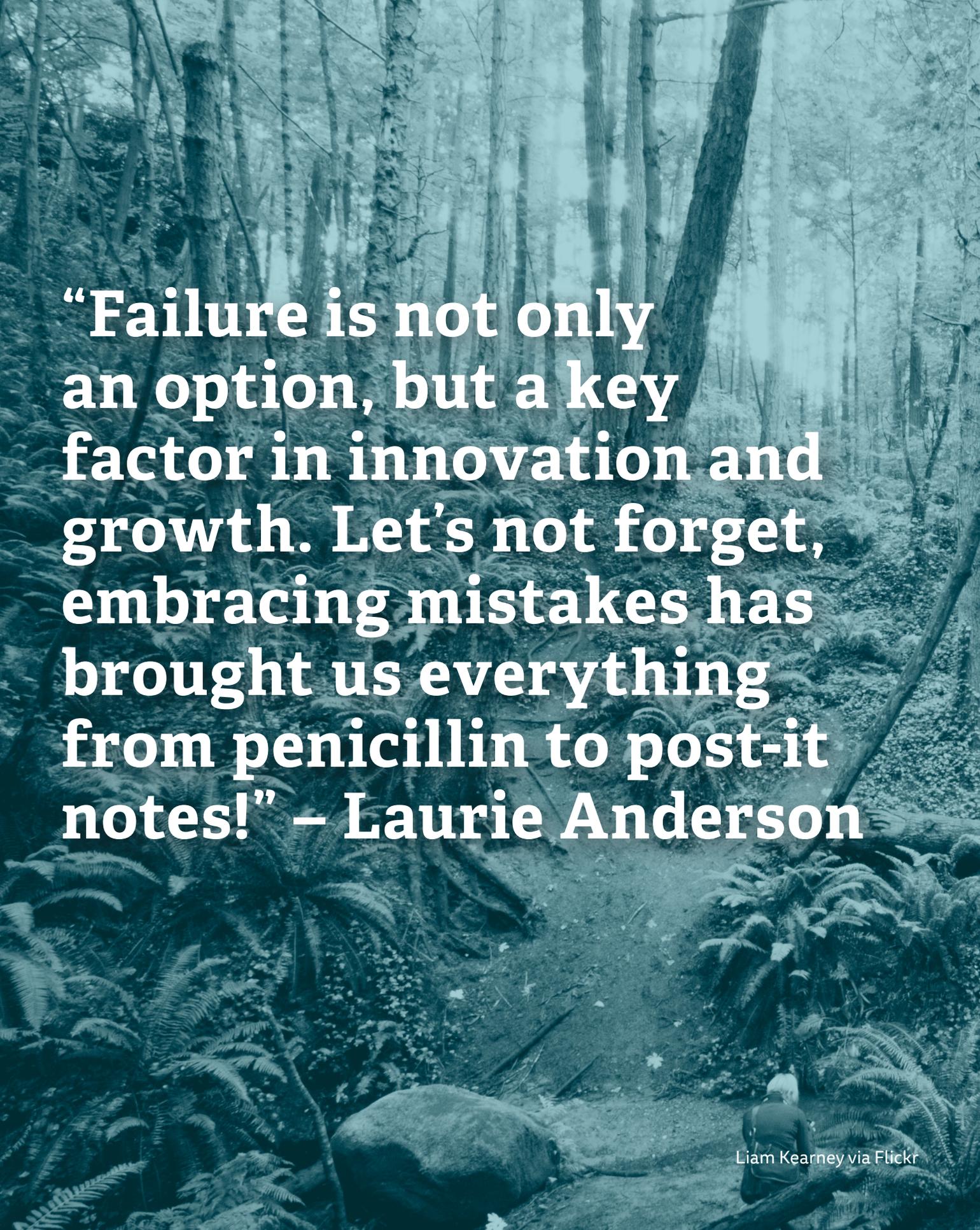


# 2013

## Failing Forward Report





**“Failure is not only an option, but a key factor in innovation and growth. Let’s not forget, embracing mistakes has brought us everything from penicillin to post-it notes!” – Laurie Anderson**

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BY WILL HORTER, EXECUTIVE DIRECTOR

# Failing Forward



The status quo isn't acceptable to me. Whether it is inexcusable poverty, degradation of the air, land and water on which we rely, injustice or oppression, I worry about the growing gap between the world I dream about for my precious daughter and the world I see unfolding before me. As a father, as an activist and as a human being, I spend a lot of time trying to identify tangible paths to reverse these trends and move closer to the world of my aspirations.

The path forward is windy and while the specific steps needed may vary with place and circumstance, one thing has become clear to me: changing the world just isn't possible without taking risks and innovating – which inevitably means failing sometimes.

To the best of my ability, I'm trying to deeply embed a culture of failing fast and of failing forward within everything Dogwood Initiative does. I know Dogwood will continue to make mistakes. If we don't, it means we aren't trying hard enough. To tackle the biggest, hairiest, most audacious issues, civil society must learn to move through the test-fail-succeed cycles of innovation much faster and more transparently than our current approach permits.

The 2013 Failing Forward Report is Dogwood Initiative's latest contribution to fast-tracking this process.



# Embracing Failure

**Embracing failure as an organization goes way beyond writing an annual failure report. It involves shifting organizational culture and being open to a dialogue – both internally and externally.**

When Dogwood Initiative began this process a couple years ago, I'd hoped that publicly disclosing our biggest failures would help open us up to learning – and to testing our assumptions – while always seeking the quickest, cheapest, most effective means to creating systemic change on important issues affecting British Columbians.

What we found was that it was easier said than done. But that commitment to the process, however difficult, resulted in surprising benefits.

The process of moving from concept to innovation is simple. It involves piloting an idea, measuring the results, figuring out what worked and what failed, adapting and redeploying. To scale bigger – wash, rinse and repeat.

Our main goal was to embed the process of innovation – failing fast and learning from it – in the cultural DNA of Dogwood Initiative. We also had two external goals. We hoped to:

1. Catalyze more frank discussion of failure between NGOs and amongst funders.
2. Build transparency and trust with our supporters.

With the later goals we had mixed results. Some foundations embraced the dialogue we'd hoped for. We were asked by two foundations to present our failures report to their boards and other grantees.

Also, Failing Forward 2011-12 seemed to catalyze a deeper dialogue with many program officers who work with us. That said, I was disappointed there wasn't more uptake in the NGO sector.

Although our data is limited, we believe the more systematic confession of Dogwood Initiative's biggest failures did contribute to our strengthened connection with supporters. One of the strongest themes that surfaced in our survey of 3,500 supporters was a desire for timely, frank reporting on Dogwood's successes and failures. In addition to our annual failure report, report-back e-mails that outline successes, failures, progress and next steps are now compulsory and are integrated into communications schedules for all fundraising series and calls to action. So far, supporter responses to this kind of accountability have been consistently positive.

I am also pleased to report there was no backlash from last year's report. I'm not ashamed to admit that I was anxious last year about publicizing our failures – especially considering the increasingly divisive political culture in Canada today. Fortunately, anxiety that our admissions would be used against us proved unfounded.

*"We are all failures – at least the best of us are." - J.M. Barrie*

# Failures in 2013

## Failure 1: Organizing on Northern Vancouver Island

**Goal: To build a politically powerful ground game that key decision-makers perceived as formidable**

### Our failure:

Dogwood Initiative attracted more than 32,000 new supporters after Canada's then Natural Resources Minister Joe Oliver attacked everyday Canadians as "radicals". This huge spike in support exposed the limitations of our systems and highlighted our inability to integrate supporters into an effective political force. We realized Dogwood Initiative needed to build both a larger network of supporters that covered the province, as well as a deeper network grounded in neighborhoods that could provide political muscle targeted at key decision-makers.

After hours of analysis of past election results, the density of our existing supporters and the importance of federal and provincial incumbents to leaders in Ottawa and Victoria, we chose to launch our organizing model pilot on northern Vancouver Island. We set some initial acquisition targets, rented out an office in Courtenay and hired an experienced canvasser from Victoria as the lead organizer. What we didn't do was set clear metrics, provide much training, direction or, frankly, organizational support.

As a result, this pilot didn't produce the results we'd hoped for. We should have paid more attention when our initial acquisition numbers were modest, but we weren't paying close enough attention, nor providing the pilot the support it needed. The problem only came to a head during the 2013 provincial election when we found out that the team of volunteers wasn't willing to door knock or conduct phone banks. Ultimately, despite everyone's best intentions and hard work, we didn't build the strong, cohesive team of volunteers needed to organize at scale on the local level.

Our debrief following the 2013 provincial election made it clear that change was needed. It took us a few months to identify the need to start over on the ground floor with a greater focus on volunteer training and staff support.

### What we learned:

Even though the pilot didn't produce the results we hoped for, the lessons learned were invaluable in designing our new, citizen-fueled, riding-by-riding organizing efforts that we launched in January 2014.

The central lesson of this pilot is that organizing is about meaningful relationships. We learned that choosing the right organizer for the specific place is the make-it-or-break-it decision. In addition to getting the right person in the right place, other lessons this pilot highlighted include:

- The best organizers are grounded in local culture and community;
- The task was too big for one person and can only be accomplished by a team, so the key aptitude of a good organizer is their ability to recruit, inspire and support a team;
- To truly engage local citizens, Dogwood Initiative needed to change the way it structures, staffs and manages its campaigns;
- Clear goals and objectives for teams must be established early; and
- Accountability and open communications channels must be established to provide both autonomy and structure for organizers and their teams.

As with all pilots, we set out to conduct “a small scale preliminary study... to evaluate feasibility, time, cost, adverse events, and affect size in an attempt to predict an appropriate sample size and improve upon the study design prior to performance of a full-scale research project.” (Wikipedia)

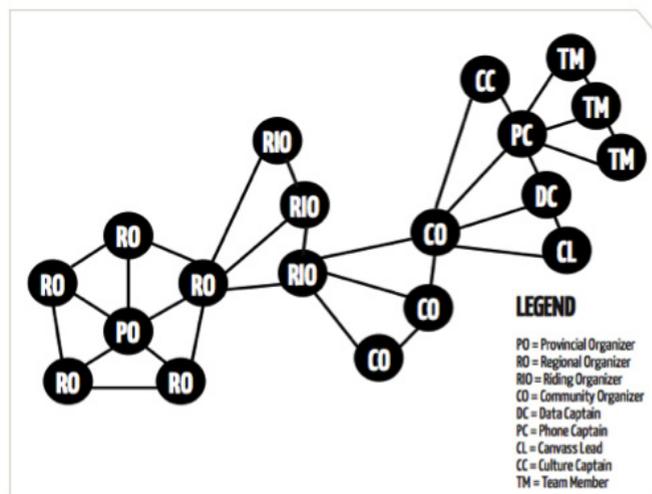
Even though the pilot didn’t achieve our internal goals, we learned valuable lessons that have helped Dogwood understand how to better organize at the regional scale.

## Going forward, what has changed?

The pilot confirmed what our previous organizing efforts, and new science on human behavior, taught us: humans, no matter how talented, can only

effectively manage between six and ten relationships at a time.

With this lesson we have adopted a “snowflake model”, or a distributed leadership structure, adapted from the organizing models of Marshall Ganz. Key features of this approach include clean lines of communication within and between each team, all team members are accountable to each other, and that the power, responsibility and ownership of the tasks and outcomes are distributed – not concentrated.



The strength of our new distributed organizing model is that it integrates local action with the bigger, broader purpose: it’s scalable, yet manageable on a human scale. It builds on the glue that drives all successful relationships.

Every team has a leader who coaches organizers through challenges and helps keep the big picture in sight without being responsible for everything. To maximize effectiveness, teams are small: each member has a clear area of responsibility and is able to measure their progress. Teams meet regularly and, most importantly, they have fun together.

# Failure 2: No Tankers in the 2013 provincial election

## Goal: To ensure the next government of British Columbia opposed projects that would expand oil tanker traffic in B.C. waters

### Our failure:

There are endless interpretations of what exactly happened during the election. It's difficult to talk about the nuances of what worked and, more importantly, what didn't.

First, the positives: we succeeded in helping make the expansion of oil tanker traffic a defining issue of the 2013 election. The leaders of three parties – the Green, NDP and Liberal – competed to be perceived as No Tankers champions. The Liberal Party even made the peculiar anti-NDP move of running “Stand Up for BC” ads, which were perceived as praising the Green Party position on oil tankers and pipelines.

During the entire election the rhetoric from Green, NDP and Liberal leaders was critical of Enbridge's proposal – but the big question was where the next government of B.C. would stand on Kinder Morgan. Going into the election only the Green Party had come out against Kinder Morgan – the NDP position was “wait and see” while the Liberals promoted their five conditions.

Dogwood's non-partisan canvassers were working on the ground door-knocking in potential swing ridings, informing their neighbors about the various party positions. Our team in the riding of Oak Bay-Gordon Head received national media attention, as it was perceived as a battleground between the NDP and Greens. Even though they received more publicity, our Oak Bay team was doing nothing

different than any of the other 13 teams operating in other ridings.

Three weeks before the vote, frontrunner Adrian Dix of the BC NDP announced his opposition to the Kinder Morgan proposal, which caught even members of his own party by surprise. At a press conference in Kamloops, Dix declared that the expected increase in tanker traffic resulting from Kinder Morgan's plan was not acceptable, later adding he would not support any oil pipeline that would change Vancouver's harbour into a major oil export terminal.

There has been a lot of speculation about why Adrian Dix chose to do this at that moment in the campaign. The truth is no one except Mr. Dix will ever really know.

People offer various speculative hypotheses for Dix's surprise announcement, arguing the NDP was trying to:

1. Prevent a Green Party breakthrough in Oak Bay;
2. Prevent a bitter split in the NDP caucus; or
3. Appease Dogwood and our growing supporter base (which is flattering, but ridiculous)

When the surprise announcement hit the wires, Dogwood organizers celebrated. Here was the person most pundits predicted to be the next premier adopting the position we had fought so hard to advance.

But then things got complicated. A day after the announcement, John Horgan (a perceived member of Dix's inner circle) mused at the potential of Kinder Morgan locating an oil tanker terminal at Fraser Surrey docks or Westshore Terminals. It would seem any potential for attracting informed Green Party voters quickly evaporated with that widely distributed article. Contrary to the rhetoric of many commentators at the time, polling showed an immediate bump for the NDP as voters seemingly abandoned other parties and rallied behind Dix on the tanker issue. Documents now reveal Christy Clark's top advisors urged her to follow suit.

What happened next was instructive and sobering. Clark did not follow Dix on Kinder Morgan. Instead, she turned Kinder Morgan into a wedge issue, accusing him of flip-flopping, then wove it into a larger story about an NDP she claimed was opposed to jobs, development and economic growth. At the same time she took out full-page ads saying she would "Stand Up for BC". Key union leaders withdrew their manpower from Dix's campaign and it fell steadily off the rails. Many NDP voters stayed home thinking they had the election in the bag.



*"It is fine to celebrate success, but it is more important to heed the lessons of failure." - Bill Gates*

Green Party voters didn't flip because they felt they couldn't trust the NDP. Polls, it turns out, don't tell the whole story.

Dix's announcement – and pundits' almost universal predictions of an NDP landslide – also removed the urgency for our volunteer teams. If the election was in the bag and the presumptive premier was already against both Enbridge and Kinder Morgan, why bother canvassing or phoning your neighbours? We had no antidote to this conventional wisdom and despite our attempts we couldn't overcome the narrative coming from all other channels.

But even without Dix's surprise announcement, our election ground game was not what we'd hoped for. In some ridings our volunteer teams were active. In others, not so much.

Why did we have vibrant teams in some areas and not in others? What were the characteristics of the active teams?

We concluded it all came down to the relationships among the team members. Active teams had strong leadership, defined roles, a sense of shared purpose and the experience of working together.

We also identified a deeper challenge: because our volunteers included supporters from all major federal and provincial parties, how do we keep them mobilized around a single issue in the highly partisan environment of an election?

We concluded that you couldn't unless the bonds among team members pre-dated the election, were tested and strong with experience.

## What we learned:

Elections are unpredictable and it's hard for a non-partisan, non-party group to break through the narrative being repeated by political parties and the media. It is not impossible, and we have succeeded in a couple ridings, but scaling these efforts is difficult when relying on untested, unpaid teams.

Historically, we have the biggest impact and most leverage in close elections. That is the sweet spot – but sometimes it's hard to predict in advance where the cliffhangers will be.

Using our old model we could only dabble in a few ridings, so if we wanted to be effective and influence multiple ridings simultaneously we had to develop a new model. While we'll never be able

to compensate for bad candidates or party mistakes through election organizing, going forward we believe we can influence the outcome of close contests with a different approach.

## Going forward, what has changed?

Essentially, we've decided to dramatically restructure the organization to implement the new decentralized engagement organizing model described earlier in this report. We're actively decentralizing our operations and investing heavily in recruiting, training and supporting neighbourhood teams well in advance of our next election efforts.

We gave ourselves 18 months until the next federal election to get our decentralized model operational and battle-tested for key ridings. Areas that will likely be battleground ridings in the upcoming elections are prioritized, getting more support in the Let BC Vote campaign.



# Failure 3: Shifting culture toward engagement organizing

**Goal: To have neighbourhood organizing teams in all 85 ridings across the province**

## Our failure:

Internally, 2013 was a difficult year at Dogwood Initiative. Our senior team was not fully aligned on priorities and the strain this created rippled throughout the organization. Morale was low, although we still were achieving success on our campaigns.

Dogwood Initiative was at a crossroads. There was tension among staff about how to respond if Ottawa tried forcing unwanted pipelines and oil tanker projects on British Columbia. Some staff wanted to focus on becoming more efficient and building on past successes. Others felt like even making vast improvements wouldn't get us to the promised land – that in order to catalyze transformative change, we had to try something huge and audacious that had never been done before.

Superficially, the debate centered on whether to prepare for a citizens' initiative if Ottawa and Victoria attempted to push through oil tanker projects. Underlying the tension was a deeper lack of agreement on our theory of change and priorities. It was an emotional and contentious debate.

The provincial election forced us to go back to fundamentals. Up until then we'd dabbled with orga-

nizing pilots (see Failure 1), but like many other organizations it had been bolted onto our existing modes of operation. We'd even tried some hybrid efforts in the lead up to and during the 2013 provincial election (see Failure 2). None of these had worked as we'd hoped. The question was – what do we do next?

As executive director I was the strongest proponent of the citizens' initiative preparation tactic. Unfortunately I wasn't fully aware of the misalignment around our underlying theory of change. I

paid too close attention to addressing specific concerns related to the pros and cons of the strategy and not enough to the process and organizational culture. As a strong advocate, I wasn't as sensitive to some staff concerns as I should have been.

As a result of this misalignment, internal communication unintentionally deteriorated. As a leader I failed

to lead staff through a process to get organizational buy in and pressed too strongly and quickly for major change. A key component to achieving any form of change is how the message is delivered and I failed to communicate with our team in an optimal fashion. I underestimated the time and energy necessary to get full staff buy-in to radically shift the organizational culture and got frustrated with the process, leading to further communication breakdowns.

*“Winners are not afraid of losing. But losers are. Failure is part of the process of success. People who avoid failure also avoid success.”*

*- Robert T. Kiyosaki*

## What we learned:

Everyone in the organization needs to be aligned with the organization's key priorities and theory of change.

If alignment is missing, stop everything and spend the time and resources necessary to achieve alignment.

Structural change is hard. Truly becoming an organization committed to engagement organizing isn't something that can be casually undertaken. It's not something that can simply be tacked onto existing structures.

Success was going to require a significant rethink about how the organization makes decisions, sets priorities, communicates internally and allocates resources. There are no shortcuts.

## Going forward, what has changed?

Personally, as a leader, I have learned to listen more and talk less.

Organizationally, it took more than 9 months to fully achieve buy-in to the initiative preparation strategy, but also – and more importantly – to deep engagement organizing and all it entails. It was hard work and we've certainly encountered some speed bumps and detours, but I believe it was worth it because we've built a real network of deeply committed teams.

We re-examined and improved our internal communications and decision-making systems to provide better clarity. Now we also spend a lot more time trying to achieve and maintain alignment on our top priorities and theories of change.

Our theory of change for the organizing program and what has since evolved into today's Let BC Vote campaign was:

"We believe if Dogwood Initiative can build a large enough consensus behind the right of British Columbians to vote on projects that affect our province, then we can subject oil tanker proposals to a democratic decision because we'll have the numbers to stage and win a citizens' initiative."

*"Here's to the crazy ones. The misfits. The rebels. The troublemakers. The round pegs in the square holes. The ones who see things differently. They're not fond of rules. And they have no respect for the status quo. You can quote them, disagree with them, glorify or vilify them. About the only thing you can't do is ignore them. Because they change things. They push the human race forward. And while some may see them as the crazy ones, we see genius. Because the people who are crazy enough to think they can change the world, are the ones who do." - Steve Jobs*

# Failure 4: Outreach to potentially allied organizations for what would become the Let BC Vote campaign

**Goal: To bring in partners who would support the initiative preparation efforts and potentially take turf if a citizens' initiative were launched**

## Our failure:

It wasn't just the internal process for what would become Let BC Vote campaign that was messy – our initial external outreach was belated, tone deaf and under-resourced.

Dogwood Initiative began contemplating the concept of a potential citizens' initiative for our No Tankers campaign in the spring of 2012. The internal debate created a lot of organizational turmoil (see failure 3), so we didn't mention the idea publicly until just before the provincial election in May 2013.

The main concern of colleagues was whether we had the horsepower to achieve the thresholds for required signatures. Even when we began to mention it publicly, it was cited as only one of a number of potential options if the new provincial government ignored the will of the majority of British Columbians and began to approving compulsory permits needed to build pipelines and expand oil tanker traffic on our coast.

After the election and shortly before I left on sabbatical, we revised our annual plans and decided that gauging the interest of potential partners was a priority for summer outreach. Unfortunately this outreach didn't really occur.

When I returned from sabbatical in October, the clock was ticking – there were only six weeks left until the federal regulatory panel on Enbridge's oil tanker-pipeline proposal was required to release its recommendation to the federal cabinet. Not only had we no potential partners, but many organizations actively opposed our idea and there still wasn't full Dogwood staff buy-in to the concept.

*"The only real mistake is the one from which we learn nothing."*

*- Henry Ford*

It took a few weeks to move through Dogwood's internal process to finally make the decision to launch initiative preparations that has since become the Let BC Vote campaign.

Once this process was complete, we had only a few workdays to reach out to potential allies. It did not go well.

I was surprised by push back from various organizations. In addition to skepticism about our ability to meet the difficult 10 per cent threshold,

*“Why do I talk about the benefits of failure? Simply because failure meant a stripping away of the inessential. I stopped pretending to myself that I was anything other than what I was and began to direct all my energy into finishing the only work that mattered to me.” - J.K. Rowling*

a narrative developed that our strategy would somehow negatively impact First Nations title and rights litigation. I didn't anticipate this.

We encouraged aboriginal law experts and First Nations leaders to express support for our approach. Many did so, including leaders from Coastal First Nations and the Union of BC Indians Chiefs (UBCIC).

To build support we held group and private meetings, conducted conference calls, wrote memos and developed Frequently Asked Question documents, but partners were still not emerging.

## What we learned:

We learned three important lessons:

1. Ideally, we should have brought potential partners in earlier on in the process so they would have more opportunity to build the idea from the ground floor.
2. We didn't allow sufficient time for a full conversation with potential partners. When we did have discussions about the strategy, some groups felt the decision had already been made.
3. We didn't dedicate enough staff resources to one-on-one outreach with key colleagues and potential partners.

In retrospect, I did a poor job of explaining both the complicated details of the initiative legislation and our strategy.

## Going forward, what has changed?

In the first few months of 2014 we began a low-key effort to build local and riding-level teams, train organizers and build the systems necessary to support the massive acquisition and organizer-training blitz necessary for Let BC Vote.

After we had developed these systems and had a significant number of teams operating, we circled back and had our new Democracy & Energy Director, Kai Nagata, hold individual and group meetings to explain our progress and address any concerns. Things began to shift.

To secure partners that would take responsibility for specific ridings, we approached selected groups and held one-on-one meetings to explain our plan, address concerns and work out the details of collaboration. Groups started signing on to join the effort.

# Progress on Past Failures 2012 Failures

## Communications failures with supporters

**Goal: To effectively communicate with supporters while being sensitive to their wishes**

### What have we been doing to address this?

Last year we identified insufficient individualized engagement with supporters as one of our biggest failures. Although continued progress is needed, we made significant strides in 2013.

We continued to test methods to communicate personal, geographically relevant information and calls to action to individual supporters and their neighbours. We were somewhat limited by the constraints of our e-mail system. In the coming year, we transitioned to a new mass-mailing program that allows us to better communicate with individual supporters.

We also didn't do a very good job supporting our most passionate volunteers. Specifically, we did a poor job of following up with supporters who completed our Find Allies Kit. This failure spurred us into re-envisioning what a decentralized, citizen-driven and values-based organizing model would actually look like, so we began restructuring our programs to prioritize this work. As a result, we elevated organizing to become its own program, appointed Celine Trojand as director and adjusted budgets to prioritize organizing at the neighbourhood and riding-level in all of B.C.'s 85 electoral ridings.

*"When you take risks you learn that there will be times when you succeed and there will be times when you fail, and both are equally important."*

*- Ellen DeGeneres*



# Not putting enough pressure on political parties regarding Kinder Morgan's tanker and pipeline proposal

**Goal: To ensure the government of B.C. opposes Kinder Morgan**

## What have we been doing to address this?

As outlined in Failure 2, we succeeded in helping make the expansion of oil tanker traffic a defining issue of the 2013 election. In addition to trying our best at an effective ground-game, our party position scorecard infographics went viral on social media and for a time, our No Tankers ads dominated the CKNW airwaves. Anyone watching the election race would have seen three of four parties battling to be perceived as No Tankers champions. No other single issue stuck nearly as deep a nerve.

*"Failure isn't fatal, but failure to change might be." - John Wooden*

Despite this success, it wasn't nearly enough to bring in a new government publically committed to opposing Kinder Morgan. Today we better understand the unpredictability of elections and the fundamental need for experienced organizer teams with longstanding relationships that are ready, willing and able to pressure elected and unelected officials in every riding in British Columbia.

# Project Management: underestimating the time and resources necessary to launch new projects

**Goal: Strengthen Dogwood Initiative by reducing office costs, creating a transparent culture that embraces failure and helps other groups while engaging citizens on emerging issues using decentralized tools**

## What have we been doing to address this?

In January we moved into our new, custom-built office space at 864 Queens Avenue. Located in the historic North Park neighbourhood, we occupy one of three floors in a restored heritage building. Our new location will help build community and lower our operating costs over time, allowing more for campaigns and less on overhead – all the while reducing our carbon footprint. Our modern tele-web conferencing facilities allow us to connect organizers and staff all across B.C. without travelling, further reducing the climate impact of our activities.

In the past, many of our greatest failures resulted from taking on too many non-core projects with too few resources and consistently underestimating time each of these projects required. In 2013 we avoided past pitfalls and improved dramatically, albeit further improvement is needed.

We have attempted to ensure staff doesn't work off the side of their desks to complete projects. We have refined this further by assigning project lead roles to those without significant project implementation duties to ensure project leads can focus on the forest and not just the trees.

Last year we identified time spent developing our digital platforms to decentralize our organizing model as one of the biggest project management failures of the year. We didn't abandon developing our digital tools, but we did improve efficiency by better defining roles, setting timelines as well as relying more on consultants. Although we have overcome many obstacles that strained Dogwood's capacity in the previous year, the ongoing process of improving digital platforms to help us scale and decentralize organizing efforts in all 85 electoral ridings – as well as training local organizers to fully utilize them – continues to challenge our time and resources.

*"Failure should be our teacher, not our undertaker. Failure is delay, not defeat. It is a temporary detour, not a dead end. Failure is something we can avoid only by saying nothing, doing nothing, and being nothing." - Denis Waitley*



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