HUMANITARIAN LEADERSHIP ACADEMY

TERMS OF REFERENCE
OPEN BADGES PILOT
For Recognition of Humanitarian Learning, Skills and Experience
Parties to the project

- Humanitarian Organisations
  - MSF
  - ICRC
  - LINGOs
  - Save the Children UK – Humanitarian Capacity Building Team
- Humanitarian Passport Initiative (HPI) – Working group on Open Badges
  - Professionals in Humanitarian Assistance and Protection (PHAP)
  - Core Humanitarian Standard (CHS) Alliance
  - Humanitarian Leadership Academy (Academy)
  - IFRC
- Technology partner (pro-bono)
  - Discendum Oy.

Background and Context

Finding a mechanism to recognise learning, skills and experience is a core focus in the drive to professionalise the humanitarian sector. One option being explored is recognition via the use of Open Badges\(^1\). Many humanitarian organisations have identified benefits that might be provided to the sector through the use of Open Badges. Key among these are their alignment with an open standard, verifiability, ability to recognise learning, the transferability of badges (meaning they are portable for users as they move between organisations), the opportunity to align with a humanitarian competency framework, and the possibilities of recognising humanitarian experience alongside learning.

As a member and core supporter of the Humanitarian Passport Initiative, the Humanitarian Leadership Academy (the Academy), has entered into a pilot with Discendum to explore how the sector could benefit from Discendum’s Open Badge Factory (OBF) and Open Badge Passport (OBP) platforms. Discendum has provided a bespoke implementation of the OBP pro-bono, and in addition has agreed to provide low bono licenses for the Academy and five partners for Discendum’s Open Badge Factory (OBF). The result is the Humanitarian OBP (name and branding pending) that can be seen at http://hpi.openbadgepassport.com.

It is hoped that this platform – in combination with the access to badge creation tools through OBF – will provide organisations within the sector with a place to create and

\(^1\) https://openbadges.org/
share badges. Learners will be able to display their badges on the platform, and/or on other sites that are equipped to display Open Badges.

More information on Open Badges is appended to this TOR.

Now that the initial implementation of the Humanitarian OBP technology platform is in place, there are other issues to explore relating to the creation of badges. These include:

- The badging framework: what will badges be awarded for? Will they build on each other, to create large badges from smaller ones? How will different types of badge and different styles of assessment be differentiated?
- Reputational drivers and opportunities to build third party endorsement into the badge. Credibility and impact of badges will be key to their uptake by learners: if they know that a certain badge is looked upon favourably by a particular organisation, they may be more likely to pursue it.
- Integration of different badging systems within the sector, both integration with pre-existing systems, and building in the potential for integrations with any systems that may be created within the sector in the future.

An exploratory meeting was held in mid-January 2017 between Discendum, the Academy, MSF, ICRC, Save the Children UK and LINGOS to discuss the potential and appetite for a pilot to explore the above issues further with a view to better informing the use of open badging within humanitarian learning. This ToR is a reflection of discussions at this meeting, and of subsequent discussions with individual partners.

In addition, the Humanitarian Passport Initiative (HPI) has agreed to focus on Humanitarian Open Badges as key strategic goal, with a focus on the recognition of learning, skills and experiences of the individual learner. The HPI will aim to support learning providers to meet learning and assessment quality standards, especially at a local level, that will then have the ability to issue (or create) Open Badges that align with the standards and core (CHCF) or functional competency frameworks (e.g. CaLP). The HPI agreed to set up a working group that includes members from within and outside the HPI to focus on this goal. A pragmatic suggestion is to merge the above pilot organisations with the new HPI Open Badges working group to drive this pilot forward.

Assessments development by the Collaboration Centre for Recognition and Certification

The Collaboration Centre for Recognition and Certification (CCRC) is an initiative run by PHAP, the CHS Alliance and the Academy, which is focussing on the creation of ISO-accredited assessments against competencies in the Core Humanitarian Competency Framework (CHCF), and on promotion of that competency framework across the sector. The CCRC is in the final stages of development of the first three
assessments, which will be badged. These higher-stakes badges will be issued through Pearson’s Acclaim system, but will be compliant with the open standard and so can be imported into the Humanitarian OBP.

The goal will be to create learning pathways (consisting of the learning, engagement and assessments) that could be used to generate a competency-aligned lighter-touch Open Badge through the OBP, with sufficient disambiguation from the higher-stakes badges.

Objectives of the project
To create a process and Open Badges to test the capabilities, opportunities and challenges of the Humanitarian OBP and of badges in general. This will include consideration of:

- The badge topic or focus area. This will be something with cross-sector application that is relatively well understood and boundary.
  - Topics put forward as suggestions during the meeting in January 2017 included project management and the Humanitarian Essentials pathway (see https://kayaconnect.org/totara/program/info.php?id=6).
  - Certified learning, e.g. PMD Pro and FMD Pro
- The badging framework (which may include hypothetical additional badges not to be created under this TOR)
- Look and feel of the badge(s)
- Promotion of the badge(s)
- Monitoring of uptake and user satisfaction with the badge(s) and the platform
- Surface potential drivers for buy-in from humanitarian and non-humanitarian organisations, e.g. which humanitarian badges will be attractive to non-humanitarians (Google staff being deployed to emergencies) and conversely which non-humanitarian badges will be attractive to humanitarians or development professionals more broadly (Finance Management badge)

Deliverables
This project will deliver a badge or badges for a specific piece of learning. ‘Deliver’ means the badge will be made available to learners via the Humanitarian OBP and any other platforms as appropriate, for a period of time to be determined, but which will be considered to be long enough for learners to earn the badge.
It may be necessary to design self-assessments to verify learning, if they do not already exist for the chosen content or topic. The pilot can draw from the PHAP credentials process for developing self-assessments and diagnostic tools.

Additional deliverables are:

- Curated resource page on the Humanitarian Open Badge Passport for project participants and pilot learners to understand the background of the project, the nature and opportunity of Open Badges, and which badges are available or planned.

- Report from pilot phase with roadmap for future development.

- Engagement plan for reaching out to the selected audiences through participating organisations.

- Communications plan for disseminating the badge, including definition and limits of the badge audience.

- Monitoring and evaluation plan.

- A final report with recommendations.

It will be the responsibility of all parties to create these deliverables, with the final report to be the ultimate responsibility of the Humanitarian Leadership Academy.

Provision and maintenance of the Humanitarian OBP will be the responsibility of the Academy and Discendum Oy, with non-technical support from partners as appropriate.

**Indicative schedule**

The project would start by 01 May, with initial badges being delivered in June and the final report delivered by 30th July 2017, to allow time for the project to influence 2018 planning.

The project will be delivered in three stages:

**Ideation**

**Preparation**

May 2017

- Develop a resource page on the Humanitarian Open Badge Passport for participants to review Open Badges background, review ePIC 2012-2016 proceedings, other projects such as the Humanitarian Passport and other resources as appropriate.

- Collaborate online (e.g. Google Docs) to edit the **Draft Short List of Badgeable Prospects** (to be provided) and develop the agenda for the workshop described below.
Allocate Open Badge Factory licenses for up to five organisations within the agreement between the Humanitarian Leadership Academy and Discendum Oy

Work with a third-party graphic designer to develop a series of outline badge templates, to be finalised at the Ideation Workshop (below). The selected one of these can then be quickly fleshed out for the chosen topics following the workshop.

Develop pilot plan

**Ideation Workshop**

Recommended: 1 day, May 2017.

**Get on the same page**

Using the MSF Learning Agents Workbook as a guide (see separate annex), establish common needs, goals, priorities, types of badges, skills frameworks, indicators, endorsements, etc. of an ideal intersectional/ inter-agency “badge system” that can be flexibly adjusted through experience and emerging knowledge.

**Pilot Selection, Design, triage pilot opportunities**

Using the Learning Agents Workbook and the Draft Short List of Badgeable Prospects (both to be provided):

- Identify three or more badge pilot opportunities
- Choose one or more badge pilots answering questions such as:
  - Project owner
  - Badge issuer(s)
  - Badge earners
  - Badge consumers
  - Badge recognition/endorsement
- Agree basic visual approach for badges, select template visual framework
- Determine resourcing responsibilities for creation, issuing, maintenance and promotion of badges
- Develop a collaboration strategy and broader communication plan for the pilots.
- Decide on a timeline, including a common deadline for detailed pilot project plans.

**Pilot Project**

May - July 2017

Pilot plans to include:

- Timeline
- Roles and activities
- A development strategy that includes building awareness and seeking feedback from the target audience, perhaps through focus groups
- Skills framework alignment
• Creation of badge graphics (using template as selected in the Ideation Workshop)
• Alignment with other related projects at partner organisations
• Deliverables
• Measurable outcomes
• Evaluation, perhaps with a focus group
• Resourcing (cash, in kind)
• Additional resources required

Next steps
August-December 2017 and ongoing

Analyze outcomes, re-align with external developments (including other Open Badge activity both inside the sector and beyond it)
Design and implement projects in a recursive strategy that can grow in scope and complexity in response to designed and environmental factors

Anticipated benefits
Short Term
• A version of an Open Badge approach to demonstrate the power of Open badges to recognise diverse forms of learning
• Sector-driven approach ensuring organizational neutrality
• Increased sector and community awareness
• Road map for future development

Long Term
• Support for career development within the humanitarian sector
• Support for recruiters
• Development of communities of practice.
• Recognition of informal learning (social and experiential)
• Recognition of external learning opportunities
• Larger organisations better able to recognise achievements of all staff
• Organisations better able to showcase staff competency and capacity
• Support for performance management
• Support for recruitment
• Measureable workforce development
• Staff mobility across agencies within the sector

Out of scope
Issues relating to other open badging platforms on which the badge(s) may also be trialled during this project.
Integration of existing platforms.
Issues relating to the CCRC ISO-accredited assessments.

Wider dissemination of badges outside of the agreed content or area of focus and defined audience.
Appendix A: About open badges and where you can put them

In this context, a badge is an image that has particular information indelibly associated with it. That information includes:

- The badge name
- The badge creator
- The badge issuer (for example a badge might be created by a professional association, but issued by an accredited assessor)
- The criteria for earning the badge
- If/when the badge expires

In this way, the badge holds the same information as a traditional paper certificate, but in a way that is both more secure (in the sense of being harder to forge), and more shareable.

There are several ways of creating these badges. Some badges can only be displayed on particular systems. The Open Badge standard means that badges that meet the standard can be displayed on multiple systems. For a system to display Open Badges, the platform must also be set up to meet the standard. For example, Open Badges can now be displayed on LinkedIn, but this was not the case until LinkedIn did some development to their system to make it compatible with the open standard.

The standard was developed by Mozilla, and was then released to the community to develop as needed. Mozilla originally created an online display site called the Backpack, which still exists but is no longer maintained. Several other display tools have been created, with various features and focuses; Discendum’s OBP is one of these.

One of the advantages of OBP is its focus on social features. OBP allows users to curate pages of badges to display, and to follow and comment on badges. This means communities can build up around badges, made up of those who have already earned a badge and learners currently pursuing it.