



Failure Reports: A How-To Guide

INTRODUCTION

This document is intended to support organizations who are interested in documenting and learning from their failures, and using the process as a launch point for organizational change. It is largely based on the process developed by Engineers Without Borders Canada (EWB), an organization which has been publishing its Failure Reports publicly since 2008 (ewb.ca/reports).

You are encouraged to take the process outlined below, adapt it, test it, and otherwise make it your own so that it is suitable for your specific context. And if you need a hand, Fail Forward specializes in supporting organizations just like yours to implement tools for learning, innovation and resilience. Don't hesitate to be in touch (failforward.org/contact).

WHY WRITE A FAILURE REPORT

How do you create an organizational culture that encourages the risk-taking, creativity and continuous adaptation required for innovation? Engineers Without Borders Canada has been publishing an annual Failure Report for five years to do just that. The [New York Times](#) says it is helping "the social change world reach its true potential."

It creates both open dialogue about failures and organizational acceptance of them, giving employees and volunteers incentives to innovate as well as tools and collaborative space to fail fast and fail forward, a "brave" and "welcomed exception" according to [The Guardian](#).

We all know that failure happens. It is those who are able to recognize it, learn from it, and adapt to the learning that prove successful. A Failure Report demonstrates that you are transparent, agile and self-aware – and it is these characteristics which allow an organization to maximize learning and build resilience. Paradoxically, it is always the strongest most effective organizations that are able and willing to speak openly about their failures.

A word of caution: A Failure Report does not replace the need for robust mechanisms for analysis and evaluation of one's work. It is a tool for instilling an organizational culture of innovation and learning needed to be resilient in a rapidly changing world. It is not an evaluation. However, including stories of failures in the process of evaluations (and performance reviews, team meetings, etc.) has proven to be effective at ensuring learning is maximized year-round.

TIMELINE

As mentioned in the introduction, the timeline presented below is used by Engineers Without Borders Canada. It may not be suitable for the nature of your organization. This timeline should be viewed as a starting point for thinking about what it would take for your organization to produce such a report.



In Summary

For the following process approximately 60 hours of staff time were invested over four months for strategic visioning, internal communications requesting failure stories, editing and revisions of submissions, final compiling of stories and online publishing.

External providers were used for the copy editing, design, and printing of the report, costing approximately \$300 for professional editing, \$700 for design work (provided by [Kyle Baptista](#)) and \$1500 for printing. Therefore the total cost of producing the required 1000 hard copies of EWB's 30-page report was approximately \$2500.

Before You Start: Organizational Change Management

Give me six hours to chop down a tree and I will spend the first four sharpening the axe.

- Abraham Lincoln

Is your organization ready to speak openly about failures?

No matter whom you are or what your failure is, it can be a very hard thing to do. Writing a Failure Report can be a big change for an organization. How you will manage this change is important to consider before anything else.

One can think of this change process as all the steps that need to happen to bring stakeholders from an awareness of your plan to write a Failure Report, to understanding why and how, to committing to the initiative, and finally, to participating in making the Failure Report happen.

This process will differ greatly for every organization but below are some guiding questions to get you started as you consider this change process.

- How will people feel about this initiative? What are possible reactions?
- What support do you need to make this happen? Who, if they were opposed, could prevent it?
- Whom should you consult to ask for input and feedback and at what stage in this process?
- What benefit and risk would this bring your organization? How and to whom do you need to communicate this?
- Who needs to be involved to make this happen? What are their specific roles?
- What support will people need to write their failure stories? What will encourage them to follow the [communicating failure best practices](#)?
- What does it look like to measure the impact of creating a Failure Report at your organization?

If you would like further support to develop a context-specific change management strategy to get your organization ready to write a Failure Report, feel free to [contact us](#).



Month One

Approximately five hours of staff time

Vision Setting

Brainstorm the theme or direction of the report. The Failure Report is a tool for organizational learning. As such, the folks who curate and create it should never stop questioning if, how, and why it works to support this learning culture and use this reflection to iterate and improve upon the report every year. EWB has been exploring different approaches to increase the Failure Report's effectiveness as a learning tool. Those ideas are included as Appendix A.

Determine Budget and Timeline

Consult with all stakeholders to determine how many hard copies will need to be printed. This is also the time to consider your translation needs and if you will have to ship reports to get them to stakeholders.

Engage everyone involved including any external providers (designers, translators, editors, printers, etc.) in dialogue to determine what their timelines and costs are for the work they will do. Working back from the date you would like to have the report ready for, the deadlines for each stage in the process can be set.

Plan

The major deadlines and milestones in the process of writing a Failure Report that should be communicated to those involved are the period for vision setting, the launch date for the request for stories, the deadline for story submissions, the period for story revision, the deadline for final drafts, the period for editing and translation, the deadline for getting text to the design team, the date final products need to be sent to the printers and, if necessary, the date hard-copies should be shipped.

It is a good idea to add an appropriate amount of buffer time (EWB chose 2.5 weeks) into the planning schedule in the event activities take longer than initially projected.

Month Two

Approximately 15 hours of staff time

Share the vision for the Failure Report and communicate to the people in your organization that they should start thinking about their failures from the past year to contribute a story to the Failure Report. Communication channels that can be employed for this purpose include newsletters and regular update emails, direct emails to organizational leaders, and personally encouraging leaders to engage with their peers and staff. When thinking about the communication channels available to you, ensure you are reaching all areas of your organization to encourage broad representation.

Be sure to include the deadline for when stories should be submitted and where they should be sent in all communications. Potential authors should be informed that they will receive, and so should be prepared for, feedback on their first drafts. You may also wish to include the [communicating failure best practices](#) or create your own guidelines and best practices for writing failure stories at your organization.



Month Three

Approximately 30 hours of staff time

Read the stories as they are submitted and offer the authors feedback on the depth of learning communicated, pushing authors to focus on what is really important. I have included a list of common feedback for authors from EWB as Appendix B.

Edit as you see fit and send back to authors for approval. Get a professional editor to proof read the final versions for grammar, style and typos.

Send to the appropriate people for translation, and design.

Month Four

Approximately 10 hours of staff time

Work with your designer and confirm final versions.

Double-check with stakeholders that their initial estimates for the number of hardcopy reports needed are still accurate and send to print.

Arrange for shipping if required.



Appendix A: EWB ideas for Turning the Failure Report into a better Learning Tool

- Insist that authors must consult every stakeholder implicated in the story before their story can be published.
- Write a “success report” to showcase instances where the conscious application of learning from previously reported failures has enabled eventual success. This could even be included as a "Success Report" section in subsequent failure reports (i.e. it does not necessarily have to be a separate report).
- Have an external facing Failure Report with all project-related stories and an internal report for all the operational and leadership failures. Use the operational failures to drive discussions at head office about the recurring issues (e.g. resource allocation process and communication between the network and head office were recurring themes this year).
- Have the report come with workshop templates and/or suggestions by which chapters can use failure stories as case studies to facilitate discussions about organizational learning within the chapters. These workshops would be deliberate about reinforcing the organizational learning culture.
- Have an annual meeting to discuss past failures and what, if any, actions need to be taken.
- Develop a creative way to better manage for and increase learning from failure throughout the year rather than simply managing the information itself.
- Make all failure reports mandatory reading for pre-departure (EWB has an overseas sending program) as well as new-hires.
- Invest in analysis of trending failures over time to build a deeper understanding of recurrent failure modes.
- Present failures as a dialogue, not the single-voice story they currently are - in order to better represent the multiple perspectives involved and encourage people to have ongoing discussions.



Appendix B: EWB's common feedback for authors on their first drafts

- *On word count* - You're at ___ words. The ideal word count is supposed to be 400-450 words which is set for readability and is meant to force authors to be concise and focus on what really matters. To shorten, tell the story in as few words as possible - you only need to share the vital information that makes the learning understandable. Get to the "so what?" as concisely as possible.
- What are the consequences? To you, your team, EWB, etc? Talk about the pain it caused as a basis for why the learning is so important to share.
- Your story should have a recommendation. Answer the question "what makes this story valuable to other people?" and make sure to highlight that because this is the reason your story should be communicated.
- Draw out the bigger picture of this failure. What patterns or trends do you see in this failure? Does it cause you to question any core values/beliefs/theory of change that you or your chapter/team holds? What can EWB learn from this failure?
- *On bringing in partners to collaborate on the story* - Is there any chance that you can send this to x who is clearly involved in this failure? Would they be willing to offer their perspective into this story? It'd be neat to at least add a quote from them. **Either way, remember this will be public on the internet so they are likely to see it!** Send it to them. It's best if they have a say in it before finding out through someone else.
- *On internalizing responsibility* - Be sure to write it as YOUR (or your team's) failure. At the moment it looks a little strong on the blame side. You need to take responsibility or it should be the other party writing this story.
- *On failures that happen each year (EWB failure modes)* - EWB has a history of falling into this trap - read this failure about x from the 20xx failure report for proof and it would be great if you could comment on why this is a deeper problem and insert your perspective on why this comes up over and over and is not solved.