

Overview of assessments of each step/tool/method – Value of Work

Country	Step 1: Organisation
Cyprus	Excellent cooperation with the bank in organising and running the project. The project did give an extra work burden for the bank officials involved
Denmark	<p>Difficult to find a bank willing to participate – only very late did we succeed. Had to cut down on the original planned process – cancelled some of the steps and had to settle on 7 participants in app. 10 hours each.</p> <p>Recruitment and motivation went well but the limited time and scope did have a negative influence on the process.</p>
Iceland	<p>Experienced close cooperation with the banks and the trade union in planning of the pilot and standard development. They took care of the recruitment through the union. In general, high motivation and positive attitudes.</p> <p>Clarification of methods and tools as well as timeline needed lengthy discussions.</p>
Slovenia	<p>The organisation phase went very well. A good network in the social care sector proved to be an important precondition for recruitment and the validation process as such.</p> <p>Difficult to choose the two counsellors from a different sector without knowledge and experience from other sectors</p>
Sweden	<p>The participants were very motivated.</p> <p>We experienced a lack of time as well as some of the participants were prevented in participating with the consequence that only 7 participants completed the validation.</p> <p>Should have earmarked more time for planning and information to the target group.</p>

Country	Step 2: Survey / planning discussions
Cyprus	<p>A smooth implementation of the project – deadlines met etc. The organisation was effective.</p> <p>It would have been better if the bank had been more involved in the identification of standards as well as the methodology from the beginning of the project. (no sub-standards were produced)</p>
Denmark	Worked very well – no barriers or problems encountered
Iceland	<p>The introduction meeting was held at a neutral location (trade union) – good for the participants.</p> <p>It was a problem that the procedures at this stage were not fully clear with some of the methods not fully developed. It would be preferable to have procedures fully planned prior to presentation to the participants.</p>
Slovenia	All went well in this phase due the network of the co-ordinator of our PTG. We reached the right target group.
Sweden	<p>It was difficult to find a transfer sector and to recruit participants. However, the participants recruited were very motivated but we did not have enough time for briefing discussions with every participant and for planning of activities.</p> <p>Furthermore, the participants expressed concern that they should do most of the work in their leisure time.</p>

Country	Step 3: Portfolio
Cyprus	<p>It was straightforward and very quick to complete the process (30 minutes per participant) due to the fact that the bank kept all documents on training of the participants and that they consequently did not have to do everything from scratch.</p> <p>No barriers and problems encountered</p>
Denmark	<p>The objectives and the actual drafting of the portfolio went very well and were clearly understood by the participants. However, it was difficult for everybody to describe the tasks. They could have used more time and more supervision and assistance by e.g. a coach.</p>
Iceland	<p>The participants were very motivated in producing their portfolio and the 10 standards were clear and relevant. However, some replication among the sub-standards was noticed. Possibly more time could be needed for producing the portfolio work. Maybe two extra hours of group work could be added (10 hours instead of 8 hours).</p>
Slovenia	<p>We chose candidates with a lot of experience and could therefore complete the portfolio in a month. Due to our experience in the field we knew exactly what to collect.</p> <p>It was too short time for the candidates. We should have planned for more time for the portfolio and more time for the whole validation process. That could have made the portfolios less structured and given the candidates the opportunity to come up with different pieces of information.</p>
Sweden	<p>The participants were enthusiastic when realising how many things they had handled but were a little confused in the beginning in describing all elements in such a detailed level..</p>

Country	Step 4: Self-assessment / dialogue with supervisor
Cyprus	<p>The self-assessment was completed without any dialogue with the supervisor. It was a straightforward process with no problems or barriers encountered.</p> <p>However, the assessment scale needed numbering and definitions in order to enable a more objective and comparative self-assessment</p>
Denmark	<p>To ask the supervisor and the participant the same questions seemed to work very well. However, we found it difficult to use a numerical assessment as an indication of the value attached to each area. The understanding of the scale differed from person to person and from participant to supervisor and the assessment was therefore difficult to apply directly. Numbers are relative!!</p>
Iceland	<p>All participants understood the relevance of this step. They also did not see it as a difficult task to approach their supervisor in this way.</p> <p>Some of the supervisors were busy and difficult to access making this process a lot longer than anticipated. Should have been introduced in detail from the beginning maybe ensuring a better planning. Step 3 should be seen as a warm-up for step 4.</p>
Slovenia	<p>It was very positive to see that the supervisors in general assessed the participants higher than they did themselves.</p> <p>It was difficult to understand the standards.</p> <p>It would have been better to give instructions in a group instead of individually. That could have saved much time.</p>
Sweden	<p>The participants were well prepared by their portfolio-work but the self-assessment scheme had too many questions. Sub-standards were developed.</p>

Country	Step 5: Follow-up conversation – planning of validation
Cyprus	The method was not directly used but the participants had access to the assessor during the whole process through email or telephone.
Denmark	We did not do this part of the validation due to the limited time and scope.
Iceland	<p>The open conversations with the participants were an important tool and worked very well.</p> <p>In Iceland, the dialogue with the supervisor was discussed and planned. It was considered to possibly feel uncomfortable for participants to have a dialogue about their competences with their supervisor – which it turned out not to be. Therefore, it would have been better to have completed the supervisor’s assessment prior to this step to be able to focus more on what should be validated.</p>
Slovenia	Did not do this phase of the validation process
Sweden	The portfolio and self-assessment served as a basis for the conversation.

Country	Step 6: Case study
Cyprus	<p>The case studies had to be modified according to Cyprus banking practice. All participants completed the case studies. It enabled them to demonstrate clearly their level of competence in the required areas. The use of the checklist was a valuable tool for the overall assessment.</p> <p>It took longer than expected to complete this phase but the method was considered to be the most effective by the assessors since case studies and exams are common practice in assessing candidates in Cyprus.</p> <p>It would have been better if the bank had been more involved in the identification of standards as well as the methodology from the beginning of the project. (no sub-standards were produced)</p>
Denmark	<p>We did not do this part of the validation due to the limited time and scope. However, we are sure that it could have helped in giving a more fair and correct picture of the competences of the participants.</p>
Iceland	<p>The cases worked very well and identified the competences, knowledge and abilities of the participants. Some of the participants thought they were going to an exam and felt anxious about it. The environment created with background music, candle lights and cookies seemed to relax the participants. The co-assessors were contributing in a very important way.</p> <p>The stress factor could possibly have been reduced with better and more information in advance.</p>
Slovenia	<p>Did not do this phase of the validation process</p>
Sweden	<p>The assessors went to the workplace and made an analysis of the participant's jobs. This was very helpful and a good way to proceed instead of carrying out the case-studies. However, it was time-consuming to carry out the tasks that were done in the participant's leisure time. Next time, the assessment process should be initiated with discussions in the workplace.</p>

Country	Step 7: Observations
Cyprus	This method was not implemented as the need for extra persons to get involved became a barrier
Denmark	We did not do this part of the validation due to the limited time and scope. However, we are sure that it could have helped in giving a more fair and correct picture of the competences of the participants.
Iceland	This method was not used. The PTG and the assessor considered that the other methods combined would be sufficient. In a way, observation of personal competences is taking place informally through the whole validation process
Slovenia	The observation in the users houses went very well. The one hour allocated to each observation proved to be too little. That would have given the co-assessors the opportunity to observe even more competences.
Sweden	It was not possible to use the actual workplaces so the situation was artificial. However, the observations/role-plays worked out satisfactory despite the artificial context.

Country	Step 8: Supplementary interview
Cyprus	This method was not implemented as the need for extra persons to get involved became a barrier
Denmark	We did not do this part of the validation due to the limited time and scope. Furthermore, we did not see the relevance of doing supplementary interviews. We had all information necessary after the first interviews and the portfolio work.
Iceland	This method was not used formally. But the results of the validation were discussed at the end of the cases. The participants had access to the assessor if needed during the whole process through email and telephone.
Slovenia	The participants extensive work experience proved to be an important factor and made this phase smooth and without problems. The portfolios were an excellent preparation for this step and with the supplementary interview the commission had enough material to reach decision
Sweden	This step was not implemented

Country	Step 9: Test of knowledge / possible supplementary questionnaire
Cyprus	No supplementary questionnaire was given
Denmark	We did not do this part of the validation due to the limited time and scope. However, we are sure that it could have helped in giving a more fair and correct picture of the competences of the participants.
Iceland	This method was not used and not considered necessary by PTG or assessor. Evidence of competences from other methods were considered sufficient.
Slovenia	Did not do this phase of the validation process
Sweden	It was too time-consuming to carry out the tasks. See step 6.

Country	Step 10: Summary assessment
Cyprus	<p>Out of the three methods used (portfolio, self-assessment and case studies) the last two involved the use of standards. From these the assessors found that the case study was the most effective in identifying the level of competence of the participants.</p> <p>No significant problems were encountered but it would have been better if the bank had been more involved in the identification of standards as well as the methodology from the beginning of the project. (no sub-standards were produced)</p>
Denmark	<p>Generally, the participants were rated high on all areas. This reflects a bias in the validation process due to the fact that employees who were selected to participate all are among the employees who already are seen as being the best in their field by management.</p>
Iceland	<p>The connection between the various validation methods went well. For most participants, the cases finally verified their self-assessment and were thus a very important method due to its potential of verifying the other methods. All the participants had competences up to par with the sub-standards created. They all had years of experience in their jobs and now, finally, have a certificate that proves that.</p>
Slovenia	<p>Worked in general very well. See other comments</p>
Sweden	<p>The assessors summarised the results from the used methods.</p>

Country	Step 11: Recommendation
Cyprus	<p>The assessors found the Case study method the most effective. The team of tellers had varied opinions on the preferred method. Specifically, 3 tellers (20%) opted for the Portfolio method, 7 tellers (47%) opted for the Self-assessment method, and the remaining 5 (33%) opted for the Case Study method.</p> <p>Despite the varied opinions of the tellers, the two assessors reached a unanimous decision in favour of the Case Study method. This decision provides a clear direction as to what future steps to follow.</p>
Denmark	<p>We did not feel that the limited data material provided us the opportunity to recommend anything. We let it be up to participants to assess where they should focus in relation to CPD</p>
Iceland	<p>Very important to have the validation process planned from A-Z. As much time for portfolio work as possible, with guidance from a counsellor and the assessor during the self-assessment phase.</p>
Slovenia	<p>The standards could be transferred to other sectors.</p> <p>If the participant does not get along with the counsellor, he/she should be able to choose another counsellor.</p> <p>Criteria and measures for cooperation between counsellors and assessors should be developed so that the counsellors could be able to get relevant feedback and develop accordingly.</p>
Sweden	<p>This step was not implemented</p>

Country	Step 12: Documentation
Cyprus	The participants received a certificate signed by SYNTHESIS and the bank involved
Denmark	We used the certificate from Iceland as our point of departure – of course tailored to our process. However, we felt it necessary to present a more detailed assessment on the basis of the sub-competences drafted in the beginning of the process. Everything was well received by the participants.
Iceland	Certification issues should be determined and introduced to the participants clearly in the beginning. Should be as legitimate as possible in the local and national society – meaning that all relevant stakeholders must approve of it and quality issues must be intact for that.
Slovenia	The participants were happy to receive two certificates
Sweden	We used the VOW certificate supplemented with a more detailed description of the participant's competences based on the validation process.

Country	Step 13: General summary
Cyprus	<p>The methods and tools used worked very well. No sub-standards were used.</p> <p>The case studies had to be modified to comply with the Cyprus banking system.</p> <p>Lack of time was the main barrier for not implementing all methods</p>
Denmark	<p>Methods and tools worked well but too many steps in a pilot project like this. Not feasible to get a private company to invest so much time in a pilot project without any clear benefits for them. We should have analysed the sector prior to the process in order to understand how to “sell” a project idea like this to a Danish bank.</p>
Iceland	<p>Methods and tools provided by the Swedish partners worked well. The material was clear and effective.</p> <p>Possibly more time for portfolio work at the initial stages.</p> <p>Supervisor’s evaluation to be conducted before the assessment interview.</p> <p>The standards seemed good, comprehensive and transferable.</p> <p>Supervisors’ assessments should be presented and explained earlier.</p> <p>Participants to be better informed about the cases, many of them thought that it was a test, which increased anxiety.</p> <p>The group was excellent to work with, highly motivated and efficient in this type of work. They have expressed their satisfaction with the validation procedures and some of them are planning their competence development, taking into consideration entering the formal school system. Increased self-esteem is evident through the identification of strengths. Company representatives (human resource department) are exploring ways to develop validation strategies within their companies.</p>
Slovenia	<p>More than a month for the portfolio work is recommended. Methods and tools as well the standards worked very well</p>
Sweden	<p>In general, the tools worked very well but too many sub-standards. The participants did not get enough information in the recruitment process and in general the validation process has been too time-consuming. However, the process has been carried out without any major problems and the participants were satisfied. Especially the work with the portfolio was appreciated.</p> <p>It was a disadvantage that it was not possible to work with a PTG.</p>