



The European Technology Transfer Manager

WP 6: PILOT OF EXPERTISE CHECK UP

D.6.4. Overall Report on pilot of Expertise Check Up



Lifelong
Learning
Programme

This project has been funded with support from the European Commission.
This publication [communication] reflects the views only of the author, and the Commission cannot be held responsible for any use which may be made of the information contained therein.

TABLE OF CONTENTS

- 1. Introduction**
- 2. Conducting the piloting of the Expertise Check up in the country**
 - 2.1. Organization**
 - 2.2. Implementation**
- 3. Results of the questionnaires for evaluation of the pilot Expertise Check up**
 - 3.1. D.6.1.a Questionnaire_Pilot Checkup_candidates**
 - 3.2. D.6.1.b Questionnaire_Pilot Checkup_partners**
- 4. Results of the focus group for evaluation of the pilot Expertise Check-up**
- 5. Conclusions**
- 6. Glossary**

1. Introduction

The report aim is to present the results of the pilot of Expertise Check-up in all partner countries. It contains:

- summarized information about implementation of this project activity in the country;
- evaluation of the overall process by the actors involved - candidates and partners;
- conclusions related to methodology, organization and procedure for expertise assessment and identification of candidates' training needs in the field of technology transfer.

The TTM Expertise Check-up was carried out according to the methodology prepared by responsible partner and agreed by all project partners. It included:

1. On line self – evaluation questionnaire, containing:
 - a. Personal data
 - b. Professional experience
 - c. Competence assessment of knowledge and skills related to the TTM activities.
2. CV uploading, as optional for collecting additional information.
3. Phone interview ex-post, in order to clarify doubts or get deeper explanations (if needed).

The self – evaluation questionnaire was mandatory. The candidates conducted a primary self-evaluation on the following key activities (units of competence) of TTM:

1. PROJECT MANAGEMENT
2. NEGOTIATION
3. COMMUNICATION AND NETWORKING
4. TECHNOLOGY COMMERCIALIZATION
5. IPR AND LICENSING
6. INFORMATION GATHERING
7. NEW BUSINESS DEVELOPMENT

The on line tool allows a primary evaluation using the answers of the TTM. If the candidate answer is NO to the questions a), b), c), d), e), f) or g) the correspondent unit of the training course should be mandatory. When the candidate has answered YES to more than 50% of the questions on skills and competences the Unit of the training course should be proposed.

On an second evaluation the TTM CV was analyzed by the assessor and, according to the TTM experience, academic background and diplomas or certificates, the assessor recommend the attendance, or not, of the units of the training course.

If the analysis on the questionnaire and the CV, and other provided information, is not enough for the assessor to decide which units of the training course the TTM should pass, a phone interview was arranged. During the Expertise Check-up the experts fulfilling the role of assessors also had informal meetings with most of the candidates.

The methodology for assessment during the Expertise Check-up is based on the units of learning outcomes, as defined in the TTM competence profile in previous project activity. It thus allows recognition of learning outcomes achieved by each candidate and allocation of respective ECVET points.

There was a requirement the evaluation process, from the TTM application to the indication on the modules he/she must attend, should not take more than two weeks.

In order to evaluate the Expertise Check-up two questionnaires for collecting feedback from candidates and experts who have carried out assessment were implemented and after summarizing the results a focus group was organized.

The following issues which were analyzed with respect to the candidates' group:

1. Gender, age, years of experience, area of studies, the organization of provenance of the candidate.
2. Role of the candidates in their company.
3. Main developed activities by the candidates in their work.

As regards the evaluation of the Expertise Check-up, the report presents the analysis of:

1. Adequacy of the time used to fulfill the questionnaire.
2. Questionnaire's user friendliness and comprehensiveness.
3. Assessment of knowledge and skills in self-evaluation.
4. Personal feedback of professional strengths and weaknesses.
5. Functionality of uploading the CV.
6. Phone interview experience and feedback.
7. Interaction with the expert.
8. Level of the assessment of the expertise.
9. General satisfaction with the Expertise Check-up.
10. Comments and suggestions.

The report ends up with a glossary of main terms related to the project activity – Expertise Check-up.

2. Conducting the piloting of the Expertise Check up in the partners' countries

2.1. Organization

2.1.1. Selection and involvement of experts to carry out the Expertise Check up

All 7 partners selected appropriate experts for carrying out the Expertise Check-up based on the "Methodology for the expertise check-up of the TTM", developed in the frames of the project. All organizations involved experts who have already participated in the project activities implemented in the previous work packages.

ASEV, Italy involved the experts who had created the on line Courses so to be more precise in addressing the courses and to be more accurate in answering to possible doubts.

FCI, Spain involved 1 expert, Mr. Abraham Arcos.

AOA AG, Romania selected 3 researchers involved in the project and who have worked at developing all necessary steps for identifying from the national studies, describing the key activities (units of competence) of TTM and identifying, for each activity, the main skills and knowledge needed to develop the methodology. All experts were personnel with experience and training in analysis and human resources.

SPI, Portugal involved its own staff due to their experience and knowledge of the project/pilot and its content.

ITPIO, Bulgaria, involved three experts in total – 2 from its staff, who have capacity and experience in competence assessment, good knowledge of requirements related to ECVET implementation and are well acquainted with the project idea, activities and results achieved and planned and one external expert, who was involved with the beginning of promotion of Expertise Check-up and who has previously worked in ITPIO and knows all project developments.

During the organization phase the experts were at the disposal of those, who had interest to know more about the project, the current activity and the procedure, the time they have to spend for participation, what particularly is expected by them etc. Communication was carried out mainly by phone, some persons came to the office to meet the experts and ask their questions related to the forthcoming activity.

University of Lodz, Poland decided to involve internal experts in the field of technology transfer. Two persons working and conducting studies in this field were involved in the pilot process.

IDEC, Greece involved Natassa Kazantzidou, who was responsible for the development of the Blue Print of the training course, the learning material for the IPR Unit and for delivering the e-learning for the IPR Unit.

2.1.2. Inviting of candidates

For recruiting candidates for pilot of expertise check-up the partner organizations used the following approach:

- Sent the newsletter regarding the start of the pilot to the subscribers to the ETM newsletter.
- Contacted directly institutions and organizations active in the field of technology transfer - Universities, firms, scientists and researchers, with whom they have collaborated in other projects and initiatives.

In addition to this, ITPIO, Bulgaria organized an information meeting in January 2014 with representatives of relevant institutions and organizations.

Good lessons learned

The good lessons learned, pointed out by partners' organizations, could be summarized as follows:

- the process of recruiting participants in the project activity is a very good opportunity to disseminate information about the project as a whole;
- direct communication, by phone and face to face, is extremely important when it comes to implementing new process/ tool;
- the fact that the candidates had to provide information, necessary for their expertise assessment online, at time chosen by them, as well as that they will have the opportunity to be involved in e-learning, according to their individual needs, were highly motivating for participation in piloting;
- Using the ICT made the experience of the pilot much easier to manage and to coordinate;
- TTMs turned out to be interested in new forms of acquiring knowledge which makes the online platform attractive in the future and makes the project more sustainable;
- Participants showed much interest in continuing learning and going deeper to the units of competence and achieving a certification in this field, despite of the fact that many of them have knowledge and experience in technology transfer;
- It is better from the announcement or information about the pilot to the start of the pilot should not pass much time because, sometimes people think it twice and repents from the initial interest, or their circumstances change and then are not able to participate.

The difficulties encountered

Distance technologies, although very attractive, have also some disadvantages. When contacting experts (TTMs are experts in their domain), who are usually very busy through indirect, distance tools you have to be prepared that sometimes you have to repeat your enquiries.

TTMs were very much interested in measurable effects of their participation in the pilot and expected valuable certificates for their involvement.

The main difficulty encountered was to maintain the interest of the participant during all the process, also to involve people in a course without providing them an official certification.

2.2. Implementation

2.2.1. Time frame, number of candidates, number of experts

The *time frame* of provision of pilot Expertise Check-up in the different countries is as follows:

- Spain – December 2013 – February 2014
- Romania, Bulgaria - January – March 2014
- Italy, Portugal - February – May 2014
- Greece – March – April 2014

All partners have reported that the number of candidates who expressed interest in participating was greater than those who were selected. The final number of candidates

and experts involved in the pilot Expertise Check-up by countries is presented in the table below:

Country	Number of candidates	Number of experts
Italy	15	4
Spain	11	1
Romania	19	3
Portugal	11	1
Bulgaria	16	3
Poland	16	3
Greece	14	1

2.2.2. Methodology

All partners followed the methodology, as agreed in the partnership, according to the specifics in their countries. Some of the elements were mandatory, other optional. The table below presents what was implemented during piloting.

P.no.	Country	Self-assessment questionnaire of every candidate uploaded Yes/No	CV of every candidate uploaded Yes/No	Number of phone interviews conducted	Post interviews conducted Yes/No	Focus group conducted Yes/No
P1	Italy	Yes	Yes	5	Yes	No
P2	Spain	Yes	Yes	4	Yes	No
P3	Romania	Yes	Yes	No	No	No
P4	Portugal	Yes	Yes	3	Yes	No
P5	Bulgaria	Yes	Yes	9	No	Yes
P6	Poland	Yes	Yes	3	Yes	No
P7	Greece	Yes	Yes	No	No	No

2.2.3. Summary results of the expertise Check-up in the partners' countries

Profile of candidates

Gender

As is obvious from the table below, women prevail among candidates in majority of the participating countries. Exceptions are Spain and Romania, where men are more than women. In average 55% of all participants are female and 45% - male.

Country	Male (%)	Female (%)
Portugal	36	64
Bulgaria	37,5	62,6
Italy	40	60
Greece	43	57
Poland	43,8	56,2
Spain	55,6	44,4
Romania	59	41
Average %	45	55

Age

The data in the table below shows that in all countries the majority of candidates are distributed between the first two age groups.

In Poland most of candidates (62,5%) are at the age of 25-35 years. This group prevails over the second in Bulgaria.

The predominant part of participants in Spain (66,7%) and Portugal (64%), as well as half of them in Romania are in the age group 35-45 years. In Italy and Greece both groups are equally represented, respectively with 40% and 36% each.

Country	Age groups (in %)			
	25-35	35-45	45-60	Over 60
Italy	40	40	13,3	6,7
Spain	33,3	66,7	-	-
Romania	38	50	6	6
Portugal	27	64	9	-
Bulgaria	43,8	37,5	18,8	-
Poland	62,5	18,8	18,8	-
Greece	36	36	28	
Average %	40,1	44,7	15,2	

Years of work experience

The data about the length of work experience of candidates in all countries is summarized in the table below. The representation of the different groups varies between countries. Candidates with experience up to 5 years are with the biggest share in Poland, those with experience 5-10 years are most strongly represented in Spain,

majority of candidates in Portugal are with 10-15 years of work experience. Italy stands first in the most experience group – over 15 years. The involvement of participants with different experience in the piloting of the expertise check-up in fact reflects the real situation – potential candidates for validation are less as well as more experienced specialists.

Country	Years of work experience (in %)			
	1-5	5-10	10-15	Over 15
Italy	20	26,7	20	33,3
Spain	-	50	40	10
Romania	35	12	24	29
Portugal	36	19	45	-
Bulgaria	12,5	31,3	25	31,3
Poland	37,5	25	25	12,5
Greece	14	22	14	50
Average %	22,1	26,6	27,6	23,7

Area of studies

The share of candidates in the countries according to the area of studies is presented in the table below.

In all countries, except Italy, the majority of participants is distributed between engineering and economic/business studies, one of them prevailing over the other.

Engineering has the biggest share in Greece (53%), followed by Bulgaria (43,8%) and Romania (41,2%). Most of the participants in Portugal (54,5%), Spain (40%) and Poland (34,8%) have graduated economic/business studies.

In Italy participants with economic background have equal shares with those who have graduated natural sciences.

Area of studies (in %)	Italy	Spain	Romania	Portugal	Bulgaria	Poland	Greece
Engineering	20	20	41,2	18,2	43,8	13	53
Natural sciences	33,3	20	5,9	18,2	18,8	17,4	6
Formal sciences	-	-	-	-	6,3	8,7	12
Economic/ Business studies	33,3	40	41,2	54,5	31,3	34,8	29
Law	6,7	20	-	-	-	8,7	-
Humanities	6,7	-	5,9	9,1	6,3	17,4	-
Others	-	-	5,9	-	-	-	-

Type of organization

As obvious from the table below, most of the candidates are representatives of companies in Romania, Portugal, Bulgaria and Greece, followed by universities in the first two countries, technology transfer offices in Bulgaria and universities and chambers of commerce (with equal shares) in Greece. In Italy, Spain and Poland participants from universities are most strongly represented.

In all countries there aren't representatives of adult/vocational training providers, laboratories and technology incubators.

TYPE OF ORGANIZATION (in %)	IT	Spain	RO	PT	BG	PO	GR
Adult/Vocational education provider	-	-	-	-	-	-	-
Spin-off/ start-up company	6,7	-	-	9	-	-	-
Enterprises' Associations	-	-	17,6	-	6,3	-	-
Chambers of commerce	-	11,1	-	-	-	-	18,8
University	33,3	66,7	23,5	27	-	47,6	18,8
Local development Agency	-	-	-	-	-	4,8	-
Research centre	13,3	11,1	-	-	6,3	4,8	6,2
Technology transfer office	20	-	-	19	25	39	12,5
Technology park/science and technology park	-	-	5,9	9	12,5	4,8	-
Innovation/Research driven cluster	6,7	-	-	-	12,5	-	-
Laboratory	-	-	-	-	-	-	-
Technology/ Entrepreneurship incubator	-	-	-	-	-	-	-
Company	13,3	11,1	47	36	37,5	-	31,2
Others	6,7	-	5,9	-	-	-	12,5 (self employed)

After analysis of information, collected through the self-assessment questionnaire and the CV, the assessors in the different countries depending on the particular situation used the other opportunities included in the methodology for expertise check-up for clarifying different aspects of candidates' competences:

- In Italy, Spain, Portugal and Poland phone and post interviews were conducted;
- In Bulgaria phone interviews and informal meetings with candidates were implemented;
- In Romania informal meetings and discussions were carried out.

The table below presents the distribution of candidates among the units of the training course based on the results from the expertise check -up in all countries:

Units	Number of candidates by countries					
	Italy	Romania	Portugal	Bulgaria	Poland	Greece
Project management	12	16	7	5	8	2
Negotiation	11	7	10	2	6	10

Communication and Networking	11	15	3	11	6	8
Technology commercialization	11	4	11	4	9	12
IPR and Licensing	13	10	9	5	11	8
Information gathering	11	7	7	3	7	5
New business development	12	6	10	2	13	6

Good lessons learned are that:

- As the feedback from participants shows the online tool for collection of information about the individual professional expertise functions well, saves time and is convenient to work with for candidates and experts.
- The combination of online method of gathering information and direct contact is very effective, especially when it comes to deal with expertise assessment. It allows utilizing the advantages of both methods – the procedure is not much time consuming both for candidates and for experts and at the same time is a prerequisite for accuracy and respectively for the necessary trust in the results obtained.

ITPIO did not encounter difficulties using the tool. The only difficulty was related to ensure active participation of candidates in the frames of the deadlines, since they were very busy with their work.

3. Results of the questionnaires for evaluation of the pilot Expertise Check up

3.1. D.6.1.a Questionnaire_Pilot Checkup_candidates

All participants in the Expertise Check-up in the different countries filled in the questionnaire, so the data about the profile of respondents with respect to gender, age, years of experience, area of studies, type of organization they are working is identical with the one presented under the previous item of the report. The evaluation of candidates about the three parts of the self-assessment questionnaire and other important elements of Expertise Check-up is presented below.

Self-assessment questionnaire

Part A. Personal data

All participants in Spain and Portugal and predominant part of candidates in the rest 5 countries state that **filling in the personal data in not much time consuming.**

Do you think that the part a) Personal Data takes too much time?							
Answers in %	Italy	Spain	Romania	Portugal	Bulgaria	Poland	Greece
Yes	6,7	-	12	-	6,3	-	-
Somehow	13,3	-	-	-	6,3	18,8	14
No	80	100	88	100	87,5	81,2	86

Some participants from Poland and Greece gave comments:

- the check/ tick boxes ready to use would be helpful as in the current version there is a necessity to bold/ underline certain information;
- "there are too many ambiguities e.g. field date- is the period of studies or date of graduation required" if the CV is also uploaded;
- part of information is requested repeatedly.

All candidates from Spain and Greece and almost all from the other countries join the opinion that the **information required** in this part of self-evaluation questionnaire **is enough comprehensive for the purpose of expertise assessment.**

Do you think that the required information in part a) Personal Data was sufficiently comprehensive?							
Answers in %	Italy	Spain	Romania	Portugal	Bulgaria	Poland	Greece
Yes	80	100	94	72,7	87,5	87,5	100
Somehow	13,3	-	6	27,3	12,5	6,2	-
No	6,7	-	-	-	-	6,2	-

Polish partner made a remark that among candidates there are people that graduated from many areas of studies. Therefore the option "multiple choices" should be taken into consideration. GPA is not clear for people who graduated from Polish Universities. In every country there can be a different marking system. It should be unified.

Part B. Professional experience

This part also received **positive assessment** by all candidates in Spain and most of them in remaining countries with respect to **time needed** for self-evaluation (81,6% in average for the partnership)

In your opinion the part b) Professional Experience takes too much time?							
Answers	% of answers by country						
	Italy	Spain	Romania	Portugal	Bulgaria	Poland	Greece
Yes	6,7	-	5,9	27,3	6,3	25	7
Somehow	6,7	-	11,8	-	6,3	-	14
No	86,7	100	82,4	72,7	81,3	68,8	79

The **level of comprehensiveness of the required in part b) information** is assessed **as sufficient at even higher degree** by all participants in Spain, Romania and Greece and almost all in the other countries (91% in average for the partnership).

Do you think that the required information in part b) Professional Experience was sufficiently comprehensive?							
Answers	% of answers by country						
	Italy	Spain	Romania	Portugal	Bulgaria	Poland	Greece
Yes	86,7	100	100	81,8	87,5	81,2	100
Somehow	6,7	-	-	-	6,3	6,2	-
No	6,7	-	-	18,2	6,3	12,5	-

Polish partner pointed out that the address information and other detailed personal/proffesional information should be probably deleted from the questionnaire as it is in the CV and takes much time.

Part C. Competence assessment of knowledge and skills, related to TTM activities receives high level of approval as the previous parts. Again majority of participants in all countries (81,9% in average for the partnership) share the opinion that this part is not much time consuming and the information required for the expertise check-up is enough comprehensive (86,6% in average for the partnership).

In your opinion the part c) Competence assessment of knowledge and skills related to the TTM activities takes too much time?							
Answers	% of answers by country						
	Italy	Spain	Romania	Portugal	Bulgaria	Poland	Greece
Yes	13,3	-	11,8	-	12,5	12,5	-
Somehow	13,3	-	5,9	18,2	18,8	6,2	14
No	73,3	100	82,4	81,8	68,8	81,2	86

Do you think that the required information in part c) Competence assessment of knowledge and skills related to the TTM activities was sufficiently comprehensive?							
Answers	% of answers by country						
	Italy	Spain	Romania	Portugal	Bulgaria	Poland	Greece
Yes	73,3	100	94	63,6	81,3	93,8	100
Somehow	13,3	-	6	36,4	12,5	6,2	-
No	13,3	-	-	-	6,3	-	-

The clarity of content of the Expertise check-up is highly appreciated by all participants in Spain, Poland and Greece and almost all in the other countries (92,2% in average for the partnership).

Are the content of the Expertise check up clear?							
Answers	% of answers by country						
	Italy	Spain	Romania	Portugal	Bulgaria	Poland	Greece
Yes	80	100	86,7	90,9	87,5	100	100
Somehow	13,3	-	13,3	9,1	6,3	-	-
No	6,7	-	-	-	6,3	-	-

The opportunity to improve knowledge about individual professional strengths and weaknesses is evaluated positively ("quite a lot" and "a lot") by most of the candidates in Spain, Romania, Bulgaria and Poland. In Italy and Portugal those who have learned little new prevail and in Greece – the majority learned nothing new.

According to the average for the partnership results, the Expertise check-up contributed **quite a lot to increasing the self-awareness about professional qualities of 29,9% of all candidates, a lot - 12,4%. Little new learned 25,9% of participants and nothing new – 21%.**

How much did you learn about your professional strengths and weaknesses?								
Answers	% of answers by country							Average %
	Italy	Spain	Romania	Portugal	Bulgaria	Poland	Greece	
Nothing new	13,3	-	6,2	36,4	6,3	6,2	79	21
Little new	46,7	22,2	18,8	54,5	6,3	18,8	14	25,9
Quite a lot	13,3	55,6	50	9,1	31,3	50	-	29,9
A lot	13,3	11,1	6,2	-	50	6,2	-	12,4
Not sure/ Don't know	13,3	11,1	18,8	-	6,3	18,8	7	10,8

CV uploading

Most of respondents in all countries join the opinion that uploading CV is functional (84,3%) and mandatory (76,8%) to accomplish the expertise check-up.

Do you think that the uploading of the CV is functional to accomplish the expertise check up?								
Answers	% of answers by country							Average %
	Italy	Spain	Romania	Portugal	Bulgaria	Poland	Greece	
Yes	73,3	100	100	63,6	81,3	100	72	84,3
Somehow	20	-	-	27,3	12,5	-	14	10,5
No	6,7	-	-	9,1	6,3	-	14	5,2

Do you think that the uploading of the CV should be mandatory to accomplish the expertise check up?

Answers	% of answers by country							Average %
	Italy	Spain	Romania	Portugal	Bulgaria	Poland	Greece	
Yes	66,7	100	80	63,6	68,8	93,3	65	76,8
Somehow	13,3	-	13,3	9,1	18,8	-	21	10,8
No	20	-	6,7	27,3	6,3	6,7	14	11,6

Phone interview

Phone interviews were implemented in 5 countries - Italy, Spain, Portugal, Bulgaria and Poland.

Most of judgements in all countries about the **general experience with the phone interviews are positive** - "good" receives 59,1% in average for the partnership, followed by "very good" – 23,5%.

How was your general experience with the phone interview?						
Answers	% of answers by country					Average %
	Italy	Spain	Portugal	Bulgaria	Poland	
Excellent	-	-	-	-	33,3	6,7
Very Good	40	11,1	33,3	-	33,3	23,5
Good	40	88,9	66,7	66,7	33,3	59,1
Fair	-	-	-	33,3	-	6,7
Poor	20	-	-	-	-	4

The majority of opinions in all countries about interaction with the expert during the interview are distributed among "good" and "very good", which receive equal average shares of 36,9%, followed by "excellent" pointed out by 20% of all participants.

How was the interaction with the expert?						
Answers	% of answers by country					Average %
	Italy	Spain	Portugal	Bulgaria	Poland	
Excellent	-	-	-	66,7	33,3	20
Very Good	40	11,1	66,7	33,3	33,3	36,9
Good	40	77,8	33,3	-	33,3	36,9
Fair	-	11,1	-	-	-	2,2
Poor	20	-	-	-	-	4

Almost all respondents in the partners' countries, **93,3% in average, state that they did not encounter any difficulties.** There is one exception – one participant in Poland pointed out that he encountered some difficulties.

Did you encounter any difficulties?						
Answers	% of answers by country					Average %
	Italy	Spain	Portugal	Bulgaria	Poland	
Yes	-	-	-	-	33,3	6,7
Somehow	-	-	-	-	-	
No	100	100	100	100	66,7	93,3

Most of participants in all countries (62,2% in average) support the opinion that the **phone interview was important for expertise check-up.**

Do you think that the conducting of the phone interview was important for the expertise check up?						
Answers	% of answers by country					Average %
	Italy	Spain	Portugal	Bulgaria	Poland	
Yes	33,3	77,8	33,3	100	66,7	62,2
Somehow	33,3	22,2	66,7	-	-	24,4
No	33,3	-	-	-	33,3	13,3

Post interview

Post interview was implemented in 4 countries - Italy, Spain, Portugal and Poland. **Most of all candidates (67,8% in average) involved in it assess their general experience as "good".** The lowest share receives judgement "fair" – 5,5% in average. No one assessed individual experience in the post interview as "poor".

How was your general experience with the post interview?					
Answers	% of answers by country				Average %
	Italy	Spain	Portugal	Poland	
Excellent	20	-	-	33,3	13,3
Very Good	20	-	-	33,3	13,3
Good	60	77,8	100	33,3	67,8
Fair	-	22,2	-	-	5,5
Poor	-	-	-	-	

Majority of all participants in post interview (**61,9% in average**) think that **their expertise has been accurately assessed**.

Do you think that your expertise has been accurately assessed?					
Answers	% of answers by country				Average %
	Italy	Spain	Portugal	Poland	
Excellent	42,9	-	-	66,7	27,4
Very Good	42,9	-	-	-	10,7
Good	14,3	100	100	33,3	61,9
Fair	-	-	-	-	-
Poor	-	-	-	-	-

The comments provided about general experience of the expertise check-up show satisfaction:

- The overall process was useful for me personally – it helped to systematize my experience in knowledge and competences and to better rationalize my professional strengths and weaknesses;
- The idea of involving in training after expertise check-up is very good;
- Personal contact with the expert was very important for accurate assessment.

Concerning the content, the comments focus on part C. Competence assessment of knowledge and skills, related to TTM activities, support separate self-assessment of theoretical knowledge and practical skills, as contributing to accuracy of expertise check-up. Personal contact with the expert during the phone interview is pointed out as an advantage of the whole process. The only issue that needs to be improved is avoiding the repetition of the requested information.

3.2. D.6.1.b Questionnaire_Pilot Checkup_partners

The pilot check-up was evaluated also by the experts, who have assessed the expertise of candidates, using a questionnaire, especially developed for this purpose.

As is obvious from the table below, **almost all experts** involved in the expertise check-up declare that **candidates' personal data was easy to access**. Assessors from Romania and Poland had some difficulties.

They detail that:

- they had many meetings with the participants, and that these were necessary in order to access the personal data and to talk about the project.
- "Menu open questions make it sometimes difficult".

Are the candidates' personal data easy to access?							
Answers	% of answers by country						
	Italy	Spain	Romania	Portugal	Bulgaria	Poland	Greece
Yes	100	100	-	100	100		100

Somehow			67			100	
No			33				

The summarized data for all countries, presented below shows that **for all assessors it was easy to understand the candidates' professional experience**. One exception – for the experts from Romania it was not so easy.

Comment: "discussions were necessary with the candidates in order to better understand their professional path and experience" and this was an important activity.

Are the candidates professional experience easy to understand?							
Answers	% of answers by country						
	Italy	Spain	Romania	Portugal	Bulgaria	Poland	Greece
Yes	100	100		100	100	100	100
Somehow			100				
No							

All experts involved in expertise check-up share the opinion that **competence assessment of knowledge and skills related to the TTM activities information is complete**.

Are the Competence assessment of knowledge and skills related to the TTM activities information complete?							
Answers	% of answers by country						
	Italy	Spain	Romania	Portugal	Bulgaria	Poland	Greece
Yes	100	100	100	100	100	100	100
Somehow							
No							

Uploading of candidates' CVs is considered useful and necessary for conduction of expertise check-up by all experts in all countries except Poland. Comment provided is that much of the information from CV is included in the questionnaire.

Is the uploading of the CV useful to complete the candidates check up?							
Answers	% of answers by country						
	Italy	Spain	Romania	Portugal	Bulgaria	Poland	Greece
Yes	100	100	100	100	100		100
Somehow						100	
No							

Phone interview

The judgment about the guidelines for provision phone interview is positive. Majority of experts who have carried it out assess them as “good” and the remaining part as “very good”. It is pointed out that this element of the methodology for expertise check-out has been useful in the cases where they had to decide which courses the candidates had to take part.

What is your opinion about the phone interview guidelines?							
Answers	% of answers by country						
	Italy	Spain	Romania	Portugal	Bulgaria	Poland	Greece
Excellent			-				-
Very Good		100	-		100		-
Good	100		-	100		100	-
Fair			-				-
Poor			-				-

Most of assessors consider that the **duration of phone interviews was adequate.** Experts point out that it depended on the issues which were discussed.

Is the duration of the interview adequate?							
Answers	% of answers by country						
	Italy	Spain	Romania	Portugal	Bulgaria	Poland	Greece
Yes	100	100	-	100	100		-
Somehow			-			100	-
No			-				-

Majority of all experts assessed as “good” the interaction with the candidates. Some pointed out that participants showed interest in the project idea and activities.

How was the interaction with the candidates?							
Answers	% of answers by country						
	Italy	Spain	Romania	Portugal	Bulgaria	Poland	Greece
Excellent			-				-
Very Good			-			100	-
Good	100	100	-	100	100		-
Fair							
Poor							

In addition there are comments by experts, mainly from Romania and Bulgaria, that during the Expertise Check-up the they had meetings with the candidates, this were very important and helped to establish a relationship and helped the communication, organization and information flow of the expertise check-up process.

All experts from all countries declare that they **had not faced any difficulties in interviews provision and that it was easy for them to identify the main skills and competences of the candidates.**

Did you encounter any difficulties?							
Answers	% of answers by country						
	Italy	Spain	Romania	Portugal	Bulgaria	Poland	Greece
Yes			-				-
Somehow			-				-
No	100	100	-	100	100	100	-

Did you easily identify the main skills and competences of the candidates?							
Answers	% of answers by country						
	Italy	Spain	Romania	Portugal	Bulgaria	Poland	Greece
Yes	100	100	-	100	100	100	-
Somehow			-				-
No			-				-

Post interview

According to the opinion of the majority of all experts the guideline for provision of post interview was helpful. Only Polish experts share the opinion that it needs further elaboration in order to support its successful implementation during the expertise check-up process.

Is the guideline for the post interview helpful?							
Answers	% of answers by country						
	Italy	Spain	Romania	Portugal	Bulgaria	Poland	Greece
Yes	100	100	-	100	-		-
Somehow			-		-	100	-
No			-		-		-

The opinions about taking the decision which training unit the candidate should attend divide. Experts from Spain and Portugal state that this was easy to do, while their colleagues from Italy and Poland met some difficulties. The comment provided in relation to this is that they have used direct contact by phone for gathering additional information and discussion of issues, which were not clear enough.

Did you easily decide what Unit the candidate should attend?							
Answers	% of answers by country						
	Italy	Spain	Romania	Portugal	Bulgaria	Poland	Greece

	Italy	Spain	Romania	Portugal	Bulgaria	Poland	Greece
Yes		100	-	100	-		-
Somehow	100		-		-	100	-
No			-		-		-

All experts involved in the expertise check-up expressed their satisfaction with the process as a whole and provided some comments:

- We are satisfied because of we have created a simple and valuable tool to assess the candidates' skills.
- In general, the Expertise check-up was well organised. The uploading of the CV was proved to be functional in order to accomplish the Expertise check-up.
- We are satisfied with participation in the expertise check-up because it gave us opportunity to gain experience in one important stage of validation - assessment candidates' professional competence and on this basis to recommend training units to be attended.

Comments and suggestions about the content could be summarized as follows:

- During the Expertise Check-up the experts had meetings with the candidates, this were very important and helped to establish a relationship and helped the communication, organization and information flow of the Expertise Check-up process.
- The regular contact with the candidates and provision of phone interviews in order to gather additional information to that provided in CV and self-evaluation questionnaire were very important for adequate expertise assessment.
- The process should concentrate on the information not included in the CV.

Improvements suggested

- To avoid repeated request of one and the same information (address, dates of graduation education and training etc.) in order to reduce the time for self-assessment and keep the interest and motivation of candidates.
- The self-assessment questionnaire should be available in electronic version (like internet survey facilities), not a .doc format.

4. Results of the focus group for evaluation of the pilot Expertise Check-up

Focus group was conducted only by ITPIO, Bulgaria. The focus group was formed by 2 experts from ITPIO, who have taken part in the expertise assessment and 5 candidates, who by area of studies and job position are representative for the whole Bulgarian group and have more experience in the field of technology transfer. Ludmil Kovachev played the role of moderator of focus group discussion.

Participants-candidates have graduated the following areas of studies – 3 engineering, of whom 1 holds qualification in economy; 1 economics; 1 natural science. 2 of them occupy managing positions – technology director in a company, 1 in a private Centre for technology transfer; 1 is a scientist researcher in a TTO within Sofia University; 1 is an expert in Sofia Tech Park; 1 expert in technology transfer within Bulgarian Association of

Information Technologies. Their work experience is related with technology transfer – 3 worked in the field between 5 and 10 years and 2 over 15.

The moderator made a short introduction including:

- summary of pilot Expertise Check-up organization, provision and results;
- summary of data obtained through implementation of the 2 questionnaires for evaluation of pilot Expertise Check-up;
- objective of the focus group and the issues to be discussed.

The participants were invited to provide their opinion on the following issues:

- the approach and methodology for expertise assessment;
- organization and provision;
- general satisfaction with the experience and the results;
- recommendations for improvements.

Each issue was discussed separately round the table and summary of opinions provided by participants has been made by the moderator. At the end conclusions were drawn.

The focus group meeting lasted 2 hours – 30 minutes introduction part; 1 hour 20 minutes discussion; 10 minutes conclusions.

It should be pointed out that the results from the focus group confirm entirely the evaluation of Expertise Check-up in Bulgaria:

- The approach and methodology implemented were highly appreciated by all participants as adequate. They stressed that self-evaluation of individual professional expertise, structured in theoretical knowledge and practical skills, was very useful. It helped them to better systematize and rationalize their capacity, gained through work and different forms of learning.
- The fact that the procedure did not take much of the time of candidates was outlined as an advantage. Besides, the efforts to collect the necessary information for accurate expertise assessment, through phone interviews, as well as contacts with candidates for discussion of the units of the training course recommended, were given high attention. All focus group members joined the opinion that direct contact with candidates, in the process of collection of information and for final identification of training needs, should be included as a mandatory element in the procedure for expertise Check-up and respectively guidelines for its provision have to be developed.
- The results of the expertise assessment are in compliance with their expectations and all candidates and experts are satisfied with the experience of participation in this project activity.
- It was underlined that the opportunity ensured in the frames of the project to be involved in training in compliance with the identified individual needs was highly motivating for participation in pilot Expertise Check-up.

5. Conclusions

Based on the results presented in the report the following conclusions could be drawn:

- The self-assessment questionnaire was rated as not much time consuming, requiring sufficiently comprehensive information in all the three parts, Personal Data, Professional Experience and Competence assessment of knowledge and skills.
- The content of Expertise Check-up was considered to be clear enough.
- The comments of candidates concerning the content focus on part C. Competence assessment of knowledge and skills, related to TTM activities. They highly appreciate the separate self-assessment of theoretical knowledge and practical skills, as contributing to accuracy of expertise check-up.
- The CV uploading is functional and the majority of the candidates consider that it should be mandatory to accomplish the expertise Checkup.
- The candidates involved in phone interview considered the general experience and the interaction with the expert positive, and did not encounter any difficulties. All interviewed and experts shared the opinion that phone interview is important for Expertise Check-up.
- The online tool for collection of information about the individual professional expertise functions well, saves time and is convenient to work with for both candidates and experts.
- The combination of online method of gathering information and direct contact, though implemented by countries at different extent is very effective, especially when it comes to deal with expertise assessment. It allows utilizing the advantages of both methods – the procedure is not much time consuming both for candidates and for experts and at the same time is a prerequisite for accuracy and respectively for the necessary trust in the results obtained.

Summarizing the experience with the pilot Expertise Check-up in partners' countries the following suggestions could be taken in consideration:

First one it is related to the necessity of direct personal contact with participants during the whole process – promotion and recruiting of candidates, collection of information, assessment of individual knowledge and skills in the main areas, final decision about units of the training course recommended for the candidate to attend.

This implies the following:

- Inclusion of phone interview as a mandatory element of the methodology developed;
- Further elaboration of the guidelines for provision of the phone interview aimed at providing more practical instructions to experts;
- Inclusion of a phase for individual discussion with candidates on the results of assessment and the recommended training units in the procedure for Expertise Check-up.

Second one is to enrich the guideline for post interview with examples of situations and possible set of adequate questions for gathering more comprehensive information, necessary for accurate assessment.

Third one is to avoid repeated request of one and the same information (address, dates of graduation education and training etc.) in order to reduce the time for self-assessment and keep the interest and motivation of candidates.

Fourth one is related with the necessity to discuss in the partnership a template of a document, which can certify that the expertise of a candidate has been checked –up and contain summarized information about the individual results obtained and the recommendations for training provided.

The above improvements will contribute to increasing the quality of the process and attractiveness of the training course for potential users.

6. Glossary

Qualification: a formal outcome of an assessment and validation process which is obtained when a competent institution determines that an individual has achieved learning outcomes to given standards.

Learning outcomes: statements of what a learner knows, understands and is able to do on completion of a learning process and which are defined in terms of knowledge, skills and competence.

Unit of learning outcomes: a component of a qualification, consisting of a coherent set of knowledge, skills and competence, that can be assessed and validated.

Credit for learning outcomes: a set of learning outcomes of an individual which have been assessed and which can be accumulated towards a qualification or transferred to other learning programmes or qualifications.

Assessment of learning outcomes: The process of appraising knowledge, skills and/or competences of an individual against predefined criteria, specifying learning methods and expectations. Assessment is typically followed by validation and certification.

Validation of learning outcomes: the process of confirming that certain assessed learning outcomes achieved by a learner correspond to specific outcomes which may be required for a unit or a qualification.

Recognition of learning outcomes: the process of attesting officially achieved learning outcomes through the awarding of units or qualifications.

ECVET points: a numerical representation of the overall weight of learning outcomes in a qualification and of the relative weight of units in relation to the qualification. Formal learning means learning which takes place in an organised and structured environment, specifically dedicated to learning, and typically leads to the award of a qualification, usually in the form of a certificate or a diploma; it includes systems of general education, initial vocational training and higher education.

Non-formal learning: learning which takes place through planned activities (in terms of learning objectives, learning time) where some form of learning support is present (e.g. student-teacher relationships); it may cover programmes to impart work skills, adult literacy and basic education for early school leavers; very common cases of non-formal learning include in-company training, through which companies update and improve the skills of their workers such as ICT skills, structured on-line learning (e.g. by making use of open educational resources), and courses organised by civil society organisations for their members, their target group or the general public.

Informal learning: learning resulting from daily activities related to work, family or leisure and is not organised or structured in terms of objectives, time or learning support; it may be unintentional from the learner's perspective; examples of learning outcomes acquired through informal learning are skills acquired through life and work experiences, project management skills or ICT skills acquired at work, languages learned and intercultural skills acquired during a stay in another country, ICT skills acquired outside work, skills acquired through volunteering, cultural activities, sports, youth work and through activities at home (e.g. taking care of a child).

Open educational resources (OER): means digitised materials offered freely and openly for educators, students and self-learners to use and reuse for teaching, learning and research; it includes learning content, software tools to develop, use and distribute

content, and implementation resources such as open licences; OER also refers to accumulated digital assets that can be adjusted and which provide benefits without restricting the possibilities for others to enjoy them.

Certificate: An official document, issued by an awarding body, which records the achievements of an individual following a standard assessment procedure.

Formal learning: learning that occurs in an organized and structured environment (e.g. in an education or training institution or on the job) and is explicitly designated as learning (in terms of objectives, time or resources). Formal learning is intentional from the learner's point of view. It typically leads to validation and certification

Certification of learning outcomes: The process of formally attesting that knowledge, skills and/or competences acquired by an individual have been assessed and validated by a competent body against a predefined standard. Certification results in the issue of a certificate, diploma or title.

Learning: a process by which an individual assimilates information, ideas and values and thus acquires knowledge, know-how, skills and/or competences

Skill: a personal faculty required to do something or get something done. Skills are of a general nature. For example leadership is a skill, but to give instructions to subordinates is the result of applying leadership (together with other skills) to a job task and not a skill in itself.