engineers without borders
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Canada

FAILURE REPORT

2012

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Foreword: You can't just fight poverty. You have to outsmart it.

This is Engineers Without Borders Canada's fifth annual Failure Report. It is not just a chance to reflect and learn from past failures, but also a trigger to examine failure trends, and the strategies and values that created them. In this way, we make sure we do not just "see problem, solve problem," but constantly question how we interact with and resolve them.

The Failure Report encourages this examination—but this year, we wanted to role model it. I asked EWBers from across the network to share their perspectives on the purpose of the Failure Report. How do you use it? How can it be improved? The answers were surprising.

At first glance, one might expect that we publish the Failure Report to ensure lessons learned across the organization are not repeated - however, if you look closer, you'll see that similar failures continue to pop up year after year. Kaveesh Padiachy speaks of the importance of understanding field realities - mirroring past stories by both Mark Hemsworth and Mike Klassen. Clement Bourgogne describes communication challenges between his Distributed Team and National Office, just as the Youth Engagement Distributed Team did in the 2011 report—and Jon Fishbein offered the National Office perspective on this same challenge in 2010. Erica Barnes and Heather Murdock have both spoken on failures inherent to building a leadership pipeline within student chapters. We are starting to really see this happening—Alix Krahn even wrote a failure story this year about her, and EWB's, "Failure to Learn from the Failure Report."

I could give the excuse that these deeper, darker failures are not immediately solvable. But really I should admit the obvious answer: sharing a story in the Failure Report does not mean the issue has been prioritized, or will be acted upon.

> **Stories are chosen because they shed insight into systemic issues, highlight important values, build acceptance of the risk inherent in innovation, and demonstrate the strength and resilience of the individuals who choose to contribute.**

Our stories are chosen because they shed insight into systemic issues, highlight important values, build acceptance of the risk inherent in innovation, and demonstrate the strength and resilience of the individuals who choose to contribute. These are all important things. If we evaluate the performance of the report as a learning tool or robust knowledge management platform, however, it is most certainly its own failure. If we are not learning from our failures, what are we doing?

EWB has built a strong culture of self-awareness, transparency, and humility. It is espoused in our values, in our vision, and in our leadership. Fortunately, this culture means that we are talking about our failures all year round - team members constantly discuss what they are working on to diagnose failures early and adapt accordingly.

This report celebrates our culture and reinforces it in a tangible way. The Failure Report is often how people first hear about EWB. It attracts potential staff who appreciate the challenge of systemic change and know there is validity in learning by doing. It attracts funders who welcome the innovation it encourages - knowing that without an acceptance of failure we are simply unlikely to try the riskier ideas that are needed to find innovative solutions to complex problems. After all, nothing great was ever achieved without taking a risk.

But of course, that is not good enough. In the spirit of innovation and learning we are always looking for ways to make this report more effective as a learning tool. We have been brainstorming and have some exciting ideas, but would love to hear yours! So please get in touch. Collaboration is what it will take to improve and evolve the report as we question how EWB interacts with and solves the challenging problem of creating a robust organizational learning culture.

Happy reading.

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Leadership & Organizational Change Failures

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Dear Reader,

What do you expect to read when you pick up a publication called a “Failure Report” from Engineers Without Borders Canada (EWB)? Stories of failed projects in Ghana, Malawi, Burkina Faso or Uganda? Reports of failed communication and strained partnerships that limit effectiveness, or results that were blatantly net negative for the communities we work in? Lessons that will help avoid these failures in the future? If that’s the case, you won’t be disappointed.

However, you might be surprised that over half of the content in this year’s report is about EWB’s internal operations: planning and communication processes, organizational decision-making, and personal leadership journeys. These are the failures of a dynamic, growing organization that is trying to operate differently, and they reflect the evolution of EWB over the last two years. We’ve spent time redefining our vision as an organization, to ensure it aligns with what we’ve learned as an organization. It has been a foundation-building time that has positioned us for greater progress, impact and influence in the years to come.

This internal focus may mean that some of these failures may only make sense within EWB’s context –we’re an admittedly strange bunch, but effectively and unapologetically so. However, one’s greatest strengths can often be weaknesses too, so allow me to explain three of the dimensions that make EWB unique, that are at once elements of our success and potential contributors to our failures:

A strong culture with decentralized decision-making

There is an EWB way to do things. We have our own values, language (my.ewb.ca/dictionary/), frameworks, ways of understanding and analyzing social change, and common activities. This way forms the basis of our culture, and empowers each one of our volunteers and members to represent the organization as leaders, and to act on their ideas and creativity. In fact, this was how the very first failure report was born; a handful of EWB volunteers in Africa thought that failure was an important cultural component to reinforce, and so compiled a report of their own failures that they printed and presented at EWB’s Annual General Meeting that year. I, as CEO of the organization, only learned of the initiative when the report was being handed out during that meeting.

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This kind of empowerment and decentralization allows for the right people to make decisions at the right level of the organization, unlocking and unleashing more ideas, more potential, and more energy. But it’s not without challenges, especially with respect to communication and management, as the internally-focused failure stories in this year’s report demonstrate.

Telling truths and integrating dilemmas

Internally or externally, we don’t shy away from hard conversations. The most active topics in our online community, MyEWB.ca, have historically been about

The purpose of this Failure Report is to reinforce a culture of failing and learning in EWB.

whether we should be sending volunteers overseas at all, how we should be interacting with mining and resource companies, and whether we are truly living our organizational values. We acknowledge and tackle such fundamental dilemmas at the heart of EWB. For example, while we seek to empower African leaders to drive their own countries' development, we are also employing a model that puts outsiders (us) in the driver's seat. We don't always find solutions to these dilemmas, but we are more capable to deal with the tensions they create because we've openly discussed them.

In doing so, we bias ourselves to finding the "and" solution. As an example, we are refusing to make the choice between raising money effectively "or" portraying Africa's diversity and complexity. Instead, we seek to integrate this dilemma to find a more creative, powerful path of raising money effectively "and" portraying Africa's diversity and complexity – our recent Imagine Campaign (imagine.ewb.ca) is a great example.

Our failures in navigating these truths and dilemmas are many. Sometimes we delude ourselves by thinking an "and" solution is possible. Sometimes we overcomplicate and over-think issues, slowing down our learning and actions. Sometimes we breed disunity by putting truths on the table that we're not yet ready to tackle.

Our bottom line is Dorothy

The "Dorothy test"—named after a Zambian AIDS activist who inspired this concept—is the heart and foundation of our accountability in EWB. We ask each person in EWB to consider: *Who is your Dorothy, and what choice would she make if she had the same information as you?*

This has two powerful effects. First, it directs our accountability downwards. It's why we have a Failure Report at all – the volunteers who created the first report didn't ask "what information do EWB's donors need?" or "what will our supporters think?" They asked, "what will hold us most accountable to Dorothy?" forcing us to ask ourselves if we're succeeding or not, and to make the changes if the answer is "not."

Second, the Dorothy test reveals an amazing paradox: Might Dorothy fail to make the right decision? Of course, she might. Because development is complex, there are many different Dorothys and their realities and needs may be in conflict with one another. This itself drives a fundamental humility that is crucial to being able to learn from failure.

What does all of this amount to? The purpose of this Failure Report is to reinforce a culture of failing and learning in EWB. This is critical if we are going to be successful at bringing systemic and game-changing innovations into the world — we will need to bet on projects that may fail.

It doesn't stop there, however. We need to look at ourselves, be willing to fail, and learn from our failures, internally and externally. This is the heart of a culture where failure is accepted, and a big part of being a truly great organization.

Yours sincerely.

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A Dropped Ball

At the Western Retreat, our Chapter President at the University of British Columbia (UBC) EWB Chapter decided to kick the meeting off with what she considered a big success: the fact that despite no longer having Junior Fellowship (JF) funding from AMEC, which had paid for one JF a year for the last five years, we still managed to send two JFs this year. Cheers around the circle — but wait, what? Why did we lose the AMEC support?

Big Fail #1: No clear responsibility

Our five-year contract had run its course, and no one had stepped up to investigate next steps. It was unclear who should be tasked with corporate sponsorship. The president, past JFs, future JFs, chapter veterans, VP Finance and VP Fundraising all had a responsibility in maintaining UBC's relationship with AMEC, but it wasn't obvious who should actually do the work.

The people involved in building the original relationship had left the chapter years ago and no longer had any of the documents — and the proposal was not shared on the EWB Resource Library. However, one of the original AMEC connections, Paul, was still around and interested in supporting us. He recruited another well-placed AMEC employee, Jude, and it looked like everything was in place to renew our relationship and sponsorship.

Big Fail #2: Assuming we were small potatoes

In my first conversation with Paul and Jude they laid out AMEC's perspective: "because we did not hear anything from you in the lead-up to the expiry of the contract or in the year after the expiry, we assumed two possibilities: you were swimming in money and no longer needed us; or you were too disorganized to contact us. We figured the former was highly unlikely, so assumed the latter." I had assumed that $6000/year for a company as big as AMEC was nothing — they wouldn't even notice that we had messed up. Wrong. They noticed, they talked about it, they made conclusions. And they were spot on.

Over the course of five months, I worked with Paul and Jude to develop a proposal to rebuild EWB UBC's

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partnership with AMEC. It was a partnership: UBC would commit time and resources to maintaining it; we clearly understood what we offered to AMEC; and they knew what they offered to us was more than a cheque every year. We also clarified and standardized responsibility within the chapter by putting it in JF contracts.

Despite these changes, the final proposal died on AMEC management's desk. They were not interested in partnering with a group as transient and unprofessional as UBC's chapter, and who can blame them when we neglected to contact them before the contract's expiry?

As I see it, there are three paths for chapters to pursue corporate, long-term funding:

1. Don't do it. Do not promise anything you may not be able to deliver on. For example, we cannot promise the JFs five years from now will make two presentations a year. Stick to shorter term commitments, on both sides.

2. If you are making commitments on behalf of people you do not yet know, make those commitments *very clear*, and communicate the importance of the responsibility during turnover.

3. Seek partnership at a national level with organizations and include specifications of local chapter commitment. National Office (N.O.) staff could have official responsibility for the partnership, while local chapters fulfill local responsibilities like Lunch-and-Learns and workshops. N.O. Chapter Buddies could serve as the link between the two, ensuring that chapters follow through on commitments. In return for their efforts, chapters would get a portion of the funding.

If I were to have a second chance at re-building the AMEC-UBC relationship, I would go for #3. We need to take advantage of the strengths at all levels of EWB.

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Why You Should Still Read the Fine Print, Even if You Wrote It

In the spring of 2011, a coalition of like-minded organizations and individuals came together to form Fair Trade Ottawa Équitable (FTOÉ), an umbrella group with a goal of making our city a Fair Trade Town. As the founding Chair, I was tasked with helping to build our organizational structure. Thankfully, we were not alone and worked to leverage the advantages of fellow member organizations like EWB: their networks, outreach opportunities, physical space, and samples of Fair Trade products. Our partnership with EWB Ottawa City Network (OCN) had institutional advantages for FTOÉ, including a modest chapter budget for Fair Trade outreach, charitable status, and event insurance, which can sometimes make or break an event.

As FTOÉ sought to formalize its own existence and its relationships with partner organizations, I attempted a pilot with the Ottawa City Network with the intention of replicating it with other partners. We would draft an institutional agreement outlining our mutual recognition and assistance, and we would draft a financial agreement that would describe how FTOÉ would have access to OCN funds and how it would be accountable for their use.

The institutional agreement was a snap. The financial one, not so much.

As the FTOÉ representative, I thought I had followed all of the protocols. In reality, I had no idea. The agreement was legalistic and looked great, so we signed it. However, when we tried to implement the agreement, things went off the rails. My team was not consulted and was confused as to what had been signed. The OCN was waiting for us to submit receipts we had intended to take care of in-house, and was in the dark as well. The agreement provided for OCN management of FTOÉ funds, despite the fact that we had our own bank account (which I did not know existed). Nothing worked.

When all of this came to a head, we annulled the agreements that we had signed. The agreement was a great idea in theory, but only if it was implemented properly. I alienated both my FTOÉ and OCN colleagues and strained my personal relationships — it has taken eight months for us to revisit and redesign the financial agreement collaboratively. We are still committed to this partnership, but a lot of time, opportunity and goodwill was wasted as a result of not doing it right the first time.

Things I learned:

1. Consult with stakeholders. I learned this years ago, but somehow I didn't take it to heart.
2. Read the fine print, and comprehend its consequences. If you can't, find someone who can.
3. Treasurers and Finance VPs exist for a reason, so let them lead on financial matters.

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The Village Stay

The village stay has provided immeasurable learning to EWB, its volunteers, and thousands of Canadians back home. It's a foundational pillar that has kept EWB grounded on impacting rural livelihood.

For my stay, I was set up with a host family through my Zambian colleague. The host mother was a single mother who had been forced to retire when the government changed, a common occurrence politely referred to as "retired out of National Interest." She lived with her niece whom she was helping through school. I had a chance to experience the intricacies of Zambian life first-hand and settle into a home.

Two months in, the niece received her midterm grades and had failed every class. Wanting to help, I offered to talk with the niece and tutor her. While tutoring, I quickly realized that poor schooling in the village had left the niece unequipped for her grade. At the same time, it became clear that the income of my rental did little to ease the financial stress of the aunt's deteriorating savings.

In the following month, I had to relocate to Lusaka, Zambia because of work. This stopped the progress made during tutoring, and immediately increased the financial strain on the family.

My failure was a lack of self-awareness of the implications of getting deeply ingrained within the family. The family had changed spending habits based on the income spike from my rental, subsequently becoming financially dependent on me; and I directly and disruptively tried to solve problems through tutoring, which created further dependence on me. I was expected to stay another two months — and my abrupt leaving put them back into a crunch and caused personal conflict between us.

Looking back, I should have found out more about the family beforehand. Excitement of the personal growth opportunity made me lose sight of how hosting me would change their lives. I did not realize how much $120/month could create dependency. Instead of observing and understanding how family issues are addressed, I got heavily involved — a major fault on my part especially because I did not fully understand the culture yet.

the awareness of the implications of becoming embedded within a family, and the long-term effects after we leave, is important to question.

The biggest lesson I learned is that we, as overseas volunteers, are not just observers of rural livelihood. Going forward I believe it is crucial for EWBers to challenge our judgment of the right solution. Although the learning achieved through village stays is undoubtedly beneficial for everyone within the organization, the awareness of the implications of becoming embedded within a family, and the long-term effects after we leave, is important to question. Just as we systemically approach innovations that create exit-strategies to ensure success of our partner organizations, the same approach must be done while being part of a host family. In turn, the village stay will also support and embody EWB's work values.

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The Goat is to be Halal: Field-level Lessons on Scaling Community-Led Total Sanitation

"For the celebration," said the group village head, "we want village names on the shirts and the goat is to be Halal."

"What are you talking about?" responded the confused NGO worker.

In 2011, the EWB Water and Sanitation team paired with an NGO conducting Community-Led Total Sanitation (CLTS) activities in a district of Malawi. CLTS is an approach to sanitation education that aims to trigger villages into ceasing open defecation. Our aim was to influence the process by which our partner NGO administered their program, and we sought to develop and guide them towards a system of implementation and monitoring that could be effectively transitioned to local government at project-end.

Contracts were signed and we began as agreed. EWB promoted the use of trained government extension staff to conduct CLTS activities. We consulted district managers and collaborated with community leaders and extension staff to develop and iterate on data collection processes and forms. We sought input from district government and field staff when designing our program. People were happy and we were proud of our work.

CLTS triggerings were occurring in abundance; extension staff were conducting follow-ups; and open defecation free villages were emerging. Preparing for handover, we mapped out the roles and responsibilities for the CLTS program and presented it to district managers. We allowed two months for full transition to government. They thanked us and assigned a sub-manager to take up our work.

The young man assigned was capable, energetic, and valued CLTS. He was soon ready to undertake the first trial of the CLTS program entirely independent of NGO support.

Meanwhile, we started organizing CLTS celebrations for communities certified as open defecation free. We had a small budget to purchase a *Fanta* for each participant. This is when the group village headman came requesting T-shirts and goat meat. It quickly became clear that another NGO, working nearby and organizing their own celebration, had a bigger budget than us — they were contemplating providing a bicycle ambulance to each village along with T-shirts and goat meat. We spoke with the other NGO and discussed the implications of setting expectations we could not possibly meet. They said they understood, but their budget was set — they had to spend their money.

Then, the young manager trialing our CLTS program entered the conversation. He could only mobilize half of his extension staff because he could not afford the per diems that we and the big-budget NGO had provided for triggerings. The extension staff he *could* mobilize were facing challenges assembling communities — a village headman, upon discovering that his village would not receive an elaborate celebration for achieving open defecation free status, told villagers not to participate in the program. This conversation went well beyond the implications of providing *Fanta*: the processes both NGOs took to conduct CLTS set expectations that local government, with its limited resources, could not hope to match.

It was also emerging that the carefully developed CLTS monitoring process was not sustainable. Government representatives could not afford the fuel needed to collect forms in the way we had established. The time needed for data input was also more than the assigned manager could spare – it turned out he was being asked to administer the continuation of CLTS from the side of his desk.

So what happened? The larger NGO had their elaborate celebrations and we had ours. Photos were taken. High fives were given.

Any system can work when it occurs within an artificial environment conducive to its success — and this is what we constructed

As NGOs, we unintentionally projectized CLTS; our actions created an environment that made it more challenging for the local government to conduct CLTS using their existing capacity and limited budget. We seeded notions about how to administer the program – notions the local government is now working to break down to develop a manageable one.

We failed to work within the constraints of local government. While we were interested in developing a transferable system, we also had to show it was successful. We felt regular consultation and solid transition plans were enough to ensure our program was sustainable – they were not. For sustainability, pilots need to be designed *entirely* within the resource constraints of the scaling institution. Instead, pressured to achieve results, we injected time, energy, and resources to meet targets. Any system can work when it occurs within an artificial environment conducive to its success – and this is what we constructed. We "made" our pilot work and our success was unsustainable as a result.

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Reckless Driving

This past February, I joined EWB's National Office to bring a focused effort to the Run to End Poverty (R2EP) campaign. Having recently co-lead the 2011 Toronto R2EP — at the time EWB's largest-ever chapter-based fundraiser — I saw R2EP evolving to become EWB's flagship event, with the ability to bring in over half a million dollars within three years of my hire.

Failure 1: No Brakes

My proposal relied heavily on simultaneously generating network buy-in, strategic planning, event execution, and rapid delivery of support materials. This led to a year of reactiveness. With little lead-time to develop content and strategy, I dove into event execution and scouting for local leaders. This meant there was no time to revisit initial expectations or maneuver from the set trajectory.

Failure 2: No Roadmap

I had two major hypotheses. First, by focusing on increasing the number of runners registered we could proportionately increase the total revenue generated. Second, by educating runners we could create commitment to the run, to EWB, and drive fundraising efforts. Partly based in my Toronto experience, both of these hypotheses were proven to be oversimplifications. My roadmap to success was outdated and missing information.

Failure 3: Not Fully Licensed

The teams across Canada were incredible: passionate, eager and ready to make a splash. We fed off each other's energy and I focused my support on the planning of local R2EPs. A number of leads, however, also needed support in managing their teams. Failing to recognize this, they knew where to aim, but they did not have the complete set of tools to steer themselves towards success.

Starting Again

The 2012 goal was adjusted from $250,000 to $200,000. In the end we raised $170,135. The failures above inform the path forward: we are examining the analytics of our participant demographic, distinguishing engagement from educational objectives, building a better team-support toolkit, making fundraising tools more accessible, and interviewing others in this space. However, I still have to ask what these failures mean personally, and across the organization.

Organizationally, they point first to a need for greater counterweight on ambition – one that celebrates courage and promotes ambition, but provides guidance on developing milestones and exposing anticipated barriers. Second these failures point to lack of organizational monitoring and evalutation (M&E) practices tailored to operational functions and teams. M&E is extrapolated and applied from ventures with varying degrees of adoption and success.

At a personal level, I feel like I made a commitment and fell short. I feel that I did not ask for additional support when I needed it. I feel that I did not prioritize, in fear of missing out on opportunities, and most of all, I feel that I've let people down.

I also feel a deep level of gratitude and empowerment. I have been asked to embrace this year's results and have been supported to put R2EP on the table and view the campaign objectively. This distinction between personal and strategic failures has been critical for me. It allows me to examine and address both as I aim for a successful campaign in 2013.

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Missing the Trees in the Forest: A Failure to Continuously Apply Hypothesis Testing

Fellow EWBer, Dan Boland, and I were partnered with the Northern Region Planning and Coordinating Unit in Tamale, Ghana, co-designing and implementing a program for managing district data systems in six new districts in the Northern Region.

To track decision-making, discover and explicate assumptions, improve knowledge management, and to help us evaluate the program, we decided to use hypothesis testing. We put together about 50 key hypotheses we had about the actors, their incentives, the database and its use, and what constitutes effective capacity building. We suspected that we had too many, but ploughed ahead with excitement, noting down observations to begin building evidence for (or against) each hypothesis through our design and implementation of the program. We were getting a growing pile of evidence for various aspects of our program and it was awesome.

As we sat down to create the evaluation protocol, however, our big failure was pretty obvious. We had been adding evidence to our hypothesis document, but we had failed to revise or add any new hypotheses as our experience deepened. We were intimidated by the number of hypotheses we already had, but the hypotheses we had developed represented a snapshot of our thinking at a single point in time, rather than capturing the evolution of our thinking throughout the year. Our document should have been changing in two dimensions, when we were only adding to one.

Basing our evaluation on the hypotheses as they stand will mean that we are answering questions we had a year ago, not the questions that we have found over the year. We have had to trace back our thinking, and try to remember exactly why we made certain decisions, what assumptions founded them — exactly the kind of “reverse thinking” we were trying to avoid. It has also meant that we have failed for our team, as Dan and I will both have left as of December 2012. The reverse thinking will be impossible for our new teammates, which will mean much of the knowledge will also be lost.

Tracking the hypotheses was useful in helping the team see the forest for the trees during implementation, in the evaluation, in sharing with colleagues, and for knowledge management, but we must figure out how to capture the two dimensions of hypothesis testing — continuing to gather evidence as well as building in our thinking as it evolves through experience.

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A Failure to Feel

Do you believe that feelings should be constrained and metered out sparingly in work settings? That the role of a leader is always to portray confidence and assuredness? I did. And the result was a lengthy period of deteriorating personal confidence and an unnecessarily bumpy path for the team I was leading.

It started with the launch of a challenging resource allocation process. I was new in my leadership position at EWB, having just left a 14-year career in consulting engineering. From my previous management position and training, I had brought with me fairly rigid views of what good leadership looks like. These views led me to dig my heels in as meetings and conversations became increasingly emotionally charged, pushing forward despite my growing feelings of doubt and uncertainty.

At the time I thought I was doing a respectable job of hiding my feelings, but in hindsight, I probably did a much better job of hiding them from myself than I did in fooling anyone on my team! The growing incongruence between how I was obviously feeling and the way that I was acting eroded trust. As I sensed trust diminishing, my confidence decreased, so I buried my feelings even deeper—which further decreased trust. I was in a downward spiral.

Things had to get pretty rough, both at work and in other areas of my life, to trigger me to break out of the spiral by leaning into my feelings instead of away from them. Once I did this on my own, I next had to build up the courage to share these feelings. The results were dramatic! Where suppressing my feelings and hiding my vulnerability had created a downward cycle, reversing course rapidly built my confidence and repaired trust. In addition, the more collaborative approach on the team that resulted when I let go of my need to be seen as the 'strong leader' has led to far better outcomes.

There is even more that we can do to create safe spaces and strengthen our culture of supportive feedback.

My mental model of strong leadership has changed dramatically as a result of this experience. There is a time when what's required of a leader is to confidently lead a charge, but there are also times when good leadership means acknowledging feelings and being truly vulnerable.

The work environment at EWB is already far more supportive than most for this type of exploration and personal work. However, in reflecting on my experience, I believe there is even more we can do to create safe spaces and strengthen our culture of supportive feedback. Fortunately the position I hold at EWB, VP Talent, puts me in a good position to continue exploring how make this happen.

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Failing to Fashion Solutions

Gender can be one of the juiciest, but most prickly topics to introduce within an organization. Addressing gender inequity can lead to both transformed spaces, and feelings of frustration, helplessness, and conflict. My biggest failure in addressing gender within EWB has been focusing on prickly gender challenges at the expense of championing gender *strengths and solutions*.

In early 2012, I chased down a grant to work with EWB in enhancing the organization's capacity to enable women's leadership. Most of my project involves working with the Agricultural Extension and Governance and Rural Infrastructure teams in Ghana. However, the initial month of my project focused on better understanding some of the opportunities and constraints concerning gender equity at National Office, which I explored through interviews, workshops, and a discussion paper.

So, what happened? Incredible conversations, connections, and insights were generated; many vulnerabilities and challenges also became apparent; but few clear "ways forward" were fashioned. For example, new African Program Staff were aware that they might witness domestic violence in a host family, and some National Office staff could speak more confidently about how women's leadership styles are often undervalued in the organization — but in neither case did this new knowledge adequately enable EWBers to address these challenges. Instead, many felt frustrated by these challenges but unable to address them; whereas those who had not been engaged felt helpless and/or alarmed by these ideas.

My major shortcoming was failing to provide EWB with the right kinds of tools, strategies, and communication patterns to move these gendered insights forward. I had tried hard to ensure my approach was as participatory and non-prescriptive as possible. I had failed to account for the fact that most EWBers lack the time, connections, and resources required to address challenges like gender equity, even though they would like to. Digging deeper, I sometimes lacked the confidence to stay firm in pushing forward some of the insights that were gathered or to share my own solutions.

Moving forward, I have adapted my approach to driving organizational change in several ways. First: identify opportunities in addition to identifying challenges. Though it might take more time to identify and showcase what is already working, there can be much more forward momentum generated by doing so. Second: if I am going to help others name a problem, I need to also help fashion solutions — it can be irresponsible and damaging to open a can of challenges without first identifying the most relevant stakeholders, and without committing to work with them to fashion solutions. At times, this might mean narrowing the focus, but it will also be more likely to create sustainable solutions.

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Blinded by Transparency

My failure is related to the venture resource allocation decision processes for 2012 that occurred in the fall of 2011. The event has caused me to reflect deeply on my own personal values and I believe, grow as a leader. The key learning I have taken from the experience is that transparency as a single value guiding my decisions is not always the way to go.

Don't get me wrong – I am a big fan of transparency, I am just not a fan of transparency as the single guiding value. There are times when being 100% open about every detail can have a harmful effect. Thinking, reflection, and careful sharing are required when you have information that might hurt someone else.

What happened?

In late 2011, Boris Martin and I received the ambitious plans from African Venture Leaders for 2012, and the related resource requests were twice that of *predicted* available resources. We knew we had to have more clarity on actual resources by January 2012, but we needed to make resource allocation decisions earlier—based on the resources we could count on. We decided to prepare everyone by sharing the worst-case scenario for 2012: we could only fund three of the six teams. We thought we were doing a good job, making a fiscally responsible call and being transparent about the situation.

This was difficult information for people to receive in Africa—they heard that there was a 50% chance their job might not exist in 2012. People reacted in a way that you would expect most people to react when they are uncertain about their jobs and the work they are passionate about—some were resourceful and looked at other sources of funds; some decided it was out of their control and chose not to worry; others shared a lot of frustration towards Boris and I. Ultimately, Boris and I caused these reactions.

We had good intentions of wanting to be transparent about the financial reality, possible decisions, and reasons behind the decisions. It was something we felt was valuable. However, we were so blinded by our intent to be transparent that we forgot to think about another value: people. As a result of our actions, we

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had to spend a lot of time and energy towards rebuilding trust with people in Africa. It was a painful lesson indeed.

Why is this important to share?

Twelve months later, the learning from this experience is finally starting to take root. It has been helpful to try and articulate this learning here. I have relived this experience over and over in my head. I have played out the scenarios and decided that although I would still want us to share the financial reality, I would change *how* we share it, in an attempt to ensure people could have kept as much of their energy as possible focused on what matters most – creating amazing change in Africa.

I would likely share this information with greater context – probably not over email, but by talking about it over the phone (or in the best possible case, going to Africa to discuss it face-to-face). Ideally this wouldn't be the primary message, but instead a sub-message to how EWB is shifting the way we allocate resources and what this means for our African Ventures. I would probably prepare myself for people to go through various stages as they reacted (some people faster than others went through stages of denial, anger, bargaining, depression, and acceptance.)

Regardless of the choice, a situation where we are financially constrained is not easy. It is not an easy message for people to hear regardless of how it is shared. If I had the chance to do this over again I would ground myself in that empathy as I shared the information so I could better support people.

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Opportunity in Times of Ambiguity

The story begins in October 2011. I had started my new role at EWB's National Office a few weeks prior. The task ahead was exciting, but intimidating. EWB was looking closely at our Canadian Programs — including Global Engineering — to shape them for system-wide impacts. To me, it was evident that focusing our limited resources solely on Global Engineering curriculum interventions was the key to achieving the scale of impact we sought. The team knew that a focused strategy came with both advantages and disadvantages, but at the time, we didn't know that our focus would come at the cost of the ability to support innovative and transformative ideas.

In the transition period before EWB established processes to invest in new initiatives, Team Leads were often the source of new systemic change ideas. I was approached by a few EWB volunteers with a vision for how practicing industry could embody Global Engineering principles, seeking support for their idea. Their vision included testing several ideas for interventions in a series of dialogues geared towards professional engineers, and if all went to plan, those involved in the dialogues would form a group they named The Engineering Leadership Council (ELC).

I felt that proposal to work with professional engineers threatened a strategic focus on curriculum, which I believed was needed for Global Engineering to succeed. Finding myself with increasingly limited budget available for the core curriculum work, I framed the conversation to myself as "scope creep," rather than as an opportunity for innovation that could potentially unlock otherwise unavailable resources.

As a result of this, I poorly facilitated the first six months of conversations with the ELC leaders. My fear of "scope creep" caused me to focus on trivial branding and naming compatibility issues between Global Engineering and the ELC. My mental model was rooted in protecting the focus on Global Engineering curriculum interventions, which blinded me to the opportunity ELC presented. My framing discouraged the passionate leaders behind the ELC, jeopardized their potential to create change, and slowed down the team's progress.

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As talks continued, I began to see opportunity where I used to see threat, and the second phase of discussions was much more focused on creating possibilities. We found an arrangement to provide the ELC with some support, without jeopardizing the strategic focus on curriculum — and the ELC has since managed to attract even more support, proving that a truly transformative idea can generate resources even when there seems to be none.

An unreasonable belief in possibility can be the difference between managing calculated risks versus fearing threats. It was much easier to see change as a threat to manage, rather than as an opportunity to optimize. Even if the final assessment isn't to jump on all emergent opportunities, fear blocks our creativity and guarantees failure.

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Who Makes the Decisions?

In spring 2011, six EWB members were selected to organize the 2012 National Conference in Ottawa. The newly formed Distributed Team was to operate with some support from National Office (N.O.) staff, but the planning and delivery was left in the hands of the conference team. This was a significant shift from the 2011 Conference, held and organized in Toronto with significant input from the National Office, including a full time staff member as conference chair.

In early fall 2011, the conference team working on Conference 2012 grew considerably with the recruitment of 25 additional volunteers. The timing of this recruitment did not allow for many team-building activities between N.O. and conference team members — and with little interactions between N.O. staff and conference team members, trust never fully developed.

Furthermore, during the months leading up to the 2012 National Conference, EWB actively worked on the development and formulation of its new vision. This process brought much needed change to the organization, but required significant time commitments from many staff members. During that same period, the conference team requested a lot of input from N.O. staff on conference content, marketing, and resource allocations, but did not receive the support requested with the same sense of urgency. As a result, decisions were delayed and some relationships grew tense. We also started to make decisions without consultation or approval from N.O. staff, which exacerbated tension between teams.

As a conference team, we made a fundamental assumption that shaped the interactions with staff; that they *were already excited about the conference and made it one of their top priorities*. Under this assumption, the conference team did not feel the need to build excitement among N.O. staff, and focused communications on logistics and administrative details.

Additionally, we never clearly established leadership boundaries to define which decisions could be made by one team without the approval of the other. This gap in the planning process was the cause of frustration and low morale as "final" decisions of one team were overruled by the other.

We were able to rectify the engagement of N.O. staff successfully by creating a newsletter to share details and more in-depth reporting of the conference team's progress. This improved relationships significantly, and the conference team started to receive much more positive responses from N.O. staff. However, the deeper issue of a leadership boundary was never fully addressed.

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It is undeniable that being a Distributed Team and working independently from N.O. gave the conference team incredible ownership – it pushed us to work tirelessly to make the conference a success. However, in this context, boundaries must be set to ensure that the right decisions are made. As an organization, we should have been more strategic regarding this delegation process. In the future, we must continue to give as much ownership to Distributed Teams as possible, but we must improve our ability to decentralize decision-making authority.

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Slow is Fast

A year ago, in snowy Ottawa, the EWB National Conference venue gave off a feeling that resembled EWB's state at the time—it felt to me like we were under construction! We had sprinted through the last mile of articulating our vision after two years of exploration. There was a palpable sense of unease and ambiguity—and we were diving right into systemic innovation language.

The resulting tension hindered us from asking the real, wicked questions EWB needs to engage in if we are to make a great contribution to the world as an incubator of systemic innovations. People were asking fear-based questions like "*Can we allocate resources to our ventures in a strategic way, if it's going to create a climate of competition between them?*" instead of asking "*What process design and what elements of culture do we need to preserve so that we can allocate resources to our ventures strategically, while making sure that all ventures invest in each other's success?*"—an integrative mindset that will be crucial to EWB's success as we define our unique approach to being an incubator.

To be honest, when faced with the former type of reactions, I got frustrated. I feared that people's polarization would lead us to mediocrity. I got disappointed. My frustration led me to fail to recognize everyone's concern came from the same place of love and care for EWB that my reaction came from. I failed to see that it was justified and that it deserved attention.

We cannot underestimate the cost of that tension and ambiguity on our ability to move forward. I can only imagine how much more we could have achieved in another atmosphere. I failed to create a different type of atmosphere.

With the benefit of hindsight, there are a few lessons that I can recommend for future, similar processes (namely, EWB's 2030 vision process):

- Create space for concerns to be heard. Prioritize having a thousand conversations. Build a vision that is tangible. Take the time to do it together.
- Invest in people's preparedness to deal with ambiguity and change. We are all unique, and yet we are all human. There are things we know about how change processes happen and how people react to them. It is good to inform everyone before getting started.
- At a personal level, my ability to embrace this type of situation in an effective way is rooted in my ability to embrace diversity: to have the empathy required to anticipate the ambiguity that others would feel in this situation, recognize it when it happens, and to address it adequately. It is something that is now consciously placed in my personal development plan.
- At an organizational level, I think we have to recognize that some transitions take time. EWB needs to invest in our ability to anticipate and make intentional decisions about our pace of change.

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Fewer Earthquakes? Better for the World

I think that the worst thing anyone ever told us was to do what we are told.

I paid for university by waitressing: jungle theme, khaki shorts, and "Toucan Dine" Tuesdays. The incentives of this jungle, and honestly, the education system before it, prepared me to follow direction exceptionally well.

Then I came to EWB. As a venture leader, I choose my hours; set my goals; and evaluate my progress. Technically, I am top of the direction-setting chain.

While I have often reveled in this freedom, I have just as often struggled with its challenges. One of the hardest has been fully embracing this direction-setting role — taking thoughts from others as *input* instead of instruction, and feeling confident making strategic decisions. Ultimately, *I have too often failed to think for myself.*

You see, I was a kick-ass waitress because I learned the rewards of following direction, and my default is to seek that success again, delivering—even *predicting*—exactly what everyone else wants. I want to impress by doing what others think is right. I want to feel the reward of making people proud.

The problem is, I have authority on this venture for a reason, and following one-off thoughts from others scatters me, I lose intentionality, and I frantically try to keep up with adjustments — attempts to make everyone else happy at the same time.

This spring, I struggled with this every day. I had a different vision for this venture weekly. This constant change and adaptation almost completely disempowered the Distributed Team and the network, and by disrespecting my own capacity, I rapidly lost self confidence. And now, though I'm much better at identifying this behavior, I still occasionally come to the current team frantically questioning strategy; panicking that we've made the wrong decision; asking them if we should uproot everything and change direction. I keep shaking the ground beneath them, and it's affecting them negatively, too. Just last night, they shared

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their collective wish: "Less crises," they said. "Fewer earthquakes? Better for the world."

The problem with learning to do what you are told is not just that you learn to comply — you learn to ignore your gut, and you learn to devalue what *you* think.

This is a consistent failure to value myself, reach my potential, and bring this venture to *its* potential. It is a failure that hurts, because it is not as simple as learning and avoiding the mistake. I still do this. But the more I articulate it, the more I find support: my management meetings are set up so that I know I am not expected to respond to every shared question and thought. This time allows me to push past the "say the right answer" impulse – it allows me to listen, think, and ask: *what do I think? Why am I doing this?*

It seems so simple, but it is deeply complex. Early on, I learned to do what I am told, to externalize validation, and to follow the rules. The worst of it? It's the opposite of innovation; the antithesis to change; and it is not why I am here.

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Failing to Learn from the Failure Report

Last year, I submitted a story to EWB's Failure Report on the failure of communication between parts of EWB – the failure of a knowledge management system. In brief: in December 2010, I had a meeting with an Edmonton MP where I discovered that he already had a relationship with EWB at the national level. So much so, that he was attending EWB's National Conference in January prior to visiting Ghana with EWB.

In the time since this failure was published in the Failure Report, what has changed? From my perspective – very little. There is some movement for an MP relationship tracking tool, but there hasn't (yet) been broad support for it and there is still minimal sharing between National Office and chapters in the realm of MP knowledge and actions.

So why didn't we learn from the Failure Report? Here's a look at the process of the Failure Report, from my perspective:

A person or a specific group experiences the failure and the consequences of that failure. When submissions to the Failure Report are advertised openly, they may share it, and it eventually it ends up in the year's Report, distributed at National Conference in January and occasionally referenced afterwards.
Within this process, I see three failures:

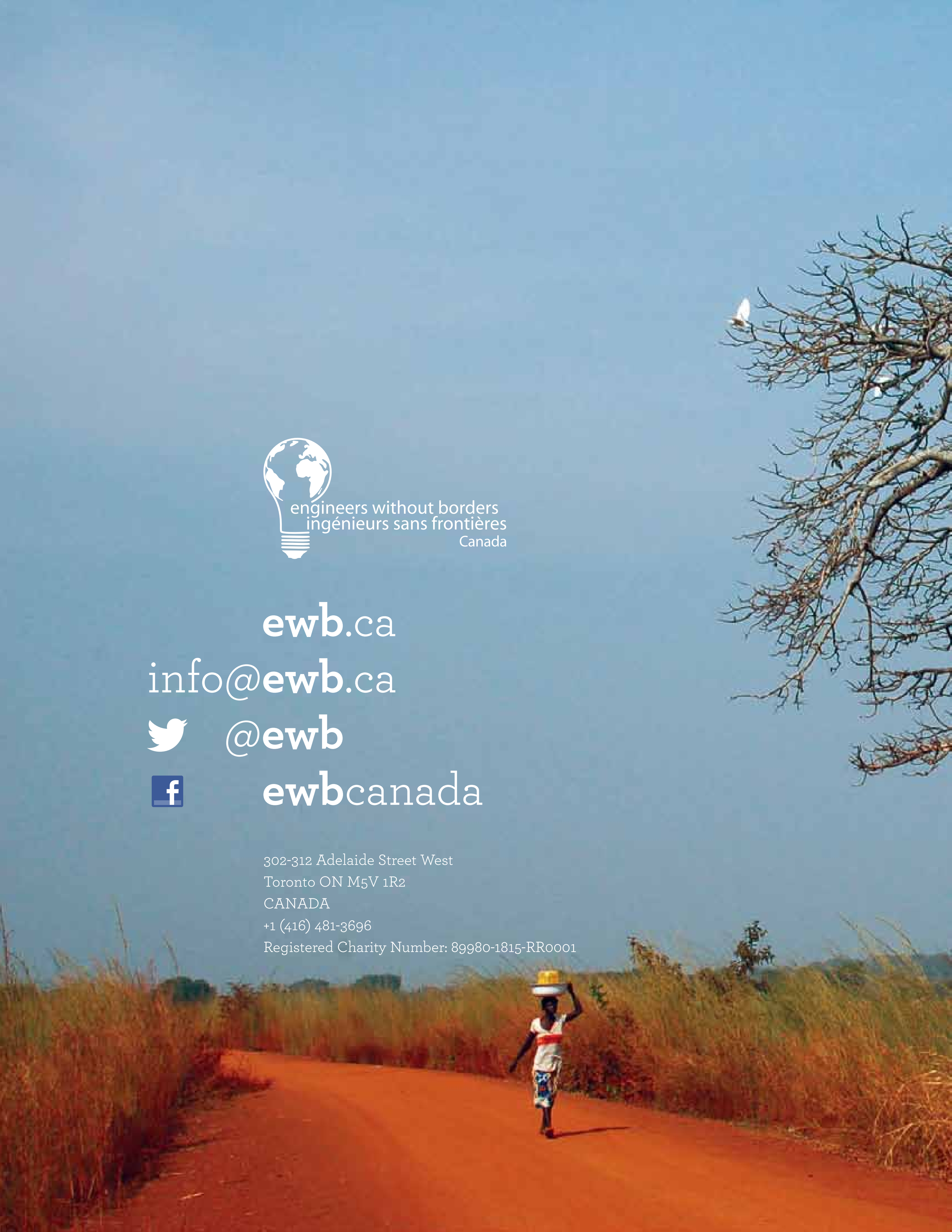
- The right people don't necessarily learn from the submitted failures. There is misalignment between who experiences the consequences of a failure, and who can solve for it at its root cause.
- The Failure Report emphasizes individual solutions, and puts the onus on one person to learn or "fix" the failure. This does not facilitate broad learning from the mistake, and does not incite institutional change to avoid the same failure.
- Very little follow-up occurs after the Failure Report is distributed at National Conference, with the exception of learning at an individual level.

Looking at the failure I submitted last year, it is the quality of EWB's advocacy work that suffers. In this, chapter representatives experience the immediate failures, but to solve for it, the change must be driven from multiple parts of the organization—and crucially must include the Advocacy team at National Office. It is not always the same people who experience the immediate consequences of a failure who can drive forward the change. The change and learning must be organizational in nature, and must not stop with one person.

Although the Failure Report is an important first step, it failed to result in organizational learning. However, Ashley, who heads up the Failure Report, suggested that I take the time to explore the issue of knowledge sharing further with James, who leads EWB's advocacy efforts. Clearly, movement forward towards an open dialogue for addressing these challenges was driven through the Report.

I have learned that organizational learning is not inherent in the Report, but that it may be catalyzed through the use of it. Ultimately, the responsibility is on each one of us, as EWBers, to act. As an organization, we should all be actively seeking out relevant stakeholders in order to have the discussions required to learn and adapt to our failures.

In the time since this failure was published in the Failure Report, what has changed? From my perspective—very little.



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