ILPO55 Competency Framework Method

for Intergenerational activities in the FSS

(ILPO55: *Output 6, Activity 1 O6-A1 Develop methods and tools for competence evaluation*)

1. Introduction

The Competency Framework Method is one of the three main methods for Competence Evaluation and the Improvement of Employability of over 55 Employees, developed as part of the ILPO55 project. It forms part of the Employability Portfolio within the ILPO55 Reference Framework and it aims at providing insight to the various tools forming part of the ILPO55 Employability Portfolio as well as recommendations for the use of each individual tool.

The ILPO55 Reference Framework is made up of a number of elements which are aimed at bridging employability gaps for older employees in the Financial Services Sector. It provides older employees with information and tools which can improve their employability skills, and provides them with information on legal initiatives related to age management available to them in their respective countries.

2. The Employability Portfolio

The Employability Portfolio is a compendium of the tools for competence Evaluation and methods for self-evaluation and career progression. It is based on the principles of self-reflection and self-evaluation and is designed as an exercise which helps individuals to identify their strengths, weaknesses and opportunities for Professional Development Plan. It consists of the following methods and tools:

The Employability Portfolio
METHODS
1. Mentoring guidelines
2. Training
3. Competency Framework
TOOLS
1. Mentoring Plan
2. Competence Evaluation Questionnaire
3. E-Portfolio
4. Interview
5. Professional Development Plan
6. Recognition of Prior Learning
7. Self-Reflection Exercise

3. The main elements of the ILPO55 Employability Portfolio

The main elements of the ILPO55 process are Mentoring and Self-Evaluation.

Mentoring is needed in order to provide professional guidance to the Over55 employee throughout the process. Mentoring adds the human element to the process, providing users with the opportunity to discuss their aspirations for the future and/or any issues and or difficulties

encountered throughout the process. Moreover, the Mentor can fill in the role of evaluator and interpret the results and outcomes of specific tools within the ILPO55 process and help the over 55 employee to plan his/her future professional development accordingly. Although most of the tools can be used by the Over 55 individual, independently, the lack of a professional guidance and evaluation would lose its efficiency. That being said, one needs to pay attention and ensure that the Mentor takes a supportive role; and not a decision making one. Any decisions for the employee's future need to be taken by him/her based on the knowledge of him/her gained through self-evaluation.

Self-Evaluation is another important element of the ILPO55 Employability Portfolio Process.

Throughout the Employability portfolio, there are various instances in which the Over 55 individual will be expected to reflect on, and evaluate him/herself as well as his/her current situation and future aspirations. Some of these instances are direct, and specifically ask the Over 55 individual to reflect and evaluate him/herself. Others take a more indirect approach. Through the application of each of the seven tools within the Employability Portfolio, Over 55 individuals have to constantly ask themselves about their own future professional objectives, analyse their skills and competences to verify whether they fulfil the necessary requirements to meet such aspirations and plan accordingly.

Self-Reflection and Evaluation are tools which help individuals to get in touch with their inner selves, making them more self-aware and hence more competent to take decisions which affect their future. Self-Reflection and Evaluation within the ILPO55 Employability Portfolio is based on the theories of Donald Schön (1983) who wrote about Self-reflection as a tool for professionals and introduced 2 types of reflection: Reflection on Action and Reflection in Action.[1] The portfolio features both forms of reflection; these will be explored in more detail in the section dedicated to the Self Reflection Guidelines further on in this document.

4. Using the ILPO55 Employability portfolio

Any organization wishing to retain older employees and offer them career progression opportunities may decide to apply the ILPO55 Employability Portfolio Process as one of its tools for age management. The ILPO55 Employability process is designed to help Over 55 employees, and organisations, to identify and tackle any employability issues which might preclude them from career progression. The ILPO55 Employability Portfolio is a Human Resources tool and therefore its provision in any organization falls under the responsibility of the HR Department.

The tools forming the Employability Portfolio can be employed in succession, as a process (in the order in which they are listed above), or used individually as per the needs of the organisation and the individual.

When choosing to offer the ILPO55 Employability portfolio as a process, it is recommended that this is offered in the same order as listed earlier on in this publication. The structure of the Employability portfolio, and the order in which tools are listed, takes O55 employees on a journey of self-discovery through which they can design a path for their future. Each tool builds on the ones preceding it, and the work done in one tool is sure to become useful when using the other tools in the process. Similarly it introduces the element of mentoring from a very early stage and enables the mentor to build his/her mentoring plan around the Employability Portfolio Process, ensuring that each tool is

---

[1] Adapted from The Reflective Practitioner by Donald A. Schön - 1983

discussed throughout the plan. In addition it guides the Over 55 individuals in a gradual process of self-discovery, starting with basic self-evaluation exercises and progressing to a fully-fledged Self Reflection exercise towards the end of the process.

Alternatively, the organization may decide to offer some of the tools forming part of the ILPO55 Employability Portfolio rather than the entire process. Some organisations may already have their own age management tools and strategies and therefore would only need one or two of the ILPO55 tools to complement their own. Similarly, it might be the case that the Over 55 individuals/ employees would already have a clear idea of what they would like to achieve for their future and therefore only need to trace the plan accordingly. In the end, the decision on whether to adopt the full process or individual tools relies on the organization; the individual; and their needs.

In either of these cases (selecting the full process or just the use of individual tools), the ILPO55 consortium recommends that:

1. guidance, in the form of a mentor is provided to the individual who chooses to use any of the tools within the Employability Portfolio;
2. the Self Reflection Exercise is always filled in, regardless of whether the individual is following the entire process or just a single tool. The Consortium believes that by developing and/or strengthening Over 55's self-reflection skills, it would be giving them a tool which will be useful for them in the long term, even beyond the ILPO55 Employability Portfolio.

5. The Tools of the ILPO55 Employability Portfolio

In this section we will take a closer look at the individual tools forming the Employability Portfolio, including their description and some recommendations for use.

5.1 Tool 1 – Mentoring Plan

Introduction

The notion of Mentoring and guidance is central to the ILPO55 Reference Framework and Employability portfolio. Each individual wishing to undergo a process of development (both personal and career oriented) needs to be guided prior to undertaking such process as well as during its execution. The role of the mentor is therefore very important as it gives the individual a point of reference:

1. with whom to discuss personal goals and any difficulties and/or doubts holding him/her back from achieving them;
2. with whom to trace the plan and tasks for the achievement of his/her pre-set goals for self and career amelioration;
3. to turn to for advice regarding any issues and/or difficulties encountered during the execution of the tasks forming part of the plan for improvement.

The mentoring plan is the first tool in the ILPO55 Employability Portfolio. Research conducted during the ILPO55 project lead the ILPO55 consortium to identify and confirm Mentoring as a key tool for the development of the Over 55 employees within the Financial Services Sector, and hence the decision to place the Mentoring Plan as the first Tool of the Employability Portfolio.

The aim of the Mentoring plan within the ILPO55 Employability Portfolio is to ensure that the Over 55 individuals choosing to follow the ILPO55 Employability Portfolio process are given the necessary support, guidance and feedback as they fill in and submit the various tools within the Portfolio. Throughout the Mentoring Plan, the Mentor and Mentee should take the opportunity to discuss the mentee's goals for the future and draw a plan for the successful achievement of such goals.

Recommendations for Use

The Mentoring Plan should be used in conjunction with the ILPO55 Mentoring Method for details on the use of the GROW model and the notion of mentoring within the ILPO55 Reference Framework. The Mentoring Plan Template (below) includes instructions on the use of its specific sections. These should facilitate comprehension on the aim of the different sections within the template.

The Mentoring Plan should be the first tool to be used with any instance of ILPO55 Employability Portfolio provision. Any organisation wishing to offer any of the tools within the ILPO55 Reference Framework and Employability Portfolio should also provide mentoring, regardless of whether the entire process (comprising all tools) is being used or not.

Although the Mentoring Plan is placed at the start of the ILPO55 Employability Portfolio; the ILPO55 Consortium envisages it as an on-going tool which is to accompany the mentee through the execution of the seven tools forming the Portfolio. The Mentoring Plan should therefore be seen as a living organism which feeds-off the results and outcomes of the other tools of the Framework in order to shift and update. This means that the Mentor should follow the mentee throughout the entire process of the Framework; record and discuss the results of the various tools, and update the Mentoring plan accordingly in order to ensure that the mentee is able to achieve his/her goals.

The ILPO55 Consortium recommends the use of the GROW model as a base for the structure of their mentoring sessions. Detailed instructions on how this should be implemented can be found in the ILPO55 Mentoring Method document.

Like other tools within the ILPO55 Employability Portfolio, the mentoring plan should be seen as the responsibility of the mentee (the Over 55 individual). The Mentor should be responsible for guiding the mentee into taking ownership of the design any decisions which will have an impact his/her future.

The ILPO55 Consortium recommends that in cases where the Mentee is following the ILPO55 Employability Portfolio Process, mentoring meetings are scheduled as a minimum on a bi-weekly schedule. The Mentoring Plan should be filled in with as much detail as possible and any updated frequently (if possible following each mentoring session).

5.2 Tool 2 – Competence Evaluation Questionnaire

Introduction

The aim of the Competence Evaluation Questionnaire is to guide the individual in the process of self-reflection in order to identify his/her own personal strengths and weaknesses in relation to employment within the Financial Services Industry. The result of the questionnaire should give an initial insight into the individual's main skills and competences, and lead the way to the other tools forming part of the ILPO55 Employability Portfolio. This is the first instance of Self Reflection and self-evaluation within the ILPO55 Reference Framework.

Being the first instance of Self Evaluation within the Employability Portfolio the questionnaire is composed solely of matrix questions related to a number of skills which are relevant to the Financial Services Sector. The user is expected to reflect on his/her skills and abilities and rate accordingly. The result of the filled-in questionnaire would indicate the user's skills and highlight and strengths and weaknesses which would need to be tackled in order to maintain the individual relevant to the Financial Services Sector and the world of work in general.

The questionnaire consists of the following sections:
- Section A: Personal Details
- Section B: Management Skills
- Section C: Technical Skills
- Section D: Social Skills
- Section E: Personal/ Behavioural Skills
- Section F: ICT Skills

Following the completion of the Competence Evaluation Questionnaire, the individual may be invited to use other tools forming part of the ILPO55 Employability Portfolio to further analyse his/her personal skills and competences. In the case of a user following the ILPO55 Employability Portfolio as a process, the outcome of the questionnaire will provide vital information for use with the other tools and it will be the basis on which activities for the progression of the individuals are built.

Recommendations for Use

The ILPO55 consortium recommends that the Competence Evaluation Questionnaire is deployed as the second tool in the ILPO55 Employability portfolio process, immediately after the setting up of the Mentoring Plan. The questions are designed to be used in the early stages of the portfolio and aim at gathering the first impressions of the individual on his/her own personal skills. The questionnaire will also introduce the individual to self-reflection and self-evaluation which are constant themes within the Employability Portfolio and which will be experienced further through the use of the other tools making up the portfolio.

The Competence Evaluation Questionnaire should be filled in by the O55 Individual on his/her own (without guidance except for minor clarifications which s/he should be allowed to ask his/her mentor). In parallel to this exercise the Individual can also be introduced to the E-Portfolio and guided through the process of filling it in.

The outcomes of the Questionnaire should be analysed in two stages:
- Stage 1: With the assigned mentor to draw up a summary of the outcome and discuss its implications;
- Stage 2: As part of the Interview planned in stage four of the Employability Portfolio. To review outcome and inform the interviewer on the skills of the individual; and to enable the interviewer to make a better informed assessment on the skills of the individual.

5.3 Tool 3: E-Portfolio

Introduction

The third tool within the ILPO55 Reference Framework – Employability Portfolio is the e-Portfolio. The e-portfolio is intended as an instrument of self-evaluation which the Over 55 individual may use in order to showcase his/her knowledge, skills, competences and other achievements, obtained through formal and informal education or work place settings, as well as other initiatives related to Continuous Professional Development (CPD) and Life Long Learning (LLL). In a way it is similar to a Curriculum Vitae, however it provides more detail, and enables the possibility of providing evidence which is difficult to include within (and/or irrelevant for) a CV (such as multimedia files, and/or samples of work produced by the individual). Many times, e-Portfolios are used as extensions of the CV to give a more complete picture of the individual.

What is an e-Portfolio?

A portfolio usually contains:
- the user's reflection as a professional;
- a record of the user's professional development through various experiences;
- proof of the user's performance at work or at school;
- user's achievements and samples of work performed (e.g. photos / videos/ samples);
- evidence of having acquired new skills.

The term e-Portfolio stands for electronic Portfolio and is not to be mistaken with Employability Portfolio. In fact for the purposes of the ILPO55 project, the e-Portfolio is a tool within the Employability Portfolio which can be used in conjunction with the other tools forming the Employability Portfolio. The e-portfolio is strategically placed within the Employability Portfolio process, following the completion of the ILPO55 Competence Evaluation Questionnaire, through which the O55 individual would have initiated a process of self-evaluation and identified his/her basic strengths and weaknesses, and prior to the Interview, in which the individual would need to discuss his/her aspirations and provide information on him/herself and his/her accomplishments.

As the name suggests, e-Portfolios are electronic applications which are managed by a user and are generally shared online via the web. Being electronic applications, users have the opportunity to develop and maintain its information dynamically over time. In fact, the development of an e-Portfolio should not be seen as one time task but as a process which accompanies the individual in his/her progression. Drawing up a portfolio helps the Over 55 individual prepare for an interview by giving him/her the opportunity to think critically about his/her experience and professional achievements. Similarly the maintenance of such a portfolio would also enable the user to plan his professional development as s/he becomes more aware of his strengths and weaknesses.

Types of e-Portfolio

There are different types of portfolios depending on the purpose which the individual wants his/her portfolio to fulfil. Some examples are:

1. Developmental Portfolio – which shows the progress of a specific task or project
2. Reflective Portfolio – in which the user reflects on his/her, learning process and consequently represents the changes in his/her understanding over time.

3. Representational or Showcase Portfolio – which showcases content, such as achievements etc.

The ILPO55 consortium recommends that the e-Portfolio developed by the user as part of the ILPO55 Employability Portfolio process is a mix of all three categories mentioned above. The e-Portfolio needs to be first and foremost a showcase of the individual, and a tool which s/he can present to prospective employers in order to give a clear image of him/herself in terms of his/her achievements. However, elements from the other portfolio categories should also be included, namely the Reflective Portfolio. The element of self-reflection is central to the ILPO55 Employability Portfolio, which sees the user gradually developing his/her self-reflective skills, thus enabling him/her to trace a path for career progression. Self-Reflection in the E-portfolio can be included in the form of blogs or articles in which the individual reflects on a specific task or personal experience etc. Similarly, the Portfolio should also include elements of the Developmental Portfolio with sections dedicated to the show casing of tasks/ projects completed by the individual. Such sections could include videos or photographic elements which show the individual at work on a specific task etc.

The e-Portfolio is also one of the main tools required for the execution of an RPL exercise. When an individual applies for RPL consideration s/he would need to submit evidences to support his/her RPL claim. Since RPL is one of the tools within the ILPO55 Employability Portfolio, the ILPO55 Consortium suggests that the e-Portfolio is designed in a way to fulfil the requirements of such task. In view of this, the following are some of the items which could be included within the e-Portfolio:

1. Blogs/Articles – Both Self-Reflective and argumentative (on a particular topics related to a specific field of study in this case FSS;
2. Links to (or scans of) Resume/CV (paper and/or online);
3. Covering letter/s;
4. Formal Education Certificates;
5. On the job training Certificates; CPD Certificates;
6. Reference Letters from current and past: employers, peers, supervisors, clients etc.;
7. Performance Appraisals, Evaluation forms, letters or appreciation; letters of recommendation;
8. Performance Awards;
9. Samples of Work Performed: Memos; Reports; Plans; Procedures and Forms; Hand-outs; Marketing plans etc.;
10. Photographs and/or videos showing work produced by the applicant and/or the applicant at work;

The creation of an e-Portfolio needs to be based on the target audience. It is therefore recommended that information is carefully selected in order to not overwhelm the audience and ensure that the message is received as clearly as possible.

Recommended Platforms

Selecting a tool for the e-portfolio was one of the main challenges encountered in the project. There are various e-Portfolio applications available online, some of which are free of charge whilst others are against payment. As part of the project, the ILPO55 Consortium researched a number of these tools and decided to recommend six in particular (this does not mean that other e-Portfolio platforms cannot be used in conjunction with the ILPO55 Employability Portfolio process). Rather than a single e-Portfolio, the ILPO55 Consortium agreed that the ILPO55 Reference Framework

should point over 55 individuals towards various readily available tools and leave it up to the applicant to select his/her preferred one, based on his/her skills and needs.

The ILPO55 Consortium recommends the following applications and/or services:

1. **Mahara ePortfolio System** (https://mahara.org/) – which is an open source software therefore free of charge, but needs to be installed on a server, for example on the servers of an organization for use by its employees etc.

2. **Google Sites** (https://sites.google.com/) – Google provides a free of charge but limited service to create a small website. This can be created in the form of an e-portfolio.

3. **Wordpress** (http://www.wordpress.com) - offers both free and paid plans in order to create a blog. A blog is one of the best platforms that can be used and adapted as an e-portfolio.

4. **Mijneportfolio** (https://www.mijneportfolio.nl/nl) – a dutch portfolio system based on the standards of the NEN 2035:2014nl (a Dutch Standard drawn purposely for the regulation of e-Portfolios).

5. **Pathbrite Portfolios** (https://pathbrite.com/#maker) – is a free of charge and user friendly approach to e-Portfolio.

6. **Linked in** (https://www.linkedin.com) – which although is a social network it fulfils the role of e-Portfolio perfectly and allows users to build networks.

Detailed descriptions of these e-Portfolio applications can be found in the E-Portfolio tool Description available at here. Although the Consortium recommends the above application, it does not mean that they are the only ones available online, or that other similar platforms cannot be used. Any E-Portfolio application can be used as long as it allows the participant to:

1. Write his/her personal details;
2. upload different types of documents;
3. share his portfolio with a third party.

5.4 Tool 4 – The Interview

Introduction

The fourth tool within the ILPO55 Employability Portfolio is the Interview. The interview builds upon the results of the previous 3 tools. By now, the individual would have had two opportunities for Self Evaluation (in the filling in of the Competence Evaluation Questionnaire and the creation of the e-Portfolio) and a number of sessions with the Mentor in which s/he should have discussed the outcome of the Competence Evaluation Questionnaire and the e-Portfolio, and started drafting a plan for the individual's path for career progression. Therefore the individual would have already gathered enough knowledge about him/herself to enable him/her to answer the questions during the interview session.

The Interview aims to:

1. analyse and review the outcomes of the previous three tools and gather information on the individual's personal experience with the ILPO55 Employability Portfolio process;
2. review the e-Portfolio and provide possible tips on improvements including professional accomplishments/evidence performance claims;
3. further explore the individual's skills and competences in order to identify any possible gaps in view of the pre-established goals within the mentoring sessions;
4. define and establish the individual goals for professional development (and determine one of the following possible outcomes):
   - Continue working in the same role within the same function within current organisation;
   - Look/Apply for another role in a different function in the same organisation;
   - Continue working in the same organisation but with other activities (trainer, mentor, coaching, CSR facilitator, intergenerational activities, social activities);
   - Look for a job outside the present organisation, and/or take another entrepreneurial route.
5. Identify any possible skills gaps based on the established goals, discuss and design an initial draft for a plan for professional development.

This is a very important tool within the Portfolio since any decisions taken at this point of the process will affect the future of the Over 55 individual. Through the interview, the over 55 individual would be confirming his/her goal for the future and tracing the course of action needed to achieve it. The process will be further concretised in the fifth tool i.e. the Professional Development Plan, however the interview could represent an exit point from the Employability Portfolio Process, especially if the individual decided to look for a job outside the present organisation or take a different entrepreneurial route.

Recommendations for Use:

The ILPO55 Consortium recommends that the interview is held by an HR expert and who is independent from: the individual, the Mentoring sessions and possibly the organization currently employing the individual. The interview should not last more than 40 to 60 minutes; however it is recommended that enough time is allocated for the discussions to take place even if this goes beyond the indicated scheduling.

It is of utmost importance that prior to the interview:

1. the expert (interviewer) is briefed on the process of career development being followed by the individual and
2. is provided with the individual's outcomes for the first 3 tools in the Employability Portfolio.

The interview should concretize the O55 individual's idea/s for Professional Development Plan and provide the basis for filling in the Professional Development Plan which is the fifth Tool within the ILPO55 Employability Portfolio. In fact, at the end of the Interview process, the interviewer is to issue a report including all the information discussed during the interview and highlight any targets established. The O55 individual should be invited to examine this report in depth, in conjunction with the support of his facilitator/mentor, in view of the creation of his/her the Professional Development Plan.

5.5 Tool 5 – Professional Development Plan

Introduction

The Professional Development Plan is the fifth tool within the ILPO55 Employability Portfolio and marks the last step in which the over 55 Individual has the opportunity to reflect on his/her career progression. Any decisions taken at this stage will be the definite decisions for the future of the O55 individual and therefore all that would be left for him/her is to execute the plan and meet the pre-set goals, should the individual decide to go through with them (and the ILPO55 Employability Portfolio Process).

The Professional Development Plan is composed by six sections as follows:
- SECTION A: PERSONAL DETAILS
- SECTION B: PERSONAL ASPIRATIONS
- SECTION C: EXPLORING DIFFERENT POSSIBILITIES
- SECTION D: DECIDING
- SECTION E: MAKE IT HAPPEN – THE WAY FORWARD
- SECTION F: ASSESSING THE ACTION PLAN

In each section, the over 55 individual is required to evaluate his/her current professional situation and think of his/her future and the possible path s/he may trace for his/her career. All sections build on one another so as to help the individual follow a logical thinking process. Moreover, the sections within the ILPO55 Career Development plan are designed in such a manner so as to:
1. identify the over 55 individual's career goals;
2. break down the process which the O55 needs to follow in order to achieve such goals;
3. identify any missing skills which s/he has in view of his/her desired goals;
4. identify how the individual can achieve these goals and record their achievement;
5. reflect on the process and its results.

Apart from self-evaluation, some sections also require the individual to seek guidance from peers regarding his/her possible options for his/her career progression. In doing so, the Individual would be learning more about his/her possible options and also identifying personal information which could possibly be unknown to him/her. This is directly related to ILPO55 Reference Framework which aims at a holistic development of O55 individuals within the FSS.

Recommendations for Use

The ILPO55 Consortium recommends that the Professional Development Plan is completed with the assistance of a mentor, in order to enable the applicant to clarify any queries and/or difficulties encountered throughout the process.

The choices to be made as part of this Professional Development Plan depend on a number of factors which are both internal (i.e. which depend mainly on the individual and his/her skills, competences and plans for the future) and external (i.e. which cannot be controlled by the individual) to the individual. In fact, for the construction of the Professional Development Plan, the ILPO55 Consortium recommends that apart from reflecting on him/herself (as seen in the first four tools of the Employability Portfolio and the emphasis placed on Self Evaluation), the O55 individual also analyses other factors which are external to him/her such as:

(i) External Factors - Within the current organization:
- The prevailing corporate culture within the financial organisation in particular in relation to its elder employees.

- The availability or otherwise of early retirement schemes.
- The availability or otherwise of reduced working hours; flexi-time and job sharing schemes.
- The availability of job opportunities and new roles within the organization.
- The prevailing HR policies within own current job.

(ii) External Factors - External to the current work organization:
- The general state of the banking and financial services sector.
- The disposition of financial services firms to outsource work and award consultancy positions.
- The support available from the state and other related entities for new start-ups and small and medium sized enterprises.
- The ease with which new business start-ups could be set up and the extent to which authorities support new business initiatives and innovation.
- The current and envisaged state of the economy including the job market.

Such evaluation of external sources should be conducted prior to the final decision of the individual so as to prevent any unnecessary disappointments. There are various options which the individual could take for his/her future. Some of these will see the individual opting for a job which s/he likes doing but which is different from his/her current tasks, and therefore requiring him/her to obtain new skills, or else choosing something s/he is good at and reinforcing his/her skills to be able to execute the work accordingly. Decisions at this stage will also present changes in income and therefore this is another factor which the individual needs to take into consideration prior to making the final decision.

When used as part of the ILPO55 Employability Portfolio process, the Professional Development Plan should be completed after the Interview. At this stage of the process the over 55 individual would have already had multiple occasions for introspection as well as formal discussions with dedicated experts such as the mentor and the interviewer. This means that s/he would have already built a certain dose of self-awareness and developed his/her ideas for the future of his profession. Nonetheless the assistance of the Mentor in the composition of the Professional Development Plan is crucial. Regardless of any activities held prior to the Professional Development Plan, the Over 55 individual still needs to have a point of reference with whom to discuss the various options at hand and the possible doubts and concerns which can result from planning the future of his/her career.

5.6 Tool 6 – Recognition of Prior Learning

Introduction

The inclusion of Recognition of Prior Learning (RPL) within the ILPO55 Employability Portfolio is in line with the ILPO55 project aims of improving the employability of individuals of 55 years or older within the Financial Services Sector.

RPL within the ILPO55 Reference Framework has a dual role:

1. To provide information to over 55 individuals about the National initiatives related to Recognition of Prior Learning available in their own countries. More information about this can be found in the Main RPL tool Document available here.

2. To provide organisations with a procedure and tools for the provision of *RPL in Employment* which complements their HR and Interview processes related to internal progression of employees.

RPL is typically associated with an educational setting in order to match the skills of an individual to a qualification being offered and determine whether s/he fulfills all or some of the criteria in order to claim full or partial completion of the programme. However the same principle can be applied within an employment setting in order to determine whether an individual possesses the necessary skills for a specific position within an organisation and or in conjunction with in-house courses.

RPL in Employment

Whilst within an educational setting the comparison would be between the applicant's skills against a unit or course descriptor (with Learning Outcomes; Credits and assessment Criteria), in employment the comparison would be against a detailed job description, broken down in a number of tasks and/or duties. In order for this to be successful it is imperative that the job description is broken down into a number of sections/duties, each with their own clear set of tasks. The aim of the exercise would be for the applicant to reflect on his/her skills, weaknesses, education and employment history and identify how these have shaped him/her into the person s/he is today.

Following this exercise the applicant would be in a better position to identify and provide the evidence from his prior experiences, to justify that s/he can perform the specific tasks listed within the job description. In doing so, the applicant is being allowed active participation in the recruitment process and helping the interview board to make a more informed decision. In cases where the user is following the ILPO55 Employability Portfolio as a process, this would be an easier task, as s/he would have already had multiple occasions to self-reflect and evaluate his skills and knowledge. Additionally, the e-Portfolio filled in as the third tool of the project would already contain most of the information needed as evidence for an RPL claim.

The use of RPL in employment is not an entirely new concept. The Scottish Credit and Qualifications Framework (SCQF) speak of RPL for Employers and how RPL can be used within an Employment setting in order to help employers in:

– *"identifying employees' skills effectively;*
– *identifying skills gaps in organisations;*
– *identifying appropriate training opportunities;*
– *reducing the time required in employee training due to minimised duplication of learning;*
– *increasing motivation and interest in workplace activities on the part of the employee/learner;*
– *generating new ideas and developments for the organisation as a result of the employee/learner reflecting on work activities."*[2]

The SCQF also claims that RPL in Employment *"can lead to increased employee retention and reduced recruitment and training costs."*[3] This is directly in line with the aims of the ILPO55 project and it is an incentive for both the Organisation/s (as it reduces the costs and time required for

---

[2] http://scqf.org.uk/more/rpl/rpl-for-employers/ accessed on 28.03.2017
[3] Ibid.

training) and the Employee (as it reduces the effort needed in order to advance within his/her place of work).

RPL can be used as the main source of information for workforce and organisational development. The information gathered from RPL will enable the organisation to learn more about its own employees; identify gaps within the organisation and plan accordingly. The SCQF also states that "*Employers can use RPL to support all aspects of workforce development:*

- *Recruitment: By the incorporation of an RPL process into the interview, an applicant can be helped to reflect on their achievements, prior work and life experiences and leisure pursuits to identify and demonstrate the strengths, skills and values that they will need to successfully undertake the post they are applying for.*
- *Induction: Information gained in the interview through reflecting on prior experiences can be used as part of the induction process. By using RPL within induction processes new employees can be supported in building on what they have already gained in terms of core and other skills relevant to the job.*
- *Supervision and appraisal: RPL used as part of supervision and appraisal can encourage the reflective process to help an individual review their performance, identify particular areas for further personal and professional development and challenge poor work practice.*
- *Performance interviewing: RPL can support the process of application for promoted posts, by helping individuals to reflect on particular instances, where, for example, they have challenged poor work practices, considered the outcomes of their own or another's action or thought about how they might have dealt with a situation differently.*
- *Gaining qualifications: RPL can be used to support workers to recognise their learning, including those who lack confidence as learners and/or who are reluctant to engage in formal learning. It can also accelerate the process of achieving qualifications through the recognition and award of SCQF credit points for prior informal or non-formal learning".*[4]

Organisations may also decide to apply the principles of RPL for their own in-house courses in order to confer these to their employees. Similarly RPL can be applied to the 2 courses of the 2 professional qualifications developed as part of the ILPO55 project: the Adult Trainer and the Financial Services Sector Social Responsibility Facilitator. Since the ILPO55 project is mainly interested in improving the employability status of Over 55 employees, it goes without saying that through the years these individuals would have gathered a large portfolio of experiences, and therefore it is only logical to apply the principles of RPL to Over 55 employees. In fact both the Adult Trainer and the FSS Social Responsibility Facilitator courses were developed with the Over 55 individual in mind and based on the skills which these employees are more likely to possess. The prospect of reducing time needed to complete specific courses (in-house) and or that valuing prior experience as credit for promotion would further encourage older employees to follow these qualifications, prolong their employment and proceed with their careers.

Recommendations for use

The RPL process can be a fairly lengthy process which requires complete dedication and commitment by:

---

[4] Ibid.

- the applicant - in order to submit the information required and to answer any clarifications requested by the organisation, and
- the organisation – in order to verify the authenticity of the elements within the applicant's claim and to provide the necessary guidance to the applicant throughout the process.

The ILPO55 Consortium therefore recommends that RPL for Employment is carried out with employees within own organisation and preferably as part of the ILPO55 Framework. Reference can be made to Opren (2006) who referred to the benefits of RPL in employment and on the lessons learned from a pilot held by the Institute for People Development, one of which was that *"RPL should be embedded within broader personal development path planning within any organisation to be personally and organisationally meaningful."[5]*

This is in line with the proposal and recommendations of the ILPO55 Framework wherein RPL for Employment is being proposed as part of a holistic process for the personal development of O55 employees

The structure of the ILPO55 Framework facilitates the application of RPL. The most important element to the successful application of RPL is clear guidance and mentoring, a factor which is common throughout the entire process of the ILPO55 Framework. It is important that the person helping the Over 55 employee as part of the Framework also acts as a facilitator for the recognition of prior learning process. Moreover, some of the other tools forming the Framework can easily be applied as tools for RPL. The e-Portfolio is one such tool. The information contained within the e-portfolio can be enhanced and developed in such a way as to serve as the main repository for the evidence needed to be assessed for RPL. In addition when the RPL Process is applied as part of the ILPO55 framework, it is easier to identify whether an individual is eligible or not (for RPL) given the information gathered about the individual throughout the process. This means that the institution is ensuring that the time and effort spent on the RPL process is not wasted.

In order to offer RPL in employment an organisation would need to set up:

1. a clear RPL policy and procedure;
2. documentation to be used in the process i.e. RPL application Form (a sample of which can be found [here](#)); Job Description/ Call for application with RPL consideration (which would split the job description in a number of tasks for which the applicant can choose to submit evidence of prior achievement)
3. a team of experts who can act as mentors and RPL Assessors/ evaluators.

A flowchart showing a typical RPL process which organisations may choose to adapt when offering RPL in Employment, and which can be used to build the organisation's RPL policy and procedure can be found in Appendix 1 to this document.

---

[5] https://www.skillsportal.co.za/content/rpl-makes-sense-employers-well-employees accessed on 28.03.2017

5.7 Tool 7 – Self-Reflection Guidelines

Introduction

The final step in the ILPO55 process is a self-reflection exercise aimed at analyzing the applicant's awareness of his/her own professional development as a result of his/her experience with the tools forming the ILPO55 Employability Portfolio Process.

Self-Reflection is the exercise by which individuals take an introspective look at themselves, in an attempt to learn more about their fundamental nature, purpose and essence. Self-Reflection is an important element which helps individuals make informed decisions about themselves assisting them to analyse their past to learn about their present and plan for their future. Through Self Reflection, individuals will be able to learn more about their general state of mind, their goals and aspirations and their abilities to achieve such goals.

Self-Reflection is a very important aspect which is central to the ILPO55 Reference Framework, especially the Employability Portfolio. The ILPO55 Reference Framework aims at helping Over 55 employees in the Financial Services Sector to make informed decisions about their future and their career progression, and one of the ways it tries to do this is by getting the over 55 individuals to evaluate themselves and identify their strengths and weaknesses. The Employability Portfolio is composed of seven tools. Through the application of each of these tools, individuals have to constantly ask themselves about their own objectives for the future, analyse their skills and competences to verify whether they fulfil the necessary requirements to meet such objectives and plan accordingly.

The ability to self-reflect is one of the main skills which every professional should possess. Donald Schön (1983) wrote about Self-reflection as a tool for professionals and introduced 2 types of reflection: Reflection on Action and Reflection in Action. Reflection in Action[6] is the reflection which is done while an action (or event) is occurring. Such reflection will affect any decisions taken in relation to that action/event and might result in a change of action prior to the end of the event in order to obtain a better result. In other words, Reflection in Action is the reflection which is done in real time, prior to the end of an event. It will give the individual the opportunity to improve the work which s/he is currently doing in order to better meet any pre-set specifications or targets. On the other hand, Reflection on Action[7] is the reflection done on an action or event which has ended. The thought process for reflection on action would normally come after the following pattern "what would I improve? or what would I do differently… next time or if I had the opportunity to do this again?" Both forms of reflection, offer the individual the opportunity for continuous improvement, and hence their importance and inclusion within the ILPO55 Framework and Employability Portfolio.

The ILPO55 reference portfolio was designed with the Over 55 employees in mind and aims at improving their employability and relevance to the industry. The ILPO55 Employability Portfolio features both elements of reflection identified by Donald Schön. Reflection in Action is featured in the main concept of the Employability Portfolio, which is intended to be used by the Over 55 employee whilst s/he is still in employment, in order to identify how s/he can progress his/her career. Moreover, the tools forming part of the Employability Portfolio, such as the Competence Evaluation Questionnaire, the E-Portfolio and the Career Development Plan, all encourage the O55 Individual to self-reflect on a number of factors about him/herself as an employee and about his/her future to identify potential ways of improving his/her current position.

---

[6] Adapted from The Reflective Practitioner by Donald A. Schön - 1983
[7] *Ibid.*

Alternatively, the Self Reflection Exercise, at the end of the Employability Portfolio, takes the role of Reflection on Action. At this point of the Portfolio Process, the Employee should have gained a high dose of experience on self-reflection through the use of the other tools and reached a point where s/he needs to reflect on the benefits (or lack thereof) obtained through such an experience. Guidance should have been provided to the individual, in the form of a mentor, throughout the entire Employability Portfolio Process and the individual should now have developed a higher level of self-awareness which facilitates the self-reflection process and enables him/her to reflect deeper.

The aim of the Self Reflection Exercise is that of guiding the over 55 individual to reflect on his/her experience and:

1. validate its effects on himself/herself as an individual, on his/her career and on his/her prospects for the future;
2. reflect on the effectiveness of the ILPO55 Reference Framework and the tools forming part of the Employability Portfolio within the financial services industry, and;
3. suggest ways in which tools and their provision can be improved.

Recommendations for Use

The self-reflection exercise should be filled in by all participants making use of the ILPO55 Employability Portfolio tools. The ILPO55 Consortium recommends that this is filled in even by users who did not follow the entire portfolio process, although in this case the level of reflection will be lower.

It is divided into four main sections as follows:

Section A - Personal Detail:	The Self Reflection exercise is an integral part of the ILPO55 Reference Framework – Employability Portfolio. Although one of its aims is that of gathering feedback for improvement it is not intended to be an anonymous exercise.
SECTION B - Reflection on own experience with the ILPO55 Employability Portfolio:	This section is meant to guide the Individual to reflect on the general experience with the tools forming part of the Employability Portfolio including a chronological reflection on the events leading the individual to follow the ILPO55 process and the reasons behind such decisions. The Individual is invited to reflect on the difficulties encountered and the solutions taken to overcome them, and the areas and tools which in his/her opinion were more satisfying.
SECTION C - Reflection on Personal and Professional Growth through the ILPO55 Employability Portfolio:	In this section the individual is invited to dig deeper and reflect more about the changes s/he, as an individual, has undergone through the use of the tools forming part of the ILPO55 Reference Framework especially the Employability Portfolio. The individual is invited to reflect on who s/he was prior to the Employability Portfolio Process and who s/he has become at its completion, focusing on a number of points such as (self-confidence; self-discipline; employment position; personal aspirations and goals; etc.).
SECTION D - Recommendations for Improvement:	This is meant to provide information to the organisation, offering the ILPO55 Employability Portfolio Process, in order to gather feedback for improvement in view of future offerings. Such a reflection might also reveal to the individual areas where s/he could have improved his/her performance.

Each section within the Self Reflection Exercise template is made of a number of questions in order to help the thinking and reflection process of Over 55 individuals. Questions are closely knit to one

another and some may seem very similar and/or repetitive. This was done on purpose to ensure that the reflection process for each section follows a pre-determined path. Whilst it is not necessary to answer each and every question directly (given the sheer volume of questions), The ILPO55 consortium recommends Over 55 individuals cover as many questions as they can in their reflective process. Each question is meant to provoke thoughts and to help users reflect on their personal experience/s.

Through this Self Reflection exercise the user will be:
1. drawing a summary of his/her experience (which s/he can refer to in the future) using the Employability Portfolio tool and;
2. providing feedback to the organisation offering the tools forming part of the ILPO55 Reference Framework and Employability Portfolio (as a source of feedback for continuous improvement).

The ILPO55 Consortium recommends that each user is given enough time to fill in the Self Reflection exercise but suggests that this does not exceed a maximum of 20 days from the completion of the last tool used, so as to ensure that the user is still fresh from the Employability Portfolio Experience.

Moreover the ILPO55 Consortium also recommends that the completion of the Self-reflection exercise is not left to the discretion of the individual, as the outcomes of the reflection carried out, if done correctly, will have multiple benefits for both the individual and the organisation.

6. Conclusion

The ILPO55 Reference Framework is a tool designed for the retention of older employees in employment within the industry. It aims at bridging any employment gaps for Over 55 employees thus keeping them relevant to the industry. This is in line with European discussions on age management, which mark the future of society and employment. The principles of the ILPO55 Reference Framework, although based on the Financial Services Sector, can be transposed to a number of different sectors thus making its tools even more relevant. The Individual tools for the ILPO55 Reference framework can be found on the ILPO55 project website: http://www.ilpo55.eu/en/ilpo55_activities06.aspx?lang=en

FLOWCHART FOR THE APPLICATION OF RECOGNITION OF PRIOR LEARNING

```
┌─────────────────────────────────────────────┐
│ Publishing of Call for Applications with     │
│ RPL Consideration                            │
│ Owner: HR Department                         │
└─────────────────────────────────────────────┘
                      │
                      ▼
┌─────────────────────────────────────────────┐
│ Initial Expression of Interest               │
│ Owner: Prospective Applicants                │
└─────────────────────────────────────────────┘
                      │
                      ▼
┌─────────────────────────────────────────────┐
│ Initial Interview with Prospective Applicant │
│ to gather general information of previous     │
│ learning and to discuss the RPL process       │
│ and its requirements.                         │
│ Owner: RPL Assessor                          │
└─────────────────────────────────────────────┘
                      │
                      ▼
┌─────────────────────────────────────────────┐     Documents:
│ Confirmation of Eligibility and Distribution │  •  Job Description
│ of Documentation related to the RPL Process  │──►•  RPL Process Instructions
│ Owner: HR Department                         │  •  RPL Application/tool
└─────────────────────────────────────────────┘
                      │
                      ▼
┌─────────────────────────────────────────────┐
│ Building of RPL Application Package,         │
│ Selection of Evidence, and Submission of     │
│ RPL Claim.                                   │
│ Owner: Applicant                             │
└─────────────────────────────────────────────┘
                      │
                      ▼
┌─────────────────────────────────────────────┐
│ Evaluation of RPL Claim                      │◄──────────┐
│ Owner: RPL Assessor                          │           │
└─────────────────────────────────────────────┘           │
                      │                                     │
                      ▼                                     │
                  ◇ More                  ┌──────────────────────────────────────┐
                  Information  ── YES ──► │ Request from Applicant (and/either/or):│
                  Required?               │  •  Interview                          │
                      │                   │  •  Practical Demonstration            │
                      │                   │  •  Further Evidence                   │
                      ▼                   │         Owner: RPL Assesor             │
┌─────────────────────────────────────┐  └──────────────────────────────────────┘
│ Issuing of Evaluation Result        │
│ Owner: RPL Assessor                 │
└─────────────────────────────────────┘
                      │
                      ▼
           ╭─────────────────────────╮
           │ Communication of Outcome │
           │                          │
           │ Owner: HR Department     │
           ╰─────────────────────────╯
```