IREC DIGITAL CREDENTIAL INITIATIVE

CASE STUDY DECEMBER 2015

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ALBANY, NY

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INTRODUCTION

Enabled through a 2015 grant from the ACT Foundation/ National Network of Business and Industry Associations (National Network), the Interstate Renewable Energy Council (IREC) piloted a dynamic digital credentialing initiative for IREC's Certified Master Trainers and Instructors. The pilot involved embedding in a digital representation of the credential, the criteria based upon which it was issued, evidence of attainment, issue and expiration dates, an accurate description of the scope of the credential and its use in the market. The dynamic aspect of the credential ensures responsiveness to market conditions and that the most current information about the certificant's status is displayed. This concept was well received by other credentialing bodies in the clean energy sector and likely holds wide appeal for personnel certification bodies across sectors. Competency and high-quality training are coming into alignment, but stakeholders could benefit from an easier and smarter way to understand and demonstrate the value and credibility of credentials. Using today's technology to display the requirements, terms, and conditions for acquisition of a credential offers stakeholders convenient and easy access to comprehensive information.

> *All postsecondary credentials – from badges to degrees and beyond – should be based on competencies, making them easier to understand and use by students, employers, educators and workforce agencies.*
>
> Lumina Foundation, 2015

BACKGROUND

Credly, a digital badging software platform, estimates that more than 90 percent of skills gained by the workforce do not make it onto a resume or transcript. According to the Census in 2012, 11.2 million adults with a high school degree or less held a professional certification or a license (US Census Bureau, 2014). The value of these alternative credentials can be increased in the professional setting with the proper tools. With the availability of alternative credentials expected to double over the next five years, the need for recognizing achievement through credible digital credentials is greater than ever.

The role of credentials is becoming more prominent in the national landscape, but to gain traction across sectors, hiring managers and other stakeholders need a better understanding of how

credentials build quality into the industry. With one click, an employer is able to see the details of a credential and how the worker's skills are aligned with the employer's needs. One objective of this project was to encourage organizations to rely on credible credentials for hiring and promotion purposes by providing a dynamic and accessible representation of a worker's achievement. The fluency created by moving a credentialing mark onto a digital host transforms the credential from a back-of-the-house, static position into a three-dimensional, in-depth display.

The digital credential has value for many audiences. For the credential holder, the digital credential offers easy and secure recognition of skills that can differentiate him/her in a competitive marketplace. When used consistently, credible digital credentials can help an organization to hire and or promote based on competency. The hiring manager can verify a credential in real-time and instantly learn more about the issuing body and its requirements for awarding the credential. As a nation of online shoppers, consumers will have a way to find vetted products and practitioners by looking for digital credentials. For a credentialing body, digital credentials enhance the value of a credential to holders and prospects. Moreover, they provide a low-cost yet highly visible opportunity to promote the credential.

Digital credentials are already in use in higher education and K-12 as well as private businesses and the military. Now there is an expansion into assessment-based certificate programs, professional development courses, and workforce credentials.

PILOT

The crux of this project is that it takes the eloquence and innovation of digital "badge technology" and adapts and applies it to the more rigorous and demanding quality assurance credentialing framework. IREC contracted with a digital badging software platform to develop and issue digital credentials to two categories of its credential holders. This pilot intentionally was kept to a small sampling to explore both the process and response.

The term "badge" is in the current credentialing vernacular. In this case study, we will use the terms "digital badge" and "digital credential" interchangeably. Of note is our use of "dynamic" to describe the type of digital credential selected for this pilot. The dynamic aspect of badging refers to the fact that the metadata in the badge can be updated as the credentialing program evolves or the holder's status changes. A "static" badge is one that, once issued, is unchangeable and provides no real-time validation. By contrast, a "dynamic" badge provides immediate validation of the credential holder's current standing.

The pilot also included creating a narrated slide show of implementation details and lessons learned. We met with clean energy and related credentialing bodies to gauge interest and help them on the path to implementation. Credentialing bodies include: North American Board of Certified Energy Practitioners (NABCEP), Building Performance Institute (BPI), Clean Energy Credentialing Coalition (CECC), Solar Rating Certification Corporation (ICC-SRCC), Small Wind Certification Council (SWCC), and Center for Energy Workforce Development (CEWD).
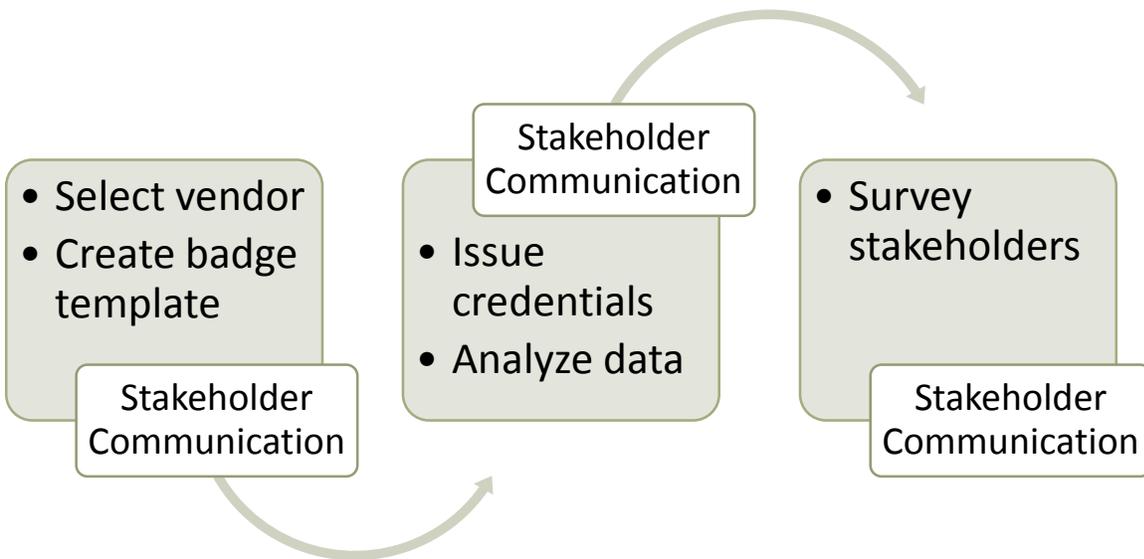
IMPLEMENTATION DETAILS

The following section details the process IREC used to offer existing credential holders a digital credential to display their mark in a manner that is more accessible for HR personnel, training and education providers, and students and workers.

ABOUT THE DIGITAL CREDENTIAL

The credential has 'metadata' embedded into it so that when clicked upon, someone can view detailed information. The credential is no longer a stand-alone title, but a comprehensive explanation of what the certificant did to earn the credential and sufficient information about the issuing organization to show proof and ensure confidence that the credential is credible.

The credential must be "accepted" or "claimed" by the certificant. Care should be taken to educate the holder on the value of the digital credential and the ease at which it can be claimed and shared. At this juncture, we are simultaneously creating a demand for the digital credential from the hiring organization and consumer, while encouraging the certificant to broadcast achievements digitally. To do so will require a coordinated and targeted communications campaign to prompt other adopters.

- Select vendor
- Create badge template

Stakeholder Communication

Stakeholder Communication

- Issue credentials
- Analyze data

- Survey stakeholders

Stakeholder Communication

Step 1: Select a badge issuing platform vendor

Digital badges were introduced in 2011. Open source software exists for credentialing bodies to build their own badge issuing platform. Alternatively, there are a number of existing credible vendors that offer badging services: Credly, Acclaim (a product of Pearson), ProExam Vault (Professional Examination Services), and BadgeCert. For this project, we received estimates of one-time fees to set up badge templates that ran up to $13,000 with annual access fees of up to $8,000. Some of these badging services provide integration with many major platforms, such as Moodle, Salesforce, Eventbrite, WordPress, and MailChimp. IREC explored three of these vendors. Each vendor was evaluated based on the following criteria:

1) cloud-based;
2) verifies certification in real-time and authenticates that the certification is in good standing;
3) provides detailed information about the credential and its issuer;
4) allows the credential to be easily displayed and shared via social media, email, personal websites and blogs;
5) ability to track where badges are viewed, shared, etc.;
6) ability to interface with IREC's customer relationship management software; and
7) has data-security/ high-level security protocols for exchanging and storing the data: regarding the digital badging issuance process.

8) Desired criteria:
   a. manageable annual fee or per badge/ credential fee;
   b. criteria/ evidence data housed on IREC site as opposed to vendor site, i.e. when the credential is clicked on, the viewer is taken to an IREC page for verification;
   c. notification of credential award to come directly from IREC, and not the software implementer; and

The vendor selected for this pilot met most, but not all criteria. For example, the badge lives on the vendor's site. The certificant must create a profile on the vendor's site to accept and share the badge.

Step 2: Create a badge template

For an organization that currently issues credentials, they would simply extract from their own credentialing system the information to appear in the badge. For an organization entering into the credentialing market, this is a more thoughtful task. The digital credential should represent skills and knowledge demonstrated through an exam or other assessment process.

Metadata includes

- Name of certificant
- Issue and expiration dates
- Skills
- Criteria to be awarded credential
- Standard met
- Evidence
- Link to information about the issuer
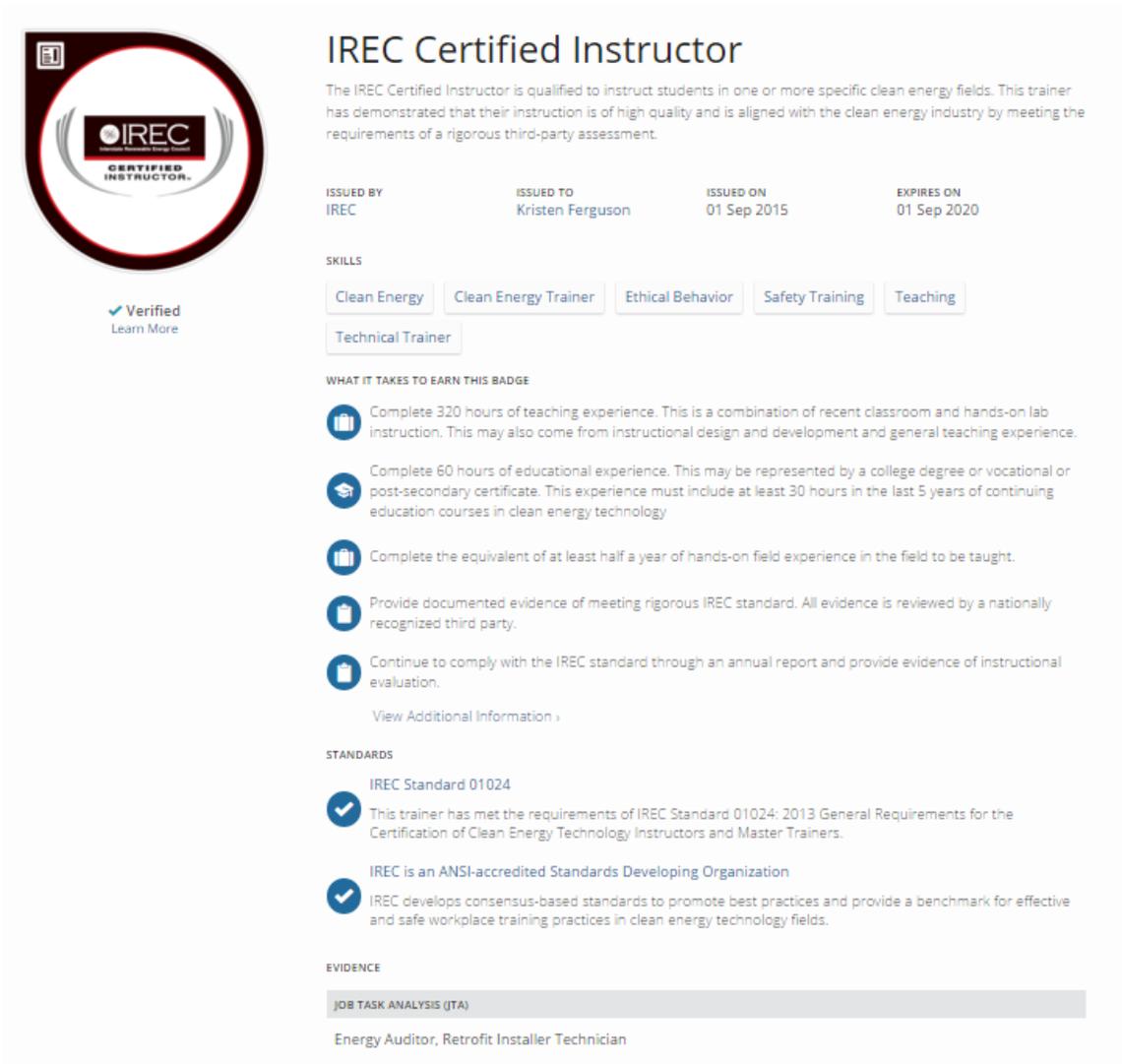
IREC Certified Instructor

The IREC Certified Instructor is qualified to instruct students in one or more specific clean energy fields. This trainer has demonstrated that their instruction is of high quality and is aligned with the clean energy industry by meeting the requirements of a rigorous third-party assessment.

ISSUED BY	ISSUED TO	ISSUED ON	EXPIRES ON
IREC	Kristen Ferguson	01 Sep 2015	01 Sep 2020

SKILLS

Clean Energy   Clean Energy Trainer   Ethical Behavior   Safety Training   Teaching

Technical Trainer

WHAT IT TAKES TO EARN THIS BADGE

Complete 320 hours of teaching experience. This is a combination of recent classroom and hands-on lab instruction. This may also come from instructional design and development and general teaching experience.

Complete 60 hours of educational experience. This may be represented by a college degree or vocational or post-secondary certificate. This experience must include at least 30 hours in the last 5 years of continuing education courses in clean energy technology

Complete the equivalent of at least half a year of hands-on field experience in the field to be taught.

Provide documented evidence of meeting rigorous IREC standard. All evidence is reviewed by a nationally recognized third party.

Continue to comply with the IREC standard through an annual report and provide evidence of instructional evaluation.

View Additional Information ›

STANDARDS

IREC Standard 01024

This trainer has met the requirements of IREC Standard 01024: 2013 General Requirements for the Certification of Clean Energy Technology Instructors and Master Trainers.

IREC is an ANSI-accredited Standards Developing Organization

IREC develops consensus-based standards to promote best practices and provide a benchmark for effective and safe workplace training practices in clean energy technology fields.

EVIDENCE

JOB TASK ANALYSIS (JTA)

Energy Auditor, Retrofit Installer Technician

✔ Verified
Learn More

STAKEHOLDER COMMUNICATION

A key element of the digital credential roll-out is to prepare and place communication elements to raise awareness with certificant and hiring organizations. In addition to emails, IREC created a series of articles on the value of digital credentials for these different audiences:

1) Dynamic Digital Credential
2) IREC's New Dynamic Digital Credentials: A Game Changer for Instructors and Employers
3) An Eloquent 21st Century Way to Hire Those with the Right Credentials

Step 3: Issue credentials

The most straightforward step of the process is issuing the digital credential. Credentials can be issued in bulk or individually. A CSV template is provided to collect the certificant holder's data and is uploaded right to the badging software platform. Credentials are issued by the badging platform through an email to the certificant. The certificant must then follow the link to the vendor site, create a password, and accept the badge; a process that takes just two minutes. Once accepted, they can begin sharing the badge immediately on LinkedIn or other social media sites, or embed the badge in their website or add a link to their email signature.

Claim badge

Share badge

Through the badge platform, the certificant shares the credential on social media, website, or by email.

As viewed by certificant in badge platform

Badge as it appears on LinkedIn. *LinkedIn only allows for a small arrow to link to the metadata rather than the badge image.*

Badge as it appears in email signature
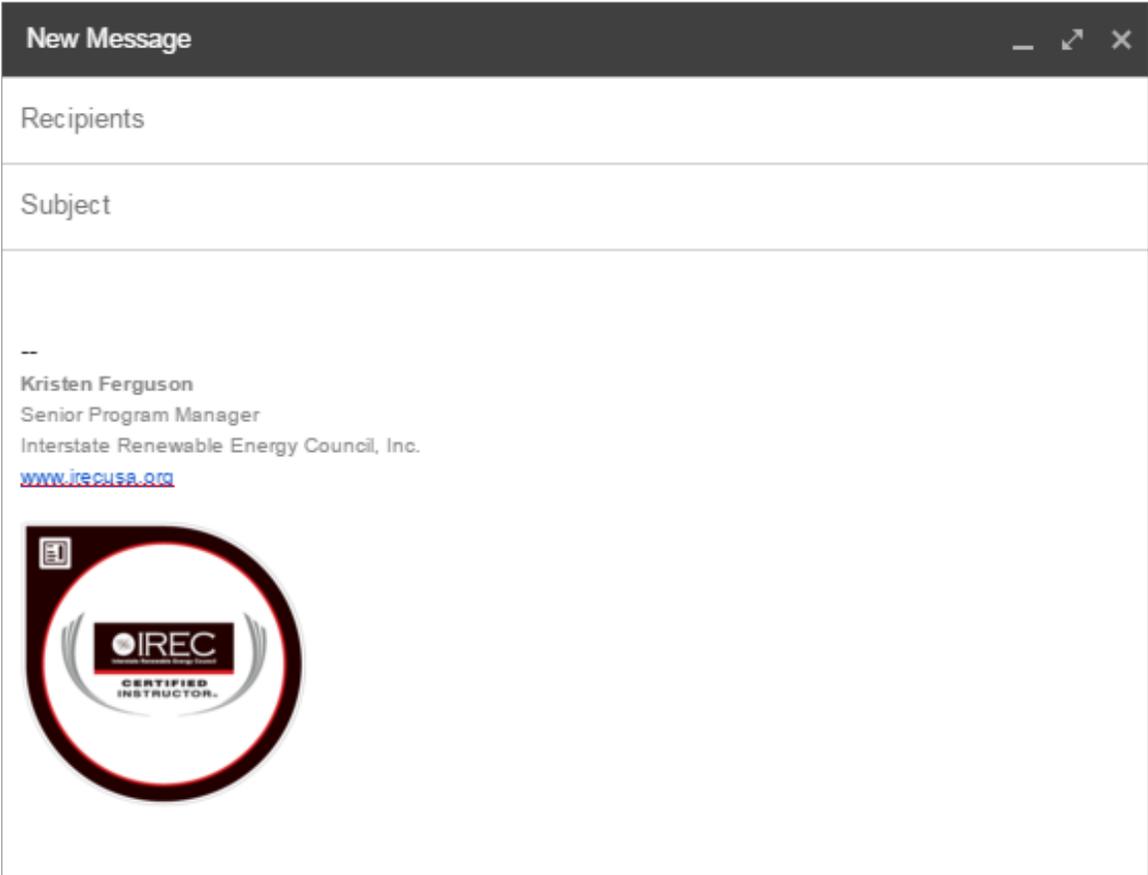
Step 4: Analyze data

Platforms come with easy to access analytics that show badge acceptance, shares and views (in the software platform). Below is an example of available analytics. In the example, the badges issued include those issued to 'friendlies' for platform testing prior to commencing the pilot.

Pilot Data

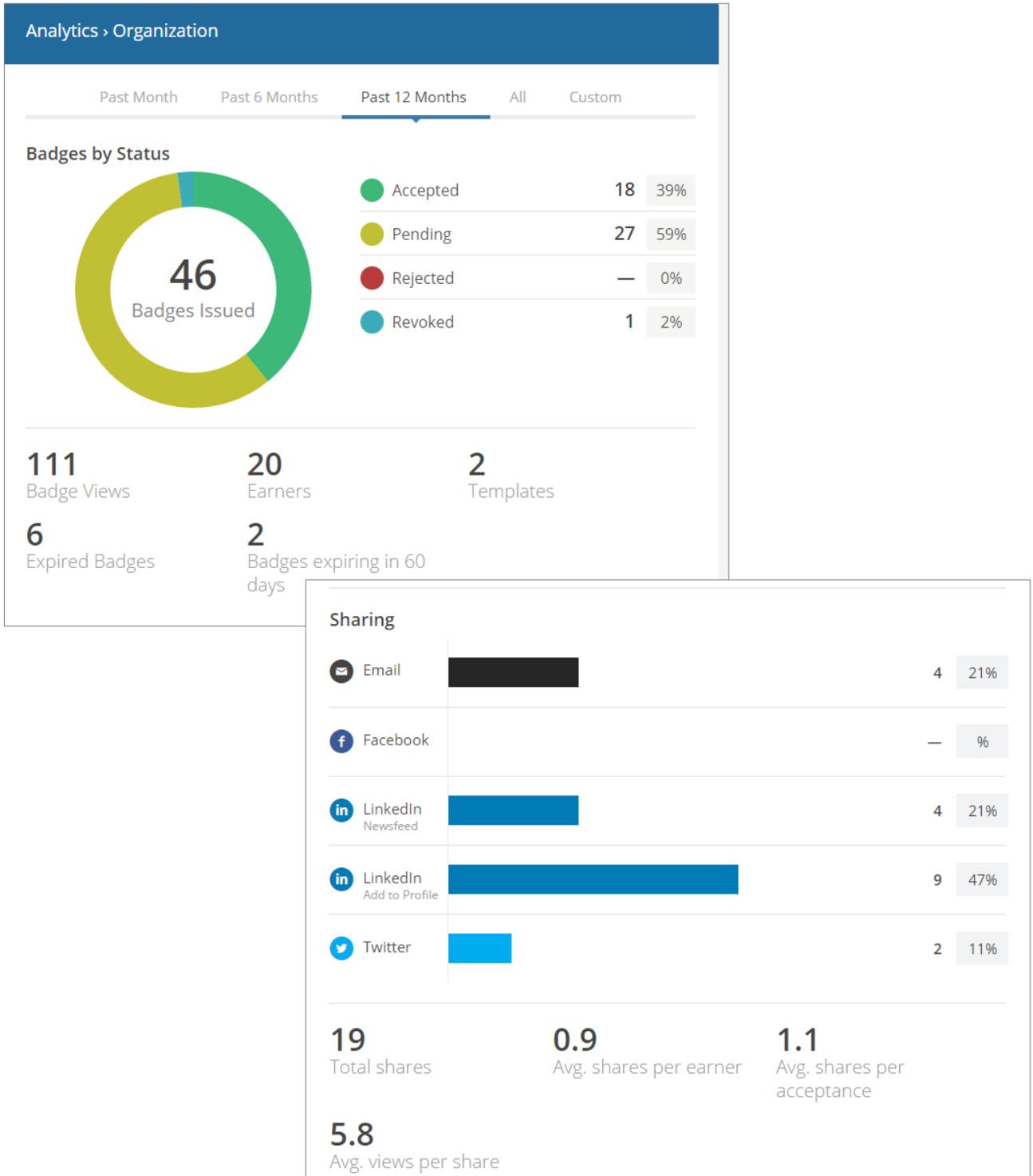In this pilot, 42 percent of certificants claimed the badge. There were 111 page views. Page views indicate that a badge was clicked on, and the certificant's Acclaim profile showing badge metadata was viewed. LinkedIn was the most popular method for sharing.

Step 5: Survey stakeholders

The digital credential is intended to strengthen the value of the credential. Therefore, a brief survey can provide good feedback. Questions should cover: What value do your credential holders find in having a digital representation of the credential? How did they find the process of claiming and sharing the badge? How can the experience of claiming and sharing the credential be improved? How can you help the user leverage their digital credential?

Engaging hiring organizations is critical. We will see the growth of digital credentials when organizations recognize their value and begin to demand them for hiring and promotion purposes.

PILOT SURVEY RESULTS

Below are some examples of credential holder comments.

Barriers to acceptance. Some certificants did not claim the badge upon issuance because they lost the link or were unsure of the benefits or requirements.

Digital aspect. All credential holders surveyed felt the ability to display their certification(s) online in professional networking sites such as LinkedIn, or via email was important or very important.

> In the words of IREC credential holders, a digital representation of my credential:
>
> *"Provides quick identification"*
> *"Makes it easy for stakeholders, clients, etc. to access and view"*

Comments on the process of claiming the badge. All but one user described the process of claiming the badge, which included setting up a password on the software platform, as very easy. An online survey of users two months after credentials were issued revealed some of the barriers to acceptance. Three primary reasons for not claiming the badge emerged: 1) the certificant did not have time; 2) the certificant did not understand the value of the badge; 3) the certificant did not understand the relevance of the email issuing the badge, which came from Acclaim.

LESSONS LEARNED

1. Digital badges and credentials, although aligned with a worker's electronic presence, are seldom used. Consider the tools of the professional: LinkedIn networking sites, online job search platforms, and resume posting sites. For long term success, each industry will need to emphasize the value of the digital credential to both hiring organizations and credential holders. This is an investment of time, perhaps over the course of two years or more.[1] Simultaneously, multiple sectors will need to build awareness of digital credentials to make them the new norm. We have a chicken and the egg problem: digital credentials are valuable if they are sought by a hiring organization; however, enough valid and valuable digital credentials must be in the marketplace to impel the hiring organization and credential holder to look for and demand them.

2. The best investment in a successful digital credential initiative is a strategic and targeted communications campaign to educate stakeholders about digital credentials in the larger context of the professional world as well as in their industry. Stakeholder communications are critical. Creating a communications plan for roll out is essential. For example,
   a. Let certificants, employers, other stakeholders know about the initiative in plenty of time to promote buy-in.
   b. When the digital credential is offered, explain in the email exactly how much time is required of the credential holder to accept the badge. It is about 2 minutes.
   c. Let certificants know how to get the most of the digital platform. Give them tools to show exactly how to share on LinkedIn, email signature, website, etc.
   d. Plan a series of staged blog posts, newsletter articles, and other communications to raise awareness about the initiative.

3. It is necessary to provide users with information on how to leverage the digital credential and take advantage of the added value. This may be targeted emails, website posts, or other avenues, but repeated attempts should be made.

4. Digital credentials will be most valuable to professionals who regularly use online platforms for work such as LinkedIn.

5. A valid assessment of skills and knowledge must be at the core of the issuance of the credential in order to ensure confidence in its credibility.

6. Credentialing bodies are leery of costs, financial and staff time, to invest in a digital credentialing program, but at the same time quickly grasp the inherent value in this type of representation.

7. Existing digital badge software platforms limit customization. For example, at this time, there is no way to include a badge or certificate number on the visual representation of the digital credentialing mark.

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[1] As discussed on Webinar Badging to "Support Professional Development and Career Building" on August 27, 2015

8. Credentialing bodies wish to integrate badge issuance with existing customer relationship management products. Some badge platforms integrate with Moodle, Salesforce, WordPress, Drupal, uCertify, and other platforms.
9. The software badging platform sends out two additional reminders to claim the badge after the first issuance. Each certificant holder has a unique URL to claim the badge. It may be useful to plan an additional reminder email that comes directly from the credentialing body which contains a unique link to claim the badge. It is possible some holders will read the email from the credentialing organization but not that of the badging platform.

PATH FORWARD

A coordinated, multi-sector campaign can accelerate the adoption of digital credentials, which in turn can promote "hiring for competency" practices. IREC plans to continue making the digital credential available to certified master trainers and instructors beyond the life of the pilot. IREC continues to act a resource for credentialing bodies, within and beyond the clean energy industry. Learn more about the process of undertaking a digital credentialing program by viewing this narrated presentation here.

IREC Presentation on Digital Credential Pilot

For a 14 minute narrated presentation, visit https://youtu.be/3czMGlMVmcA

Or view the slides on the IREC website here.

REFERENCES

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