Validation of the Open Recognition Framework, developed for the Erasmus+ project MIRVA: Making Informal Recognition Visible and Actionable

O3 - GUIDELINES FOR ORGANISATIONS & PRACTITIONERS
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# Guidelines for Organisations & Practitioners

## Guidelines - main outcome

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INTRODUCTION

The present document concludes the work on IO3: Guidelines for Organisations and Practitioners. Drawing from the preceding discussion paper and a number of case studies, it offers a set of guidelines to support organisations and practitioners in opening their recognition processes. To make it easier to understand the process step by step, it is illustrated with relatable examples.

An interactive version of all guidelines produced in the project can be found on the project website.

JOINING AN EXISTING RECOGNITION HUB

Recognizing reliable host organisations

Charlotte is a project manager at a secondary school. She knows that the teachers are growing frustrated with their work and would like to innovate their practice, but lack inspiration and training opportunities.

Charlotte would like to write an application for a European mobility, which would allow teachers to take part in training sessions and job shadowing abroad. The application requires her to choose host organisations for the mobilities but Charlotte finds it very difficult to find an organization she could trust. She knows that she will need to find schools and training providers who ensure a comfortable learning environment, as for many of her teachers, it will be the first time travelling abroad for work.

Things to consider:

- What information is needed for Charlotte to define an organization as “trustworthy” or “like-minded”?
  - Hard skills and competences? Or values and attitudes?
  - Will it help to have an endorsement from a sending organization? If yes, in what form? A comment? A review? A “thumbs-up”?
  - If Charlotte manages to find information about the mindset of people working at these organizations, can she consider this to evaluate the organization?
- Is it enough to look up a database of existing organisations?
  - Perhaps she could consider the information that would be included in a large, official database: it might display competences or subjects of interest, but perhaps not attitudes and values.
Charlotte finds a smaller online community. Each host organization is endorsed by an organization that has participated in a mobility there. They can be endorsed according to different information, for example whether they organize ice-breaking activities, if they support the guests in making practical arrangements, if they provide a comfortable learning environment.

Charlotte contacts the schools that interest her most and arranges the first visits. The visits go as planned and eventually Charlotte, who is now part of the online group, discusses with the school management whether they could host a visit themselves.

### Acknowledging a collective achievement

Marco is a secondary school student. With five other classmates, he has volunteered to organize the welcome day for a group of foreign students who will stay at the school for two weeks. Together they decide on the activities, how to arrange the room, who will prepare snacks and how they will be served. The school has agreed to allocate a small budget for the welcome day; managing the budget is also one of their tasks.

The welcome day is a success. Marco feels that he and his classmates are contributing to the school’s achievement but it hasn’t been made as explicit as he would like to.

Things to consider:

- **Why does Marco feel that it has been an achievement?**
  - Because the event was a success?
  - Because he learned something new in the process?
  - Because it required a team effort?
- **Who should be recognized in the process?**
  - Only Marco?
  - The official organizing team?
  - Anyone who contributed to the event?

Since recently, the school has been using Open Badges to grade group projects, which are collected in an Open Badge Passport. While this task was not part of his obligatory school work, Marco suggests to his classmates that they ask the school to issue a collective achievement badge, as the organizing team of the day.

When reflecting on the tasks that were part of the success of the event, they realize that it was a bigger effort that included more than just the six of them. They ask for badges to be issued also for anyone who has lended them a hand: the teacher who oversaw the preparations, the classmates who did the groceries for the event or who helped to move the chairs in the room.

### Recognizing progress towards barrier-free learning


Victor is a director of a folk high school. In the past few years, the school has been working consistently towards making it more accessible, improving the facilities as well as didactical methods of working with learners who have disabilities. As far as he knows, no guidelines exist on the national level to support him in this task. Victor is, on the one hand, curious how other organisations have dealt with the problem, and on the other hand, whether there are ways to double check if he is doing a good job.

Things to consider:

- Should the recognition process include an assessment?
  - Are the criteria clearly listed?
  - Is there an external assessor, or is it a self-assessment?
- Is it important to highlight the progress towards the goal?
  - Is there a final goal that Victor would like to reach in his efforts? Are there a few steps on the way that he feels he might have already taken?
- How will Victor’s partners and learners know that his school is accessible?
  - Is it important to share a report? A certificate?
  - Perhaps it would make sense to have something easy-to-read and visually appealing, that could also be shared online.

Victor finds an online community that has shared inspirational resources, and starts reading up about how to organize accessible art exhibitions, or different smartboards and audio equipment that could be used. He also investigates how communication materials to promote the courses could be made more accessible.

To check his progress, he registers on the website, completes an assessment grid and finds out that the accessibility level is on Level 2. He receives the badge and publishes the badge on the website and social media of the school. He continues to improve the accessibility of his school to eventually advance in the assessment, and most importantly, to make the learning environment barrier-free.

**Recognition as a step towards further education**

Francisca grew up in Brazil and moved to Portugal when she was 25. For many years, she has been working as a shop assistant. At 50, she decides to open her own business. She feels that she would benefit from a management course to gain the skills that might be needed for her to succeed, and finds one at the local university. Unfortunately, to be able to enroll, she needs to have a secondary school diploma and she dropped out of school when she was still a teenager.

Things to consider:

- Who could help her?
A local adult education centre or university might be the right place to turn to when aiming to recognize informal and non-formal learning.

- What will she need to prove?
  - In many cases, formal recognition of informal and non-formal learning is done by assessing a portfolio. Learners are encouraged to think of what they have learned in different environments.

- What will she gain?
  - Francisca is aiming at enrolling in a course and opening her own business, which are very clear objectives.
  - She might also gain other things in the process: a better awareness of what she has learnt throughout her life; of her journey as a learner, an employee and a person. She might also get more confidence in her own abilities.

Francisca contacts a local Qualifica centre, where she is guided by a validation specialist. Her learning experiences are carefully discussed, from the financial and numeracy skills she has gained while working as a shop assistant or managing her household, to interpersonal skills that play an important part in her job. All the information is registered in a “passport”, which holds her learning path as well as areas of interest, in case Francisca wants to reconsider her options. She is eventually granted the diploma she was hoping for, and gets access to the university course.

ESTABLISHING A RECOGNITION SYSTEM

Recognizing a local community with a global mindset

Margit is doing a traineeship in a language school together with two of her classmates. As part of their research project, they are incorporating the Sustainable Development Goals (SDGs) as a transversal theme in their teaching. Upon the completion of the traineeship, they are told that it was an interesting experiment, but that the school lacks funding and time to develop it further. Margit and her classmates decide to establish a network of teachers who are interested in SDGs and would like to support each other.

Things to consider:

- What is the objective?
  - To recognize each other as supportive of SDGs?
  - To share relevant information?
  - To innovate their teaching practice?
  - To raise interest for the topic of SDGs?
Who will have access?

- It could be by invitation only: members could invite people they know.
- It could also be open to anyone
- It could target individuals (for example teachers), or institutions (schools)

Who will have the capacity to claim skills?

- Members can claim skills for themselves, and have other members endorse them
- Perhaps members claim skills for each other?

What will be recognized?

- SDGs are divided into 17 goals; each of them is further subdivided, which could facilitate the achievements of members.

Margit and her classmates start by endorsing each other as “SDGs teachers”, and invite other young teachers they know. The network functions as a social media group to share teaching resources and events. Each member can issue an open badge to show which Sustainable Development Goal they highlight in their work; the badge can then be endorsed by the peers in the group.

With time, the group decides to extend the membership to schools and NGOs that are interested in the topic, which eventually helps them establish projects together, and raise awareness of SDGs in the community.

**Recognizing a local community to make its voice heard**

Anna is a teacher in a community education centre in a rural area. She is aware that many women lack access to learning opportunities because of family responsibilities and lack of childcare facilities. The infrastructure around the town is underdeveloped and also hinders access to learning opportunities. At the same time, she feels that her community education centre as well a lot of local women are already doing the best they can to improve the situation, but their voice is not heard enough.

Things to consider:

- What will be the objective of the recognition process?
  - Strengthen the connections between different women in the community?
  - Show policymakers what local women are already doing, and highlight what support is still needed?
  - Empower women to participate in decision-making?

- Who will be involved?
  - Teachers?
  - Learners?
  - Local activists?

- What would be the best way to illustrate women’s achievements in their community?
  - Short videos? An infographic? Maybe a comic book?
● What tool can be easily used by all women involved? Does it have to be digital?
  ■ Perhaps a more traditional document could encourage participation and representation of all women, even those who are not digitally literate.
● How can other people in the community show support for the cause?
  ■ Is it enough if they “like” or share the information on social media?
  ■ Is there a way for them to endorse it?

Together with her colleagues and learners, she starts drafting a ‘Women’s Manifesto’ that highlights various grassroots initiatives that help women access learning. The document outlines what support local women still lack from policy, public services and training organizations to be able to participate in learning and advance in their personal and professional lives. It is published online, with interactive material, and more traditionally, in print.

Widely disseminated online and at local events, the Women’s Manifesto gets signed and endorsed by a number of people who support the cause: activists, social workers, local citizens. The Women’s Manifesto group meets regularly in the community centre to discuss their expectations toward the local policymakers and to hone their arguments. As the community grows, the group gets the attention of local journalists and ultimately of the municipality, who agrees on a meeting with the representatives.

Recognizing a local community where everyone counts

Johannes works for a study centre as a Partnerships and Outreach Coordinator. He has been working on a strategy to recruit more participants to the courses, as he has realized that some of the local communities are consistently missing.

After a discussion with some European colleagues, Johannes decides to engage some of the former students as “Learning Ambassadors”. Learning Ambassadors will represent different communities that are particularly difficult to reach out to, due to language or cultural barriers. Their role is to meet with potential learners in their communities, and to discuss their own learning experience and how they have benefited from it. Johannes knows that some of the students are already sharing the information about the centre, but he would like their role to be stronger and more visible.

Things to consider:

● How will the “Learning Ambassadors” be selected?
  ■ Are there going to be official criteria to be fulfilled?
    ● Based on diversity, for example of the community they represent, gender or age?
    ● Based on their achievements?
    ● Based on a positive attitude to learning?
  ■ Perhaps anyone who volunteers could be a Learning Ambassador?
● How can the role of Learning Ambassadors be recognized in the study centre?
  ■ By offering financial compensation?
  ■ By involving them in planning and designing future courses, to increase ownership?
  ■ By highlighting their role in communication materials about the school?
  ■ By providing them with a certificate of appreciation?

Johannes asks every teacher in the study centre to mention the opportunity to their class; a few volunteers sign up for the task. They meet regularly to decide how they will work, share suggestions and experiences. Learning Ambassadors are active in promoting the courses in their communities, translate some of the promotional materials into their languages, but also make suggestions on how the school could improve their outreach. Upon the suggestion of some of the volunteers, the school starts organizing more activities in public places located in different areas; for example, one language class takes place in a park.

To recognize the contribution of the Learning Ambassadors, as well as of all learners at the study centre, Johannes and his colleagues organize a Learning Festival. During the festival, artwork from the classes is exhibited, a few students volunteer by playing music, and Learning Ambassadors are interviewed on stage about their experiences and plans for the future.

EXTENDING A RECOGNITION SYSTEM

Recognizing the value of teachers

Maria is a director of an adult education centre. She has recently been approached by a research institute that would like to test an innovative teaching model, which would make the entire teaching process more learner-centred: from planning and designing the course, through its implementation to evaluation. Maria thinks that the idea could help the school get to know their learners better, and to reduce the number of drop-outs. Her teachers also find the idea interesting and relevant, but refuse to participate in the pilot, as they feel it would only add up to the large amount of work they already have.

Maria organizes a meeting with the teachers to address their concerns and to explain the wider rationale behind the project. Through conversations with her employees, she realizes that some of them feel undervalued for their work and do tasks that go beyond their job description. She is surprised as her teachers undergo a regular evaluation process according to specific criteria – such as how many of their learners re-enroll, or how many
training sessions they have attended – based on which they are eligible for an increase in salary. She starts looking into how recognition within the organization could be improved.

Things to consider:

- Why has it taken so long for Maria to acknowledge the frustration of her teachers? Why haven’t her teachers spoken out about it earlier?
  - Is there a platform for teachers to speak out about their concerns?
- Are there already ways in which teachers are recognized for their achievements?
  - Does the evaluation take into account the diversity of tasks that teachers undertake?
- What should the new policy recognize?
  - Achievements?
  - Attitudes?
  - New skills?
  - Innovation?
- How should recognition happen?
  - Should it be internal, and encourage a better understanding between teachers,
  - or external, to make their achievements visible to the outside world?
- Can Maria design a recognition policy on her own, or will she need help?
  - Should the help come from the outside, for example a recognition expert, or from the inside, for example a working group among the teachers?

An external expert is invited to help Maria investigate the problem and discuss the issue more thoroughly with the staff. His conclusion is that the teachers are struggling with a lack of internal communication and the hierarchical structure, and that the evaluation system is more oppressive than motivating.

Maria starts setting up informal meetings to discuss the achievements of teachers and how they add up to the success of the school. To reduce the feeling of hierarchy, the meetings are always moderated by a different staff member, and continue to take place also when Maria is absent.

With time, Maria realizes that many of her teachers are already implementing a learner-centred process. Upon their suggestion, she starts a repository of resources they can use to improve their practice, and which they are invited to expand.

To highlight the value of teachers’ voices, Maria invites them to participate in the design of the new strategy for the school, which will outline how the school can make learning more attractive and relevant for learners.
Building bridges between the formal, non-formal and informal

Juan works for an NGO that works primarily with young migrants, offering them language classes, career guidance and facilitating placement in traineeships. The registration of every participant starts with an orientation process, during which they discuss their previous training and professional experiences and plans for the future.

Each language course ends with a certificate of completion, which lists the number of hours and the CEFR level achieved. The hosting organization also issues a certificate for each trainee. The beneficiaries often tell Juan that while the help is much appreciated, they still struggle in finding a job. Juan would like to extend the existing recognition system to include information that would be more valuable to employers, and to help the beneficiaries link with an interested employer.

Things to consider:

- What technological solution would be most appropriate for the target group, while also facilitating a connection with potential employers?
  - An e-portolio? A skills pass? An open badge?
- What skills will be taken into account?
  - Hard skills?
  - Soft skills?
  - Both?
- Should they be connected to a formal recognition system?
  - If so, which one? At which level (national, regional, EU)?
- What evidence should be collected?
  - Grades? Diplomas? Certificates?
  - Pictures? Videos? Testimonials?
  - Work experience? Hobbies? Interests?
  - Endorsement from previous teachers, employers and colleagues?
- Should Juan’s organization develop the tool themselves?
  - Will they have the expertise? The funding?

With the help of one of the career counsellors, the beneficiaries work on their portfolios, where they map out their work and volunteering experiences so far, as well as what competences they have acquired through formal, non-formal and informal learning. They are encouraged to reflect on their competences and achievements broadly and to use different formats to record their reflections: by visualizing them, in sound-bites or in writing.

Juan contacts a technology provider with whom he has worked on previous projects and who occasionally does pro-bono work, and agrees to support him in designing Open Badges that would correspond to Juan’s requirements. To make it more understandable across borders, Juan takes the EU Skills Profile Tool as a point of reference.
Juan’s next task is getting the interest of local employers.

**Strengthening recognition within a network**

Zvonka works as an events manager for an association of training providers. All members have the same rights; to show their membership, they have an affiliation badge that is displayed on their website.

During the next General Assembly, Zvonka would like to support members in building new connections within the network. In a recent survey, many members indicated they would like to work in a more targeted way on certain topics, for example through projects, but they don’t know how to kick off the process or find reliable partners with similar interests.

Zvonka knows that while many members in the association know each other, and tend to partner together, they have little trust towards new or less active members. She would like to encourage a feeling of solidarity and trust between all members of the network while keeping a meaningful discussion.

**Things to consider:**

- How can the time and space during the event be used to connect the participants?
  - A networking session over coffee or drinks, a small-group buzz session or an open space session could help the participants build new connections, or suggest topics of interest to a larger audience.
- Will all participants have a chance to speak out?
  - Some formats still give priority to more dominant, experienced or well-connected members; networking or speaking out in a larger group is not an easy task for new people.
- From the perspective of a member association, what format or tool can be used to not only connect the participants, but also give useful information for the network?
  - A digital tool could map out the connections made and flag the topics of interest, eventually helping to build a lasting network.

Zvonka decides to try using smart badges, which can match people with similar interests. The badge will record different information that could be useful for Zvonka in future planning of events (such as where the conversation took place, how long it took, and which topics proved relevant), but most importantly for the participants, who can easily recover the contact information of everyone they have spoken to.

The event was a success. Zvonka is currently looking into the connections that have been made, and how they could be expanded and made into lasting networks.