



Guide to Digital Badging

Who is this guidance for?

This document is for humanitarian organisations, employers, human resources departments and learning and assessment providers who want to start using **digital badges** to verify staff or volunteers' skills, experience, training, professional development, course completions, competencies and achievements.

About this guide

This guide supports organisations to use digital badging on HPass. It is designed to introduce you to the processes of creating, issuing, earning and evaluating digital badges for workforce development.

Digital badging through HPass uses two key services, which are linked:

- [HPass Badge Factory](#) the badge issuing platform for organisations. HPass uses a service called Open Badge Factory (OBF) to enable organisations to create and issue badges.
- [myHPass](#) the HPass badge sharing platform for individuals who earn badges in the humanitarian sector.

The guide assumes that you are the first person registering on Open Badge Factory with HPass, with 'Admin' status. However, you may invite other users (including Admins) into the Factory account for your organisation, who will also be able to complete many of these learning tasks.

‘A new initiative focusing on professional development in the humanitarian sector’

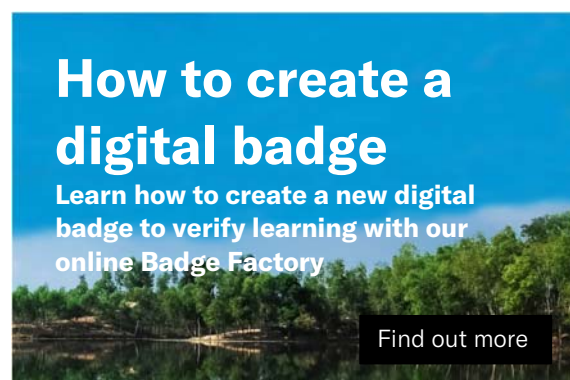
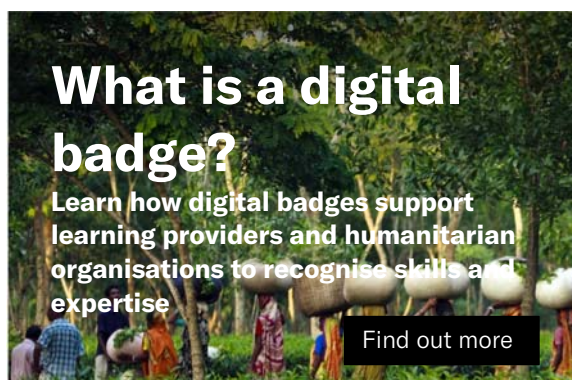
Contents



Click to navigate to each section

Introduction to HPass	6
HPass supports humanitarian professional development	6
HPass and digital badging	7
What is a digital badge?	9
Setting up a digital badging strategy for your organisation	12
Deciding what to badge	13
Integration with a Learning Management System	14
Using the Badge Factory	16
Step-by-step guide to using the Badge Factory	17
1. Sign in to your account	17
2. Take a tour to familiarise yourself with the control panel	17
3. Earn Milestone Badges	17
4. Invite the HPass Admin to your account	18
5. Configure your account	19
6. Adding branded banners to your communications	20
Badge creation	24
1. Create a test badge	24
2. Use a badge template to create a test badge	27
Badge issuing	28
1. Issue your test badge	29
2. Accept your test badge	30
Creating and issuing 'real' badges	31
Further guidance	31

Annex 1 – Badge Strategy Template	32
Section 1: Overall objectives	32
Section 2: Target audience	33
Section 3: Badge system	33
Section 4: Badge governance	34
Section 5: Technology	35
Section 6: Design	35
Section 7: Other	36
Annex 2 – Badge Design template	37
Background badge thinking	37
Required badge information	38
Optional badge information	39
Annex 3 – Badge Image Creation Tool	40



**HPass responds to the need
for consistent professional
development and learning
for humanitarians.**



Introduction to HPass

HPass is a new digital platform focusing on professional development in the humanitarian sector. Recognising that people are our greatest asset in an emergency response, its aim is to offer tools that will promote effective development and training opportunities for humanitarian staff and volunteers.



HPass offers two key services:

Digital badges as a common currency through which to recognise humanitarians' skills, and experience, providing verifiable evidence of their competencies and supporting more effective recruitment and deployment. HPass offers a 'badge factory' through which humanitarian organisations can create and issue digital badges to their staff, volunteers and learners. Humanitarians are able to create a MyHPass profile on which to collect and showcase their badges.

Quality Standards for humanitarian learning and assessment. Developed in consultation with 400 organisations worldwide, the Standards capture best practice in humanitarian learning and assessment. Offered in the form of handbooks, they provide a reference guide for all organisations seeking to offer quality humanitarian learning and assessment, as well as the ability to for organisations to benchmark the quality of their own services and access an external review.

HPass supports humanitarian professional development

HPass works with humanitarian organisations and learning providers, staff and volunteers. It provides:

- A space for humanitarians to showcase their skills, experience and expertise
- The opportunity for humanitarians' skills to be recognised through digital credentials
- A facility for humanitarian organisations and learning providers to recognise humanitarians' skills and experience through digital badges, a format which offers transparency and transferability between roles and locations
- Tools to support quality delivery of humanitarian learning and assessment

HPass is a collaborative initiative brought to you by a group of humanitarian organisations that are passionate about learning and ensuring that humanitarians are recognised for their skills and experience. It is overseen by a Steering Committee of eight organisations and hosted by the Humanitarian Leadership Academy.

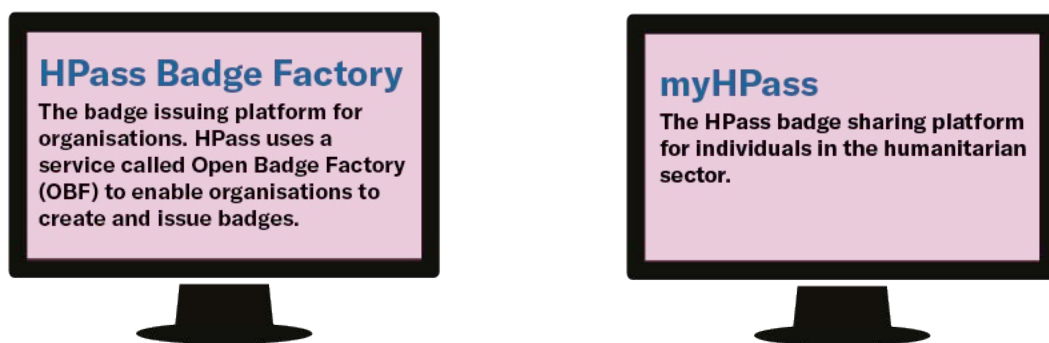


HPass and digital badging

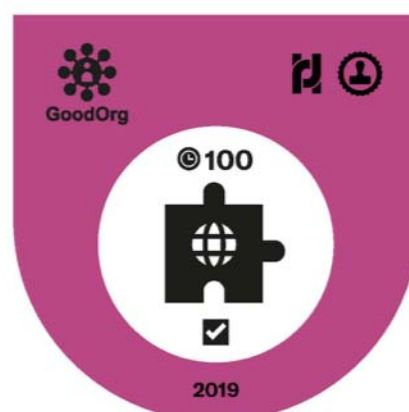
A key service offered through HPass is the opportunity for organisations to use digital badging to recognise humanitarians' skills, achievements, competencies and experience.

This enables humanitarians to gain verifiable evidence of their skills and learning, which can be easily displayed via an online profile or shared via social media. By increasing transparency and consistency in the way that humanitarians' skills are recognised, HPass aims to support increased effectiveness of recruitment and deployment, ultimately driving up quality in the sector. By enabling humanitarians to build up a consolidated digital portfolio of their skills, HPass will eventually reduce the need for paper certificates. It will enable humanitarian organisations to set out clear development objectives against which to benchmark staff and volunteers' progress, and support retention by providing tangible recognition for their achievements.

There are essentially two parts to using digital badging on HPass:



Badges can be issued manually, or automatically from a range of learning platforms



Humanitarian organisations can create badges in the HPass Badge Factory and issue them to learners for them to display as part of a profile on myHPass, a dedicated platform for humanitarians to showcase their skills. HPass Badge Factory uses a service called Open Badge Factory. Badges created in the factory can be automatically issued from a range of Learning Management Systems, or manually issued. They can be used flexibly by organisations to recognise whatever competencies; course completions or other achievements are most relevant for their staff or volunteers.

Humanitarians can earn badges from a range of providers, by completing online or face-to-face learning, assessments, or practical experience. Having fulfilled the requirements to earn a badge, humanitarians receive an email enabling them to claim it, and display as part of a free profile on myHPass. On myHPass, humanitarians can use a customisable profile to showcase their most relevant badges. Badges can be shared via social media or as a link on a CV or e-signature.

As an organisation using HPass to issue badges, you may also want to test the process as an individual humanitarian - earning, claiming, displaying and sharing badges.

Badges can be issued to individual learnings on a my HPass profile



Learners can share them via social media, as a link from a CV or as part of an e-signature



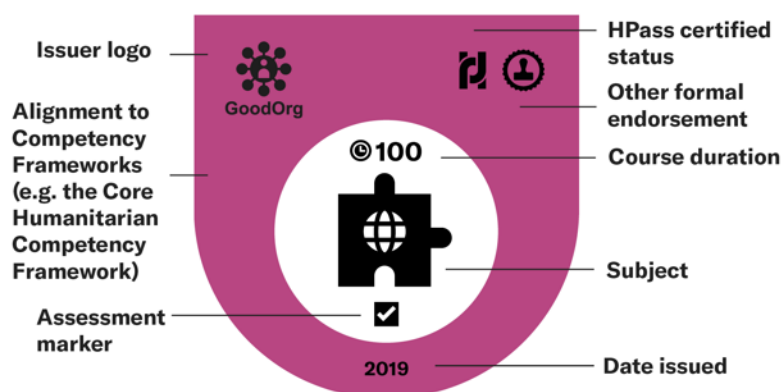
What is a digital badge?

Simply put, a digital badge is an indicator of achievement, like a certificate, that can be displayed, accessed, and verified online.



- A digital badge can be displayed as part of a badge portfolio, as a link on a CV shared via social media, or on an e-signature
- The badge design can be used to communicate key information about the badge such as the learning time spent by the recipient, whether they completed an assessment, the badge issuer, the theme of the badge and whether the organisation or the badge itself has been endorsed by a third party (see more about endorsements in the [Badge Creation](#) section).
- Learners can earn badges from a variety of different providers and display them as part of one portfolio on [myHPass](#)

Please note: Digital badge design can be used to signify the characteristics of the badge, for example whether the earner has completed an assessment, the duration of the course they have taken, the theme of the badge and whether it has been endorsed by an external body – you can see some examples in the badge below. A badge will also contain metadata which gives details of what the individual has done to earn it.



Digital badging is already being used extensively outside of the sector by organisations such as EY, IBM and Open University (please click on the badges below). HPass aims to create a resource specifically reflecting the needs of the humanitarian sector.



HPass has created a set of badge design guidelines. These are optional though we ask that organisations who choose to adopt them do so fully. See more about [Badge Design Guidelines](#).

Benefits of digital badges for humanitarian staff and volunteers	Benefits of digital badges for humanitarian organisations
<p>Digital badges offer:</p> <ul style="list-style-type: none"> • At-a-glance evidence of skills and qualifications (with detail visible in the metadata) • Ability to maintain a central portfolio of achievements, transferable between organisations and locations • A professional profile including badge showcase which can be made public and shared with colleagues and potential employers • The ability to share to social media or display on LinkedIn, as a link from a CV or in an e-signature • Impetus to complete courses and assessments in order to demonstrate skills and develop a portfolio • Through HPass, participation in a community of humanitarian actors committed to professional development and quality humanitarian response. 	<p>Digital badges offer:</p> <ul style="list-style-type: none"> • Ability to recognise course/module completions, experience or assessed competencies, dependent on needs • A motivational tool for staff, volunteers and learners to pursue professional development by enabling them to gain evidence of their achievements • The ability to easily identify staff with relevant skills, and track completion of professional development targets • The ability to offer badges publicly in a searchable catalogue or for a limited audience of staff/volunteers • The ability to track the success of a course, and course completers • The ability to create a new badge with minimum time/capacity commitment • Opportunities to profile learning opportunities.

HPass offers humanitarian employers and learning providers the opportunity to create and issue digital badges to their staff, volunteers and learners, in recognition of their skills, experience and expertise.



Setting up a digital badging strategy for your organisation

When starting out with digital badging, the best approach is to look for a ‘quick win’ that will enable you to test the process, and provide a visible example of a digital badge that can be used for demonstration to colleagues and key stakeholders within your organisation and with partner organisations (see section on deciding what to badge below).

However, before you dive in, you may also want to set some overarching principles for your organisation’s approach to badging. This will help you to ensure:

- That the badges you develop gain and maintain value to your earners, and are a motivating factor for them to pursue courses and other achievements
- That within your organisation you are clear what achievements warrant the awarding of a badge
- That you have determined clear roles and responsibilities for creating and issuing badges within your organisation
- That you have clear design guidelines in place to ensure consistency (HPass offers a template design which can help with this)

The extent to which this is important will depend on the size and complexity of your organisation, but it is useful to determine some basic principles before you start.

See Annex 1 which provides a template badge strategy, and some questions to prompt you through. These can be used with a group of colleagues to determine your strategy as a group.



“Humanitarian U is hoping to be able to issue badges to learners who have taken our online and face-to-face training programs. We are also excited to contribute to and be a part of this community of training providers with high-quality standardised, competency-based programs.”

Kirsten Johnson, Humanitarian U

Deciding what to badge

This step should follow neatly from your work on the badging strategy. Your next priority is to identify a ‘quick-win’, which will enable you to create a digital badge that can be used as a demonstration to colleagues and internal stakeholders.

For example, you could badge a course you have already designed, or which is already running. You could choose to issue badges to a limited audience to start with, in order to get the process up and running. Some examples to help you think through the options are provided below.



Humanitarian Leadership Academy **[Introduction to Coaching and Mentoring](#)**

Created specifically for those working in the humanitarian sector, this course helps build and strengthen coaching and mentoring skills.



PHAP International Association of Professionals in Humanitarian Assistance and Protection **[Certification in Understanding the Humanitarian Ecosystem](#)**

Designed for humanitarian practitioners and others in related fields who need to demonstrate a comprehensive understanding of the components and dynamics of the international humanitarian ecosystem.



Humanitarian U **[Core Professional Humanitarian Training and Certification](#)**

Designed for those wanting to start working in aid or to improve their knowledge and better prepare themselves for the challenges they will face.



World Vision **[Disaster Management Foundations Course](#)**

This orientation course is a series of modules covering foundational core topics in Disaster Management. Each module is designed to support staff in demonstrating critical behaviours from World Vision's Core Humanitarian Competency Framework (based on the Humanitarian Industry's Humanitarian Competencies).

[Please see Annex 2](#) which can be used to help you think through your first badge. As you become familiar with the process, you may no longer need to use a template and can do your thinking as you create the badge.

Integration with a Learning Management System

Although it is possible to issue badges for face-to-face learning or practical experience, many users will want their badges to be issued automatically as a result of someone completing a course, or another set of tasks, on a Learning Management System (LMS), such as Totara or Moodle. This requires the LMS to be integrated with the Badge Factory.

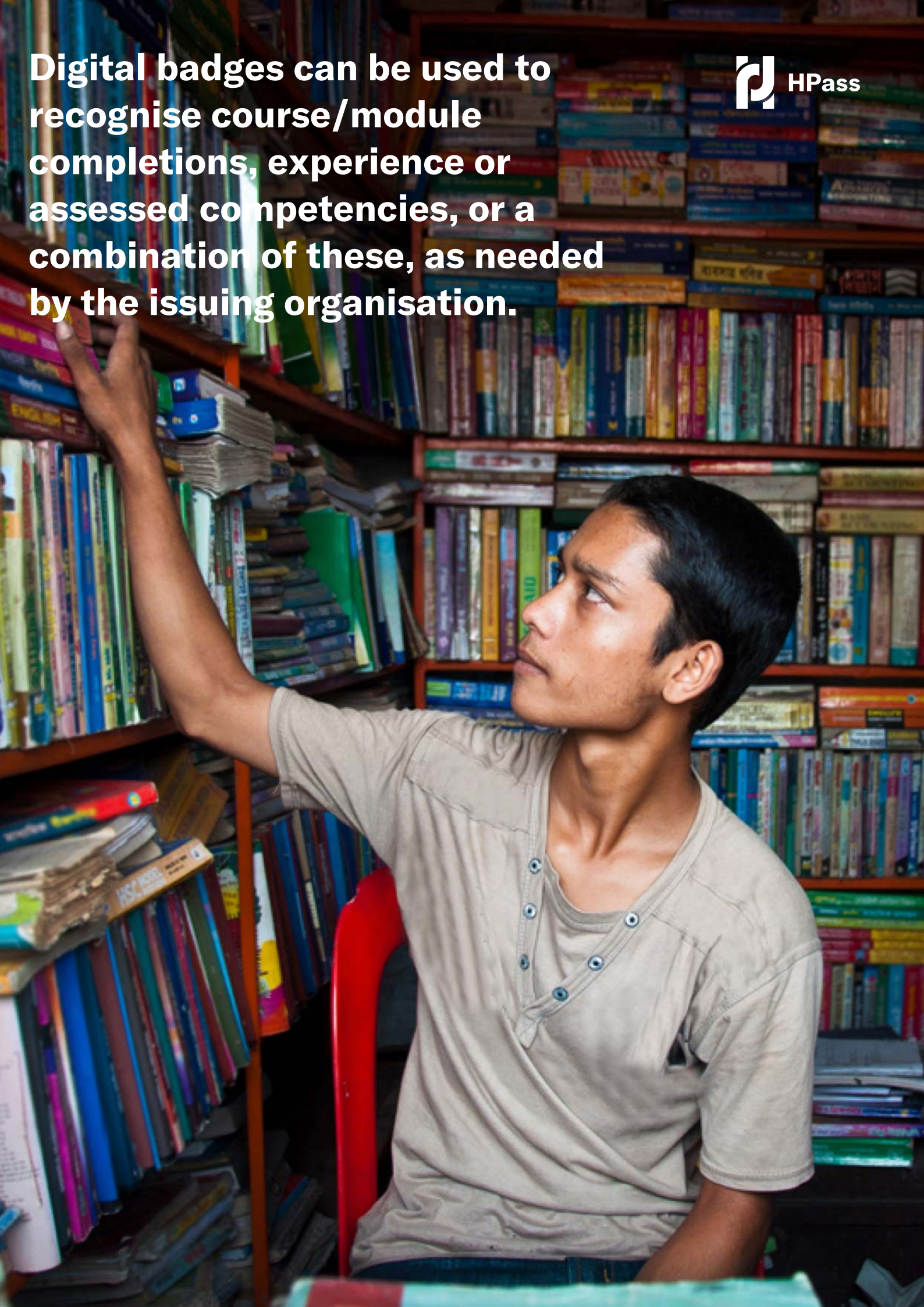
The Badge Factory already supports integrations with the following Learning Management Systems:

- Kaya
- Moodle
- Totara
- Brightspace
- Canvas
- LearnDash on Wordpress

If you are using a different system, please contact info@hpass.org to discuss options for how digital badges can be automatically issued from your LMS.



Digital badges can be used to recognise course/module completions, experience or assessed competencies, or a combination of these, as needed by the issuing organisation.



Using the Badge Factory

Having established your approach to digital badging, creating your badges should be the easy bit.

The first step is to register with the Open Badge Factory (OBF), through which HPass offers its badge creation facility. Staff at the Academy will send you an invite code enabling you to access the Badge Factory, HPass' version of OBF: <https://openbadgefactory.com>

OBF is a reliable and flexible badge management platform which has been specifically designed for the needs of education and training organisations.

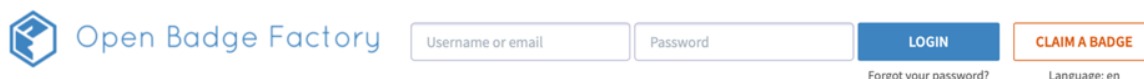
Click here to visit the Open Badge Factory



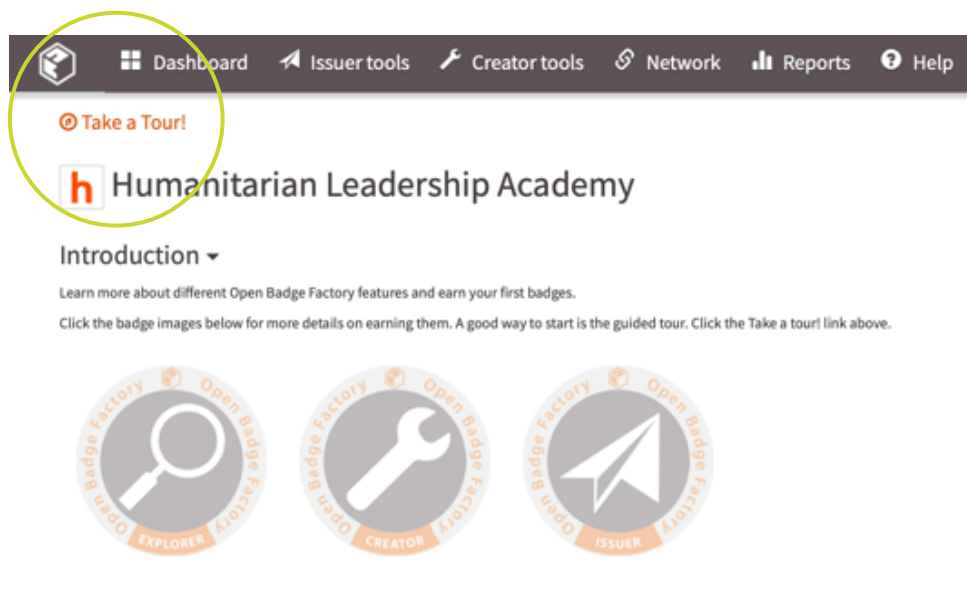
Step-by-step guide to using the Badge Factory

Please follow these instructions to start using the Badge Factory, this will give you all the information you need to start creating and issuing your organisations badges.

1. Sign in to your account



2. Take a tour to familiarise yourself with the control panel



3. Earn Milestone Badges

After completing the tasks in this guide, you will earn all of the Milestone badges below. These badges appear in the Open Badge Passport and can be downloaded to upload to myHPass.



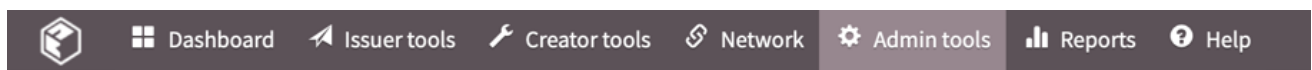
² Please note that these badges display on Open Badge Passport rather than myHPass, the dedicated platform for humanitarians. However, if needed you can download them from Open Badge Passport and upload them to myHPass.

4. Invite the HPass Admin to your account

The first thing you should do is invite HPass Admin info@hpass.org to your account as an Admin. This will help us help you inside your account on an ongoing basis.

Navigation

Go to Admin tools	User accounts	Create new user account	Select Admin	Enter info@hpass.org	Click Send invitation
-------------------	---------------	-------------------------	--------------	----------------------------------------------------------	-----------------------



Admin tools / Wildfire Collective — User Accounts

User accounts

Organisation details

Badge languages

Sub-organisations

Shared by us

Guideline

Alignments

Deletion requests

API key

LTI

Branding

Subscription

☒ Order by last modified ☐ Order by title

filter



Create new user account



Sarah

Invite the HPass Admin to your account

 Here you can invite users to your organisation.

You can send invitations to existing users in other organisations and also to new users who don't have an account yet.

Recipient email *

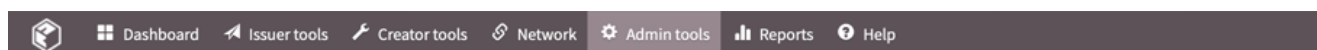
Input email address of the new admin user you wish to invite.

Send invitation

5. Configure your account

You can add further details to your organisation's profile in the [Open Badge Factory](#). Edit your organisation details page for effective branding and messaging in your badge communications. Please pay attention to the specific fields below when completing the form.

Navigation



Admin tools / Edit organisation details

User accounts

Organisation details

Badge languages

Sub-organisations

Shared by us

Guideline

Alignments

Deletion requests

API key

LT1

Branding

Subscription



Upload icon

Client ID PTSU2TaFPTaT0

Name *

Humanitarian Leadership Academy

URL *

<https://www.humanitarianleadershipacademy.org/>

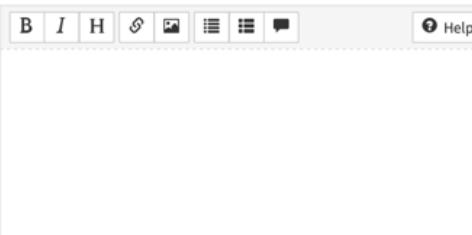
Country

UNITED KINGDOM

Organisation type

Other

Description



Organisation email *

sarah@wildfirecollective.com

This email address is embedded to all issued badges.

Reply-To address

This email address is added to all outgoing messages (including badge issuance messages). Recipients can use it if they wish to reply to you.

☒ Searchable

If checked, your organisation will be visible in searches and other organisations add it to their networks.

☐ Show icon in badges

If checked, your organisation's icon will be shown in the badges you issue.

☐ Show description in badges

If checked, your organisation's description will be visible in the badges you issue.

Save

Cancel

Field	What information to put in these fields
Name	Your organisation name as you would like it to appear in badges you will issue
URL	Typically, your home page, embedded as a link to your organisation name in your badges. People viewing the badge will be able to click on this link to help them verify that the badge does indeed come from your organisation.
Country	This information does not appear in the badge, but it will be one of the ways that other organisations can find your organisation on Open Badge Factory. You can only choose one country, so this will typically be where your headquarters are located.
Description	A short paragraph, perhaps from the About page of your website, that will be part of your organisation's online profile and may also optionally be published in badges you issue. (See checkbox further down the form)
Organisation email	Part of the badge information. People viewing the badge may try to email this address, so it should be an official organisation email account whose users know about your badging initiative.
Reply to address	If completed, this will permit badge earners to reply directly to emails that come from your account related to badge applications and badge issuing events. This could be the same as the organisation email, or something like badges@yourorg.org if you can create a new email account.
Icon	An image likely excerpted from your logo. This is part of your organisation's online profile and may also optionally be included in badges you issue. (See checkbox further down the form) Click Upload icon and upload a perfectly square PNG file (e.g. 400 x 400 pixels)

6. Adding branded banners to your communications

Navigation



Add at least one banner that will be applied to these communications functions, helping maintain your branded connection with your badge earners.

- Badge applications
- Criteria pages
- Email messages
- Badge download

We can upload a default HPass banner for you, that you can use or replace with your own banner. A single banner may be used for all four communications functions, or several banners may be used for one or more functions each. We advise trying a single banner first.

Admin tools / Organisation details

- User accounts
- Organisation details
- Badge languages
- Sub-organisations
- Shared by us
- Guideline
- Alignments
- Deletion requests
- API key
- LTI
- Branding**
- Subscription



Save Cancel

Creating a PNG banner

If you don't have access to a graphic artist and lack specialised image composition tools, you can create a PNG banner in Powerpoint using the following method.

1. Open Powerpoint and open a blank slide.
2. Insert a rectangle shape on a blank slide, Width 6.4" (c. 16cm), Height 1.1" (c. 2.8cm – your choice, but not much taller), Fill light grey (exact shade doesn't matter), no Line
3. Compose your banner content (e.g. logo, text, images) on top of this square shape
4. When you finish the banner content, change the Fill of the rectangle to no fill to make it invisible
5. Select the invisible shape and all its contents. We suggest you group them (Control+G)
6. Right-click and select Save as Picture in the dialogue box
7. Save as type PNG with a name like 'Banner'
8. This banner is now the right shape but is probably too large. You can resize it in an image editing program on your computer if you have one, or online at: www.online-image-editor.com
9. As you resize the image to exactly 640 pixels wide, make sure that you have checked Aspect ratio, so that the overall shape of the image remains the same

How to upload a branded banner

Click Upload new banner and upload a PNG file exactly 640 pixels wide (and we recommend 100-120 pixels high).

Make sure you select at least one check box for placing the banner:

Click save.

Automatically earn your Admin Badge: By completing the task of uploading a banner, you will automatically earn the admin Badge from Open Badge Factory. You can just ignore the email message or simply download the badge for later use.



Digital badges motivate staff, volunteers and learners to pursue professional development by enabling them to gain evidence of their achievement.



Badge creation

To enable you to create your first badge, the Badge Factory takes you through a simple step-by-step process. You can jump straight in, or start by creating a test badge, using the process below. This will also enable you to trial the process of claiming and displaying a badge, from the perspective of a user.

We have also created some badge templates which you can copy and edit to quickly and easily create your own badges. Contact info@hpass.org if you do not see these badges under the Creator tab.







1. Create a test badge

Navigation

Creator tools

Badge Library

Create new badge

 Dashboard
 Issuer tools
Creator tools
 Network
 Admin tools
 Reports
 Help

Creator tools / Badge library

Badge library


- Milestone badges
- Badge applications
- Shared badges
- Image library
- Criteria page templates
- Form templates

☒ Order by last modified
 ☐ Order by title

🔍

+

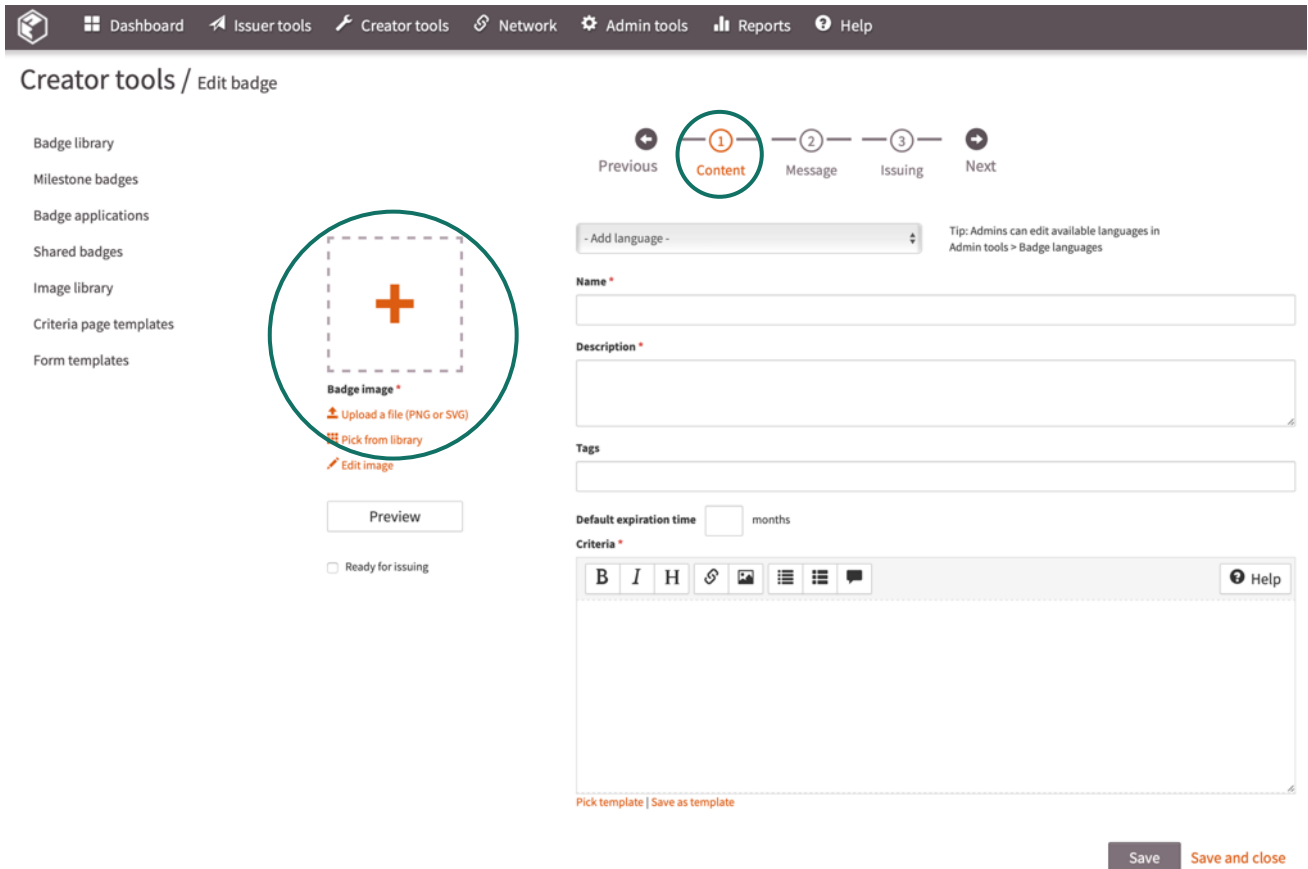
Create new badge



OBF Template [Give the badge a name that

The idea of the description of the badge is to describe the meaning / content of the badge shortly and effectively so that the badge earner and

Create a quick, simple badge to issue to yourself as test



Creator tools / Edit badge

Badge library
Milestone badges
Badge applications
Shared badges
Image library
Criteria page templates
Form templates

Previous **1 Content** 2 Message 3 Issuing Next

- Add language -

Tip: Admins can edit available languages in Admin tools > Badge languages






Name *

Description *

Tags

Default expiration time months

Criteria *

B I H      Help

Pick template | Save as template

Preview

☐ Ready for issuing

Save Save and close

Instructions to create a simple badge – see above

- **Click on the '1 Content' circle**
- **Badge image:** click the 'edit image' to quickly create a badge image. Its appearance does not matter, since only you will see it, but feel free to experiment. Click 'done' to continue.
- **Add name:** e.g. Test or My First Badge
- **Add description:** describes the purpose of the badge. A few simple words such as: purely for exploration
- **Add criteria:** describes how the badge is earned.

Creator tools / Edit badge /

- Badge library
- Milestone badges
- Badge applications
- Shared badges
- Image library
- Criteria page templates
- Form templates



Email subject

Email body

Email link text

Set the text for badge download button. Earners will get their badges by clicking this button. Default link text: "Get your badge"

Email footer

[Pick template](#) | [Save as template](#) | [Preview](#)

[Save](#) [Save and close](#)

Instructions for creating an email message – see above

- **Click on the '2 Message' circle**
- **Email subject:** Sample text could be 'Claim your first test badge from Open Badge Factory'
- **Email body:** Sample text 'Congratulations on issuing and receiving your first badge. Click on the button below to get your badge.'
- **Please note: button link text and Email footer are not required**
- **See email worksheet for sample text**

Creator tools / Edit badge /

- Badge library
- Milestone badges
- Badge applications
- Shared badges
- Image library
- Criteria page templates
- Form templates



Instructions for issuers

B

I

H

🔗

🖼️

📋

📋

💬

Help

☐ Ready for issuing

[Save](#) [Save and close](#)

Instructions for issuing the badge – see above

- **Click on the ‘3 Issuing’ circle**
- **Instructions for issuers:** anything needing to be considered when issuing the badge, for example: how to assess, where to find/how to use tools or resources when issuing (e.g. rubrics), instructions about configuring badge details, such as date of issue/expiry, criteria, email message, issuing event labeling for reports etc
- **Check the box:** labelled ‘ready for Issuing’
- If you’re ready to continue, click **‘issue now’** which takes you into the ‘Issuer Tools’ area
- If you want to stop for now, click **‘save and close’**

Please note: The other option is to copy a template badge and edit it (see below). The template badges contain much of the information from the worksheets.

Automatically earn your Creator Badge: Creating and issuing a test badge above will automatically earn you the creator badge. You can ignore the email message or simply download the badge for later use.



2. Use a badge template to create a test badge

Navigation



This is an alternative to the process described under point 1 above. We have supplied you with some badge templates to make it easier for you to create your own badges:

1. Assessment-Based Certificate Template
2. Participation-Based Certificate Template
3. Competency Certification Template
4. Recognition of Other Achievements Template

Creator tools / Badge library

Badge library

Milestone badges

Badge applications

Shared badges

Image library

Criteria page templates

Form templates

☒ Order by last modified
 ☐ Order by title

filter



Create new badge



Humanitarian Essentials MOOC (Part)

An orientation to the sector, focusing on "Understanding humanitarian contexts and applying humanitarian principles" Endorsed by the



Psychological First Aid for Children

Earners have built their understanding of the concepts and steps involved in providing support to children following a distressing event.



Academy Test Badge

Academy Test Badge Description



Humanitarian Futures and Foresight MOOC

Earners have built their understanding of: • the basic concepts of foresight; • the difference between trends, disruptions and signals; • the



TEST Introduction to Core Humanitarian

Look at Kaya course and use text from 'how will I benefit from this course'



Introduction to Coaching and Mentoring

Earners have built their understanding of coaching and mentoring and explored how it can be used effectively within a humanitarian



Humanitarian Futures and Foresight MOOC

Earners have built their understanding of: • the basic concepts of foresight; • the difference between trends, disruptions and signals; • the



Humanitarian Futures and Foresight

Earners have built their understanding of: • the basic concepts of foresight; • the difference between trends, disruptions and signals; • the

Step 1 and 2: To use a template badge, simply click on it, select copy from the menu that appears and proceed to edit the badge to your needs. Edit both the content (step 1) and message (step 2) forms. Make sure you remove all the guidance text before issuing the badge.

Step 3: Select 'Advertise in Passport' in Issuing, in order that your badge will be displayed to potential earners in the 'Badge Catalogue'. If your badge is only earnable by people within your organisation, you can note this within the metadata.

Step 4: Endorsements is something you can explore later or ask us about. Basically, you can seek an endorsement from another organisation on the Badge Factory, which can help increase the perceived value of your badge.







Badge issuing

Navigation

Issuer tools

Select your
new badge

1. Issue your test badge

 Dashboard
  Issuer tools
  Creator tools
  Network
  Reports
  Help

Issuer tools / Issue badge

Issue badge

Review applications

Email message templates

Recipient lists

Previous

1 Preview badge

2 Set badge details


3 Select recipients

4 Edit email message


5 Confirm & issue

Next

[Instructions for issuers](#)



ACADEMY TEST BADGE

 **Humanitarian Leadership Academy**
info@humanitarian.academy

The Humanitarian Leadership Academy is a global learning initiative set up to facilitate partnerships and collaborative opportunities to enable people to prepare for and respond to crises in their own countries.

Tags: Academy, Badge, Tags, Test

Academy Test Badge Description

[\[Open criteria in new window\]](#)

Academy Test Badge Criteria

This is the process of issuing a test badge, which will result in you receiving an email prompting you to claim and display your badge.

- **Preview badge:** a view of what the badge will look like once issued
- **Set badge details:** no need to change anything here. Learn more in the Help tab
- **Select recipients:** make sure you add your own email! Optionally, add info@hpass.org if you like some feedback from us about your badge and its messaging
- **Edit email message:** you can skip over this, if you're happy with what you entered previously
- **Confirm and issue:** check the box labelled 'hide' from reports since this badge is only for testing purposes.

2. Accept your test badge

After you confirm and issue your test badge (instructions above), you'll receive an email from [YourOrganisationName] via OBF with the subject 'Claim your first test badge from Open Badge Factory'. Click on 'Get your badge' in the email message.

As you accept the badge through your email and the web, notice how your organisation details and branding are displayed. You can adjust these details further in 'Admin tools', if you wish.

Go ahead and accept the test badge. It will be private unless you make it public and you can delete it at any time from your account on myHPass.

Automatically earn your Issuer Badge: by completing this task, you will automatically earn the issuer badge. As above, you can just ignore the email message or simply download the badge for later use.



Automatically earn your Member Badge: But this time, because you have now earned all four pathway badges, you automatically earn the OBF Member badge (also known as the OBF User badge).

You should see the download link for the OBF Member badge at the same time as the Issuer badge. Download this badge to a safe place on your computer – you can upload it to your profile at [myHPass](https://myHPass.com).



Creating and issuing 'real' badges

Having completed the test process above, you are now ready to create and issue 'real' badges.

The three main processes you will have to complete are as follows:

1. **Create a new badge (using either method 1 or 2 described above) and follow the step by step process in the Badge Factory.** This will set the parameters for earning the badge and provide the text for the metadata and for the email received by a badge earner. It will enable you to include details within the badge, such as endorsements and alignments.
2. **Create and upload your badge image to the Badge Factory.** You can choose whether to use the HPass style or your own. If using the HPass style, please request the Powerpoint Badge Creation Tool ([see Annex 3](#)) which provides an easy-to-use template.
3. **If you are issuing badges automatically from a Learning Management System (LMS),** link your badge to the relevant online course in your LMS. The details of this process will depend on which LMS you are using (see section on Integration with a Learning Management System). Please contact info@hpass.org if you require any support.

Further guidance

If you require further guidance on how to create and issue digital badges or have any further feedback to share with HPass, please email info@hpass.org. We look forward to hearing from you!

Annex 1 – Badge Strategy Template

This document sets out a strategy for how [insert organisation] will use digital badging to support its [insert staff, volunteers, learners] to meet their professional development and learning goals.

Please amend this template as appropriate for your organisation.

Section 1: Overall objectives	
What goals will digital badging meet for your organisation?	
Strategy	Questions to consider
<p>We will use digital badging to meet the following organisational goals:</p>	<p>What are the primary goals of your badge system - what would you like this system to accomplish?</p> <p>What values and behaviours would you like to see expressed?</p>

Section 2: Target audience

Strategy	Questions to consider
<p>The primary audience describes who will mostly earn your badges. The primary audience for digital badges created by us will be:</p>	<p>How will a badge earner grow and evolve by earning badges in this system?</p> <p>How will this badge system help them achieve their career or life goals?</p>
<p>The secondary audience describes anyone who may be likely to view badges, aside from the badge earner.</p>	<p>Would anyone besides the earners be interested in viewing these badges?</p> <p>Why?</p>

Section 3: Badge system

Strategy	Questions to consider
<p>We will use digital badging to recognise the following:</p>	<p>How will you ensure that badges are valued by those that earn them?</p> <p>Do you want to endorse badges created by other organisations, or recognise completion of content from other organisations using your own badges?</p> <p>Will your badges be used to recognise achievements in your organisational priority areas, or against a competency framework your organisation uses?</p>

We will badge according to the following rules:	
--------------------------------------------------------	--

Section 4: Badge governance

Strategy	Questions to consider
The following roles will have responsibility for badging within our organisation (include job titles and roles in relation to badging):	<p>Think about:</p> <p>Who decides how badges are used/owns the badge strategy?</p> <p>Who is able to create badges?</p> <p>Who determines who receives a badge (or is this automatic)?</p> <p>Who has to create/sign off the design?</p> <p>How are badges marketed/communicated?</p> <p>Who assesses their success?</p>

Section 5: Technology

Strategy

Delete/add as appropriate:

Section 6: Design

Strategy

The badge design will include the following elements: [add/delete as appropriate]:

The badge design will use the following template (add as appropriate, please see Annex 3: Badge image creation tool if you choose to use the HPass template

Badges will be named according to the following conventions: [add/delete as appropriate]:

Section 7: Other

Strategy

The following training and support will be needed by badge creators and issuers in order to carry out their duties:

The following information will be needed by badge earners to enable them to understand and use the system:

The following marketing and communications materials will be needed to support use of digital badging within my organisation:

The following feedback processes will be in place to assess the success of digital badging within my organisation:

Annex 2 – Badge Design template

Background badge thinking

Issuer Perspective

Which part of your organisation is issuing the badge? How will this help them?

Earners Perspective

What is the target group? Are they internal/external? How will this help them?

Viewer/Consumer Perspective

Who will want to evaluate this badge and its earner? How will this help them?

Badge System Structure

Single badge or part of a pathway or cluster? Describe the structure/sequence.

Issuing Method

Manual? Automatically by e-learning course completion? Badge application?

Type of recognition?

One or more of (circle which apply):

- Participation-Based Certificate (F2F, online) - no summative assessment
- Assessment-Based Certificate - formal summative assessment
- Competency Certification - independent formal assessment
- Other Achievements (experience, service, awards, etc.)
- Membership
- Issued via badge application, incorporating:
 - Skill/knowledge testing questions
 - Additional evidence or reflection

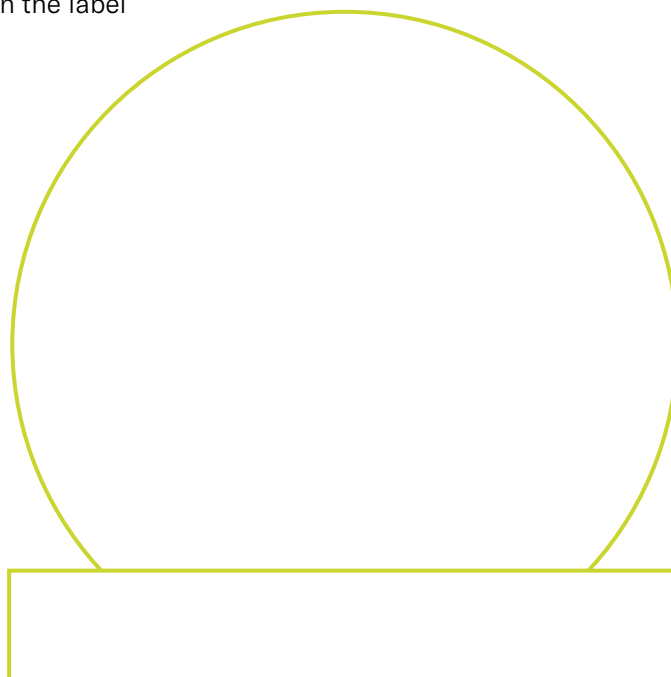
Other, or variation on the above (describe)

Required badge information

Elements needed to meet the technical standard

Badge image

Provide a mock-up image in the white space as a placeholder. See Guidelines and Badge Design Template for more info. Write a badge name on the label



Description

The 'recognition mission' of the badge. What skill or knowledge or achievement does it demonstrate? Short: 10-20 words.

Criteria

How does someone earn this badge? What learning activities? What assessment? How much effort? Be as clear and transparent as possible.

Optional badge information

Tags

1-5 words that may help classify the badge.

Expiration

Should it expire? Does it require renewal? In how many months?

Alignment

Does it align to a framework, either one used by the sector such as the Core Humanitarian Competency Framework, or one specific to your organisation?

Endorsement

Can another organisation endorse this badge? Why? Formal or informal.

Multiple languages

Should the badge info be translated to one or more other languages? Which ones?

Annex 3 – Badge Image Creation Tool

The Badge Image Creation Tool is available to help you design your badges using the HPass style.

Please note that you are not obliged to use the HPass style and can alternatively adopt your own design approach. We do ask that if you choose to use the HPass style you adopt it completely rather than partially.

Please contact info@hpass.org to request the tool which is in Microsoft PowerPoint.



