2015 Reflections: Learner Advocate Pilot
Colleen Broderick

The role of the learner advocate remains an essential component to the success of the new system and a core focus of our work. As we've described previously, this network of advocates will partner with learners and their families to help navigate an expanded ecosystem of learning opportunities to design their pathway and to cultivate relationships and resources essential to their success.

The Learner Advocate Pilot, which we recently wrapped up, explored the relationship between an advocate, technology and a drive for student agency. Along with Fidelis Education and our partners from Project VOYCE, Generation Schools, Zero Dropouts and Real Alternatives for Teens (RAFT), we set out to learn how technology can amplify and support the advocate role. Can technology serve to assemble the expanded network of resources and providers needed to execute the ReSchool vision at scale? Can it enhance the efforts of advocates to customize and coordinate pathways for learners? In the end, we struggled to reach a conclusion around our key research questions, but we discovered so much more about how technology access, current structures, and digital tools continue to help and hinder students' drive to own their learning.

Lesson: Many learners do not have easy access to technology.

Our partnership with Project VOYCE and Real Alternatives for Teens (RAFT) surfaced a frequent barrier: many of our students fail to have consistent access to technology and the internet. Although there may exist spaces such as labs or libraries for students to go to access these tools, we failed to recognize the additional burden that exists to schedule transportation and time for learning and connecting with mentors when access should match the flow of the learner's needs. Commonly, we combat this challenge by noting the role the smartphone can serve in leveling the playing field. The pilot, however, highlighted that the high cost of data plans and the poor interface of online tools through mobile devices do not always mean the phone can be a substitute for a computer. As a result of this learning, we are more sensitive to the readiness of learners and organizations to participate in design challenges with us. This also means that collectively we can't ignore issues of equity and technology access and assume that devices that may be a solution in the future serve learners' needs now.

Lesson: **It's challenging for individuals to pursue independent pathways outside of organizational goals.**

We approached the pilot with the hope that this project would both serve to sharpen ReSchool's design and to add value to our partners' current work. In all four cases, partners could articulate how the platform could play a role in strengthening some aspect of the work that they were already doing. Whether they saw the platform as a means to professionalize student efforts through the badging function, to codify curriculum through learning apps, or to match students with mentors through the student portal, these early adopters jumped into the work, voluntarily adding the use of the platform to their plate in addition to other organizational priorities. Although we recognize that the integration of technology can shift behaviors -- in this case we were hoping it would -- tensions emerged between the role of the platform and the demands and constraints of the current status of the different organizations.

We deeply appreciated the opportunity to work within the current system, but we recognize that in moving forward we would benefit from focusing on projects that exist along the edges, like summer or after school programming, as those spaces offer a greater opportunity to serve and support learners in new ways, complementing the efforts of the current system and expanding people's vision of what learning can look like in the 21st century.

Lesson: Let practices and scale drive a need for the digital tool.

When we were introduced to the Fidelis platform, its capability to support students in important ways aligned with the ReSchool vision. **The tool's ability to enable learners to** communicate a clear purpose, to pursue a personalized pathway and to cultivate a network of people to help accomplish their purpose reflected a level of agency we hope all students have the opportunity to achieve. As we entered the pilot, it became evident that our partners were also working to improve practices to support students in this drive for agency. For example, some were developing new curriculum, while others were building in strategies to help students connect with mentors. In the same way we recognized the tension that emerged from organizational and individual goals, we recognized that we introduced another tension between practice and technology. The instructional practices and structures to support students in their quest for agency was most important to get right first, before adding in the complexity of a new technology solution to manage the process and relationships.

Additionally, as our partners were building fluency around these skills, they were working with small groups of students with plans to scale down the road. In reflecting with the team at Fidelis, it became clear that their platform provides value at scale. **In managing a small group of students, we discovered it's possible to stitch** together tools that meet discreet needs before turning to an integrated solution required to add efficiency and effectiveness at scale. Fidelis has thought through different tool alignment that individuals could use to meet core functions of support with smaller groups of learners.

Below, the team from Fidelis offers up steps to support students in customized pathways before you need to turn to a Learning Relationship Manager (LRM) for an integrated holistic student success solution designed to serve large numbers of learners.

Hacking a LRM in 7 Simple Steps
Gunnar Counselman and the Fidelis Team

It seems that every educational organization we run into is working to build custom learning lifecycles for all their students. **It's crazy to me that just** five years ago it was radical to suggest that every student should have a personalized learning pathway, that they should be guided by a coach and a team of mentors, and that every student should develop a clear personal vision or "purpose" for their learning experience. What was radical is now mainstream...in concept, if not in practice.

Our first LRM was a hacked together bunch of spreadsheets, YouTube videos, gmail and a cell phone. That hack broke pretty quickly though when we started to work with more than 50 or so students. Now, we have a beautiful (hey, I'm a founder and I think my baby is gorgeous), elegant, and comprehensive Learning Relationship Management System that allows any organization to blend coaching, mentoring, content, goal setting and community engagement into personalized learning lifecycles for thousands of students at a time.

If you're just starting up and don't have to deal with thousands of students at a time, then we recommend that you do what we did and hack it.

Here are 7 simple steps to hack an LRM without spending a dime:

1. Write down your desired lifecycle. **Here's an** [example](). Only you can decide what is required and what is optional. **But once you've decided, stick to the plan. Outline coaching actions throu**ghout student lifecycle. **It's also helpful to establish contact frequency expectations for both check ins and coaching sessions.**
2. Recruit students. Sorry, that one is up to you.
3. Assemble content. **We recommend brainstorming 15 content pieces that you'll n**eed to get started. No need to be too fancy to get moving. Some youtube videos, wikipedia pages, Khan Academy exercises, Lynda courses are fine. Use this [Content Template]() as a guide for students. There is so much great content out there that we strongly recommend curation first, creation second.
4. Coach your students. Rapport is THE most important thing. Assign a coach to every student and make sure those coaches seek to understand first, and to be understood second. Ask the students what matters most to them. What are the students there for? What are their goals? Coaching is a minute to learn and a lifetime **to master, just like Othello (™).**
5. Build student agency. From the start, clarify with students that the goal is to build them towards independence and interdependence, not to make them dependent on you. Dependence just kicks the problem down the road a bit. Students have agency when they have a clear Purpose, a solid Pathway of goals, and a support network of People other than the coach to help them pursue their purpose. We call **that the 3Ps of Success (™).**
6. Track student progress. **If you're going to coach students, you've got to have a** way to hold them accountable. **And even more critically, if you're going to build their agency, they've got to have a way to** track their own progress. Use this tool called [**"Sherpa"**]() **to keep track of who you've talked to, when and** about what. And use this tool called the [Student Home]() to collaborate with students to make sure that they have a clear Purpose, solid Pathway and support network of People to support their progress.
7. Call Fidelis to Scale. These tools will work great until you get to around 50 students. After that, the whole **thing will get more unwieldy, you'll miss important stuff,** and it will be far too manual. **At that point, you'll** be ready for an upgrade to a full-featured LRM. **Give us a call and we'll set you up with a powerful tool to** scale your efforts.

For visual learners, [here's]() a video to explain how to use all these tools.