



## Open Badge Network

### O4A4 Executive Report - Testing the Guidelines for Open Badges in Territories

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## Index

Index .....	1
Executive Summary.....	2
Who is this document for? .....	2
What methodology was used to develop the report?.....	2
What does this document cover? .....	2
How can this document be used? .....	2
Summary of the Guidelines for Establishing Open Badges within Territories (O4A3).....	3
Pilots of the Guidelines for Establishing Open Badges within Territories (O4A3) .....	3
Beuth pilot - background to the pilot .....	3
DUO pilot - background to the pilot .....	4
Focus Groups' consideration of the Guidelines for Establishing Open Badges within Territories (O4A3) .....	5
Key findings from the pilots and focus groups .....	5
Responses .....	6
1. Can networks help develop and support roll out of badges across a territory?.....	6
2. Does the categorisation of networks in the guidelines make sense? Are there any categories missing? (p7 of the Guidelines. Section: What does an Open Badge network look like?) .....	9
3. When developing the pilot, were the case studies useful to serve as examples of how networks might be formed, structured etc? Are there other case studies it would be useful for the guidelines to include? (Pages 8-12 and Appendices from p18) .....	11
4. Key considerations - were they clear? Are any missing that would have been helpful? (p13 and the headings from pages 14 - 16) .....	12
5. Could the Canvas provide a useful tool for mapping networks? .....	15
6. Does the terminology make sense? .....	16
7. How would you use the Guidelines in a practical context? Who would you involve? .....	17
8. What kind of network would you develop? What would the 'drivers' be? .....	18
Key findings .....	19
Summary of findings from pilots and focus groups .....	19
Appendix 1 .....	24
Reports from pilots .....	24



Pilot led by: DUO, Dienst Uitvoering Onderwijs .....30

## Executive Summary

### Who is this document for?

This document is for the Open Badge Network to use as a guide for enhancing the the Open Badge Network intellectual output: Guidelines for Establishing Open Badges within Territories (O4A3).

### What methodology was used to develop the report?

The data that informs this report was gathered via two pilots and five focus groups run by partners of the Open Badge Network. The pilots were run by Beuth University of Applied Sciences, Berlin in Germany and DUO, Dienst Uitvoering Onderwijs in the Netherlands, each lasting ten and sixteen months respectively. The pilots and focus groups included participants from a range of organisations including: universities; companies; voluntary organisations; national government and government agencies.

The pilot and focus group participants were asked to consider eight questions relating to the content and usability of the Guidelines, as well as an accompanying resource, a **Network Canvas**.

While feedback was provided for each question overall, each of the pilot and focus groups did not necessarily address all of the questions. Sometimes questions were responded to in the context of a grouping of questions. Therefore the summaries and recommendations included under each question heading below are an amalgamation of feedback from some but not necessarily all of the pilots and focus groups.

Some of the focus group sessions also included testing and feedback of another Open Badge Network document, the Guidelines for the implementation of Open Badges for Individuals and Organisations. As such, the responses from the focus groups included feedback that was relevant sometimes to one or both of the Guidelines. This report extrapolates the information from the focus group reports that is relevant to the Guidelines for Establishing Open Badges within Territories (O4A3).

### What does this document cover?

This document is a synthesis of the feedback from each of the pilots and focus groups on the Guidelines for Establishing Open Badges within Territories (O4A3) and its accompanying Network Canvas. The feedback is summarised and recommendations have been developed for enhancing the Guidelines and Canvas.

### How can this document be used?

- Gain an insight into perceptions of the Guidelines for Establishing Open Badges within Territories (O4A3) from a range of users
- View recommendations for enhancement of the Guidelines (O4A3), that could be used to improve your use of the them



## Summary of the Guidelines for Establishing Open Badges within Territories (O4A3)

The Guidelines for Establishing Open Badges within Territories (O4A3) were developed to support the roll-out of Open Badges across a geographical area. As noted in the Guidelines, Open Badges are innovative and potentially disruptive. As with any innovation, there will be early adopters and pockets of good practice. To support the embedding of an innovation across a territory, however, requires a more coherent and structured approach. Communication channels are vital and while these may develop organically between a number of actors, an established network can help to support communication and enable the synthesis of learning from across the network into meaningful and mutually beneficial developments ([Diffusion of Innovations, Everett Rogers](#))<sup>1</sup>.

The Guidelines were designed for organisations looking to establish Open Badges in their locality or 'territory.' A territory could be defined by geography e.g. a country or city, by sector or industry working around a common theme or goal. The guidelines are a synthesis of a [discussion paper \(O4A1\)](#) that included feedback from the community on different approaches to establishing Open Badges within territories. Our research showed that the establishment of networks can aid this process.

The guidelines set out practical advice for organisations wishing to build Open Badge networks to support the establishment of Open Badges within their territory. The guidelines include advice on what an Open Badge network can help deliver, case study examples of existing models of Open Badge networks in territories and recommendations of what to consider, drawing on the learning from existing successful networks.

## Pilots of the Guidelines for Establishing Open Badges within Territories (O4A3)

Open Badge Network partners, Beuth University in Germany and DUO in the Netherlands ran pilots to test the Guidelines for Establishing Open Badges within Territories in 2016. Reports on these pilots are provided alongside this Executive Report. The background and key findings from the pilots are included here.

### Beuth pilot - background to the pilot

**Pilot of:** Guidelines for Open Badges in Territories O4A3  
**Pilot led by:** Beuth University of Applied Sciences, Berlin  
**Date of pilot:** February 2016 - November 2016  
**Location of pilot:** Berlin, Beuth University  
**Duration of pilot:** 10 months  
**Territory:** The city of Berlin

Drivers for the pilot:

The key driver for the pilot of the Guidelines was enhancing employability of skilled migrants including refugees in the city of Berlin. The specific challenge addressed by the use of Open

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<sup>1</sup> Rogers, E. (2003). The Diffusion of Innovations. The Free Press, New York; fifth edition.



Badges in the pilot was a question of how to recognise and acknowledge individual 21st century skills and competencies of migrant academics including refugees by a higher education organisation and how to make these skills visible and significant to potential employers and other stakeholders relevant for self-/employment and career advancement. Open Badges were issued as part of a qualification program at Beuth University of Applied Sciences Berlin and were designed to certify a set of employment-relevant skills at three competency levels.

Group demographic:

Overall the pilot group was made up of 28 volunteers, 9 women, 19 men. Ages 20-50+. Three stakeholder groups were involved in the pilot:

1. Migrant academics including refugees with higher education degrees in IT related fields as participants in the BeuthBonus program and direct beneficiaries of Open Badges (28 migrant academics including refugees)
2. Industry members of the Advisory Board in the BeuthBonus program (5 persons)
3. Professional development organisations and coaches based in Berlin and cooperating with the BeuthBonus project. BeuthBonus Coaches (4 persons) and BeuthBonus Project Team (7 persons)

Context for the pilot:

The pilot was conducted as part of the qualification program for migrant academics, including refugees, at Beuth University of Applied Sciences Berlin. The BeuthBonus project enables each participant to develop their own skills based on their unique study and coaching plan and to obtain an individual certificate and Open Badge issued by the University. The BeuthBonus project is part of the IQ Network Berlin and wider German IQ Network. This Federal Network for Integration through Qualification was established with the aim of fostering integration of migrants by improving access to information and education, providing consultation on recognising prior education and new qualification programs, including vocational training and higher education.

## DUO pilot - background to the pilot

**Pilot of:** Guidelines for Open Badges in Territories O4A3

**Pilot led by:** DUO, Dienst Uitvoering Onderwijs

**Date of pilot:** September 2016 - December 2017

**Location of pilot:** Groningen

**Duration of pilot:** 16 months

**Territory:** Groningen, with aim to extend countrywide in the Netherlands

Drivers for the pilot:

The theme for this pilot was “Standardized and assessed Open Badges”. The aim of the pilot was to:

- Design and issue Open Badges based on an existing competency standards, for the role of “Hospitality Person”
- Assess the badges with an existing assessment method
- Promote optimum uptake of the badges (not only locally) and thus reach a high level of “recognisability” of the end product

Seven badges were designed, referring to our national qualification framework for VET. Upon earning all seven, a larger badge was issued, a badge showing that all competencies needed for functioning professionally as a hospitality person. Six volunteers succeeded in this



**Group demographic:**

Overall the pilot group was made up of 8 volunteers, 80% women, 20% men. Ages 25-55. Three stakeholder groups were involved in the pilot:

1. Auxiliary staff (two people who initiated and lead the project)
2. Dutch CHQ association (CHQ is a method for validating learning outcomes. Two people are involved as advisors)
3. IPSO

**Context for the pilot:**

The first stage of the pilot was conducted at Hamelhuys, in Groningen. Hamelhuys is a walk-in consultation centre for cancer patients and their families. It is part of a larger national network of consultation centres, united by an association called IPSO. These consultation centres work with volunteers, are not-for-profit and depend financially on donations and sponsors. The aim is to start issuing the badges at Hamelhuys and extend the reach to countrywide via the IPSO network of cancer guidance centres, to dozens of centres throughout the Netherlands, and many hundreds of volunteers.

**Time frame:**

- Autumn 2016 - Spring 2017: pilot phase 1, Hamelhuys
- Summer 2017: presenting results at IPSO
- Autumn 2017: national roll out (when successful)

## **Focus Groups' consideration of the Guidelines for Establishing Open Badges within Territories (O4A3)**

Focus Groups were also run by Open Badge Network partners to test the Guidelines, with on average 6 attendees per group. The sessions commenced with an overview of the Guidelines and participants were asked to consider the same questions as the pilots. The sessions also included a practical activity where participants completed the prototype Network Canvas and fed back their thoughts on this.

Participants in the Focus Groups included representatives from:

The Scottish Government; Keele University; City & Guilds; Chicago Discover Design; Learning Agents; Badge Craft; Dutch National Europass Centre; Euroguidance; DUO; Hamelhuys, volunteering centre; University of Padova; University of Turin; Cineca; University Bicocca Milan; Cetus LLP (Centre for Educational Technology, Interoperability and Standards); IQC srl (Italian Quality); Professional training school of Trevano; Casa Aranda (elderly care residential home); Association of house economy of Cantone Ticino; The Institute for Sustainable Technologies, Institute for Environmental Protection (both from the National Research Institute, Poland); PKP S.A; Enso - IT; University of Technology and Humanities in Radom.

## **Key findings from the pilots and focus groups**

Both the pilot and focus group participants were asked to consider the following questions in relation to the Guidelines for Establishing Open Badges within Territories (O4A3):

1. Can networks help develop and support roll out of badges across a territory?



2. Does the categorisation of networks in the guidelines make sense? Are there any categories missing? (p7 of the Guidelines. Section: What does an Open Badge network look like?)
3. When developing the pilot, were the case studies useful to serve as examples of how networks might be formed, structured etc? Are there other case studies it would be useful for the guidelines to include? (Pages 8-12 and Appendices from p18)
4. Key considerations - were they clear? Are any missing that would have been helpful? (p13 and the headings from pages 14 - 16)
5. Could the Canvas provide a useful tool for mapping networks?
6. Does the terminology make sense?
7. How would you use the Guidelines in a practical context? Who would you involve?
8. What kind of network would you develop? What would the 'drivers' be?

While feedback was provided for each question overall, each of the pilot and focus groups did not necessarily address all of the questions. Sometimes questions were responded to in the context of a grouping of questions or in the context of both the Guidelines for Establishing Open Badges within Territories (O4A3) and the Guidelines for the Implementation of Open Badges for Individuals and Organisations. Therefore the summaries and recommendations included under each question heading below are an amalgamation of feedback from some but not necessarily all of the pilots and focus groups.

## Responses

### 1. Can networks help develop and support roll out of badges across a territory?

#### A. Pilots

Beuth University of Applied Sciences, Berlin:

Based on the experience of the pilot, local networks are crucial for developing and supporting roll out of Open Badges across a territory. A network of stakeholders supports the development of common understanding of the requirements and the value of introducing an innovation such as Open Badges in a territory. Acting in a network enables members to understand the specific needs of the different stakeholders involved but also the assessment of risks which an innovation always has to face in an initial stage.

The communication channels within the network have proved vital to sharing awareness and enabling discussion on the possibilities and challenges of Open Badges for migrant academics including refugees. Following the guidelines, the pilot in Berlin confirmed that working in a network enables the synthesis of learning from the stakeholders representing different fields relevant to the pilot. The pilot in Berlin especially helped encourage the formation of partnerships to develop and promote Open Badges and working in the network provided a 'safe space' in which first steps in the implementation of Open Badges could be tried out with the help of advice of stakeholders involved in the BeuthBonus program.

DUO:



Definitely a yes. It stimulates the dissemination of Open Badges and best practices around them. Without a network the decision to adopt the use Open Badges is dependant on an individual finding out about the existence of Open Badges and understanding why they might be useful to. This is not necessarily an efficient way of implementing them. On top of that, a network is far more efficient in terms of sharing experiences, badge designs and tools, troubleshooting and improving quality. Next to that, it improves the commonly perceived value of the designed badges.

## B. Focus Groups

### Digitalme:

Yes. They can help with demonstrating and sharing best practice, connecting with similar organisations, building capacity across a network. An example provided came from the representative from the Scottish Government, who commented that they have been using communities of practice across the organisation. They have found these useful for supporting and delivering change.

### ARTES:

It is clear the importance of establishing networks at territorial level to develop Open Badges. Open Badges are useful only if there are organisations and institutions sharing the same strategy. The guidelines are missing indications on a common glossary, which is necessary to establish a network. Some participants have pointed out that this is a common problem in the Open Badge world: missing a common language and missing common criteria on quality assurance and competency framework.

It has been suggested to capture in the guidelines that the issues regarding methodology, criteria and use of competencies frameworks for Open Badges are still open and unresolved, especially for informal and non-formal competencies.

In this regard, one important indication is that Open Badge issuers should provide earners with the information on how to use Open Badges in their territory. In order to engage users, the earners must know that the Open Badges are “valuable” and “expendable” currency in their territory. One way to do this is to integrate Open Badges into existing software in universities and /or organisations (for example CINECA started a project to include Open Badges in University platforms, making them transformable into training credits and exchangeable between universities).

It is also important to create common criteria for Open Badges at territorial level that could be agreed and shared among different institutions and organisations. This would also help avoiding unnecessary duplications of similar Open Badges in the same network.

The experts were all convinced of the necessity to create a network at territorial level to support Open Badges development.

### SUPSI-DEASS:

The network is seen as of utmost importance. In particular, after a discussion about the necessity, for the correct functioning of the badge, of a network of territorial institutions and key actors able to support the tool and to give trustability, the participants agree on the way of keeping this network in a range of control of the institutions and key actors. In this way the badge awarded people can be ensured of the validity and value of the certification.

It is also important to create a common criteria for badges at territorial level that could be agreed and shared among different institutions and organisations able to give trustability to



these badged. The risk to be avoided is to overlap badges with existing ways in Switzerland, in canton Ticino in particular.

A glossary can be helpful, but also some more procedural hints.

ITEE:

The majority of experts stated that networking is the easiest way to develop and support Open Badges. Smaller, non-networks enterprises are not able to introduce Open Badges to their own business. There are more advantages of developing Open Badges within the network in a local society / across specific territory:

- Using the Open Badges system by several entities in a given territory can result in synergies that increase benefits of using Open Badges
- Joint Open Badges projects can reduce costs and facilitate promotion of Open Badges
- Well organised networks can influence local authorities to support the Open Badges idea

### Summary of findings from pilots and focus groups

Networks can help develop and support roll out of badges across a territory. They can support:

- Driving change
- Building capacity
- Sharing workload / expertise
- Pilot / proof of concept
- Communication / mobile supply chain
- Introducing open practices and encouraging sharing
- Exploring thematic approaches
- The development of trust, validity and value in the badges
- Synergies that increase benefits of using Open Badges
- Reduced costs and facilitate promotion of Open Badges through joint projects
- Influence local authorities to support Open Badges

Some recommendations were provided on what the networks can do to enhance uptake and trust in Open Badges, such as encouraging existing trusted institutions like universities to integrate badges into their systems and practices and aiding transferability through developing a common criteria for Open Badges at a territorial level. It was also suggested that a common glossary would help network members to develop Open Badges, although it was recognised that this is missing from the Open Badges ecosystem overall: a common language and common criteria on quality assurance and competency frameworks.

ARTES commented that the experts were convinced of the necessity of creating a network at territorial level to support Open Badges development. They believed key actors to include are universities and the Human Resource departments of private organisations, mentioning that the connection between education and employment is still poor and Open Badges could help bridge the gap.



## Recommendations

The concept of using networks to support the uptake of Open Badges across a territory appears sound and is an appropriate approach to use in the Guidelines for Establishing Open Badges within Territories (O4A3).

Provide some additional recommendations that could enhance network activity such as:

- Suggest existing trusted institutions like universities or professional associations integrate badges into their systems and practices
- Develop a common criteria for Open Badges at a territorial level to avoid duplication and aid transferability
- Develop a common glossary
- Ensure network members are aware that issues regarding methodology, criteria and use of competencies frameworks for Open Badges are still open and unresolved, especially for informal and non-formal competencies

## 2. Does the categorisation of networks in the guidelines make sense? Are there any categories missing? (p7 of the Guidelines. Section: What does an Open Badge network look like?)

### A. Pilots

Beuth University of Applied Sciences, Berlin:

The categorisation of networks as specified on page 7 of the guidelines makes sense based on the experience of the pilot in Berlin. The BeuthBonus pilot can be categorised as a “pre-defined network” as it was developed deliberately by the Project Team to achieve the specific aims of the BeuthBonus programs which is primarily enhancing employability of migrant academics including refugees. As stated in the guidelines, the Berlin network within the BeuthBonus program is based on a funding model with funding coming from German and European stakeholders, i.e. German Federal Ministry of Labour and Social Affairs, German Federal Ministry of Education and Research, German Federal Employment Agency and the European Social Funds for Germany. This funding was in place to support the network from the start and a defined objective of the BeuthBonus program.

### DUO

DUO started with one organisation, joined by an umbrella organisation with an existing network of organisations. This category (“existing network”) seems not identified on page 7.

### B. Focus Groups

Digitalme:

Consider additional categories:

- Pre-existing (joining with a network that exists for another reason)
- Hybrid network
- Learning network (within an organisation)



**ARTES:**

The categorisation at p7 was deemed too theoretical and not very relevant in view of building a territorial network. Instead, it has been suggested to include pragmatic indications on how to propose Open Badges to territorial organisations/institutions.

**SUPSI-DEASS:**

The categorisation is fine but for the specific case of Canton Ticino is not so relevant.

**ITEE:**

The experts highlighted that there are many different kinds of networks. The categorisation presented, although non-exhaustive, seems to be correct. Some experts have expressed the opinion that the categorisation of Open Badge networks is not very important. The most important issue is to understand the interests of all the organisations that make up the network. Organisations should clearly define their interests and a level of engagement. The network should be subdivided into working groups that bring together representatives of similar organisations.

**Summary of findings from pilots and focus groups**

Overall the categories listed on page 7 of the Guidelines make sense, however, these could be augmented with the following:

- Pre-existing
- Hybrid network
- Learning network (within an organisation)

The categorisation was viewed as too theoretical by members of the ARTES focus group and a request made for making these more practically focused.

Experts from the ITEE group commented that the categorisation of Open Badge networks is not very important and that the important issue is to understand the interests of those who make up the network. Organisations should clearly define their interests and a level of engagement. They also believed that the network should be subdivided into working groups that bring together representatives of similar organisations.



## Recommendation

Include new categories:

- Pre-existing
- Hybrid network
- Learning network (within an organisation) (Author's note: learning network could be combined or listed as an example under pre-existing network or pre-defined network.)

In order to enhance understanding and avoid the categorisation being viewed as too theoretical, include an additional point that practical examples of the networks are provided in the case studies further on in the Guidelines.

Provide guidance that in any network, it is important that organisations clearly define their interests and a level of engagement. Subdivision of the network into working groups could be highlighted as an example in the case studies (such as the Open Badges in Scottish Education Group, where sub-groups existed as part of the wider network).

### 3. When developing the pilot, were the case studies useful to serve as examples of how networks might be formed, structured etc? Are there other case studies it would be useful for the guidelines to include? (Pages 8-12 and Appendices from p18)

#### A. Pilots

Beuth University of Applied Sciences, Berlin:

The case studies from the guidelines as introduced on pages 8-12 were somewhat useful for developing the pilot. The pre-defined networks presented in the guidelines only partially correspond to what we have been trying to achieve in the BeuthBonus program. It would be useful to include further case studies of organisations which implement Open Badges though working with different organisations in a network. It would be very useful to get first-hand insight from networks focusing on specific objectives like enhancing employability and learn from them about the experience of establishing Open Badges and how working in the network was helpful.

DUO:

The character of the networks in the case studies is quite different from mine. Perhaps Digitalme's work with City & Guilds (which is a lot larger and wider than IPSO) might be another good example?

#### B. Focus Groups

Digitalme:

Additional networks could be included, such as:

- Nordplus
- The Learning Network run by Don Presant in Canada



#### ITEE:

The case studies presented in the text are clear, well described and useful, especially because they include practical information about the process of networks' creation. The examples given are not suitable for Open Badge networks in Poland, for instance the Open Badges in Scottish Education Group seems to be a great example for the UK, although impossible to use in Poland. Other networks described are examples of slightly formalised working groups that develop the general idea of Open Badges in the Internet and do not refer to Open Badges in territories

#### Summary of findings from pilots and focus groups

The case studies from the guidelines as introduced on pages 8-12 were somewhat useful, however, they could be extended. Suggestions for additional case studies included:

- Organisations that implement Open Badges though working with different organisations in a network
- Networks focusing on specific objectives like enhancing employability
- How the uptake of Open Badges has been promoted via a pre-existing network. (City & Guilds could be used an example for this)
- Nordplus
- The Learning Network run by Don Present in Canada

#### Recommendation

Identify and approach relevant networks to provide further case studies on:

- Organisations that implement Open Badges though working with different organisations in a network
- Networks focusing on specific objectives like enhancing employability. (Author's note: sub-groups within the Open Badges in Scottish Education Group network were thematically based. Information on these could be extended to cover this recommendation.)
- Nordplus
- The Learning Network run by Don Present in Canada
- A case study that would be relevant for Poland

#### 4. Key considerations - were they clear? Are any missing that would have been helpful? (p13 and the headings from pages 14 - 16)

The Guidelines provide recommendations of what to consider when creating a network. These are:

- What Open Badge need are you setting out to address?
- Is there an Open Badge problem in your territory that you are trying to find a solution for?
- Who would participate in your network?
- Do you have existing partnerships or access to networks that you could leverage?
- How much time and resource are you able to commit?



- Can you access funds to support your work?
- What are the guiding principles that underpin your Open Badge network?

#### A. Pilots

Beuth University of Applied Sciences, Berlin:

The key considerations in the guidelines are clear and helpful. They would be even more helpful if they could be designed in the form of a decision tree to model key decisions and their consequences when establishing a network. A decision tree could help to identify a strategy most likely to reach a given objective.

DUO:

In the case of the DUO pilot, the pilot was being developed before the Guidelines were published. Even so, the guidelines are very useful. We realise now that we have an important omission in the pilot: the involvement of other employers (other than the volunteering organisation itself). The value of a badge is, in my view, quite dependant on the value an employer accredits it, e.g. if the badges will offer the “badge earning” volunteers a better chance of a paid job.

I find pages 13 to 16 most useful. A good list of topics and reminders what-not-to-forget.

On page 14 “Who do I engage”, HRM-professionals might be added. The (remarkable) director of Hamelhuys, Josje Hamel, made the remarkable statement: “we are volunteers but no amateurs”. We are using this pilot also as as a “role builder”. At this moment, the role of “Hospitality person” is “badged” in seven groups of desired competencies. A next role, that of “Buddy”, will be badged too. Both roles will overlap partly, concerning the badges needed for each role, but clearly some new badges will be designed for this new role too. So Open Badges can be used to visualise what is needed in the job framework of an organisation.

Create a community page on EPALE (Electronic Platform for Adult Learning in Europe. This platform can be used by national and/or international communities). Not only does this function as a communication platform for a community, but also has promotional value to people outside the community (but inside the group of guidance professionals) (note: Erik is starting one in Dutch)

#### B. Focus Groups

Digitalme:

Yes the considerations were clear. Retaining flexibility is important for sustainability

ARTES:

The key actors to be involved are the Universities and Human Resource departments of private organisations. The connection between education and employment is still poor and Open Badges could help bridge the gap. Some examples:

- Open Badges to certify extra-curricular activities such as work experiences, apprenticeship, etc
- Open Badges for technical-administrative personnel working on a University portal (realised in the University of Turin <https://goo.gl/zRRu1f>)
- Open Badges to certificate competencies that the private sector is looking for (soft skills, problem solving, etc)

(Note that the ARTES Focus Group featured a high number of university participants, which may have influenced this recommendation.)



#### ITEE:

This is, in the opinion of the experts, the best part of the guidelines because clear and practical tips to consider when building a network are given. Experts valued the holistic approach and the attempt to create a network based on the local government, private sector (employers, global and local companies), representatives of education and representatives of the third sector (voluntary / charities)

#### Summary of findings from pilots and focus groups

The key considerations in the guidelines are clear and helpful. They should be used as a flexible tool and could be revisited when a badge network has been established. They could be augmented with:

- An additional aid, such as a decision tree
- An additional point about including HR professionals under “Who do I engage?”. HR professional could benefit from Open Badges, by using them to visualise a job framework for an organisation

One of the focus groups (with a high percentage of participants from higher education) pointed out that the key actors in a network should be universities and HR personnel from private companies.

DUO pointed out that as a practical tip for hosting a community space, if relevant, a community page can be created on EPALE (Electronic Platform for Adult Learning in Europe. This platform can be used by national and/or international communities). Not only does this function as a communication platform for a community, but also has promotional value to people outside the community (but inside the group of guidance professionals).

The comment about community spaces highlighted that it might be useful to pull out the headings used on pages 14-16 in the Guidelines, and incorporate these in the list of things to consider on p13.

#### Recommendation

- Create a decision tree template that can be used to help chart decisions and their consequences when establishing a network.
- Under the section “Who do I engage?”, add an additional point: HR professionals, with the explanation that Open Badges can be used to visualise what is needed in a job framework for an organisation
- Ensure that universities are mentioned under the section: “Who do I engage?”
- Pull out the headings used on pages 14-16 and incorporate these in the list of things to consider on p13



## Network Canvas

The pilots and focus groups were asked to consider if a tool, such as the Network Canvas that has been created to sit alongside the Guidelines, would be useful when creating a network to support uptake of badges across a geographical territory. The Focus Groups were asked to run an activity with participants, where they introduced the Canvas and provided limited time for participants to complete it. The Beuth University of Applied Sciences pilot group and Digitalme and ITEE Focus Groups tested the Canvas.

### 5. Could the Canvas provide a useful tool for mapping networks?

#### A. Pilots

Beuth University of Applied Sciences, Berlin:

Yes, a Canvas could be a very useful tool for designing a network. I think the canvas would have been very useful as it would allow to bring all stakeholder to the table not only when designing Open Badges but also for designing the Open Badge Network itself. I think it would have been especially useful for thinking through about how to create value and ensure sustainability.

DUO:

The Canvas was not relevant for DUO's pilot. As the goal of the pilot was to stimulate the use of Open Badges (based on standardised competencies) within an already existing network, a canvas was not used. If by the end of next year the success is great enough, within the national network, we will look for similar networks in social or healthcare. Best practices within one network, could lead to adoption in other networks.

#### B. Focus Groups

Digitalme:

The Network Canvas was well received and participants found it easy to use. Participants agreed it would be useful to have an area that allows for visualising and mind-mapping the network and thought this could provide a good first step for starting the Canvas.

They also felt it would be useful to consider:

- What are some of the challenges / restrictions that need addressing?
- Drivers work to start with, then add goals/solutions
- Can the canvas evolve over time?
- Important to quantify the time required - why should people invest in recognition
- Expand the Business strategy section to include other possible factors e.g. social/community mission

ITEE:

Yes, the Canvas is a useful tool for networks' mapping.



## Summary of findings from pilots and focus groups

A Canvas could be useful for designing a network. It would enable clarification on stakeholders to bring together and would be especially useful for thinking through how to create value and ensure sustainability. It could have been useful for designing the Open Badge Network itself.

It could be enhanced by including an area for visualising and mind-mapping the network. It would be worth interrogating the Network Canvas structure overall, for example to ensure it takes into account the logical steps someone might follow to complete it. Items to consider include:

- Start with drivers, then add goals/solutions
- Can the canvas evolve over time?
- Quantifying the time required - why should people invest in recognition?
- Expand the Business strategy section to include other possible factors e.g. social/community mission

## Recommendations

- Start with drivers, then add goals/solutions
- Include an area for mind-mapping the network in a visual way. This should be one of the first fields on the Canvas
- Provide an area to help users quantify the time required for their network and to articulate why should people invest time in Open Badges
- Expand the Business strategy section to include other possible factors e.g. social/community mission
- Make clear that the Canvas is distributed under a Creative Commons license that would allow it to be adapted and so evolve over time.

## 6. Does the terminology make sense?

### A. Pilots

Beuth University of Applied Sciences, Berlin:

The key parts of the Network Canvas could be based on a traditional Business Canvas and adjusted to network-building, e.g. “relationships to stakeholders in the network” instead of “relationships to customers”.



## B. Focus Groups

### ITEE:

The terminology used is clear and helps in the networking process.

### Summary of findings from pilots and focus groups

The Canvas could be based on a traditional Business Canvas (this is the underpinning model that the Digitalme Design Canvas and the Network Canvas is based on). It is important to use the right terminology for network building, such as using “relationships to stakeholders in the network” instead of “relationships to customers”.

## Recommendations

Review terminology to ensure it is consistent with network development

## 7. How would you use the Guidelines in a practical context? Who would you involve?

### A. Pilots

Beuth University of Applied Sciences, Berlin:

I think the guidelines are useful for persons/organisations who want to take initiative and establish a network.

### B. Focus Groups

Digitalme:

The Canvas could be used to create a business case for people to be involved in developing Open Badges. It would help them identify:

- Why are we doing this?
- What impact will it have?
- How can we measure it?
- How can we make it sustainable?

### Summary of findings from pilots and focus groups

The Guidelines could be useful for those wishing to take the initiative and create a network to support uptake of Open Badges across a territory. The Canvas could help provide the information for a business case for using Open Badges. It would help identify:

- Why are we doing this?
- What impact will it have?
- How can we measure it?
- How can we make it sustainable?



## Recommendations

Point out that as well as helping with the mapping of a network, the Canvas could also provide the information for a business case for using Open Badges. It could help identify:

- Why are we doing this?
- What impact will it have?
- How can we measure it?
- How can we make it sustainable?

## 8. What kind of network would you develop? What would the 'drivers' be?

### A. Pilots

There was no feedback to this question from the pilots.

### B. Focus Groups

#### SUPSI-DEASS:

For a concrete application of badges in Switzerland and in Ticino, participants see necessary some specific conditions:

- network of partners able to mutually recognise the trustability
- identification of specific gaps not covered by training paths already existing
- select a specific sector to test
- find a good balance on territorial dimension (not too big but not too small)

Participants again repeat the necessity to involve in the badge users network institutions and key actors able to create a mutual trust on the tool, such as enterprises, education providers, professional trainers, professional associations, public bodies, universities, VET territorial practitioners.

### Summary of findings from pilots and focus groups

SUPSI-DEASS were the only group to respond to this section. They commented that to support uptake of badges in Switzerland and in a more localised context such as in Cantone Ticino, they would consider:

- Developing a network of partners to mutually recognise the trust and value in badges
- Identifying specific gaps not covered by existing training paths
- Using a specific sector to test
- Finding a good balance on territorial dimension (not too big but not too small)

They highlighted the necessity of involving institutions and key actors who would be able to develop a mutual trust in badges, such as enterprises, education providers, professional trainers, professional associations, public bodies, universities, VET territorial practitioners.



## Recommendations

Review the Guidelines to ensure it is clear that creating networks around Open Badge initiatives can support the development of trust in Open Badges and help with understanding of the value of them within a territory.

## Key findings

### Summary of findings from pilots and focus groups

Both the pilot and focus group participants were asked to consider the following questions in relation to the Guidelines for Establishing Open Badges within Territories (O4A3):

1. Can networks help develop and support roll out of badges across a territory?
2. Does the categorisation of networks in the guidelines make sense? Are there any categories missing? (p7 of the Guidelines. Section: What does an Open Badge network look like?)
3. When developing the pilot, were the case studies useful to serve as examples of how networks might be formed, structured etc? Are there other case studies it would be useful for the guidelines to include? (Pages 8-12 and Appendices from p18)
4. Key considerations - were they clear? Are any missing that would have been helpful? (p13 and the headings from pages 14 - 16)
5. Could the Canvas provide a useful tool for mapping networks?
6. Does the terminology make sense?
7. How would you use the Guidelines in a practical context? Who would you involve?
8. What kind of network would you develop? What would the 'drivers' be?

There was consensus the concept of using networks to support the uptake of Open Badges across a territory appears sound and is an appropriate approach to use in the Guidelines for Establishing Open Badges within Territories (O4A3). It was noted that networks can support:

- Driving change
- Building capacity
- Sharing workload / expertise
- Pilot / proof of concept
- Communication / mobile supply chain
- Introducing open practices and encouraging sharing
- Exploring thematic approaches
- The development of trust, validity and value in the badges
- Synergies that increase benefits of using Open Badges
- Reduced costs and facilitate promotion of Open Badges through joint projects
- Influence local authorities to support Open Badges

It is essential to **bring together stakeholders from different fields** into the network. In the case of the BeuthBonus programme, these were stakeholders from education and stakeholders from



industry. In this way the programme could identify what the labour market and employers were looking for in terms of skills of migrant academics including refugees and could optimise the overall design of their Open Badges.

It is essential to actively involve stakeholders from the network in the **iterative development and design of Open Badges**, possibly right at the onset starting with joint mind mapping and progressing through conceptual, visual and technical designs. This approach allowed the Berlin pilot to arrive at high quality results.

It is essential to **involve the key beneficiaries of Open Badges** in the creation and development of the network. In case of the Berlin pilot the key beneficiaries were migrant academics including refugees. We involved the participants in the design and testing of Open Badges at different stages.

Some recommendations were provided on what the networks can do to enhance uptake and **trust** in Open Badges, such as encouraging **existing trusted institutions** like universities to integrate badges into their systems and practices and **aiding transferability** through developing a **common criteria** for Open Badges at a territorial level. It was also suggested that a **common glossary** would help network members to develop Open Badges, although it was recognised that this is missing from the Open Badges ecosystem overall: a common language and common criteria on quality assurance and competency frameworks.

The focus group run by ARTES commented that the experts were convinced of the necessity of creating a network at territorial level to support Open Badges development. They believed key actors to include are universities and the Human Resource departments of private organisations, mentioning that the connection between education and employment is still poor and Open Badges could help bridge the gap.

Regarding categorisation of networks, overall the categories for types of network (listed on page 7 of the Guidelines) make sense, however, these could be augmented with the following:

- Pre-existing
- Hybrid network
- Learning network (within an organisation)

The categorisation was viewed as too theoretical by members of the ARTES focus group and a request made for making these more practically focused.

Experts from the ITEE group commented that the categorisation of Open Badge networks is not very important and that the important issue is to understand the interests of those who make up the network. Organisations should clearly define their interests and a level of engagement. They also believed that the network should be subdivided into working groups that bring together representatives of similar organisations.

DUO pointed out that as a practical tip for hosting a community space, if relevant, a community page can be created on EPAL (Electronic Platform for Adult Learning in Europe. This platform can be used by national and/or international communities). Not only does this function as a communication platform for a community, but also has promotional value to people outside the community (but inside the group of guidance professionals).

The comment about community spaces highlighted that it might be useful to pull out the headings used on pages 14-16 in the Guidelines, and incorporate these in the list of things to consider on p13.



The case studies from the guidelines (as introduced on pages 8-12) were considered somewhat useful, however, they could be extended. Most of the examples of territories are very large networks, which may be quite different than those of the average reader. Suggestions for additional case studies included:

- Organisations that implement Open Badges though working with different organisations in a network
- Networks focusing on specific objectives like enhancing employability
- How the uptake of Open Badges has been promoted via a pre-existing network. (City & Guilds could be used as an example for this)
- Nordplus
- The Learning Network run by Don Presant in Canada

The key considerations in the guidelines are clear and helpful. They should be used as a flexible tool and could be revisited when a badge network has been established. They could be augmented with:

- An additional aid, such as a decision tree
- An additional point about including HR professionals under “Who do I engage?”. HR professional could benefit from Open Badges, by using them to visualise a job framework for an organisation

One of the focus groups (with a high percentage of participants from higher education) pointed out that the key actors in a network should be universities and HR personnel from private companies.

A Canvas would be useful for designing a network. It would enable clarification on stakeholders to bring together and would be especially useful for thinking through how to create value and ensure sustainability. It would have been useful for designing the Open Badge Network itself.

It could be enhanced by including an area for visualising and mind-mapping the network. It would be worth interrogating the Network Canvas structure overall, for example to ensure it takes into account the logical steps someone might follow to complete it. Items to consider include:

- Start with drivers, then add goals/solutions
- Can the canvas evolve over time?
- Quantifying the time required - why should people invest in recognition?
- Expand the Business strategy section to include other possible factors e.g. social/community mission

It is important to use the right terminology for network building, such as using “relationships to stakeholders in the network” instead of “relationships to customers”.

The Guidelines could be useful for those wishing to take the initiative and create a network to support uptake of Open Badges across a territory. The Canvas could help provide the information for a business case for using Open Badges. It would help identify:

- Why are we doing this?
- What impact will it have?
- How can we measure it?
- How can we make it sustainable?



## Recommendations

### Overall

Review the Guidelines to ensure it is clear that creating networks around Open Badge initiatives can support the development of trust in Open Badges and help with understanding of the value of them within a territory.

Clarify or provide some additional recommendations and practical tips that could enhance network activity, such as:

- Suggest existing trusted institutions like universities integrate badges into their systems and practices
- Develop a common criteria for Open Badges at a territorial level to avoid duplication and aid transferability
- Develop a common glossary
- Ensure network members are aware that issues regarding methodology, criteria and use of competencies frameworks for Open Badges are still open and unresolved, especially for informal and non-formal competencies
- Bring together stakeholders from different fields into the network
- Actively involve stakeholders from the network in the iterative development and design of Open Badges, possibly at the onset starting with joint mind mapping and progressing through conceptual, visual and technical designs
- Involve the key beneficiaries of Open Badges in the creation and development of the network

### Categorisation of networks

Include new categories:

- Pre-existing
- Hybrid network
- Learning network (within an organisation) (Author's note: learning network could be combined or listed as an example under pre-existing network or pre-defined network.)

In order to enhance understanding and avoid the categorisation being viewed as too theoretical, include an additional point that practical examples of the networks are provided in the case studies further on in the Guidelines.

Provide guidance that in any network, it is important that organisations clearly define their interests and a level of engagement. Subdivision of the network into working groups could be highlighted as an example in the case studies (such as the Open Badges in Scottish Education Group, where sub-groups existed as part of the wider network).

### Case studies

Identify and approach relevant networks to provide further case studies on:

- Organisations that implement Open Badges through working with different organisations in a network. (The Open Badges in HE network in the UK could be approached to provide this)
- How the uptake of Open Badges has been promoted via a pre-existing network. (City & Guilds could be used as an example for this)
- Networks focusing on specific objectives, such as enhancing employability. (Sub-groups within the Open Badges in Scottish Education Group network were thematically based, focusing on specific objectives. Information on these could be extended to cover this recommendation.)
- Nordplus



- The Learning Network run by Don Presant in Canada
- A case study that would be relevant for Poland

### Considerations

- Create a decision tree template that can be used to help chart decisions and their consequences when establishing a network.
- Under the section “Who do I engage?”, add an additional point: HR professionals, with the explanation that Open Badges can be used to visualise what is needed in a job framework for an organisation
- Ensure that universities are mentioned under the section: “Who do I engage?”
- Pull out the headings used on pages 14-16 and incorporate these in the list of things to consider on p13

### Network Canvas

- Start with drivers, then add goals/solutions
- Include an area for mind-mapping the network in a visual way. This should be one of the first fields on the Canvas
- Provide an area to help users quantify the time required for their network and to articulate why should people invest time in Open Badges
- Expand the Business strategy section to include other possible factors e.g. social/community mission

Make clear that the Canvas is distributed under a Creative Commons license that would allow it to be adapted and so evolve over time.

### Terminology

- Review terminology to ensure it is consistent with network development

### Practical uses of Canvas

Point out that as well as helping with the mapping of a network, the Canvas could also provide the information for a business case for using Open Badges. It could help identify:

- Why are we doing this?
- What impact will it have?
- How can we measure it?
- How can we make it sustainable?



## Appendix 1

### Reports from pilots

**Pilot led by:** Beuth University of Applied Sciences Berlin

**Pilot of:** Guidelines for Open Badges in Territories O4A3

**Date of pilot:** February 2016 - November 2016

**Location of pilot:** Berlin, Beuth University

**Duration of pilot:** 10 months

**Information about the pilot:**

- **Drivers for the pilot (or theme, challenge you wanted to address):**

The key driver for the pilot was enhancing employability of skilled migrants including refugees. The specific challenge addressed by the use of Open Badges in the pilot was a question of how to recognise and acknowledge individual 21st century skills and competencies of migrant academics including refugees by a higher education organisation and how to make these skills visible and significant to potential employers and other stakeholders relevant for self-/ employment and career advancement. Open Badges were issued as part of the qualification program at Beuth University of Applied Sciences Berlin (see the context description below) and were designed to certify a set of employment-relevant skills at three competency levels.

- **Group demographic:** The groups involved in the pilot Beuth University in Berlin included three stakeholder groups, which are listed in more detail below:

**(1) Migrant academics including refugees** with higher education degrees in IT-related fields as participants in the BeuthBonus program and direct beneficiaries of Open Badges. The size of the sample comprised 28 participants (9 female and 19 male) from the following countries: Venezuela, Tunisia, Spain, Rumania, Peru, Mexico, Italy, India, Brasil and Afghanistan. Most of the participants (over 50%) were 30 to 39 years old. About 20% were 40 to 49 years old and other 20% between 20 and 29 years old. Only one participant was over 50 years old. The most common degrees were bachelor degrees (8 persons, 29%), diplomas (7 persons, 25%), master degrees (5 persons, 18%), and doctorate degrees (2 participants, 7%). All participants resided in Germany and had difficulties finding adequate employment despite their formal degrees. Altogether 93% (26 out of 28) participants were seeking work at the beginning of the program.

Besides the participants of the BeuthBonus program a number of other territorial stakeholder groups were involved in the pilot. These groups include:

**(2) Industry members of the Advisory Board** in the BeuthBonus program, i.e. (A) representatives of **Bitkom** - Germany's Digital Association founded in 1999 as a merger of individual industry associations in Berlin: <https://www.bitkom.org>. Bitkom represents more than 2,300 companies in the digital economy, among them 1,000 SMEs, 300 start-ups and almost all global players; (B) representatives of **Technologiestiftung Berlin** which is a foundation for technological development with the seat in Berlin. Technologiestiftung Berlin is committed to transforming new ideas into reality and shifting projects emerging from Berlin's scientific R&D community into action; (C) representatives of **SIBB e.V. - Forum Digital Business**, which is network and a forum for Digital Business with the seat in Berlin.



**(2) Professional development organisations and coaches based in Berlin and cooperating with the BeuthBonus project.** These include (A) **FrauenComputerZentrumBerlin e.V. (FCZB):** <http://fczb.de> - a Berlin based organisation promoting STEM for women and offering a wide range of IT-related qualification and mentoring programs for female participants including migrants and refugees; (B) **ProfilPass Dialogzentrum Berlin:** <http://www.dialogzentrum-berlin.de> which is a coaching and training center for career orientation and career advancement in Berlin using ProfilPass as a methodology for capturing individual skills and competencies; (C) **Vulkan Training Berlin:** <http://vulkan-training.de/vulkan-training.html> which is a training consultancy with focus on communication, cooperation and personal development.

- **Context for the pilot:** The pilot was conducted as part of the qualification program for migrant academics, including refugees, at Beuth University of Applied Sciences Berlin. The program for migrant academics called BeuthBonus is led by Prof. Dr. Ilona Buchem and started in January 2015 as a follow up project to the previous qualification program called Credit Points (2013 - 2014). Both programs - CreditPoints and BeuthBonus - focus on enhancing the employability of migrant academics, who already hold a higher education degree but still cannot find adequate employment on the German labour market. The BeuthBonus project is dedicated to designing and delivering a flexible technology-enhanced qualification program suited to the needs of each individual participant. Each participant develops own skills based on their unique study and coaching plan suited to specific needs and obtains an individual certificate and Open Badges issued by the Beuth University of Applied Sciences Berlin. Detailed information about the project can be found (in German) on the project homepage: <http://beuthbonus.beuth-hochschule.de>
- **Additional information:**  
The BeuthBonus project at Beuth University of Applied Sciences in Berlin is part of the **IQ Network Berlin**. The IQ Network Berlin is part of the German IQ Network - a **Federal Network for Integration through Qualification:** <http://www.netzwerk-iq.de/network-iq-start-page.html> - is a German program with federal networks established with the aim of fostering integration of migrants by improving access to information and education, providing consultation on recognising prior education and new qualification programs, including vocational training and higher education. The IQ Network including the BeuthBonus program are founded by the German Federal Ministry of Labour and Social Affairs, German Federal Ministry of Education and Research, German Federal Employment Agency and the European Social Funds for Germany.

#### **Participants:**

**Auxiliary staff:** Members of the Advisory Board (5 persons in total), BeuthBonus Coaches (4 persons in total) and BeuthBonus Project Team (7 persons in total)

**Total number of participants:** 28 migrant academics including refugees



Based on your experience of the pilot, please respond to the following questions:

1. Do you feel that networks can help develop and support roll out of badges across a territory?

Based on the experience of the pilot, local networks are crucial for developing and supporting roll out of Open Badges across a territory. A network of stakeholders supports the development of common understanding of the requirements and value-added for introducing an innovation such as Open Badges in a territory, which in case of the BeuthBonus pilot was a territory of the city of Berlin. Acting in a network enabled to understand specific needs of the different stakeholders involved but also the assessment of risks which an innovation always has to face in an initial stage. Also, the communication channels within the network have proved vital to share awareness and discuss potentials and challenges of Open Badges for migrant academics including refugees. Following the guidelines (see page 6) the pilot in Berlin confirmed that working in a network enables to synthesise learning from the stakeholders representing different fields relevant to the pilot. As listed on page 6 of the guidelines, the pilot in Berlin especially helped to encourage the formation of partnerships to develop and promote Open Badges and working in the network provided a 'safe space' in which first steps in the implementation of Open Badges could be tried out with the help of advice of stakeholders involved in the BeuthBonus program.

2. Does the categorisation of networks in the guidelines make sense? Are there any categories missing? (p7 Section: What does an Open Badge network look like?)

The categorisation of networks as specified on page 7 of the guidelines makes sense based on the experience of the pilot in Berlin. The BeuthBonus pilot can be categorised as a "pre-defined network" as it was developed deliberately by a the Project Team to achieve the specific aims of the BeuthBonus programs which is primarily enhancing employability of migrant academics including refugees. As stated in the guidelines, the Berlin network within the BeuthBonus program is based on a funding model with funding coming from German and European stakeholders, i.e. German Federal Ministry of Labour and Social Affairs, German Federal Ministry of Education and Research, German Federal Employment Agency and the European Social Fonds for Germany. This founding was in place to support the network from the start and a defined objective of the BeuthBonus program.

3. When developing the pilot, were the case studies useful to serve as examples of how networks might be formed, structured etc? Are there other case studies it would be useful for the guidelines to include? (Pages 8-12 and Appendices from p18)



The case studies from the guidelines as introduced on pages 8-12 were somewhat useful for developing the pilot. The pre-defined networks presented in the guidelines only partially correspond to what we have been trying to achieve in the BeuthBonus program. It would be useful to include further case studies of organisations which implement Open Badges though working with different organisations in a network. It would be very useful to get first-hand insight from networks focusing on specific objectives like enhancing employability and learn from about the experience of establishing Open Badges and how working in the network was helpful.

4. Key considerations - were they clear? Are any missing that would have been helpful? (p13 and the headings from pages 14 - 16)

The key considerations in the guidelines are clear and helpful. They would be even more helpful if they could be designed in form of a decision tree to model key decisions and their consequences when establishing a network. A decision tree could help to identify a strategy most likely to reach a given objective.

## Canvas

If relevant, please consider if an easy-to-use tool, such as the Networks Canvas would be useful when creating a network to support uptake of badges across a geographical territory

5. Would the Canvas provide a useful tool for mapping networks?

Yes, Canvas could be a very useful tool for designing a network.

6. Does the terminology make sense?

The key parts of the Network Canvas could be based on a traditional Business Canvas and adjusted to network-building, e.g. “relationships to stakeholders in the network” instead of “relationships to customers”.

7. How would you use the guidelines in a practical context? Who would you involve?

I think the guidelines are useful for persons/organisations who want to take initiative and establish a network.



8. Would the Canvas have helped you to map the network you developed in your pilot? What would the 'drivers' be?

Yes, I think the canvas would have been very useful as it would allow to bring all stakeholder to the table not only when designing Open Badges but also for designing the Open Badge Network itself. I think it would have been especially useful for thinking through about how to create value and ensure sustainability.

#### Additional information

Please feed back any additional information that arose from the pilot, that could help inform development of the Badges in Territories Guidelines O4A3.

This might include:

- Themes that came through during the pilot, e.g. things that worked, things that were a challenge
- Context specific feedback, e.g. elements that you think came about due to the group demographic, context for the pilot etc
- Anything else you think pertinent

I think in general it would be useful to interview 2-3 people who have been successful in establishing a sustainable network (maybe from another field) who can provide some first-hand insights, hints and recommendations of how to establish, run and sustain a territorial network.



### Report conclusions and recommendations

Please summarise key outcomes from the pilot that you feel should inform the Badges in Territories Guidelines O4A3 and recommendations for changes to the Guidelines, based on these. Please also include any relevant statements from participants that you feel are relevant.

The key outcomes of the Berlin pilot are:

1. It is essential to bring together stakeholders from different fields into the network. In case of the BeuthBonus program these were stakeholders from education and stakeholders from industry. In this way we could identify what the labour market and employers are looking for in terms of skills of migrant academics including refugees and could optimise the overall design of Open Badges.
2. It is essential to actively involve stakeholders from the network in the iterative development and design of Open Badges, possibly right at the onset starting with joint brainstorming and progressing through conceptual, visual and technical designs. This approach allowed the Berlin pilot to arrive at high quality results.
3. It is essential to involve the key beneficiaries of Open Badges in the creation and development of the network. In case of the Berlin pilot the key beneficiaries were migrant academics including refugees. We involved the participants in the design and testing of Open Badges at different stages.

A handwritten signature in black ink, appearing to read 'Ilona Buchem'.

Prof. Dr. Ilona Buchem, 19 November 2016  
Date and signature of Pilot Lead



## Pilot led by: DUO, Dienst Uitvoering Onderwijs

Pilot of: Guidelines for Open Badges in Territories O4A3

Date of pilot: September 2016 - December 2017

Location of pilot: Groningen

Duration of pilot: 16 months

### Information about the pilot:

- Drivers for the pilot (or theme, challenge you wanted to address):

The theme of the pilot is “Standardized and assessed Open Badges”

The main idea behind the pilot is to design and issue Open Badges (OB) with the following characteristics:

- based on a existing competency standard
- assessed with an existing assessment method
- the designed badges will be used as widely as possible (not only locally)

and thus reach a high level of “recognisability” of the end product.

- Group demographic:

80% women, 20% men, in the age of 25-55

- Context for the pilot:

The first part of the pilot is conducted locally at **Hamelhuys**, in Groningen. Hamelhuys is a walk-in consultation centre for cancer patients and their families.

The spreading effect should come into function as Hamelhuys is part of a larger national network of consultation centres, united by an association called **IPSO**.

These consultation centres work with volunteers, are not-for-profit and depend financially on donations and sponsors.

- Additional information:

Time frame:

- Fall 2016 - Spring 2017: pilot phase 1, Hamelhuys
- Summer 2017: presenting results @IPSO
- Fall 2017: national roll out (when successful)

### Participants:

Auxiliary staff:

Two persons composed the project idea and do the project lead. From the Dutch CHQ association (CHQ is a method for validating learning outcomes) two people are involved as advisor. IPSO is involved, being interested in applying lessons learned to a much wider audience.



**Total number of participants:**

In the pilot, in the first group, eight volunteers are participating. A second group is planned. When successful, the very use of OB, the used competence and assessment standards, will be promoted to be used countrywide, in the IPSO network of cancer guidance centres, with dozens of centres throughout the Netherlands, and many hundreds of volunteers.

**Based on your experience of the pilot, please respond to the following questions:**

**1. Do you feel that networks can help develop and support roll out of badges across a territory?**

Definitely a yes. It stimulates the dissemination of OB and best practices around them. know Without a network the decision to adopt the use OB is dependant of the odd individual finding out about the existance of OB and needing them to invent a not-necessarily efficient wheel for implementing them. Above that, a network is far more efficient in terms of sharing experiences, badge designs and tools, troubleshooting and improving quality.

**2. Does the categorisation of networks in the guidelines make sense? Are there any categories missing? (p7 Section: What does an Open Badge network look like?)**

Well, in my case, I started with one organisation, joined by an umbrella organisation with an existing network of organisations. This category (“existing network”) seems not identified on page 7.

**3. When developing the pilot, were the case studies useful to serve as examples of how networks might be formed, structured etc? Are there other case studies it would be useful for the guidelines to include? (Pages 8-12 and Appendices from p18)**

The character of the networks in the case studies is quite different than of mine. (See also question 2) So your work with City and Guilds (much also still a lot larger and wider than IPSO of course) might be another good example?



4. Key considerations - were they clear? Are any missing that would have been helpful? (p13 and the headings from pages 14 - 16)

The first ideas of the pilot were born before this document was published. But even now, the guidelines are still very useful. We can adjust the course of the ship. We realize now that we still have an important omission in my pilot: the involvement of other employers (other than the volunteering organisation itself). The value of a badge is in my view quite dependant of the value an employer accredits it. So useful for offering our “badge earning” volunteers a better chance on a paid job. We will try to include them on our further way. (And in a new project-to-come)

I find pages 13 to 16 most useful. A good list of topics and reminders what-not-to-forget.

On page 14 “Who do I engage”, HRM-professionals might be added. The (remarkable) director of Hamelhuys, Josje Hamel, made the remarkable statement: “we are volunteers but no amateurs”. We are using this pilot also as as a “role builder”. At this moment, the role of “Hospitality person” is “badged” in seven groups of desired competencies. A next role, that of “Buddy”, will be badged too. Both roles will overlap partly, concerning the needed badges, but clearly some new badges will be designed for this new role too.

So Open Badges can be used to visualize what is needed in the job framework of an organisation.

## Canvas

If relevant, please consider if an easy-to-use tool, such as the Networks Canvas would be useful when creating a network to support uptake of badges across a geographical territory

5. Would the Canvas provide a useful tool for mapping networks?

As the goal of the pilot was to stimulate the use of OB (based on standardised competencies) within an already existing network, a canvas was not used. If by the end of next year the success is great enough, also within the national network, we will look further for similar networks in social or healthcare. Best practices within one network, could lead to adoption in other networks.

Additional information on the following questions relating to the canvas was not provided as it was not relevant.

6. Does the terminology make sense?

7. How would you use the guidelines in a practical context? Who would you involve?

8. Would the Canvas have helped you to map the network you developed in your pilot? What would the ‘drivers’ be?