- Number of male participants: 6
- Number of female participants: 4
- Average age: 57.8
- Number of over 55 professionals from banks: 6
- Number of over 55 professionals from insurance companies: 4

2.3. Planning

Part 1 (November 2016 – March 2017)

Piloting the ILPO55 European Framework

The reference framework which will address the needs of FSS over 55 individual with a 360° perspective:

- analyze education & training and work experiences;
- assess individual competencies (knowledge, skills and competencies);

- identify personal and professional objectives
- support over 55 individuals in planning their future career/work experiences
- give advice regarding the existing opportunities for 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)

Part 2 (March 2017 – April 2017)

Piloting Unit 2 of the Adult Training Qualification (Technology Enhanced Learning)

The proliferation of technology and online learning has created a wealth of opportunities for educators to facilitate the learning process. This is also highly relevant within the context of workplace training and adult learning. This unit will introduce learners to methods and techniques that can be used to complement training delivery.

This unit explores how information and communication technology promotes interactions between the learners themselves and also the adult trainer within different learning contexts. The use of technology in learning is also able to redefine the roles of learners and trainers, giving learners more control over their learning process and giving trainers the role of guides and/or facilitators.

3. PILOTING STAGE STEPS



Stage 1 – Framework: Competency Evaluation and Professional Development Planning

NIBE SVV completed the following instruments related to the ILPO55 European Framework:

- Interviews: 10 persons (7 telephone, 3 face to face)
- Questionnaires: 10 persons
- E-portfolios: 9 persons (1 participant was unable to create an e-portfolio)
- Career plans: 10 persons

The interviews (average duration: 1 hour) were the starting point of this stage. Through the interviews (and the questionnaires) we collected useful information from the participants, and we used the interviews to introduce the project and its objectives.

Stage 2 – Adult Trainer Qualification: Technology Enhanced Learning

The proliferation of technology and online learning has created a wealth of opportunities for educators to facilitate the learning process. This is also highly relevant within the context of workplace training

and adult learning. In order to provide the highest level of professionalism and proficiency in the field, NIBE- SVV launched a set of tablet and smartphone e-learning apps. NIBE-SVV believes it is important to apply technical capabilities that support learning and making it easier to learn. With the e-learning apps NIBE- SVV, with help of its technical partner, developed an app for being time and location independent continuously informed and trained.

For the purposes of the pilot of this unit NIBE SVV provided participants with an app (Triple A) and access to a virtual learning environment (e-Connect). Screenshots are attached in Annex 3.

4. NATIONAL CONSULTATION SEMINAR

The Dutch National Consultation Seminar was organized on 27th March 2017. The following 21 persons participated – 16 of them were either piloting participants or HR managers of Dutch banks.

Company	Name	Role
ABN AMRO	Ed Gonlag	Senior Manager
ING	Paul van Vuuren	Director Wholesale
Rabobank	Eric Passchier	Manager Lending
SNS Bank	Carry Douve	Training Manager
BNG Bank	Yvonne Bloem	Training Manager
Triodos Bank	Bettina van Wetten	Senior Manager
NIBC	Olav de Bruijn	Senior Manager
Achmea	Marco Geboers	Project Manager
Delta Lloyd	Klaas Valk	Knowledge Manager
Voogd & Voogd	Helly Buursma	Wholesale Expert
ABN AMRO	Eva van der Donk	HR Manager
ING	Marijke Brunklaus	HR Manager
Rabobank	Joris Greve	HR Manager
BNG	Eduard de Kroon	HR Manager
Triodos	Marjolein Jansen	HR Manager
NIBC	Evert van Waal	HR Manager
NIBE SVV	Jeanette Hadderingh	Managing Director
NIBE SVV	Rob Schotsman	Scientific Director
NIBE SVV	Aart Verrips	Product Manager
NIBE SVV	Jan Marchand	Account Manager
NIBE SVV	Nana Asante	Assistant

The agenda of the Dutch Consultation Seminar (see Annex 3) contained a word of welcome by Managing Director Mrs. Jeanette Hadderingh, a presentation on the project and its objectives, delivered by Mr. Aart Verrips, a keynote on lifelong learning in the Dutch financial services industry with special attention to older workers delivered by Prof. Rob Schotsman (Scientific Director of NIBE SVV, professor at Amsterdam University, and over 55!), a panel discussion/feedback session on the Framework and the Qualifications, moderated by Mr. Aart Verrips. Photos are attached as Annex 4.

Feedback on the ILPO55 European Framework:

Participants considered the interviews a good starting point. This qualitative component suits better than a qualitative component. The majority of the participants were not necessarily positive about the e-portfolio software, as it was not user friendly, difficult to navigate. Participants suggested to implement this element in E-Connect or offer it through the app. The career plans gave participants the right direction and was considered a fruitful way to develop a sustainable career strategy.

Feedback on the Qualifications:

In general, both qualifications were positively received. Participants especially embraced the aim of the

Social Responsibility Facilitator, as knowledge, skills and competences necessary to implement CSR is pivotal for organizations: research shows that more and more organizations focus on reputation and license to operate. Participants advised to strengthen the industry involvement in qualification development. Moreover, from a HR perspective, participants required mandatory periodic reviews of qualifications to determine whether they are still fit for purpose.

ANNEXES

ANNEX 1 – Invitation piloting phase

Hilversum, januari 2017

Geachte mevrouw Van der Donk,

NIBE-SVV is de Nederlandse deelnemer aan het *Intergenerational Learning Partnership Over 55*, een internationaal leven-lang-leren-project met steun van het Erasmus+ Programma van de Europese Unie.

Het ILPO55 project beoogt een belangrijke bijdrage te leveren aan een duurzame implementatie van een bewust leeftijdsbeleid en intergenerationale samenwerking in de Europese financiële sector.

De belangrijkste doelstellingen zijn:

- een stijging te bewerkstelligen van employability, motivatie en ondernemend gedrag van werknemers boven de 55 die werkzaam zijn in het bankbedrijf;
- het samenstellen van een concreet ILPO referentiekader met curricula, opleidingen en diploma's;
- banken en financiële instellingen recente organisatorische praktijken en profielen aanbieden;
- ondersteuning van banken om "Lerende Organisaties" te worden door middel van intergenerationale professionele ontwikkeling;
- vermindering van de werkloosheid van de 55-plussers binnen het bankbedrijf door het bevorderen van de samenwerking tussen werkgevers, vakbonden en opleidingsinstellingen

Een belangrijk onderdeel van het project is een pilot waarbij het ILPO55 Framework en een onderdeel van een door het consortium ontwikkelde kwalificatie (Adult Trainer) getest worden. Het bijgesloten document voorziet u van meer informatie. Voor deze pilot, die zal plaatsvinden in de periode november 2016 - februari 2017 zoeken wij 55+ professionals werkzaam bij banken en verzekeraars.

Graag verneem ik van u of er binnen uw organisatie collega's zijn die willen deelnemen aan de pilot.

Om collega's aan te melden en/of voor aanvullende informatie kunt u zich wenden tot de heer Aart Verrips (a.verrips@nibesvv.nl), ILPO55 project manager namens NIBE SVV.

Bij voorbaat hartelijk dank voor uw inspanningen.

Met vriendelijke groet,

Aart Verrips
NIBE SVV

ANNEX 2 – NIBE SVV Triple E App and NIBE SVV E-Connect



dashboard

DASHBOARD USERS THEMAS TOPICS SPECIALISTS DOCUMENTS PROFILE GROUPS QUESTIONS ADMIN

Report per [dropdown] Apply

Team bancalir

Name	Last time active	Unopened	Up-to-date until	Score %	Status
medewerker 1		19	not updated	0% (0/1)	OK
medewerker 2		8	not updated	0% (0/8)	OK
medewerker 3		6	not updated	0% (0/6)	OK
medewerker 4	2014-06-17 20:27:47	2	17-06-2014	100% (2/2)	OK
medewerker 5	2014-06-20 16:04:58	2	14-04-2014	25% (1/4)	OK
Team Bancalir				91.7% (11/12)	
Team bancalir				42.3% (11/26)	

medewerkers

status teams

Wft
TRIPLE
E

NIBE
SVV

Wft TRIPLE E NCOI

Lilian van der Vliet

Aantoonbaar up-to-date tot

Status Toetsing up-to-date

Toets beschikbaar

Er zijn 5 ongetoetste artikelen beschikbaar

5

Start de toets

Bekijk artikelen

Leergedrag klant wordt onbewust beïnvloed

Let op! Geld lenen kost opduik

Een klant wordt onbewust beïnvloed door de manier waarop de bank zijn aanbod presenteert bij het afsluiten van een lening. De ANM laat dit in het rapport.

Rapportage

Maak een rapportage en krijg inzicht in uw studievoortgang

Hennep mag, maar niet te veel

Hennep kweken verhoogt het brandgevaar. Dat betekent nog niet dat een paar planten voor eigen gebruik de dekking in gevaar brengen. Bij professioneel hennep

Thema's

Bekijk al uw artikelen

De snelle e-bike

Met ingang van 1 januari 2017 wordt de regels voor de speed-pedelec (ook wel snelle elektrische speed-bike genoemd). Dat heeft gevolgen voor de WAM-verzekering

Advies

Kom snel in contact met onze specialisten

OLO openen

Naar e-Connect3

E-CONNECT

Train de Trainer: Professioneel Trainen

Ontwikkelaar: Niet bekend

Meester: Niet bekend

Volledige
Leeromgeving

Lessen

Overzicht opdrachten

1. De rol en de fu... >

2. Werkvormen >

3. Aan de slag in... >

Inleiding

Opmerkingen voor de docent:

OLO openen

Naar e-Connect3

E-CONNECT

1. De rol en de functie van een trainer

Train de Trainer: Professioneel Trainen

Ontwikkelaar: Niet bekend

Opdrachten: Bekijk alle opdrachten +

Volledige
Leeromgeving

Module • Les 1

Naam van de les

De rol en de functie van een trainer

Inleiding docent

ANNEX 3 – Agenda National Consultation Workshop

EVEN LANG LEREN IN DE FINANCIËLE SECTOR:

HOE ZETTEN WE OUDERE WERKNEMERS STRATEGISCH IN?

27 maart 2017

Locatie:

Het Groene Paviljoen
Zandheuvelweg 7
3744 MN Baarn

Programma:

08.30 – 09.00

09.00 – 09.15

09.15 – 09.45

09.45 – 10.30

10.30 – 11.00

11.00 – 12.00

12.00 – 12.30

Registratie

Opening en welkom – J. Hadderingh, NIBE SVV

"Intergenerational Learning Partnership Over 55" – A. Verrips, NIBE SVV

"Leven lang leren in de financiële sector" – R. Schotsman, NIBE SVV

Pauze

Discussie over ILPO55 European Framework – A. Verrips, NIBE SVV

Wrap up & afsluiting – J. Hadderingh, NIBE SVV

ANNEX 4 – Photos National Consultation Workshop



Photo 1: Mr Aart Verrips (NIBE SVV) explaining the project's objectives prior to the event



Photo 2: Mr Aart Verrips (NIBE SVV) with participants during the coffee break



Photo 3: Prof. Rob Schotsman (NIBE SVV / University of Amsterdam) delivering his key note on life long learning in the Dutch financial services sector



Photo 4: Prof. Rob Schotsman (NIBE SVV / University of Amsterdam) delivering his key note on life long learning in the Dutch financial services sector