DEIMAN4FINANCE

WP2.A5 - Open Badges Ecosystem

Developed by Emphasys CENTRE

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Introduction

This document presents the **assessment methodology** incorporated in the DEIMAN4FINANCE Courses Pack (WP3.A1) to assess and validate the knowledge, skills and attitudes gained by middle managers in the financial sector. This assessment methodology would be the procedure towards the transformation of learners **into DEI Managers** and their personal and professional development. The methodology follows European Vocational Education and Training (VET) principles and aligns with the European Qualifications Framework (EQF), ensuring transparency, transferability, and recognition of learning outcomes.

Description of Open Badges Ecosystem

General information

Open Badges are a digital representation of skills, learning outcomes, achievements or experience such as:

- Knowledge acquisition
- Hard skills: knowledge, competences etc.
- Soft skills: communication, teamwork etc.
- Participation and applied competence
- Recognized micro-credentials

Open Badges can be shared:

- On blogs, websites, portfolios, professional networks, social media
- In job applications
- In email signatures

Advantages

Acquiring Open Badges provides the following benefits for learners:

1. Recognition of competences acquired through formal, non-formal, and informal learning
2. Portable and verifiable digital credentials that can be displayed on online CVs and social networks
3. Transparent documentation of learning pathway and supporting evidence
4. Verified metadata including issuer, EQF level, and assessment criteria
5. Structured progression pathways supporting employability and career advancement
6. Validation of transversal and professional skills valued by employers
7. Credentials issued by a wide range of organisations, including non-profits, employers, and educational institutions, according to recognized Open Badge specifications and quality assurance procedures

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Open Badges Ecosystem

Below, the "life cycle" of an Open Badge is demonstrated. Issuers, who can be anyone from Education providers to a website or any organization, first create (design) and then deliver to (award) the Recipient (Earner) the Open Badge images, which Earners then store in a 'backpack' or any other displayer. The displayer is connected to the Issuer who verifies the content and displays the verified information (metadata) to various consumers (employers, college admission officers) who are interested in their accomplishments and wish to verify the validity and credibility of the awarded badge.

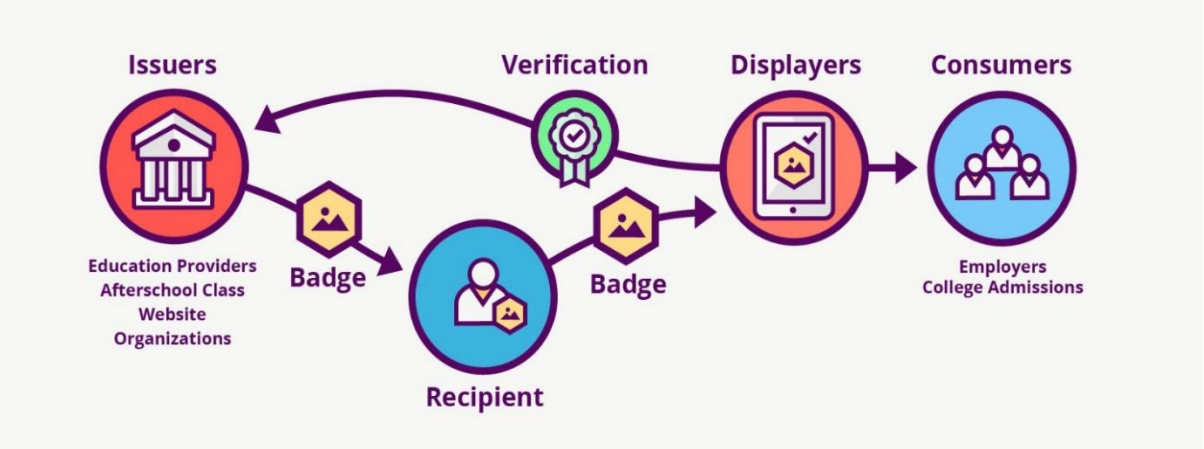

Figure 1: An Open Badge Ecosystem (Life Cycle)

Description of the DEIMAN4FINANCE Open Badges Ecosystem

General information

The DEIMAN4FINANCE consortium has developed 5 stackable Open Badges correspond to the five training courses in the already developed syllabus (WP2.A3) and the Course Pack to be developed under WP3.A1. The Open Badges follow the colour palette and style of the logo, ensuring its unique identity.

Each badge is aligned with:

- European VET learning outcome structure
- EQF Level 6
- Micro-credential principles
- Evidence-based assessment

More specifically, the Open Badges correspond to the following training courses:

- **Course 1:** Disability Inclusion
- **Course 2:** Gender Discrimination
- **Course 3:** Multicultural Competence
- **Course 4:** Inclusive Language and Cognitive Bias Reduction
- **Course 5:** EU Regulation on Work Inclusion

Proposed Qualification Level

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EQF Level: 6

Participants should demonstrate:

- Advanced knowledge of DEI concepts in finance
- Critical understanding of theories and frameworks
- Advanced analytical and implementation skills
- Responsibility for decision-making in complex organisational contexts

Criteria to earn an Open Badge

The criteria for earning an Open Badge were set by the DEIMAN4FINANCE consortium and led by Emphasys Centre, the leader of this activity and of the platform's development. To ensure alignment with European VET assessment standards, badge acquisition requires successful completion of:

1. Registration and participation on the DEIMAN4FINANCE platform: https://dei-finance.eu/
2. Completion of each course through the available questionnaire
3. Quiz assessment (minimum 60% success rate)

Volume of Learning and Stackability

Each course includes an estimated workload of approximately 50 hours and corresponds to one micro-credential unit aligned with ECVET principles. The courses are designed as a stackable pathway, allowing learners who successfully earn all five badges to obtain the DEIMAN4FINANCE DEI Manger Professional Credential.

Figure 2: The DEIMAN4FINANCE Open Badges

The DEIMAN4FINANCE Ecosystem

According to ***Figure 1*** and the description previously provided, the Ecosystem of the DEIMAN4FINANCE Open Badges is as follows:

1. Issuer: the DEIMAN4FINANCE consortium
2. Open Badge: the credential (5) based on the training module (5) **- *Figure 2***
3. Recipient: the middle managers (or any other interested bodies in the financial sector)

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4. Displayer: website, social media, CV, portfolios, networks, etc.
5. Consumers: employers, institutions, stakeholders, etc.

Description of the DEIMAN4FINANCE Open Badges

Course 1: Disability Inclusion

This course develops advanced competence in disability inclusion within financial institutions, equipping learners with knowledge of international conventions, EU accessibility legislation, and organisational compliance requirements. Participants learn to analyse systemic barriers, design accommodation and accessibility strategies, and lead inclusive policy implementation while ensuring ethical and legal responsibility in complex workplace contexts.

EQF Level: 5-6

Learning Outcomes	Knowledge	Skills	Responsibility & Autonomy
LO1. Analyse systemic barriers in finance	• Social Model of Disability • Structural discrimination mechanisms • Accessibility legislation principles • Intersectionality theory	• Analyse organisational systems • Detect structural exclusion • Interpret compliance gaps • Conduct barrier audits	• Integrate findings into strategy • Lead accessibility improvements • Ensure inclusive decision-making
LO2. Evaluate organisational compliance	• European Accessibility Act • UNCRPD standards • Regulatory obligations • Compliance frameworks	• Perform compliance audits • Interpret legal standards • Assess risk exposure • Produce evaluation reports	• Ensure regulatory alignment • Advise leadership • Monitor compliance systems
LO3. Design accommodation plans	• Reasonable accommodation principles • Workplace adaptation methods • Neurodiversity inclusion • Undue hardship criteria	• Design individual plans • Match needs with solutions • Evaluate feasibility • Apply inclusive HR approaches	• Make decisions in complex cases • Balance organisational constraints • Ensure equity
LO4. Address unconscious bias	• Bias theory • Disability stereotypes • Organisational culture dynamics • Inclusion psychology	• Identify bias patterns • Apply mitigation strategies • Facilitate awareness sessions • Evaluate behaviour change	• Promote bias-free culture • Model inclusive conduct • Guide teams

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LO5. Apply intersectional analysis	• Intersectionality frameworks • Gender-disability links • Ethnicity and exclusion factors • Inclusion data indicators	• Analyse intersectional barriers • Develop targeted strategies • Interpret demographic trends • Evaluate impact	• Lead inclusive retention strategies • Ensure fair access • Adapt policies autonomously
LO6. Develop accessibility action plan	• WCAG standards • Accessibility tools • Inclusive design principles • Financial product accessibility	• Draft action plans • Apply accessibility standards • Design inclusive services • Monitor outcomes	• Oversee implementation • Evaluate effectiveness • Drive innovation

Assessment criteria: Learners will complete the **Course 1: Disability Inclusion** and will have to successfully passed with a minimum of 60% upon completion of the quiz (Moodle questionnaire) available on the project's platform, in addition to completing a case study analysis, an action plan, a reflective component, and the submission of supporting evidence demonstrating the learner's applied understanding and competence.

Volume of Learning: approximately 50 hours

Issuer: DEIMAN4FINANCE Consortium

Quality Assurance Process: Peer review among Consortium

Figure 3: Open Badge for Course 1: Disability Inclusion

Course 2: Gender Discrimination in Finance

This course provides advanced understanding of gender discrimination frameworks, structural inequalities, and EU equality directives relevant to the financial sector. Learners gain analytical and strategic skills to identify bias, design gender-inclusive policies, and implement organisational change initiatives that promote equitable decision-making and inclusive leadership cultures.

EQF Level: 5-6

Learning Outcomes	Knowledge	Skills	Responsibility & Autonomy

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LO1. Define gender discrimination concepts	• Gender equality frameworks • Bias typologies • EU directives • Intersectionality	• Distinguish concepts • Interpret cases • Explain disparities • Apply terminology	• Promote informed dialogue • Ensure accurate interpretation • Guide teams
LO2. Identify bias patterns	• Recruitment bias • Leadership inequality • Workplace culture dynamics • Pay gap mechanisms	• Detect bias indicators • Analyse HR data • Evaluate decisions • Map inequality patterns	• Ensure fair processes • Intervene when bias appears • Promote transparency
LO3. Analyse disparities through case studies	• Quantitative indicators • Qualitative evaluation methods • Financial sector gender data • Inclusion metrics	• Conduct case analysis • Interpret datasets • Compare scenarios • Draw conclusions	• Lead analytical assessments • Inform policy decisions • Support evidence-based action
LO4. Apply DEI strategies	• DEI frameworks • Inclusive HR models • Organisational change theory • Leadership inclusion	• Design interventions • Implement policies • Facilitate inclusion initiatives • Monitor results	• Lead change processes • Take strategic decisions • Ensure accountability
LO5. Design gender-inclusive policies	• Equality legislation • Policy design principles • Best practice benchmarks • Institutional governance	• Draft policies • Align with regulations • Assess feasibility • Present proposals	• Oversee implementation • Ensure compliance • Evaluate outcomes
LO6. Evaluate impact of measures	• Monitoring frameworks • KPIs for equality • Evaluation models • Continuous improvement theory	• Develop indicators • Analyse results • Interpret trends • Recommend improvements	• Lead evaluation cycles • Adjust strategies • Ensure sustainability

Assessment criteria: Learners will complete the **Course 2: Gender Discrimination** and will have to successfully passed with a minimum of 60% upon completion of the quiz (Moodle questionnaire) available on the project's platform, in addition to completing a case study analysis, a policy design, and a reflective component.

Volume of Learning: approximately 50 hours

Issuer: DEIMAN4FINANCE Consortium

Quality Assurance Process: Peer review among Consortium

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Figure 4: Open Badge for Course 2: Gender Discrimination in Finance

Course 3: Multicultural Competence for DEI Managers in the Financial Sector

This course strengthens learners' ability to address cultural diversity and migration realities in financial environments. It develops skills in analysing demographic and socioeconomic data, designing inclusive financial strategies, and managing intercultural dynamics, enabling participants to lead initiatives that ensure equitable access to services and inclusive organisational practices.

EQF Level: 5-6

Learning Outcomes	Knowledge	Skills	Responsibility & Autonomy
LO1. Identify communities in financial context	• Migration demographics • Inclusion policies • Cultural identity theory • Socioeconomic determinants	• Analyse data • Map communities • Interpret indicators • Identify barriers	• Integrate insights into planning • Promote inclusion • Ensure sensitivity
LO2. Analyse diverse financial needs	• Financial exclusion drivers • Cultural behaviour patterns • Access barriers • Inclusion models	• Conduct needs assessments • Interpret client profiles • Compare contexts • Evaluate risks	• Ensure equitable services • Inform product design • Adapt strategies
LO3. Design inclusion actions	• Inclusion frameworks • Intervention models • Stakeholder ecosystems • Social impact concepts	• Design programmes • Select tools • Coordinate stakeholders • Plan implementation	• Lead initiatives • Allocate resources • Monitor progress
LO4. Apply intercultural communication	• Communication theory • Cultural competence principles • Conflict dynamics • Linguistic diversity	• Adapt communication style • Facilitate dialogue • Manage misunderstandings • Apply mediation techniques	• Model intercultural respect • Guide teams • Foster inclusive environments

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LO5. Develop monitoring tools	• KPI frameworks • Impact measurement models • Data evaluation methods • Reporting standards	• Design indicators • Analyse results • Produce reports • Adjust tools	• Ensure accountability • Oversee monitoring systems • Improve strategies

Assessment criteria: Learners will complete the **Course 3: Multicultural Competence for DEI Managers in the Financial Sector** and will have to successfully passed with a minimum of 60% upon completion of the quiz (Moodle questionnaire) available on the project's platform, in addition to completing a data analysis task, an inclusion strategy, and a reflective component.

Volume of Learning: approximately 50 hours

Issuer: DEIMAN4FINANCE Consortium

Quality Assurance Process: Peer review among Consortium

Figure 5: Open Badge for Course 3: Multicultural Competence for DEI Managers in the Financial Sector

Course 4: Inclusive Language and Cognitive Bias Reduction

This course builds advanced awareness of cognitive bias, social cognition, and inclusive communication principles. Learners acquire practical tools to identify bias in decision-making, apply debiasing strategies, and implement inclusive language practices, supporting psychologically safe workplaces and sustainable behavioural change within teams.

EQF Level: 5-6

Learning Outcomes	Knowledge	Skills	Responsibility & Autonomy
LO1. Explain inclusion and bias concepts	• Social cognition theory • Identity frameworks • Bias types • Belonging models	• Define concepts • Interpret examples • Distinguish bias forms • Explain impacts	• Promote awareness • Support learning • Guide discussion

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LO2. Understand bias influence	• Decision-making psychology • Implicit bias theory • Workplace behaviour science • Leadership bias research	• Detect bias effects • Analyse decisions • Evaluate judgments • Map influence patterns	• Ensure fair decisions • Challenge bias • Promote objectivity
LO3. Apply debiasing techniques	• Evidence-based strategies • Behavioural interventions • Inclusive management methods • Evaluation models	• Implement techniques • Facilitate workshops • Adjust processes • Assess results	• Lead interventions • Sustain behavioural change • Support teams
LO4. Implement inclusive language	• Inclusive language principles • Linguistic framing effects • Communication ethics • Accessibility standards	• Adapt language • Draft inclusive texts • Review communications • Train staff	• Model inclusive speech • Guide communication policy • Ensure consistency
LO5. Evaluate organisational practices	• Inclusion metrics • Culture assessment tools • Audit frameworks • Improvement models	• Conduct audits • Analyse culture data • Identify gaps • Recommend solutions	• Lead improvements • Monitor progress • Ensure accountability

Assessment criteria: Learners will complete the **Course 4: Inclusive Language and Cognitive Bias Reduction** and will have to successfully passed with a minimum of 60% upon completion of the quiz (Moodle questionnaire) available on the project's platform, in addition to completing a communication audit, and intervention proposal.

Volume of Learning: approximately 50 hours

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Figure 6: Open Badge for Course 4: Inclusive Language and Cognitive Bias Reduction

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Course 5: EU Regulation on Work Inclusion in Finance

This course equips learners with in-depth knowledge of European regulatory frameworks governing workplace inclusion and anti-discrimination. Participants develop skills to interpret legislation, conduct compliance audits, align organisational policies with EU standards, and advise leadership on legal risks while ensuring responsible governance and accountability.

EQF Level: 5-6

Learning Outcomes	Knowledge	Skills	Responsibility & Autonomy
LO1. Interpret EU inclusion legislation	• EU directives • Employment law principles • Anti-discrimination frameworks • Compliance systems	• Interpret legal texts • Compare regulations • Identify obligations • Explain implications	• Ensure legal adherence • Advise teams • Support policy decisions
LO2. Conduct compliance audits	• Audit methodologies • Legal benchmarks • Reporting standards • Risk frameworks	• Perform audits • Analyse documentation • Detect gaps • Draft reports	• Ensure compliance oversight • Recommend corrective action. • Monitor progress
LO3. Align organisational policies	• Policy alignment principles • Governance standards • Inclusion benchmarks • Regulatory requirements	• Revise policies • Match standards • Design improvements • Evaluate feasibility	• Lead alignment processes • Ensure consistency • Support leadership
LO4. Develop risk mitigation strategies	• Legal risk theory • Compliance risk types • Governance models • Preventive frameworks	• Identify risks • Design mitigation plans • Evaluate exposure • Monitor indicators	• Make strategic decisions • Advise executives • Ensure safeguards
LO5. Evaluate policy effectiveness	• Evaluation models • Monitoring tools • Impact assessment methods • Reporting obligations	• Analyse outcomes • Interpret metrics • Compare benchmarks • Recommend changes	• Oversee evaluation cycles • Ensure accountability • Improve governance

Assessment criteria: Learners will complete the **Course 5: EU Regulation on Work Inclusion in Finance** and will have to successfully passed with a minimum of 60% upon completion of the quiz (Moodle questionnaire) available on the project's platform, in addition to completing a compliance report, a policy draft and a reflective component.

Volume of Learning: approximately 50 hours

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Figure 7: Open Badge for Course 5: EU Regulation on Work Inclusion in Finance

Conclusion

Within this document, the DEIMAN4FINANCE Open Badges ecosystem provides a structured, transparent, and VET-aligned framework for recognising learners' achievements through EQF-referenced micro-credentials that validate knowledge, skills, and responsibility/autonomy in inclusive financial sector practices. By integrating evidence-based assessment, stackable learning pathways, and clearly defined competence standards, the system ensures credibility, transferability, and professional relevance of each badge. This approach not only supports participants' progression toward the DEI Manager Professional Credential but also strengthens employability, organisational capacity, and the overall impact of inclusive practices within the European financial sector.

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