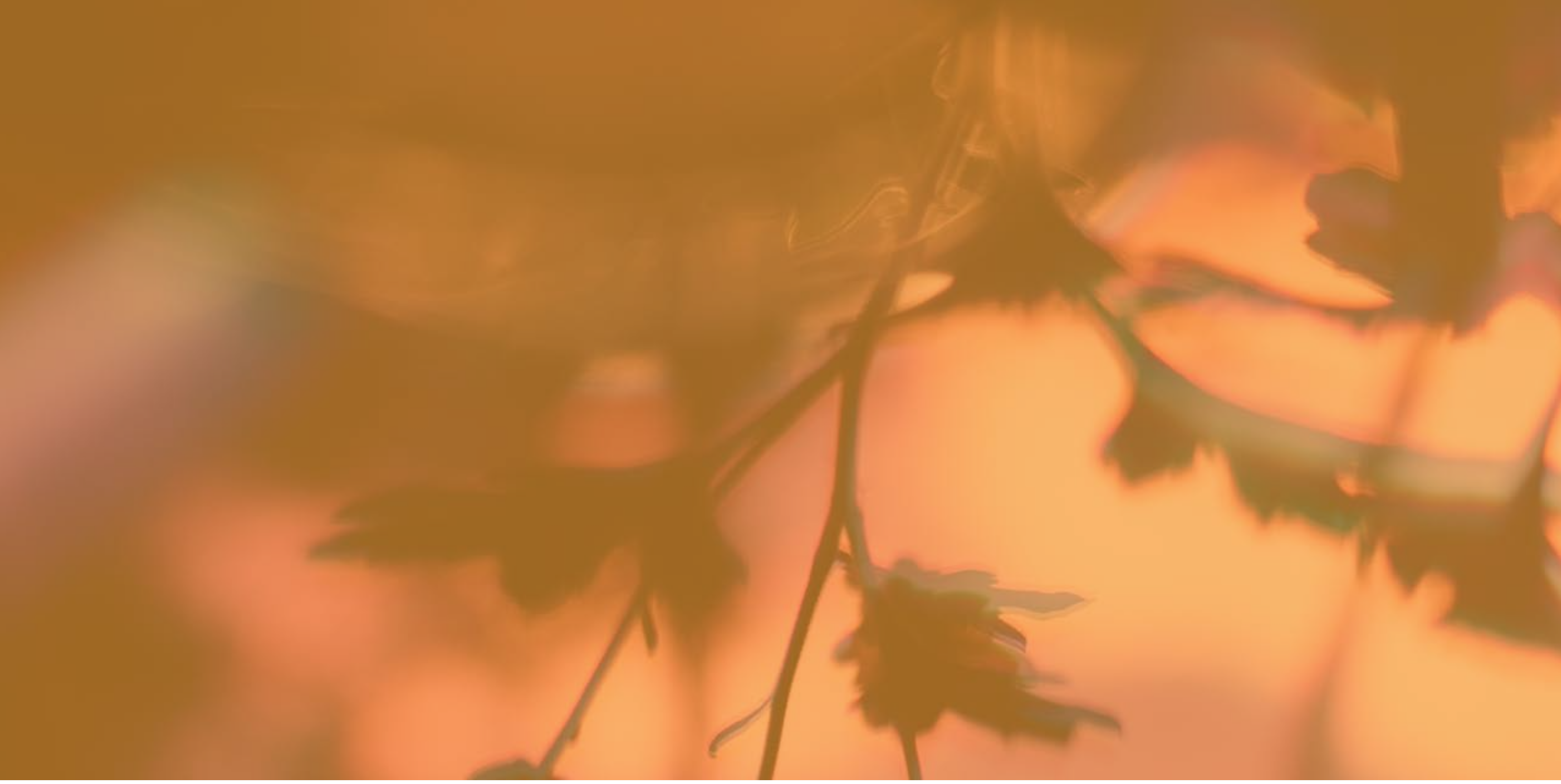

30 lessons from – and for – student-led innovation in higher education

Strategic learning from hackED's 2016-2017 year
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hackED is a J.W. McConnell Family Foundation RECODE initiative

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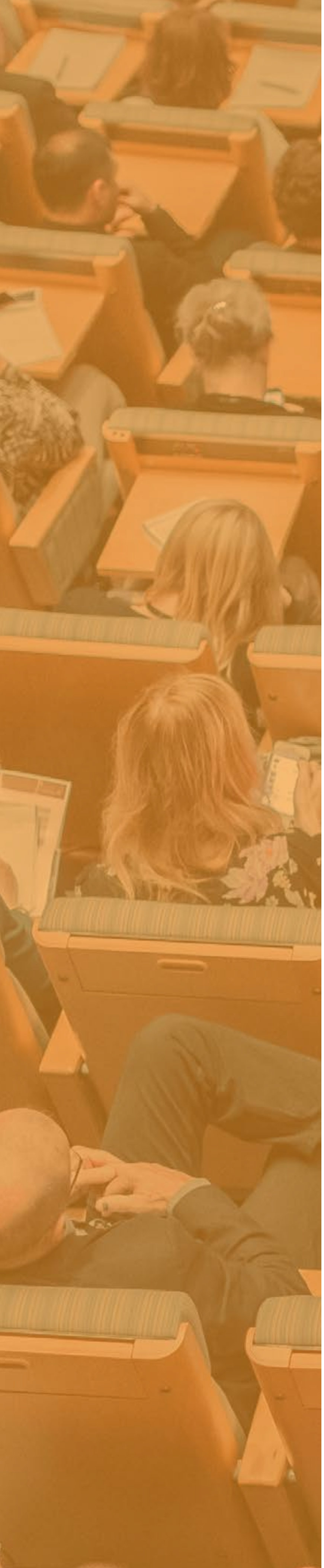
30 lessons from hackED's 2016-2017 year

1. Strong stories are better than loud ones. Instead of putting so much effort into reaching as many campuses as possible, we should have found ways to tell a stronger story. **2. Social change is social.** We should have socialized our early leaders, connecting them more deeply to the kinds of problems we aimed to solve. **3. Exit interviews.** Exit interviews might have helped us catch some crucial mistake in our process, preventing further exits. **4. Don't start anew when you could continue.** Why start anew when you could continue someone else's work? Instead of recruiting students with little connection to us or our on-campus partners, we should have connected with RECODE champions and our networks. **5. Aim small.** We should have started by scaling deep: establishing small communities and a culture of hackED on a few campuses. **6. Be ready.** Prepare all content and resources – including those materials needed later in the term – in advance of the start of the term. **7. Organizational learning has to be intentional.** Collect continuous ideas for improvement in a centralized form and plan deliberate debriefs after each phase of programming is completed. Use those debriefs (and a calendar) to build deliberate feedback loops across program delivery cycles. **8. No gambling with quantitative goals.** We shouldn't have gambled with quantitative goals, setting lofty, arbitrary targets. Qualitative goals would have been more accurate and more powerful. **9. Grow deep, not wide.** We rushed to spread out. Instead, we should have measured hackED's growth at this early stage in learning and in engagement. **10. Don't mistake vision for purpose.** In hindsight, we knew neither what problems we were solving nor who we were really solving them for. Don't follow cause alone: outline the theory of change behind the work. **11. Celebrate results.** Each time we heard about successes from our members, we should have shared the results across the network. **12. Find existing champions.** We assumed we needed our "own" leaders to make our programming happen at campuses across the country. Instead, we should have engaged existing campus groups to partner with us on their campus. **13. Facilitate mentorship success by starting with real-world connections.** Begin mentorships by finding opportunities to connect mentor and mentee in-person. In lieu, find a way to create a cultural connection online. **14. Money matters.** Consider using honoraria or paid employment as an incentive to keep students engaged. **15. Set expectations, performance metrics, and feedback loops.** Expectations are set by what is done more than by what is said. Create a culture of acknowledgement, consequences, and actions. **16. Make room for social connection.** Make involvement a fun and personally engaging experience. When spending time together, focus not only on what needs to be done, but also on learning about each other, why you're involved, and what's going on in your lives. **17. Build in disengagement detection processes.** Team leads should personally check in with each member on a highly regular basis, especially when teams are distributed and volunteer. **18. Give permission and create space for burnout.** Acknowledge that burnout/fadeout happens, and do so publicly within the team. Make sure team members know that they can admit difficulty to one another and that taking a step back is encouraged. **19. Recruit more aggressively than you think necessary.** In a volunteer, distributed team, the more the merrier. We tried to keep the team small, but having more team members might have made a substantial difference in disengagement. **20. Use a robust and real-time availability/scheduling system** Collect real-time availability – e.g., through a shared calendar service that actively displays the overlapping schedules of a team – and book meetings two weeks out. **21. Create a culture of asynchronous engagement.** Asynchronous, remote work needs to have team touchpoints. Create a culture of mutual engagement and reinforcement. **22. Divide and conquer – then reunite.** If a simultaneous meeting isn't possible, split the team into groups that can meet and find some way to share updates between these groups. **23. Balance is key in management.** A balance must be struck between macromanagement and micromanagement such that volunteers have enough instruction that they can practice their creative skills but enough clarity that they don't struggle with decision-making. **24. One-on-ones and personal check-ins should be important and frequent.** Find ways to track each team members' burdens and check in frequently. **25. Keep per-person task lists clear on responsibilities, deadlines, and dependencies.** A clear picture of what everyone is doing – and how it links together – will help drive both one-on-one and full team meetings. **26. Start partnerships from the foundations.** Work with external partners to design shared projects together, instead of bringing them in after plans have already been made. **27. Make it real.** Find concrete opportunities for real critique and feedback throughout project design and development phases. This means getting hands dirty: building out components so that they can be prototyped and played with. **28. Develop feedback loops.** Actively search for partners' impressions of the project. Find creative ways of unearthing suspicions or apprehensions, and examine those concerns fully as early as possible. **29. Launch late.** Build up to the launch of a community. Keep the launch details clear – the where, when, and how – while fostering suspense and pressure to participate. **30. Launch loud.** If you're looking for more participation and membership, share the news of your community with a loud, vibrant marketing campaign.

Dive deeper into these 30 lessons.



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Preamble: Student-led innovation in higher education

Student engagement in post-secondary is complicated. On the one hand, we know that some students are powerful activists. We regularly see the activity of the student movement, urging school administrations to act on pressing socio-political matters. On the other, most students are increasingly under pressure to beef up their resumés, all the while paying tuition fees, striving for good grades, and having some semblance of a social life--leaving little room for extra-curricular involvement. Not to mention that most students are only at one institution for a period of 2-4 years, making long-term social change on campus difficult to see through.

As an organization that takes a multi-generational view of social change, these complications raise the dilemma of whether working with students is strategic. Herein lies the big question: how might we, as a Foundation initiative, best support students nationwide in being changemakers on their respective campuses? Could we build a movement by working directly with students, rather than with faculty and administrators?

With hackED (originally RECODE Collaborate), our first major student-facing initiative, we decided to go the direct route. hackED was an effort to: a) create a network of student leaders across the country; and b) develop local chapters that would meet regularly to make change on their campuses.

After round one of the project, did we get any closer to answering the big question? Two years of hackED showed that RECODE, in the sphere of student engagement, has more work to do. While recognizing the importance of students to our goals and vision, we're currently much better placed to work with educators and administrators at an institution.

This report details the 30 lessons we learned from collaborating with students for hackED. We would like to thank the student coordinators and volunteers for the time and effort they contributed to the hackED project, especially Ara, Barbara, Ben, Christopher, Colin, Karli, Kathryn, Nadia, Sara, Tom, Will, and Yerin. Their passion and ideas for institutional change gave RECODE invaluable insights as to how we can increase our impact, while also affirming the importance of our work in post-secondary social innovation.

Student Programs

hackED's 2016-2017 student strategy: ***Develop a national network of student leads coordinating hackED campus programming at their schools***

Our aim was to develop a student-to-student network across the country by engaging and empowering student leaders ("hackED Campus Leads"). Our theory: students were passionate about the same issues we were. Given the right opportunity, resources, and guidance, we dreamed that the students we engaged would champion these causes at their school and bring their classmates into our programs, too.

We recruited Campus Leads at 60+ schools across the country through postings on volunteer and job boards, posters distributed through student affairs departments and similar units, and social media ads. We targeted public universities and colleges, especially RECODE grantees and schools with social innovation/ entrepreneurship programming. These recruitment blitzes – two in total, each run at the beginning of the semester – resulted in 77 signups from 22 schools on hackED's online "Get Involved" form.

This heartening response did not translate easily into highly engaged campus champions, unfortunately. Of those that signed up to get involved, only 16 students at 12 schools pursued the opportunity further by connecting to hackED's online Slack community and joining calls with the national team. From there, the national team worked to support these Campus Leads in launching hackED on their campus, providing them with advice and materials to coordinate hackED Roundtables. Engagement worsened, however: many Campus Leads struggled to stay connected and eventually stopped responding to the team. Only four Roundtables were held in 2016-2017.

In this section:

A. Student engagement is a sales problem

We had framed this engagement problem as a gap in students' organizing capacity. We thought our Campus Leads chiefly needed help coordinating, and attempted to address this through service-oriented tactics. We created guides to organizing on-campus, shared progress updates between schools, and tried to remain constantly available to help troubleshoot.

In retrospect, while these supports were useful to some, they were not enough. Many of our potential Campus Leads did not engage beyond completing an online form or signing up for our Slack community. It is now clear that something else kept our student leads from engaging as deeply as we'd hoped they would.

What we learned

Students are busy people. Challenging courses are just the beginning: many students are also trying to figure out career paths, social lives, finances, and a host of other competing priorities – and that's before we start talking about extra-curricular opportunities like hackED.

That isn't the lesson, of course; many of us know this from previous experience (our own included)! However, we had hoped getting involved in hackED would be a self-propelling engagement; that many students would share our passion for the future of higher education and be deeply committed by default. Instead, this cause – while doubtlessly important in the minds of everyone involved in education – is not necessarily more important than many of the other issues fighting for students' attention.

Our own passion for the cause may have blinded us to the idea that many students did not yet share that passion – at least, not to the same degree. Moreover, that the role was free and that materials and support were provided may have let us forget the true cost of this kind of opportunity: students' time.

We were trying to give away change, but we did not sufficiently recognize the extent to which our changemakers had to buy into it.

In other words: engagement is a sales job. You believe in your cause, and it's not a product, so it feels like the rules shouldn't apply. Yet people are spending their attention on you, and they may need to be convinced that it's worth it.

What we would do differently

Lesson 1: Strong stories are better than loud ones

Instead of putting so much effort into reaching as many campuses as possible, we should have found ways to tell a stronger story. Our Campus Lead recruitment happened through static graphics and print posters, when we should have produced multimedia to profile hackED's vision and mission to share the passions of those already involved. We should have connected with contacts on the ground at our target campuses – really connected – and enabled them to tell our story, too.

Lesson 2: Social change is social

Instead of trying to provide impersonal supports to those that had joined the cause, **we should have socialized our early Leads,** connecting them more deeply to the kinds of problems we aimed to solve (and the importance of solving them). Make it personal – and make friends.

Lesson 3: Exit interviews

The students that left or "faded out" before running a Roundtable were clearly limited by some barrier, but we were too busy engaging those that were still involved to chase down those who were leaving. **Exit interviews might have helped us catch some crucial mistake in our process,** preventing further exits.

B. Find ways to continue before you find ways to start

We set up Campus Leads as a standalone role on each campus. We even tried to recruit students with the opportunity to build hackED's presence on campuses from the ground up. In our vision, hackED Campus Leads would start conversations on campuses across the country, bootstrapping new collectives of education changemakers through our programs.

This was the intent behind our broad approach to promotion: plant small seeds of opportunity everywhere and those seeds will each grow into a forest.

This meant, however, that many students who signed up to help had no infrastructure with which to begin. Many could not even book rooms – they needed to ratify hackED as an official campus group before getting permission. We believe that many of our leads became discouraged by these start-up difficulties. This meant that, in practice, many of our "seedlings" floundered, failing to grow in conditions that they simply were not ready for.

In contrast, our successful roundtables were generally led by Leads who were resourceful and experienced. These students cleverly worked their way around barriers by using their previously-existing connections and resources. Similarly, Roundtables were attended best when Leads could mobilize existing networks to attend.

What we learned

The successes we observed demonstrate a pattern: instead of trying to break new ground everywhere, we may have found more success by embedding programs within already-latent environments. Where we tried to start new conversations, we should have found ways to continue, expand, or redirect existing ones.

By finding existing clusters of activity similar to hackED, or by recruiting only campus champions who were already highly engaged in their community, we could have leveraged existing social infrastructure, and our Campus Leads would have needed less supports to get started.

What we would do differently

Lesson 4: Don't start anew when you could continue

We knew we were not alone in working on the future of higher education in Canada. Yet we strove for independence, with a mentality akin to startups. **Why start anew when you could continue someone else's work? Instead of recruiting students with little connection to us or our on-campus partners, we should have connected with RECODE champions and our networks,** leveraging friendship and collegiality to fit hackED's ideas into existing opportunities.

Bruno Lam, for instance, used hackED's Roundtable process with impact@ UBC, facilitating a workshop with partners who were already connected to impact@UBC in order to discover next steps in their mission. Bruno was able to integrate hackED's ideas effortlessly, as he was already engaged in similar work.

Lesson 5: Aim small

We were set on scaling out and getting hackED programs onto as many campuses as we could. Instead, **we should have emphasized scaling deep: establishing small communities and a culture of hackED on a few campuses.** Had we focused our launch efforts on a few champions – key schools or campuses in which we had established links and already-keen students – we would have had less barriers and more ability to invest in those Leads. Later, as these communities became self-sustaining, we could have branched out.

C. Timing is crucial

One of the most important principles in design thinking is prototyping: find ways to test your assumptions against the real world early and often.

For most products or services, this is relatively easy. Validate your ideas through talking to your target audience, showing them your concepts, and letting them use or play with an actual artifact representing your vision.

We had good intentions. We sought to test our ideas in this sense, trying different approaches to promotion and engagement at different launches. What we couldn't control, however, is the march of the seasons – or in this case, semesters. What we learned in September would have to wait until January to try again. Thus, our ability to learn from our mistakes was hampered by a constant switching of modes. Worse, not only could the mistakes we made early in a semester not be rectified 'til the next, but those mistakes would snowball into bigger problems later in the current term.

For instance, when we were late to launch campus promotions in September (the third or fourth week on some campuses), we were also delayed in engaging the students who signed up early (as we were busy trying to distribute ads and posters). Then, as we scrambled to engage students, we were delayed in getting them the directions they needed to launch their on-campus activities. This led most Roundtables to be scheduled at the end of the term, when students were thinking more about their looming exams than they were about changing the (education) world. Not an ideal situation.

Then, when we learned lessons from this term (and had a stronger launch in the Winter semester), we had new lessons to learn – and so the supercycle continued.

What we learned

Student engagement happens in a well-defined cycle: students look for new opportunities at the beginning of the semester and lose time to contribute at midterms and finals. Our operations had to match that timing perfectly. Missed timeframes often meant waiting a full semester for the next opportunity to take action.

This lesson emphasizes the importance of timing when your programming is locked into the cycles of a bigger institution. Yes, this is perhaps self-evident – but hackED was student-led! No one knows the academic cycle better than us, and yet we still found ourselves lagging behind.

The true lesson is the ferocity of this semesterly schedule. There is no forgiveness, no flexibility. Unlike many other contexts and audiences, you can't even adapt to your mistakes. Missing your chance means waiting it out.

What we would do differently

Lesson 6: Be ready

Be ready across the continuum of your programs. **Prepare all content and resources – including those materials needed later in the term – in advance of the start of the term.** That way, delays early on in the cycle do not lead to an escalating drag on your programs.

Lesson 7: Organizational learning has to be intentional

Sometimes we're caught depending on instinct to remember and correct for our mistakes. We run an event, make note of the few things that went wrong, and return to those notes later when we're planning a similar event. In hackED's case, though, the semester's punishing schedule and our snowballing crises reduced the reliability of those mental notes (and this was not made easier with a remote team). Instead, **collect continuous ideas for improvement in a centralized form and plan deliberate debriefs after each phase of programming is completed.** Use those debriefs (and a calendar) to build deliberate feedback loops across program delivery cycles.

Developing an Idea Engine

hackED's 2016-2017 crowdsourcing strategy: ***Develop a self-sustaining network of student chapters that collaborate to analyze and ideate on how to improve higher education in Canada***

We imagined hackED could become an "idea engine" for transforming higher education in Canada. Connect with keen students (and staff and faculty) at institutions across the country, enable them to host conversations with their campuses, and facilitate that conversation such that it follows a deliberate (and productive!) path toward recognizing challenges and potential solutions on that campus. In the aggregate, these challenges and solutions could become a wellspring of direction for change – clear indicators of key pain points for the education system, and a grassroots network of problem-solvers coming up with clever innovations to resolve them.

As a bonus, our participants and Campus Leads would learn design thinking and systems change skills through practice. This network would therefore empower a generation of changemakers and help them identify what change they should make.

This year, we saw a glimmer of hope for this vision. Participants at Roundtables identified and prioritized interesting problems – usually unique to each campus – and theorized clever solutions to them.

These results could be a proof of concept for this model of network-based systems change. With stronger execution, a better approach to collecting and disseminating Roundtable ideas, and analytics revealing insights and leverage points for change from those ideas, such a network could become both a powerful crowdsourcing platform and a movement for change.

In this section:

What are the biggest concerns you've identified in higher education? Too much focus on academics and theoretical knowledge without the opportunity to apply those concepts in the workplace. The result? An abundance of academically excellent graduates without practical skills – who are also clueless about what career they can pursue.

A. Defining success

When we asked ourselves what success should look like, we jumped on the obvious: numbers. Roundtables held, Campus Lead applications received, participants at Roundtables – each of these served as a tantalizing indicator of whether we were reaching our goals.

It's of no surprise that when we didn't see the results we sought, we panicked. Not enough Campus Lead applications? We pushed harder on recruitment, regardless of who we'd already reached. Not enough engagement on our Slack community or in calls? We asked for more – or, worse, we went back to our recruitment problem. Not enough Roundtables? Push our Campus Leads harder. Low attendance at Roundtables? Emphasize promotions of the next one even more.

We knew every quantitative indicator was linked to others further down the "stack" of our work. What we didn't recognize is that many factors were out of our control. This was a pilot project with minimal resources, and yet we expected to be able to directly reach some (retrospectively) unlikely outcomes.

What we learned

Our quantitative expectations gave us goals, but not necessarily accurate ones – especially for a pilot project. We based these goals on little more than intuition, hope, and ambition. In hindsight, this was akin to gambling.

Meanwhile, we missed some potentially more powerful indicators of whether we were working in the right directions or taking the right actions. Who had we engaged? What were their barriers, challenges, hopes, and ambitions? What could we learn from them? How were we supporting them? What were they learning with our programs? What kinds of people were signing up to work with them, and what were the problems they sought to solve?

All of these qualitative questions have value – and answering them may have been more valuable than pursuing arbitrary quantitative goals.

What we would do differently

Lesson 8: No gambling with quantitative goals

We shouldn't have gambled with quantitative goals, setting lofty, arbitrary targets. Qualitative goals would have been more accurate and more powerful as indicators of whether we were doing the right thing.

Lesson 9: Grow deep, not wide

Trees must grow deep before they can grow tall. **We rushed to spread out. Instead, we should have measured hackED's growth at this early stage** in learning (How has the team increased in implementation capacity?) and in engagement (Who have we reached? Why? What did they learn from their experience?).

B. Vision without purpose

We set out with what we'd thought was a strong mission ("To accelerate grassroots, progressive innovation in higher education") and a strong vision ("hackED empowers a network of students and educators to co-creatively define, understand, and solve challenges in our education system and on our campuses").

These statements were challenged immediately by some of our reviewers – "so what?" – but we thought that innovation might be a purpose in and of itself. Post hoc, we aren't so sure.

What we learned

Now that 2016-2017 has come to an end and we can review the kinds of discussions that happened throughout our campus programs, the lack of purpose in our vision has become clearer. While students at different campuses across the country recognized interesting problems, these problems are united only by the theme that they involve post-secondary education.

This lack of specificity certainly fits with our vision. We did not set out to define what a better institution might look like for our students, and so the improvements participants highlighted are deliberately bottom-up.

However, this lack of direction may have made our task harder in two ways. First: it is not as inspiring as something "higher definition" might have been. "Help us innovate higher education" doesn't really have an audience, you see. Whose problem were we solving?

Second, it is not easy an easy prompt to respond to. What part of higher education are we innovating? Teaching and learning? Research practices? What is our scope – all of higher education? A particular campus or program in a particular school? What does a successful innovation look like – and what are the consequences we're looking for?

What we would do differently

Lesson 10: Don’t mistake vision for purposes

We had a powerful, inspiring, shared vision of collective problem-solving, **but in hindsight, we knew neither what problems we were solving nor who we were really solving them for. Don’t follow cause alone: outline the theory of change behind the work.** Answering these questions would have helped us find our calling – and that calling might have been better heard by potential participants.

C. Emergent design

There's creativity in numbers. hackED was designed with bottom-up in mind: find students on campuses across the country, empower them to organize their classmates, staff, and faculty, and learn from their discoveries. We aimed to crowdsource the challenges and innovations that could propel the country's post-secondary environment forward.

We could then take what individual campus communities learned and share it with others, looking for resonant issues that we could tackle nationally while cross-pollinating ideas that could help resolve old problems in new contexts.

To make this work, we designed a facilitation process around student-led Roundtables (see appendix A). The guide walked our campus leads through the facilitation of a set of collaborative exercises – from icebreakers to problem definition to problem solving – capturing all of the participants' contributions in specific formats along the way.

It worked. Kind of, at least. The Roundtables generated rich data. Some notions echoed common sense, while others struck unfamiliar ground.

At Emily Carr, for instance, students highlighted the challenges of institutional racism, the confusion of bureaucracy, and a myopic focus on theory without the pragmatics of technique as being some of the key issues they encountered. The group suggested solutions to these challenges: ethics workshops for faculty and staff, a zero-prerequisite course registration system that increased interdisciplinarity, and a student-to-student skillsharing network for practical techniques.

Some of these challenges are old and well-known, but well worth repeating. Others are novel, and it doesn't require a huge leap to imagine how their solutions could help students.

The next step was to encourage students who participated in the Roundtables to join our online Platform. The Platform is discussed elsewhere; we failed to create the user base for this plan to take root.
In sum, these results proved promising anecdotally. Due to our lack of growth across the country, however Roundtables failed to happen, and in the end, we didn't gather enough data to really use any of it.

What we learned

The Roundtable process seemed an effective design-oriented approach to getting a group to convene, connect on shared ideas, and push those ideas forward.

Feedback from audiences and our Campus Leads suggested the process was smooth and easy to follow, though the lack of uptake on some campuses implies a survivorship bias: something stopped many of our students that was unnoticable to our successful leads.

What we would do differently

Lesson 11: Celebrate results

We received Roundtable results with excitement, but often failed to use those results to reinforce other Campus Leads. **Each time we heard about successes from our members, we should have shared the results across the network.** We should have communicated our favourite new ideas with other Campus Leads, gotten those who hosted the Roundtable to join calls and share their process, and beyond. This would have enriched the network both creatively and socially.

Lesson 12: Find existing champions

We assumed we needed our “own” leaders to make our programming happen at campuses across the country. Instead, we should have engaged existing campus groups to partner with us on their campus simply by running Roundtables and reporting back. Student clubs and societies – like Engineers Without Borders, Enactus, AIESEC – would surely have been interested in and keen to help. Moreover, they would have had access to everything they needed to host a Roundtable already, except for the facilitation process and permission to use it.

Distributed Teams

hackED's 2016-2017 crowdsourcing strategy: ***Lead hackED with a volunteer distributed National Team, engaged in developing and implementing programming across the country***

Student leadership was a vital aspect of hackED's approach. Just as we sought to empower students as Campus Leads across the country, we depended on a national team of volunteer student leaders to coordinate our nation-wide activities. These passionate, talented volunteers were distributed across the country to maximize our access to and familiarity with schools from coast to coast to coast.

The theory was that a by-students for-students organization would help us stay in tune with student needs. We also thought that a student national team would be more accessible to the Campus Leads we sought to work with.

In practice, the distributed, volunteer National Team struggled to sync up, stay engaged, and get things done on time. These issues alone may not have caused too much trouble, but together – combined with the other issues discussed in this report – they created fundamentally challenging conditions for hackED's success.

In this section:

What are the biggest concerns you've identified in higher education? There is a disconnect between 'whole person' development and how students are taught. Disconnect between what is going on in the classroom at a university and what is happening in research at the university.

A. Incentive structures

The team was incredibly intrinsically motivated. Every member joined because of a heartfelt belief that post-secondary structures struggled against 21st-century needs. Further, each member recognized the impetus of social change and the potential of social innovation. These shared values and beliefs resonated through the ideas and materials produced by the team.

To complement this intrinsic motivation, the McConnell Foundation connected each team member to potential mentors in Canadian post-secondary and social change networks. The intent of this mentorship was to invest in these leaders as a reward for their efforts in hackED.

Unfortunately, mentors and mentees often found it difficult to connect. Literally. Between time zones and busy-ness, some pairs never managed to make a single call.

What we learned

There is a strong implication that neither mentorship nor the intrinsic motivation of the work were enough to keep our student volunteers engaged. Doubtlessly, the cause of this disengagement links to other problems discussed in this section and beyond. Still, the question lingers: could we have offered something else? What were we missing?

We had considered other extrinsic motivators, namely honoraria and paid employment. Mentorship seemed a more valuable offer, using social rather than financial capital. Informal feedback from team members suggested that it was sincerely appreciated.

One key notion is the absence of close ties. Our most successful examples of mentor-mentee relationships – those who successfully connected and kept up their calls – were people who had met in-person previously. Many of our connections were only digital, and this may have made the mentorships impersonal.

Another less is that payment is an effective incentive. Naturally, remuneration is not always possible, for budget and administrative reasons alone. When it is possible, though, it gives students permission to do the work they're being paid to do. Students often subsist precariously, due to the intense costs of education, low-wage pay, and limited ability to work many hours. Thus, opportunities that provide economic benefits – from direct pay to faster graduation – are more likely to gain students' day-to-day attention, even if their heart lies elsewhere.

Finally, expectations are set more by what is done than what is said. The team was clear about deadlines and timelines, but when due dates were missed, there was little consequence save for the slippage of work. Drift became the cultural norm, and missed deadlines were accepted without concrete acknowledgement. This happened quickly: in retrospect, we should have expected it.

What we would do differently

Lesson 13: Facilitate mentorship success by starting with real-world connections

Begin mentorships by finding opportunities to connect mentor and mentee in-person. In lieu, find a way to create a cultural connection online: host a facilitated conversation that brings mentor and mentee up to speed about shared interests and the value of the relationship.

Lesson 14: Money matters

For many students, payment translates directly into extra time not having to work for pay in other jobs. **Consider using honoraria or paid employment as an incentive to keep students engaged.**

Lesson 15: Set expectations, performance metrics, and feedback loops

Expectations are set by what is done more than by what is said. Create a culture of acknowledgement, consequences, and actions: find ways for missed performance to be explicitly acknowledged and discussed, connect team members to the consequences of mistakes and missed deadlines, and find ways for them to take immediate action in response.

B. Socialization

The hackED National Team had limited time together, no more than an hour each week in an online call (often garbled or otherwise messed up by the inconsistent quality of Skype and similar services). This left little time for operational discussions – and even less for socialization.

This meant that the team was all business, all the time. There was little opportunity for the team to personally connect. The events of personal and professional life outside of hackED rarely surfaced, and getting to know one another happened gradually. We had fun within our meetings, of course; discussions were always cordial and lighthearted. Nonetheless, it is possible that this led to disconnect between team members and therefore disconnect from projects.

Given the time we had, more social opportunities likely would have meant lost time on hackED planning and implementation. Yet, we may have missed a social calculus: perhaps socialization is a multiplicative factor that would lead to increased engagement, productivity, and teamwork.

What we learned

It is difficult to know the true consequences of this culture. Socialization between team members is potentially a missing piece: would the team have performed better had they been more understanding of one another, or more willing to reach out for help and collaboration?

What we would do differently

Lesson 16: Make room for social connection

Make involvement a fun and personally engaging experience. When spending time together, focus not only on what needs to be done, but also on learning about each other, why you're involved, and what's going on in your lives. Encourage informal opportunities to further these personal connections.

C. Watch the gaps

It is natural to expect team members to cycle in and out of the project over the course of time as changes in personal and professional lives are brought into balance. We are generally keen to give people a chance to disengage so that they can deal with the rest of their lives.

Throughout 2016-2017, however, it was not obvious when team members had disengaged. Moreover, disengagement was rarely explicitly acknowledged by team members until some time after the consequences were beginning to take effect.

In each of these cases, the failure to realize that someone was fading out (disengaging with the work) or burning out (overworked to the point of disengagement) translated directly into a failure to address the problem. In each case, the team could have helped the team member: by lessening their burdens, finding new ways for them to connect to the project, or simply by acknowledging their needs and making it okay for them take a step back.

Had we detected this disengagement earlier, we would have been more responsive to recognize the gaps it created. Understanding when capacity is missing is the first step in (re)building it with recruitment and role changes.

What we learned

Burnout and fadeout will happen, and it will happen in discrete and sinister fashion if there aren't conscious processes that work to detect them.
Unfortunately, failing to realize that someone is disengaging means missing opportunities to bring them back in or to recruit new members to replace them.

What we would do differently

Lesson 17: Build in disengagement detection processes

Team leads should personally check in with each member on a highly regular basis, especially when teams are distributed and volunteer. Missed meetings and deadlines should be tracked; trends of these events is a good sign that disengagement has begun.

Lesson 18: Give permission and create space for burnout

Acknowledge that burnout/fadeout happens, and do so publicly within the team. Make sure team members know that they can admit difficulty to one another and that taking a step back is encouraged – but that communication is key.

Lesson 18: Recruit more aggressively than you think necessary

In a volunteer, distributed team, the more the merrier. We tried to keep the team small, but having more team members might have made a substantial difference in disengagement. First, more team members means more teamwork and collaboration, and if these groups are healthy and fun spaces, people will be self-motivated to participate. Second, and more concretely, more members means more redundancies – if someone needs to step back or step down, someone is already ready to take on their work.

D. Time zones

At one point, the team was spread out across 4,500 km of Canadian geography (Winnipeg to St. John's), supporting campus leads from B.C. to NL. This wasn't the standard case (usually we were in Waterloo, Toronto, Fredericton, and St. John's) but it demonstrates how far apart – both spatially and temporally – distributed teams can be in Canada.

These chronological differences added an additional layer of conflict over already-busy work and school schedules. It was challenging to find a window of time narrow enough that everyone was free but big enough that it could result in productive progress. It was, for us, impossible to find a regular time that worked consistently, and yet constantly scheduling new meetings proved confusing and arduous in and of itself.

This led to meetings being missed, fraying the connection between team members and the current state of hackED's projects.

What we learned

Remote work, especially when spread across time zones, likely compounds other factors causing disengagement. Remote work leads to scheduling challenges that are especially difficult to work around when team members are volunteer students due to work and school scheduling conflicts.

What we would do differently

Lesson 20: Use a robust and real-time availability/scheduling system

Effective tracking of availability and scheduling is key. Use software to **collect real-time availability – e.g., through a shared calendar service that actively displays the overlapping schedules of a team** – and book meetings two weeks out from that software.

Lesson 21: Create a culture of asynchronous engagement

Asynchronous, remote work needs to have team touchpoints. Create a culture of mutual engagement and reinforcement using chat systems such as Slack or Microsoft Teams, track tasks and productivity publicly within the team, and actively communicate together.

Lesson 22: Divide and conquer – then reunite

If a simultaneous meeting isn't possible, split the team into groups that can meet and find some way to share updates between these groups.

E. Macromanagement vs. micromanagement

Macromanagement is a management style that depends on emergence and bottom-up leadership: share big goals, identify programs, objectives, and general timelines, and leaving teams free to work together to identify specific tasks and deadlines (or not).

Micromanagement, at the opposite end of the spectrum, involves tasking out specific, precisely-described to-dos with due dates and then supervising progress, taking action as issues arise. Micromanagement achieves control at the cost of self-direction; macromanagement achieves self-direction at the cost of control.

Ryan, hackED's 2016-2017 coordinator, is a self-professed macromanager. Over the course of 2016-2017 he keenly set up infrastructure for online collaboration, facilitated discussions around big goals and the design of objectives and programs, and largely – particularly in his approach to Campus Leads – worked to enable others self-identify how they could best achieve in their roles with hackED.

As we have observed, both Campus Leads and the National Team experienced a problem of disengagement. It is possible that greater definition around roles, tasks, and timelines could have improved engagement and retention. Perhaps open-endedness was not communicated clearly enough, reducing accessibility by making it difficult to know what the first steps were.

Campus Leads, for instance, could have been given a semesterly schedule, making it explicit that Roundtables had to be held in a given week, which meant that logistics had to be locked down a month before, and so on.

More micromanagement of the National Team, on the other hand, may have simply been an effective excuse to check in more often on a person-to-person basis. Issues that prevented a team member's success would have been easier to recognize and address, and perhaps these resolving issues would have stopped burnout and fadeout.

What we learned

The more disconnected a team is, the more micromanagement it likely needs. Hands-off management styles may allow for greater self-direction, but this self-direction can be intimidating and difficult to grapple with if someone has insufficient clarity on the task at hand. Further, micromanagement can simply be an excuse to check in on progress, giving coordinators/managers a chance to connect one-to-one with team members.

What we would do differently

Lesson 23: Balance is key

Self-direction is a noble goal. So is providing an effortless understanding of the tasks at hand. Providing too much instruction verges on demoralizing takeover, but providing too much freedom can be inaccessible and intimidating. In a volunteer project, **a balance must be struck between macromanagement and micromanagement such that volunteers have enough instruction that they can practice their creative skills but enough clarity that they don't struggle with decision-making** and know their objectives, deliverables, and deadlines.

Lesson 24: One-on-ones and personal check-ins should be important and frequent

Find ways to track each team members' burdens and check in frequently. Make sure this habit of checking in doesn't become oppressive, though: use these opportunities to recognize barriers and help team members out, not to chastise them for lack of progress.

Lesson 25: Keep per-person task lists clear on responsibilities, deadlines, and dependencies

A clear picture of what everyone is doing – and how it links together – will help drive both one-on-one and full team meetings. More importantly, however, such a tool gives everyone a picture of the domino effect delays and dropped tasks have on the rest of the project.

Launching a platform

hackED's 2016-2017 crowdsourcing strategy: ***Develop an online platform through which students engaged in hackED can pose questions identifying opportunities for change in higher education – and through which collaborators can work to answer these questions***

In this section:

- **A. Keep an open discourse with partners**
- **B. Create and build community**

Canada's post-secondary system is superfluous with exciting discussions. How can we make our colleges and universities more innovative? How might we help our cities and communities? What is the potential of student social innovation and entrepreneurship? How can we leverage 21st century technologies, business models, and values to do better in teaching and learning, research, and engagement and innovation?

These conversations happen in classrooms, studios, and laboratories; with students, professors, staff, and administrators; in public discourse and private strategy sessions; from coast to coast to coast. These conversations are powerful – but they are also fragmented. What would happen if we helped a student, professor, and administrator at the same school realize they shared an idea and worked to make it happen together? What if innovations from one University inspired parallel changes at a college on the other side of the country? What if education changemakers could collaborate together on solving a common problem?

This was the premise of the hackED Platform: an online home for changemaking in post-secondary institutions across Canada. The platform would be open to all, allowing anyone to share problems or solutions they identified with students, faculty, staff, and administration across the country. hackED's Roundtables would feed directly into the discussion, providing fodder for feedback; conversely, the Platform would provide a place for passionate participants to take the conversations they began at the Roundtable.

Unfortunately, developing such a platform proved difficult, and getting people to actively used it even harder.

A. Keep an open discourse with partners

hackED's Platform was developed by a pair of contractually-hired student developers over the summer of 2016. Like the rest of the team, these developers were remote workers: they were based in Montreal and managed by a National Team member in Waterloo.

Work proceeded independently over the course of the summer months with regular check-ins and progress updates from the developers, but something started to seem off late in the summer. When deadlines slipped, it became clear that there were issues with our technological approach to the Platform (to build it on WordPress with the use of customized WordPress plugins). The Platform was completed a few weeks late, with some missing features, and with less polish than we had hoped for.

What we learned

Success in a project owned by different partners depends, obviously, on the partnership itself.

We began the Platform without our developers, bringing them in to implement designs that we had previously come up with. Instead, we should have involved them from the start, getting their expertise and buy-in on the fundamental design and I.T. choices of the project.

Then, we failed to find strong ways of testing the project (and the partnership) as development took place. Our lack of feedback loops led to key problems only being recognized and addressed at the end of our developers' contracts.

What we would do differently

Lesson 26: Start partnerships from the foundations

Work with external partners to design shared projects together, instead of bringing them in after plans have already been made. If important, foundational decisions are made without shared ownership, not all partners may feel the same responsibility to the project – and the opportunity to make the most of each partner's expertise slips away.

Lesson 27: Make it real

Find concrete opportunities for real critique and feedback throughout project design and development phases. This means getting hands dirty: building out components so that they can be prototyped and played with. This is the only way to make sure all partners can be sure they're on the same page. Else, important problems might not be recognized until the project is put into the real world, when it's too late to fix them.

Lesson 28: Develop feedback loops

In checking in on the project itself, we sometimes neglect to check in on the partners. **Actively search for partners' impressions of the project. Find creative ways of unearthing suspicions or apprehensions, and examine those concerns fully as early as possible.**

B. Create and build community

When the Platform finally launched, we sought to connect it to the rest of hackED's programming. Asking participants take their passionate conversations from Roundtables to the Platform for an expansive and extensive cross-country dialogue seemed like an intuitive and infallible plan. (We planned to promote the Platform through traditional channels as well –a marketing campaign, social media strategies, and so on – but these plans fell through due to a lack of team capacity and expertise.)

In retrospect, this approach had two inherent problems. First (and most fundamentally), it linked the success of the Platform to the success of the Roundtables. Worse, it created a filter: the main way people would connect to the Platform would be through participating in a Roundtable, and even then, only those that were extremely keen were likely to sign up.

Second, it meant that participants joined the Platform in a trickle instead of a flood. Roundtables happened at different places with different timing. If a participant left their Roundtable and immediately signed onto the hackED Platform, excited to see an enthusiastic online discussion, it was likely that there hadn't been much activity since the last Roundtable took place elsewhere in Canada. This could be discouraging.

What we learned

Communities (online or off) can seem easy to build from the outside. Just get a lot of people with a common interest together, give them a purpose (to talk about their common interest), and give them tools to organize themselves. The problem lies in the "just" at the beginning of that statement. Our platform and purpose worked – but how do you get a lot of people with a common interest together? We should have approached the creation and support of this community with tenacity and strategy.

What we would do differently

Lesson 29: Launch late

Build up to the launch of a community. Keep the launch details clear – the where, when, and how – while fostering suspense and pressure to participate. Then, when the time comes, allow all interested people to engage at once in a fervour.

Lesson 30: Launch loud

If you're looking for more participation and membership, share the news of your community with a loud, vibrant marketing campaign. Find ways to share the excitement of the passionate participants who have been anticipating the launch with the public. This will give the community a sense of active gravity, pulling in new members.


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RECODE's Story

Universities and colleges are uniquely positioned to build the next generation's capacity to impact positive change. Supporting students in understanding current social and environmental challenges, and working with them to experiment with innovative tools and approaches is essential to accelerating this new way forward. Fundamental shifts to the post-secondary sector — bringing community to the table, engaging across institutional boundaries — are paramount to enhancing the wellbeing of the communities we all share.

RECODE, an initiative of the J.W. McConnell Family Foundation, is a call to 21st century post-secondary education that enhances community wellbeing.

As a funder, capacity builder and convener, RECODE supports the capacity of schools to weave social innovation tools and practices into the very fabric of campus and community culture.

To be successful, deep collaboration that spans organizations, institutions, disciplines and worldviews is a must. Through working groups and national gatherings, we bring together individuals to learn from each other and amplify their impact.

With these efforts, we hope to see broader funding and policy changes in post-secondary education, a "recoded" student experience fit for our times, and the transformation of campuses into pillars of their communities.

To learn more about RECODE's activities, visit our website at **re-code.ca** or follow us on Twitter @LetsRECODE.

For more information about the McConnell Foundation, visit **mcconnellfoundation.ca.**

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