

Testing the Guidelines for the Implementation of Open Badges for Individuals and Organisations (O3A4)

Outcome O3-A3. Guidelines for the implementation of Open Badges for individuals and organisations	
Document information	
Declared due date of deliverable	December 2016
Reviewed due date of deliverable	May 2017
Actual submission date	May 2017
Organisation name of lead contractor for this outcome	Institute for Sustainable Technologies – National Research Institute (ITeE – PIB)
Revision	Version - Final
Author	Partner
Michal Nowakowski	ITeE – PIB
Reviewer	Partner
Ilona Buchen	Beuth University

Copyright licence: This work is licensed under a Free Culture Licence Creative [Commons Attribution-ShareAlike 4.0 International License](https://creativecommons.org/licenses/by-sa/4.0/).

The creation of these resources has been (partially) funded by the ERASMUS+ grant program of the European Union under grant no. 2014-1-DE01-KA203-00675. Neither the European Commission nor the project's national funding agency DAAD are responsible for the content or liable for any losses or damage resulting of the use of these resources.

Contents

EXECUTIVE SUMMARY	3
The aims and objectives of Testing the Guidelines	3
Who is this document for? What methodology was used?	3
What are the contents?	3
1. FOCUS GROUPS’ CONSIDERATION OF THE GUIDELINES	4
2. SUMMARY, CONCLUSIONS AND RECOMMENDATIONS	5
Summary and conclusions	5
2. KEY FINDINGS FROM THE PILOTS AND FOCUS GROUPS	6
3. RESPONSES	6
Is the goal of the guide-lines clear to you? How do you understand the goal of the guidelines?.....	6
What do you think about the structure of the Guide-lines? Is it user-friendly?	7
What do you think of the content of the Guidelines useful? Is the content clear?.....	7
What information are you missing in the Guidelines?.....	7
Is the layout of Guidelines user-friendly? If not please give examples?	7
Are the case study examples useful? Do you know any that could be included.	8
Does the Glossary include all definitions necessary to read the content of the "Open Badges Implementation Guide for Organisations and Individuals"? If not, what is missing?	8
Do You think Open Badges can be used in ECVET?.....	8
Do you consider Open Badges are a valid tool for the certifications of education and professional achievements?	9
How could the Guidelines be improved?	9
Annex 1 Material for a moderator of the focus group testing the Open Badges implementation guide for organisations and individuals	10

EXECUTIVE SUMMARY

The aims and objectives of Testing the Guidelines

The results of the two discussion papers done in Output O3 in Open Badge Network Project, was a single document, which takes the form of a guideline of the use of Open Badges, addressed both to individuals and organisations. The aim of the document is to provide guidance on all the possible applications of Open Badges in the field of education, employment, citizenship and culture, and to indicate models of best practices to get the best results out of Open Badges.

The aim of the guidelines is also to help to formulate specific outlines, for the implementation of Open Badges. The Guidelines indicate how to implement Open Badges for individuals and organisations from the point of view of Open Badges' users, consumers, readers, issuers and endorsers.

The first version of the guidelines (which integrates both, organisations' and individuals' discussion papers) has been tested using the focus group method in seven countries; Germany, United Kingdom, Italy, Poland, Hungary, Netherlands, Switzerland.

In the testing phase, the guidelines was tested and fine-tuned within small groups of stakeholders involved in the implementation of Open Badges using a focus group technique. The final document aims to become a reference point for European education organisations, private businesses, individual educators and learners, which are interested in designing, issuing, earning or simply using Open Badges in their personal or professional activities.

Who is this document for? What methodology was used?

This document is for the Open Badge Network to use as a guide for enhancing the Open Badge Network intellectual output: Guidelines for the implementation of Open Badges for individuals and organisations.

The Guidelines for using Open Badges for Individuals and Organisations presented the possibilities of using Open Badges in the validation of educational and professional achievements and were address those who have already started using Open Badges but are looking for support in their application in a given context. The Guidelines have evolved in collaboration with all the OBN project partners and have been posted on the OBN portal in order to receive further contributions and comments from the whole community of associated partners and stakeholders.

In the last phase focus group participants were asked to consider some questions relating to the content and usability of the Guidelines. After the focus group, the main O3A3 document was changed and supplemented according to the recommendations of the experts.

What are the contents?

This document is a synthesis of the feedback from each of the focus groups on the Guidelines for the Implementation of Open Badges for Individuals and Organisations (O3A3). The feedback is summarised and recommendations have been developed during the Focus Group in all OBN Partners.

There is one annex in the document; Annex 1 Material for a moderator of the focus group testing the Open Badges implementation guide for organisations and individuals.

1. FOCUS GROUPS' CONSIDERATION OF THE GUIDELINES

Focus Groups were 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 some questions established before (Please see Annex 1). The sessions included following parts:

1. Introduction
2. Warm up
3. Appropriate discussion
4. Discussion summary and thanking participants for their time and participation in a panel.

After the Focus Group each moderator developed a report from the study with the focus group results.

Participants in the Focus Groups included representatives from:

- **Germany:** Berlin School of Economics & Law, Technical University of Wildau, Kiron Open Higher Education, Global Goals Curriculum 2030, Niekke Rovermond, Open University;
- **United Kingdom:** Thames Communications, Student from Coventry University, DigitalMe, And two independent consultant;
- **Hungary:** Centre for Learning Innovation and Adult Learning, Hungarian Institute for Educational Research and Development, Corvinus University of Budapest, Expanzio Human Consulting, University of Pecs, Municipality of Kispest;
- **Netherlands:** Dutch National Europass Centre, Hamelhuys, Cinop & Euroguidance, DUO
- **Poland:** Institute for Environmental Protection – National Research Institute, PKP S.A., Enso - IT, University of Technology and Humanities in Radom, The Institute for Sustainable Technologies - National Research Institute;
- **Italy:** University of Padova; University of Turin; Cineca; University Bicocca Milan; Cetus LLP (Centre for Educational Technology, Interoperability and Standards); IQC srl (Italian Quality);
- **Switzerland:** Professional training school of Trevano, Casa Aranda (elderly care residential home), Association of House Economy of Cantone Ticino.

2. SUMMARY, CONCLUSIONS AND RECOMMENDATIONS

Summary and conclusions

Some of the reports did not contain dedicated summary conclusions, others contained only a replies to the questions where some recommendations were included. General comments were presented bellow by countries when possible otherwise the detailed comments are presented in chapter 3.

Germany

The overall feedback on the Open Badges Guidelines for Individuals and Organisations was very positive. The majority of the participants of the focus group said that the Guidelines are written in an understandable way and language, are easy to read despite the number of pages which was considered as too much to read at the first sight but then turned out to be an adequate scope. The participants also expressed their positive opinions about the goals and the target groups envisaged by the Guidelines. However, a number of improvements have been proposed to improve the overall quality and the impact of the Guidelines.

Poland

The overall feedback on the Guidelines for Open Badges in Territories was very positive. The majority of the participants of the focus group agreed that the Guidelines are written in an accessible and comprehensible way, the graphical layout is pleasant and the content is appropriate.

Some of the experts expressed the opinion that some tables are too large and they are overload of content. In some cases the experts have requested some specific changes in the guidelines.

United Kingdom

The (first version) of Guidelines were too long (47 pages). Some participants had only had a chance to read through the Guidelines quickly before the focus group and felt this was helpful to gain a sense of how a time-pressured person might respond to them. Some participants thought that Guidelines contain too much technical data which should be banished to appendices or other documents. Most of participants said that Open Badges could be very useful (and needed) for other Erasmus+ projects and for Higher Education. Participants really liked the 'Canvas' for individuals, organizations.

Hungary

Some participants assumed that the goal of the guidelines is to give sufficient information about open badge design to a wide range of stakeholders, including organisations, individuals, companies and IT specialists. The level of detail was suitable to novice badge users and were presenting solid, convincing use cases that a variety of potential badge users could identify with. Some participants indicated that the technical description of the badge design was a bit too detailed for non – IT-literate people , but some more IT-literate people, who are also target audiences of the project, may benefit from this level of detail.

Switzerland

The participants thought Guidelines were clear and usable. In general, also for other specific sectors the badge seems a valuable tool and the step-by-step procedure on how to create a badge is good. Some details on how to evaluate and plan the assessment are necessary.

2. KEY FINDINGS FROM THE PILOTS AND FOCUS GROUPS

The focus group participants were asked to consider the some questions in relation to the Guidelines for Implementation of Open Badges for Individuals and Organisations (O3A3). In case of some Focus Group, these questions may have been slightly different, but the following questions reflect the logical meaning of the questions that were asked in the research:

1. Is the goal of the guide-lines clear to you? How do you understand the goal of the guidelines?
2. What do you think about the structure of the Guide-lines? Is it user-friendly?
3. What do you think of the content of the Guidelines useful? Is the content clear?
4. What information are you missing in the Guidelines?
5. Is the layout of Guidelines user-friendly? If not please give examples?
6. Are the case study examples useful? Do you know any that could be included?
7. Does the Glossary include all definitions necessary to read the content of the "Open Badges Implementation Guide for Organisations and Individuals"? If not, what is missing?
8. Do You think Open Badges can be used in ECVET?
9. Do you consider Open Badges are a valid tool for the certifications of education and professional achievements?
10. How could the Guidelines be improved?

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 different national context. Therefore the summaries and recommendations included under each question heading below are an amalgamation of feedback from some but not necessarily all of the focus groups.

3. RESPONSES

Chosen Expert' opinions and answers.

Is the goal of the guide-lines clear to you? How do you understand the goal of the guidelines?

- The general objectives are very clear. The document gives a wide look on the challenges and scenarios of Open Badges.
- The experts expressed positive opinions about target groups presented in the Guidelines.
- The goal of the guidelines is clear. The document wants to give insight in the ways open badges can be used.
- The experts understands that the goal of the document is how to implement Open Badges in real life and inform all the target group about OB.
- After an explanation of the project and of the set of outcomes, in particular about the badge process, the general objectives are clear. The document gives a precise idea of the aims and scenarios of Open Badges.

What do you think about the structure of the Guide-lines? Is it user-friendly?

- The conceptual parts are all included, something more could be added on the technological aspects of the Open Badges. The step-by-step procedure on how to create a badge is good. The guidelines should not be longer than this, an overly-detailed description would be excessive as the available tools and platforms for OBs creation and issuing may change, while the conceptual process to create an OB will remain the same. For people that are not familiar with Open Badges, the Guide-lines lack indications on how to include assessment criteria quality assurance methods in the design of Open Badges.
- The structure of the Guidelines is clear and logical, but it might be better to start with a chapter about "how to start using the OB" instead of initially giving the OB infrastructure's chapter. The separation of individuals from organisations seems reasonable even though there are some repetitions. In some chapters e.g. Chapter 2. And Chapter 3 there are a lot of information which aren't so important.
- The index could contain hyperlinks to the chapters/paragraphs. The report gets a little bit technical in an early phase: The diagram could put off people, and might not be interesting to every reader. Put it in an appendix? The typography is pleasant.

What do you think of the content of the Guidelines useful? Is the content clear?

- The Guidelines are useful for designers and issuers more than for users. Users would need a more synthetic tool. However, it is difficult to address the needs of both roles (issuers and earners) in a single document. All the participants underlined the importance of the glossary. It was considered a very useful tool also for experienced OB users and it was suggested to expand it.
- The participants, all principally new to the open badge phenomenon, agreed that for their purposes of understanding, the terms were sufficiently and clearly described.

What information are you missing in the Guidelines?

- Actual information about the latest (2.0) version of OB, with new possibilities, e.g. about multilingualism and endorsements is missing.
- More good practices would be welcome, now there is only one.
- Some badge platforms are missing like Badgr, Credly or BadgeCraft.
- More case study are needed.

Is the layout of Guidelines user-friendly? If not please give examples?

- Almost all participants agreed that the 'bleu boxes' were helpful and useful when you don't have time to read the whole document. Even if you just scan the pages, these catch the readers' attention. They also all agreed that the tabled practical examples were presented in a

convenient format and with sufficient level of detail. The references were also useful if somebody wanted to read more about the different use cases.

- The layout is quite nice. Graphic design is interesting though maybe a little monotonous. Use different colours for different categories of content, provide more graphic materials and present content based on graphics as much as possible.

Are the case study examples useful? Do you know any that could be included.

- The case studies presented in the text are clear, well described, and useful all the experts underlined that more case study examples are needed. One of the experts thinks that could be useful use the IBM case study.
- Some experts had suggested using IBM, Siemens and US universities case studies.

Does the Glossary include all definitions necessary to read the content of the "Open Badges Implementation Guide for Organisations and Individuals"? If not, what is missing?

- The experts expressed the importance of the glossary but some definition are missed: skills, competence, knowledge. One expert noted that it is better to use definitions from a single dictionary (now they are from definitions from a few dictionaries) e.g. from Badge Alliance.
- Provide more definitions of key concepts such as competencies, skills, formal, non-formal and informal learning
- The badge procedure and the guide's content are surely positive and can be tested, a glossary could be useful mainly for the individuals. In this way also users and possible users that are not aware of training procedures and learning in general, can have the availability of a clear correspondence on how to understand for specific terms.

Do You think Open Badges can be used in ECVET?

- All participants believe in the importance of including OBs in the system of recognition of vocational and educational training. One expert envisaged in the future two main types of OBs: a "peer-to-peer OB" completely open and free; and an "institutional OB", which will be aligned with standard competence framework and international standards. One expert suggested that it is likely that the OBs will standardize according to the most common and used practices, like in the case of other technology standards (ex. Websites). One expert suggested that OBs will align to other forms of digital credentials.
- Open Badges are perfect for systems like ECVET. Open Badges are ideal for short-term educational mobility and exchanges between training institutions. In addition, there would be no problem with recalculation of learning hours or validation of units of learning outcomes of learning outcomes for the learner in sending institution. Thanks to Open Badges, the sending organization could evaluate the units of learning outcomes using the evidence and the description of Badge.

Do you consider Open Badges are a valid tool for the certifications of education and professional achievements?

- Participants believe in the potential of OBs, provided that they are adopted by a wide range of actors in education and employment sectors. One participant has expressed the opinion that OBs are not an instrument of “certification” as there is no third institutions providing verification.
- The potential application fields are: vertical skills, hard skills, language, soft skills.

How could the Guidelines be improved?

- Provide more practical examples for implementing Open Badges for different target groups, e.g. examples for higher education, and describe these examples in the style of “how to do it?” including “lessons learned” and “recommendations” for similar target groups, issues and contexts. Also provide a negative example and show what the mistakes were and how to avoid them.
- Provide information about the current development of the backpack. What will be different? How users can make sure they do not lose their data? Will the problem with the single email sign on be improved? Who is taking care of the backpack?
- Add more information about the quality of Open Badges, including evaluation, e.g. “how can I make sure that the badges I designed are effective?”
- Design the guidelines with more visual elements like icons, e.g. one type of icon for parts related to individuals, another icon for parts related to organisations, for a better orientation in the document. Make the icons of the project and the Erasmus+ logo smaller to reduce the number of pages and focus on key information. Provide more visual material like illustrations of processes.
- Needs to be split into sections clearly labelled for different user groups (for example small organisations with a single executive person, charities, Higher Education, schools, technical/vocational education, professional body or small awarding body), so users can work through the contents in relevant chunks.
- Additional useful information would include: what resources are needed and typical costs, what platforms are available (but make the Guidelines platform-independent), and potential pitfalls, what organisations do I need to link to?

Annex 1 Material for a moderator of the focus group testing the Open Badges implementation guide for organisations and individuals

Open Badge Network
Testing the “Guidelines for the implementation of
Open Badges for individuals and organisations”
(Material for moderator)

Outcome O3-A4. Testing the guidelines	
Document information	
Declared due date of deliverable	--
Reviewed due date of deliverable	--
Actual submission date	October 2016
Organisation name of lead contractor for this outcome	Institute for Sustainable Technologies – National Research Institute (ITeE-PIB, Poland)
Revision	Version 2 final
Author	Partner
Jaroslav Sitek, Michal Nowakowski, Ireneusz Wozniak	ITeE
Reviewer	Partner
Lilia Infelise, Leonardo Franceschi	ARTES

*Material for a moderator
of the focus group testing the Open Badges implementation
guide
for organisations and individuals*

Features of a good moderator – general remarks

Good moderator of a focus group interview should be able to thoroughly learn the interview's objectives and tasks, as well as it must acquire interpersonal communication skills. An important measure of leading a focus group is a direct conversation among participants, not only with a moderator, about topics mentioned in a discussion scheme.

The moderator of a focus group interview should acquire some features that will make it easier to lead an interview:

1. *It should learn quickly.*

The moderator must be able to learn quickly and extend its thinking and vocabulary. It must be able to quickly learn the information communicated by a focus group and understand their ideas.

2. *Moderator as a "friendly" leader.*

The moderator must be able to quickly make contact with a group (during 10 minutes). It should enjoy respect in a group. At the same time it must be a person with whom group members talk eagerly. If the moderator is perceived as a friendly person, it may obtain more thorough responses from group members.

3. *Informed but not all-knowing.*

The moderator should show the group that it has at its disposal some knowledge of the subject, but is not an expert within this scope. If group members sense that the moderator is an expert, they will ask questions about the matter, instead of giving answers or debating together. Participants can also answer the moderator's suggestions rather from the perspective of an expert than a user to make a good impression on the moderator.

4. *Excellent memory is important.*

The moderator must have good memory to connect various ideas that have appeared in an initial phase of a session with those that have appeared by its end. It must associate significant information provided by various participants during the session so that it is consistent with later statements.

5. *The moderator taking on the role of a good listener.*

The moderator must be a good listener. It must be able to remember the leading information obtained from particular participants during a discussion, both its content and possible implications.

6. *Another important feature is being flexible.*

During the session the moderator must treat the course of a discussion flexibly. The scheme creates only an outline, as often better results come from the resignation from an order assumed in

advance. An efficient moderator is sufficiently flexible to take the chance, if required, of the appearance of a valuable idea.

7. Empathising in a situation.

The moderator must be able to empathize with other people's situation. It must be able to perceive nervousness of some respondents in a group caused by the fact that they must speak in front of others. If a meeting participant is convinced that the moderator understands its situation, there are more chances for its active participation in a discussion.

8. "Large format" thinker

The moderator should be able to distinguish important remarks from less significant comments. At the end of a session, the moderator must be able to collect all statements.

9. A writing skill is a key feature.

The moderator must acquire the skill of creating a clear, brief summary of a session, including significant and constructive conclusions and recommendations.

The moderator establishes clear principles of a meeting, keeping in mind that in a focus interview:

- unanimity is not mandatory,
- discussants may ask each other and the moderator questions,
- the course of a meeting must be recorded (preferable recording only of the sound) but it cannot be published – it serves only the transcription of a meeting, agreed issues,
- statements should be honest and free,
- everybody speaks individually,
- every answer should be justified.

During a discussion the moderator:

- creates a good atmosphere,
- should be completely impartial and should not express its private judgements
- motivates participants to speak,
- if required, cools down their emotions,
- asks provoking questions when discussion withers,
- cares about the freedom of expression,
- listens carefully, facilitates discussion, not participating in it,
- controls the course and duration of a meeting.

Scenario of a focus group interview

A focus group meeting should not last longer than 90 minutes. In exceptional cases, upon consent of participants and only to obtain better results of the interview, the moderator can extend the session by another 30 minutes.

1. Introduction (maximum 5 minutes)

- Greeting of the meeting participants by the moderator, thanking for arrival. Self-presentation and definition of a role to be performed during a meeting and – if other persons participate in a meeting – their presentation and definition of their role (observer, auxiliary personnel, etc.).
- Presentation of an objective, plan and cause of organising a meeting and definition of its duration.
- Explanation of principles and rules of discussion, including:
 - explanation of a concept of a study and a role of a group interview,
 - communication of the information on recording (with clear information that recording shall not be disseminated nor published),
 - obtaining the meeting participants' consent to record their statements,
 - discussion about the non-usage of personal data,
 - notification of participants that in their statements they represent only themselves – so they speak from the "me" not "us" position or in an impersonal mode,
 - establishment of time and culture of statement,
 - request to switch off or mute mobile phones and not to interrupt each other's statements.

2. Warm-up (approx. 5 minutes)

- notification of the project:
 - project purposes,
 - partners,
 - results and project outcomes.
- Every participant presents itself briefly by providing:
 - first and last name,
 - town from which it has arrived,
 - profession practised,
 - and informing whether it participates in a discussion as an individual or as an organisation representative (if yes, what organisation?).

3. Appropriate discussion (approx. 60 minutes)

In exceptional cases the moderator can resign from some questions proposed in a scenario if it claims that in this way it shall obtain a fuller answer to other key questions in the study.

(Set of Sample Question to choose)

- General questions:
 - *Is the content of the "Open Badges Implementation Guide for Organisations and Individuals" written in an accessible and clear way?*
 - *Is the layout of the "Open Badges Implementation Guide for Organisations and Individuals" user-friendly?*

- *Is the "Open Badges Implementation Guide for Organisations and Individuals" described briefly and does it discuss only significant issues?*
- *What should be included in the "Open Badges Implementation Guide for Organisations and Individuals"?*
- *What should not be included in the "Open Badges Implementation Guide for Organisations and Individuals"?*
- *Does the content included in the "Open Badges Implementation Guide for Organisations and Individuals" convince to use Open Badges in an enterprise to validate educational and professional achievements of personnel?*
- *Does the content included in the "Open Badges Implementation Guide for Organisations and Individuals" convince individuals to use Open Badges to validate their educational and professional achievements?*
- *Can the information included in the "Open Badges Implementation Guide for Organisations and Individuals" be useful in a meeting participant's professional life?*
- Detailed questions about the content of the "Open Badges Implementation Guide for Organisations and Individuals":
 - *Is the amount of information on the "Open Badge Network" project sufficient to understand its concept, assumptions and objectives? If not, what is missing?*
 - *Is the Glossary understandable and does it help in reading the content of the "Open Badges Implementation Guide for Organisations and Individuals"?*
 - *Does the Glossary include all definitions necessary to read the content of the "Open Badges Implementation Guide for Organisations and Individuals"? If not, what is missing?*
 - *Is the Open Badges infrastructure presented in a clear and understandable way?*
 - *Has the Open Badges term been described well?*
 - *Does the description of how to create Open Badges "step by step" include the necessary information provided in right order?*
 - *Is the description of areas of main benefits from the use of Open Badges for individuals convincing?*
- Additional questions:
 - *What can be possibly changed so that the "Open Badges Implementation Guide for Organisations and Individuals" could effectively motivate and be successfully used in enterprises and by individuals?*
 - *Which issues have not been discussed on a focus group meeting and which could be significant for the improvement of the "Open Badges Implementation Guide for Organisations and Individuals"?*
 - *Assess the value of Open Badges in the validation of educational and professional achievements.*
 - *What possibilities of use of Open Badges in the validation of educational and professional achievements can you see?*
 - *What future for the Open Badges development in Poland and in the European Union can you see?*

- *What areas could be concerned by the future projects connected with the Open Badges concept?*
- 4. Discussion summary and thanking participants for their time and participation in a panel (max. 20 minutes).**
 - 5. Development of a report from the study with use of a relevant form of a report from the focus group results.**