

# European 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 under Key Action 2 - Cooperation and Innovation for Good Practices

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 in 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, as part of the project 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 were created.

In order to test the products created as part of the project, so as to foster age management and intergenerational activities, the partnership, together with a number of relevant institutions in the field of the Financial Services Sector in each Partners' country, conducted a piloting phase in which tools and qualifications were tested with Over 55 individuals.

A piloting methodology was designed and agreed among Partners in order to address as many stakeholders as possible, as well as ensuring quality of the contents and useful feedback.

The aims of this “European report” are:

1. to put together the results of the different piloting processes followed in different partner countries
2. to draw conclusions and try to raise awareness highlighting some important recommendations.

The Piloting phase was carried out in the following partner countries: Malta, Italy, The Netherlands, Romania, and Spain. The individual country reports are available on the ILPO55 website at [www.ILPO55.eu](http://www.ILPO55.eu).

## 1.2 Piloting objectives

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

The piloting experience gave participants the opportunity to better understand their personal employability situation whilst considering concrete support to improve their position in the labour market.

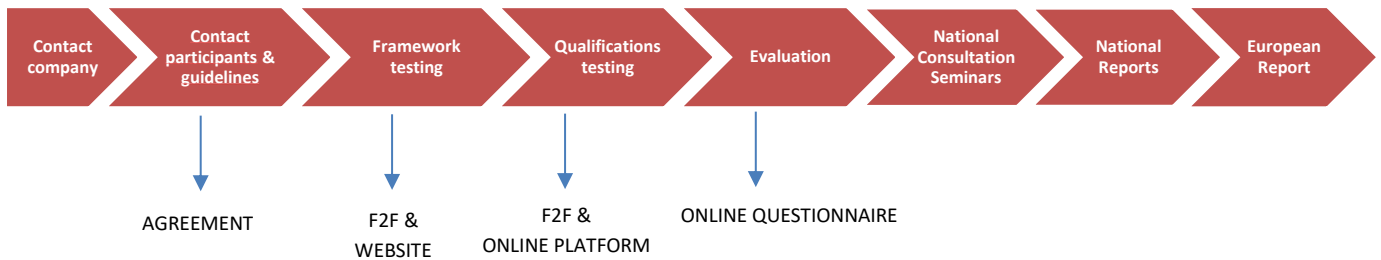
For the national piloting activities of the ILPO55 Reference Framework each Partner country identified 10 over 55 individuals within the FSS and invited them to test the various tools within the ILPO55 Framework – Employability Portfolio and to follow a blended training unit from one of the two ILPO55 professional qualifications.

## 2. Methodological approach and instruments

The piloting stage aims at checking, with the support of over 55 individuals from the Financial Services Sector, the ILPO55 Reference Framework (*Annex 1*) and its tools, and the two Professional Qualifications created as part of the project. Therefore, the following list of outputs has been checked through specific methods described below:

- ILPO55 European Reference Framework:
  - Competencies Questionnaire
  - E-portfolio
  - Feedback evaluation test
  - Interviews
  - ILPO55 Portfolio & Career development plan
- Adult trainer qualification
- Social Responsibility Facilitator qualification

The consortium followed the process shown below, as designed in the ILPO55 methodology:



The piloting stage consisted in three main phases:

### **Phase 1 (step 1 and step 2): October 2016 - November 2016.**

The first phase of the ILPO55 Piloting Phase consisted of the recruitment of 10 over 55 individuals per country, involved in the Financial Services Sector, to take part in the ILPO55 Piloting Phase. The aim of the Piloting phase was that of testing the tools and instruments of the ILPO55 Reference Framework in order to validate their relevance to the sector and to the aims of the ILPO55 Project. Participants recruited this way were asked to analyse their competencies and create their own employability portfolios and build their own career development plans.

The recruitment was carried out separately by the Partners involved in the project, who contacted a number of Financial Services institutions from their country. Once the organisation accepted the invite and the list of participants was agreed, the country coordinator (i.e. Project partner) sent a “welcome message” to each participant thanking them for their participation in the project and provided them with instructions on how to access to the ILPO55 website for the European Reference Framework and the Participation Agreement.

#### **Step 1. Testing of the ILPO55 Employability Portfolio**

A pre-condition for enhancing the employability of over 55 and help further their professional development is that both the individual and the employer have a clear picture and insight of the knowledge, skills and competences of the individual.

The ILPO55 Employability Portfolio has as ultimate objective a clear competence and skill profile of the over 55 individual which can be developed according to the following steps:

- A self-assessment questionnaire to measure the over 55 individuals’ skills/competences;
- An e-portfolio;
- An Interview

Given the short time frame and the amount of tools available, and given that most of the participants within the piloting phase were employees within an FSS institution, and were doing this voluntarily, the ILPO55 Consortium decided that not every individual needed to test each and every tool forming part of the Employability-Portfolio. A condition of the

Piloting phase was that each participant needed to; test at least one of these instruments

Following this, the participants were invited to an interview with an expert, tutor or coach to assess the outcomes and results of the above mentioned tools. Interviews were conducted on a face to face basis or remotely via telephone or Skype. This flexible approach was necessary given the busy schedules of most of the participants as well as the physical distance barriers which precluded participants from attending to a face to face interview. Since the aim of the Piloting phase was that of testing the tools and obtaining feedback from the participants, the ILPO55 consortium felt it was necessary to accommodate and facilitate the participants' participation as much as possible.

The outcomes of these tools led the way to the ILPO55 Career Development Plan and enabled participants to complete this.

### ***Step 2: Testing of the Career Development Plan***

The results of the employability portfolio enabled individuals to fill in the career development plan template to evaluate and understand over 55 individuals' aspirations; strengths; interests; drivers and other influences.

### ***Phase 2 (step 3): January-February 2017***

#### ***Step 3: Follow the blended training module***

The 10 over 55 individuals from each partner country were involved in the piloting of the ILPO55 Professional Qualifications. Each participant was asked to follow a short blended training module regarding one of the two professional qualifications developed in the project:

- ✓ *Adult trainer*: the aim of this qualification is mainly to provide knowledge, skills and competences required to effectively plan, prepare, deliver and evaluate training sessions (*Annex 2*)
- ✓ *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 (*Annex 3*)

Given the timeframe and the amount of material in these qualifications the ILPO55 Consortium felt it was more appropriate to split the qualifications into modules, and to have each organisation pilot a single module rather than a full qualification. In view of this, each partner:

1. chose a module from one of the two qualifications;
2. translated it in its own country languages (where applicable);
3. identified a trainer to adapt and if need be develop further blended training material based on the course description and the blended material which had already been conceptualised in Intellectual Output 5 of the project and deliver training accordingly, and;

4. scheduled and ran the training activities.

Although the dates for the Piloting phase were agreed amongst partners, each partner was left free to run the piloting phase as best it suited the needs of his/her organisation and the needs of the participants who accepted to take part in the piloting phase. Therefore each partner country chose to test some of the tools and instruments (at least three of five) forming part of the ILPO55 Reference framework without following a prescribed schedule and set up a blended training course of a preferred unit of the two qualifications. The ILPO55 Consortium however paid close attention that at the end of the piloting phase, all the tools and instruments and all 6 of 7 units of the 2 qualifications were tested.

### **Phase 3 - National consultation workshop with stakeholders**

To conclude the piloting stages each Partner organized a National Consultation Seminar, in its own country. A panel of stakeholders from the FSS attended the event to assess the relevancy and usefulness of the ILPO55 Framework and transferability opportunities. During these National Consultation workshops, the ILPO55 consortium had the opportunity to obtain feedback and suggestions from primary stakeholders within the FSS, in view of the proposed framework and its improvement.

A number of changes were applied to the ILPO55 Reference Framework and qualifications as part of this feedback and the outcomes of the piloting phase. Such changes will be explained further on within this report.

## **3. Stakeholders involved**

Different relevant institutions in the field of FSS from each partner country accepted to take part in the piloting phase. HR Departments within these institutions were asked to select 10 motivated over 55 employees that could benefit from this experience.

### **Malta**

The recruitment of participants was entrusted to MUBE and IFS Malta in view of their contacts with banks and other financial institutions.

The 10 selected over55 who undertook the piloting stages came from the following financial institutions:

- Bank of Valletta
- Fimbank Plc

- HSBC Bank Malta Plc
- APS Bank
- Banif Bank Malta plc
- MFSA
- Central Bank of Malta (retired employee)
- Aps Bank
- Retired Financial Consultant

### **Italy**

Effebi and Uninettuno, from Italy, conducted 2 separate piloting phases and therefore recruited participants individually. Each Partner contacted different financial institutions. A total of 5 over 55 per partner undertook the piloting experience ().

The 10 over 55 individuals who were invited to take part in the piloting experience came from the following financial institutions:

- BNL BNP Paribas, Rome (Effebi Association)
- Cooperative Bank, Grotte di Castellana (Uninettuno)

### **The Netherlands**

Nibe SVV from the Netherlands invited the following (27) banks and (7) insurance companies to participate in the piloting stages:

- ABN AMRO Bank; Amsterdam Trade Bank; Anthos Bank; ASN Bank; Bank of America; Bank of China; Bank of Scotland; Bank Ten Cate & Cie; Banque Chaabi du Maroc; BNG Bank; BNP Paribas; BNY Mellon; Citco Bank Nederland; Citibank; Deutsche Bank; HSBC; ING Bank; JP Morgan Chase Bank; Kas Bank; Leaseplan Bank; NIBC; Nederlandse Waterschapsbank; Rabobank; Regiobank; SNS Bank; Triodos Bank; Van Lanschot Bankiers; Achmea; Aegon; Allianz; Delta Lloyd; NN; Univé; Voogd & Voogd.

, The selected 10 over 55 professionals who undertook the piloting experience came from the following 6 banks and 4 insurance companies:

- ABN AMRO
- ING
- Rabobank
- SNS Bank
- BNG Bank
- Triodos Bank
- NIBC
- Achmea
- Delta Lloyd



- Voogd & Voogd

### **Romania**

ANUPInternational from Romania invited the following banks and financial institutions to select 10 over55 in taking part in the piloting stages:

- BCR (the biggest commercial bank in Romania)
- BRD (Societe Generale)
- Intesa San Paolo
- CEC Bank (the only State bank in Romania)
- ING Bank
- BNR (National Bank of Romania)
- ASE (the University of Economic Studies),
- Romanian Banking Institute
- ISF Institute of Financial Studies
- ASF Financial Supervisory Authority
- Banks Trade Union
- Association of Romanian Banks

### **Spain**

In Spain, IEF invited the following financial institutions to select 10 over55 for undertaking the piloting stages:

- IEF
- Banc Sabadell
- Catalunya Caixa
- Banc Santander
- Bbva
- La Caixa
- Cajasol
- Trade unions.
- 

From the lists presented above it is possible to notice the vast selection of stakeholders from different countries who took part in the ILPO55 Piloting Phase. Such a selection of stakeholders helps to validate the initiatives of the ILPO55 Consortium and gives weight to the feedback collected through such activities.

## 4. Assessment of the ILPO55 Reference Framework

### 4.1 Feedback and Recommendations on the tools forming part of the ILPO55 Reference Framework

The **first phase** of the piloting stage consisted in inviting 10 over 55 individuals, involved in the Financial Services Sector, per country to test at least three of five instruments and tools developed within the ILPO55 Reference Framework.

Partners provided participants with structured instructions and guidelines on how to use the tools, and all templates were made available accordingly either via email or through the ILPO55 project website (<http://www.ilpo55.eu/it/default.aspx>). The ILPO55 consortium did not specify at this stage whether templates were to be filled in manually or electronically. This was left up to the participants to make them feel as comfortable as possible. - The following documents were made available :

- a. Brief presentation of the piloting process;
- b. Downloadable instructions for the piloting steps;
- c. Competency Evaluation Questionnaires (PDF version) (*Annex 4*);
- d. Links to external sites for e-portfolios;
- e. Instructions for interviews (*Annex 5*);
- f. Career development plan template (*Annex 6*).

Each template was translated in all partner languages (see as Annexes in each country report).

At the end of the Piloting Phase, all participants were invited to fill in a feedback questionnaire (online or paper based). This was done in order to collect feedback on this process and possible improvements/suggestions and/or further recommendations for the ILPO55 Reference Framework and its tools including the training Programmes.

In each Partners country the following Instruments and tools were tested according to a different scheduling:

	Malta	Italy	The Netherlands	Romania	Spain
Competence Questionnaire	X	X	X	X	X
E-Portfolio			X	X	
Interview	X	X	X	X	X
Career Development Plan	X	X	X	X	X

## **Conclusions and recommendations**

### **Competence evaluation questionnaire**

In general, all participants declared to be satisfied in filling in the competence evaluation questionnaire. Most of them find it as an effective and detailed instrument, simple, understandable and user friendly. Some participants suggested it could have been in an online format and even a self-evaluation tool.

Participants gave positive feedback regarding the competence evaluation questionnaire as they considered it an extremely valid, useful and concrete instrument for achieving the specific aims set by the project and the reference Framework “to outline a clear picture and insight of the knowledge of an individual, and to assess their own skills and competences, whilst also identifying their strengths and weaknesses”.

The Competence Evaluation Questionnaire helped in providing a first quick analysis on the level of the individual in following competencies:

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

Finally, some suggested that the outcomes of the questionnaire should be made available to the interviewer prior and/or the interview to allow a deeper discussion and to allow the interviewer to get to know the interviewee better.

Such feedback led the Consortium to confirm the effectiveness and relevance of this tool for the aims of the project and the Framework, and therefore it was kept in the final version of the Reference Framework – Employability Portfolio.

### **E-portfolio**

The E-Portfolio was tested in Romania and the Netherlands. The reason for this was that other countries encountered some difficulties in accessing the proposed E-Portfolio application which was suggested by the Dutch partners.

From Romania over 55 individuals expressed their appreciation as they found it an extremely valid and useful instrument to assess their own skills and competencies and a good guide to precisely set up their own professional career path.

From The Netherlands the majority of the participants gave a different kind of feedback, as it was not considered as a user friendly instrument and found many difficulties to navigate.

This feedback led the ILPO55 Consortium to revisit the inclusion of an e-Portfolio within the ILPO55 Reference Framework. The main issue with the e-Portfolio was finding a suitable platform, or creating one which was simple yet fit for purpose, and which was available and accessible in all countries. Whilst the ILPO55 Consortium shared the same views as the participants in Romania, that the e-Portfolio is a valid and useful tool for the Over 55 individuals to help them reflect on their own skills, competences and achievements, and trace their own professional career path. Similarly the ILPO55 Consortium also agreed that the e-Portfolio is a tool which the Over 55 can use beyond the ILPO55 Reference Framework, thus equipping him/her with a lifelong tool, further enhanced the conviction that the e-Portfolio should form an integral part of the ILPO55 reference Framework.

At the same time the ILPO55 Consortium also acknowledged the feedback from the Dutch Participants that filling in an e-Portfolio without guidance, could be a daunting task for an over 55 individual, especially given the fact that older people tend to dislike using electronic applications. Given the above reasoning the ILPO55 Consortium decided to keep the e-Portfolio as one of the tools within the Reference Framework and to devise a mechanism by which to offer support to any prospective applicants wishing to follow the ILPO55 Reference Framework – Employability Portfolio Process.

## **Interviews**

The majority of over 55 individuals, in all partner countries, appreciated the interviews as a tool for competence analysis and career planning. Many of the applicants claimed that the interview was their preferred tool from the ones tested. The reason for this was that during the interview, participants had the opportunity to communicate with the interviewer, who is an expert in the area, and to ask questions and discuss issues and difficulties which they are experiencing or might encounter should they decide to opt for career progression. Moreover, during the interview they also had the opportunity to analyse and discuss the results of the previously tested tools with the interviewer. Once again the element of support and communication was highlighted in the feedback for this tool. The Consortium once again acknowledged the fact that in order to ensure the best results out of the tools forming the ILPO55 Reference Framework and Employability Portfolio, they needed to set up a support mechanism in order to aid the Over 55 individuals in the completion of the tools whilst giving them the opportunity to discuss any issues and plans for the future.

Participants also suggested that questions related to past experience and knowledge should be included in the Interview template in order to compare with what the individual wants to do in the future. Moreover they also recommend that it would be appropriate to include questions

regarding the organisation. This could provide insight as to how the individual could progress in his career.

Interviewers were also given the opportunity to comment on the interview process. Some commented that the interview format was considered very useful to exchange information with the participant. Conducting an interview (face to face or via telephone) gave them the possibility to examine in depth the competences and skills, declared by the over 55 having acquired during their whole professional experience and to also better understand their role within the organisation.

Another aspect which came up was the need to make the interview with an expert who is independent from the company the participant was employed in, adding the important consideration that this could facilitate the interviewees to speak more 'freely' about their professional career prospects.

The feedback received on the Interview as a tool of the ILPO55 reference Framework led the ILPO55 consortium to confirm the validity of the Interview for the aims of the project and thus it was kept as a tool within the ILPO55 Employability Portfolio.

### **Career development plan**

Feedback on the career development plan was not very positive. In fact it was considered too long and even complex tool. Most of over55 participants (especially for Italy) completed it but had several doubts and difficulties in providing their suggestions and contributions on the last part of the template related to the completion of a possible "action plan". Furthermore, as they are over55 individuals many commented that they did not 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.

In addition, (especially for Spain), participants commented that they would have preferred to use an objective-based template or balance scorecard, as they are used to that in their own professional environment. They didn't feel comfortable with the term "career" as they stated they are over55 and they don't see themselves in the mood of a career as such. They preferred "professional development plan".

Differently, (especially for The Netherlands) career plans gave participants the right direction and was considered a fruitful way to develop a sustainable career strategy.

Finally, over 55 participants also suggested that the career development plan should be done before the interview, the reason being that this would give the interviewer the opportunity to better focus on the strengths, weaknesses and aspirations of the individual.

The ILPO55 Consortium evaluated the feedback obtained on this tool. They acknowledged the fact that since they were dealing with over 55 individuals, the title professional development plan would be more suited and decided to adopt it. Moreover they also acknowledged the difficulties which filling in the Career Development Plan might present. Once again, the feedback on this tool revealed that clear guidance needs to be a central focus of the ILPO55 Employability Portfolio process. They agreed that without expert guidance many of the tools would appear difficult for the Over 55 and they would also lose their aims and value. The Professional Development Plan was kept as part of the ILPO55 Reference Framework – Employability Portfolio; however the consortium revised the process of the Employability Portfolio and included new tools based on the feedback, obtained from the Piloting Phase, as shown in Section 5.

## 4.2. Training activities

The **phase 2** of the piloting process consisted in guiding the 10 over 55 individuals per country in following a short blended training module through an on-line platform on one of the following units of the two professional qualifications developed in the project:

		Malta	Italy	The Netherlands	Romania	Spain
<b>ADULT TRAINER</b>	Unit 1 <sup>1</sup> - Analysis, Design and Delivery of Training Activities					
	Unit 2 – Technology Enhanced Learning		X	X		
	Unit 3 - Mentoring				X	
<b>SOCIAL RESPONSIBILITY FACILITATOR</b>	Unit 1 - Introduction to Social Responsibility in the Financial Services Sector	X	X			
	Unit 2 - The Role of Internal and External Stakeholders	X				
	Unit 3 - Strategies and Tools for Social Responsibility Implementation					X
	Unit 4 - Professional Knowledge, Skills and Competences for the Social Responsibility Facilitator	X				

Each partner chose a unit from one of the two qualifications, translated it in its own language

<sup>1</sup> All the unit descriptions of the piloted modules are provided, as annexes, in each country report.

(where applicable), selected and contacted a trainer and provided him/her with the blended delivery methods (e-learning and classroom), the training course contents and materials and scheduling the training activities.

The over 55 individuals already involved in phase 1 were invited to follow the above mentioned short blended training course.

The selected trainer prepared several training materials, relevant case studies and similar activities, set up working groups and held face to face sessions in order to test the validity of the contents of the selected module. Each partner followed a personalized method for the piloting of the training programmes; one which best suited the needs of the participants; the organization they were representing and the country in which the piloting was taking place.

To collect the necessary feedback and recommendations, at the end of the training session, each participant was requested to complete a satisfaction questionnaire) whose results were gathered and commented in the already mentioned countries' reports.

At the end of the piloting experience all Partners, on behalf of ILPO55 Consortium, issued a Certificate of Participation for each participant. The Certificate template is an annex of this Report (*Annex 7*).

### **Conclusions and recommendations:**

Participation in the second phase of piloting required much more effort from the individuals as when compared to phase 1. However, all the feedback collected from all the Partner countries reflected a general positive approval for the launch of the blended training courses even though, for some training session participants identified further areas that could be included in the different units.

Most the over 55 employees found these kinds of activities of interest highlighting the relevance of such actions with the specific aim of staff motivation and staff retention.

For specific feedback and recommendations related to the single units proposed and piloted, we recommend to refer to the individual country reports available in the annex section of this document.

### **4.3. Consultation workshop**

The ILPO55 Partners organized the national consultation workshops in their respective countries, inviting as many relevant stakeholders working in the FSS as possible (at least, 6 Financial Institutions per country),

The main aims of the Consultation Workshops were:

- to introduce stakeholders to the project and its main objectives, outputs and results, focusing on the specific deliverables related to the ILPO55 European Framework and the 2 Qualifications developed within the project;
- to share with FSS stakeholders the products created and piloted by individuals to analyse the level of usefulness, transferability and applicability;
- 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 partners in gathering several interesting and useful inputs and feedbacks.

For this purpose, some Partners also invited participants to complete a national consultation workshop evaluation sheet (*Annex 8*).

Some of the main reflections made by the participants were:

#### ILPO55 Reference Framework

- the ILPO55 Framework was pointed out as an important reference model to encourage and motivate over 55 employees to continue their professional career;
- overall the ILPO55 Framework was seen as 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 contents of the ILPO55 Reference Framework were seen as well-defined for the whole framework and attractive for the project's target and stakeholders;
- although ILPO55 project addresses the over 55 category, the tools and methods developed within the project and piloted could have a wider scope: the Reference Framework might also be applicable to other categories of employees (e.g. top level) and can easily be implemented by different organisations, not also in the field of FSS;
- organisations could include some tools of the Reference Framework in their training activities, and thus it could be the case to customize revising them.

#### ILPO55 Professional Qualifications

- in Malta the over 55 underlined that the courses should not be restricted to particular levels or assessments as the focus is more on continuous professional development;
- in Italy, as also in Spain, the two qualifications proposed were 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;



- in the Netherlands, participants especially embraced the aim of the Social Responsibility Facilitator, as knowledge, skills and competences necessary to implement CSR are pivotal for organizations: research shows that more and more organizations focus on reputation and license to operate. They finally advised to strengthen the industry involvement in qualification development;
- in Romania the qualification of Adult trainer (mentor) is already registered in the National Register of occupations, but the standard is rather dated (elaborated in the '90). So, based on the materials developed within the ILPO55 project it could be possible to revise and update it. Adult trainer is already a “professional certificate” in Spain too, since they benefited in using the provided materials for the training session.

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

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

There is a need for the intergenerational cooperation, in order to enhance knowledge and competences, and this has to be given priority for consideration and inclusion within the FSS institutions' policy.

The project (through the Reference Framework) should further emphasise the over 55 as a resource that should have an active role within FSS organisations. Therefore, FSS organisations should understand that aged workers engaged in senior positions, when they retire, create a huge loss in terms of knowledge and practice. FSS organisations should then strive to recognize the strengths of a multi-generational workforce.

For all these purposes, it is highly recommended that all the stakeholders involved, work together so as to clearly address this problem. It is sure that more can and needs to be done in tight collaboration with public and private institutions to better communicate and broaden the principles, and objectives of the ILPO55 proposal.

The main recommendations received during these activities were:

- 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. Although the participants consider that prior recognition is important, some of them are not interested

- in obtaining any “official” and/or accredited qualification but very interested in following the training to be updated and capable for a future professional career;
- c. the ‘career development plan’ was considered to be rather complex and therefore, participants 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;
  - e. the interview has been considered a good flexible instrument to be used for acquiring qualitative input regarding both competencies and skills and individual’s objectives and aspirations in the professional field.
  - f. some over 55 individuals proposed to create a training programme for trainers for both Adult trainer and Social Responsibility facilitator qualifications.

Moreover, the need for the inclusion of professional guidance as part of the ILPO55 Reference Framework – Employability Portfolio process was a common theme in the feedback received for the various tools used in the Piloting Phase. It was noted multiple times that many of the tools become difficult to use for Over 55 individuals and create barriers which make them lose their intended purpose. Because of this, the ILPO55 Consortium revised the structure of the Employability Portfolio within the ILPO55 Reference Framework, transforming it into a process whose tools can be used individually, but which gives major input when used in succession. The new format of the Employability Portfolio saw the inclusion of a Mentoring Plan as the first tool and the assistance of a mentor throughout the entire process to help the individual with the execution of the various tools within the Employability Portfolio; the inclusion of RPL as recommended in the National Consultation workshops in order to encourage over 55 individuals to follow programmes of training by validating their skills and competences; and finally the inclusion of a self-reflection exercise to close off the process of the Employability Portfolio. Rather than a single e-Portfolio, the ILPO55 Consortium agreed that the ILPO55 reference framework should point towards various readily available tools and leave it up to the applicant to select his/her preferred one. In doing so, they would be avoiding any possible negativity which would rise from imposing a specific portfolio which is either too complex or too simple for the needs of the individual.

The inclusion of Mentoring as part of the reference framework also provided the individual with a reference point with whom to discuss any difficulties or uncertainties which may crop up throughout the process.

Following the Piloting Phase and the evaluation of feedback received the structure of the ILPO55 Reference framework Employability Portfolio was changed as follows:

<b>METHODS</b>
1. Mentoring guidelines

2. Training
3. Competency Framework
<b>TOOLS</b>
1. Mentoring Plan
2. Competence Evaluation Questionnaire
3. E-Portfolio
4. Interview
5. Career Development Plan
6. Recognition of Prior Learning
7. Self-Reflection Exercise

More information on the rationale behind each tool can be found in the specific documents for each tool available in the Annex section of this document or on the ILPO55 website at <http://ilpo55.eu> .

## 6. Appendix List:

1. [Annex 1 ILPO55 European Framework.pdf](#)
2. [Annex 2 Adult trainer course description.pdf](#)
3. [Annex 3 SRF course description.pdf](#)
4. [Annex 4 Competence Evaluation Questionnaire.pdf](#)
5. [Annex 5 Instructions for interview.pdf](#)
6. [Annex 6 Career Development Plan.pdf](#)
7. [Annex 7 Piloting Certificate template.pdf](#)
8. [Annex 8 National cons workshop evaluation sheet.pdf](#)
9. [Annex 9 MENTORING METHOD.pdf](#)
10. [Annex 10 MENTORING PLAN LAYOUT.pdf](#)
11. [Annex 11 COMPETENCE EV. QUESTIONNAIRE.pdf](#)
12. [Annex 12 EPORTFOLIO.pdf](#)
13. [Annex 13 INTERVIEW TEMPLATE.pdf](#)
14. [Annex 14 PROFESSIONAL DEVELOPMENT PLAN.pdf](#)
15. [Annex 15 RPL- RATIONALE AND GUIDELINES.pdf](#)
16. [Annex 16 SELF REFLECTION GUIDELINES.pdf](#)