SCALING IN INTERNATIONAL DEVELOPMENT:

Definitions, Approaches and Good Practices

Presentation to the STDF Working Group

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Overview

01 Some Key Terms

02 Definitions of Scale

03 Scaling Phases Approaches and Pathways to Scaling

04 Scaling Planning and Good Practices Scaling

05 Key Factors in Mainstreaming Scaling

06 Words to Scale By

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DEFINING SCALING

A process of achieving sustainable impact that meaningfully addresses a significant share of the problem

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From transactional to transformational scaling

Transactional Scaling

- Defines **scaling simply as "more": money, projects, people, or places; partnerships** are primarily used to increase funding.

- Considers **outcomes in absolute numbers** relative to baseline, not to long-term need or the size of the problem.

- Success measured in terms of **outputs rather than outcomes**, the **results at the completion of one-off projects** rather than a long-term vision.

- Doesn't address **systemic barriers** to sustainable impact at scale.

- Too often **lacks sustainable, viable business or funding model** nor local, ongoing implementation capacity

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From transactional to transformational scaling cont.

Transformational Scaling

- Focuses on long-term scaling **need at the size of the problem** and a clear **vision** of the ultimate goal: impact, reach/coverage, GESI. Clear tradeoffs **(Optimal Scale).**

- Has **LT vision** with a **clear strategy** to achieve it: pathways, approaches, who the Doer and Payer are

- Considers outcomes in relation to **the long-term target or size of the problem**, i.e. the denominator.

- Designs, implements, and evaluates **innovations via steppingstones to scale**, using a **long-term** stage gating, funnel or product lifecycle model

- **Identifies systemic barriers** to sustainable impact at scale and **addresses them through systems change**.

- Always includes **sustainability of impact**

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DEFINING SCALING

A process of achieving sustainable impact that meaningfully addresses a significant share of the problem

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Scaling up along a pathway

A High-Level Architecture for Scaling Innovation

Approaches to Scale

- **Scaling Up or Vertical Scaling**: embedding in and changing large scale (often national) systems, e.g. policy reform, changes to the policy enabling environment, or market systems. Can also refer to institutionalization e.g. a Ministry

- **Scaling Out or Horizontal:** new locations/places, populations (demographics) and institutions. Often referred to as Replication (cut and paste), however can also be Adaptive.

- **Scaling Deep/Functional Scaling**: can either refer to changing underlying values, behaviors, relationships, to ensure meaningful, lasting impact OR to increasing impact by improving the efficacy or effectiveness of the intervention

Pathways to Scale

📖 Expansion

An intervention reaches scale by growing the size of the Organization e.g. BRAC, social enterprises. Has Capability, create Capacity

💡 Grafting

Intervention is embedded in a larger organization that can implement at scale. Larger organization has Capacity, create Capability.

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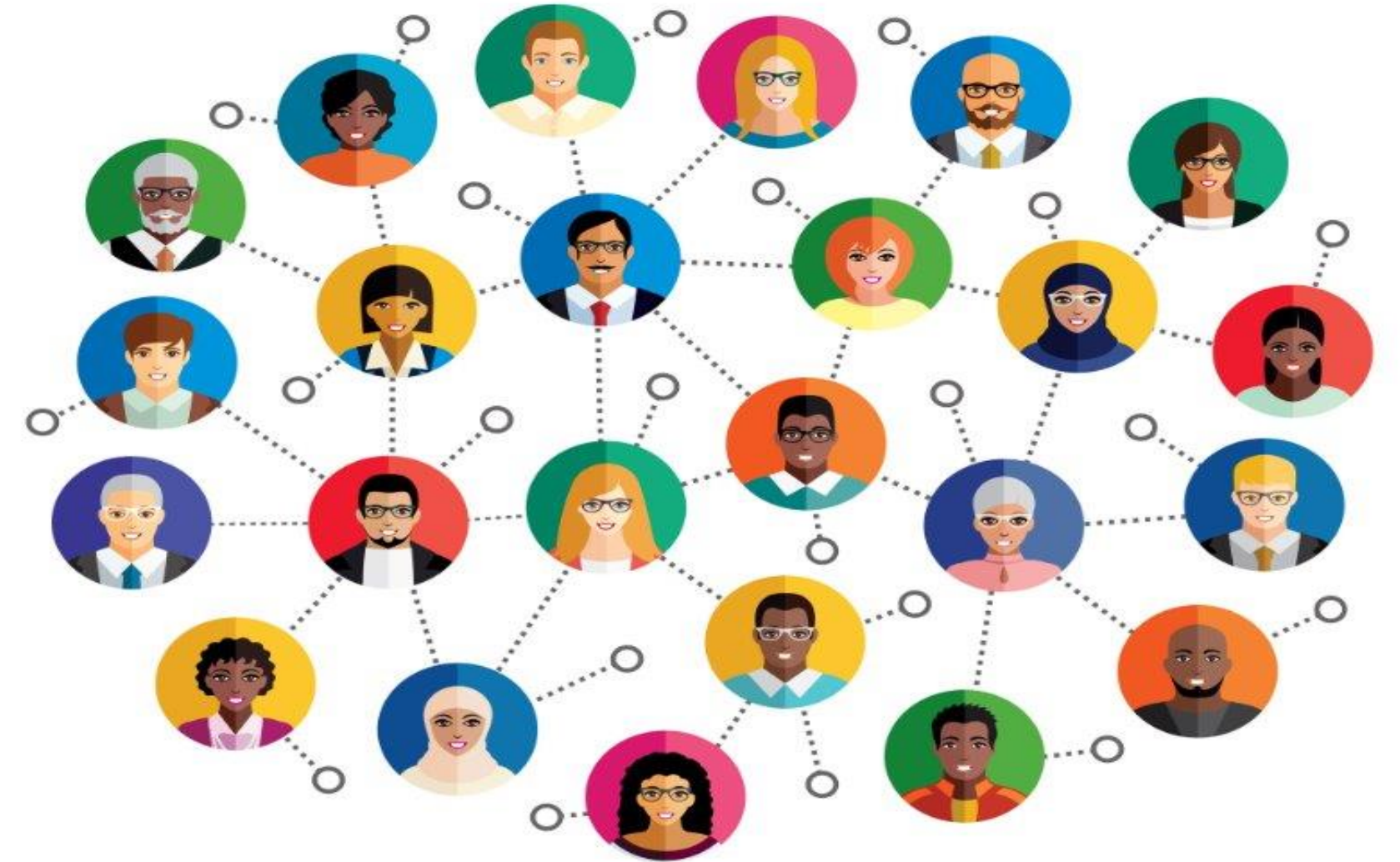COMMUNITY OF PRACTICE

Pathways to Scale

📖 Collaboration

Innovation/program developer works with a network of implementers, who collectively have Capacity and some (usually generic) Capability. Some capability building needed.

💡 Virtual

Using Digital delivery, so implementation Capacity is moot. Access by recipients the issue.

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Scaling Plan and Good Scaling Practices

Relevant to any pathway and approach

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Components of a Scaling Plan or Strategy

"What is the problem and its scale?"

"What is being scaled?"

"Who is the Doer (implementer) at scale?"

"Who is the funder at scale?"

"What are the pathway and approach to scale?"

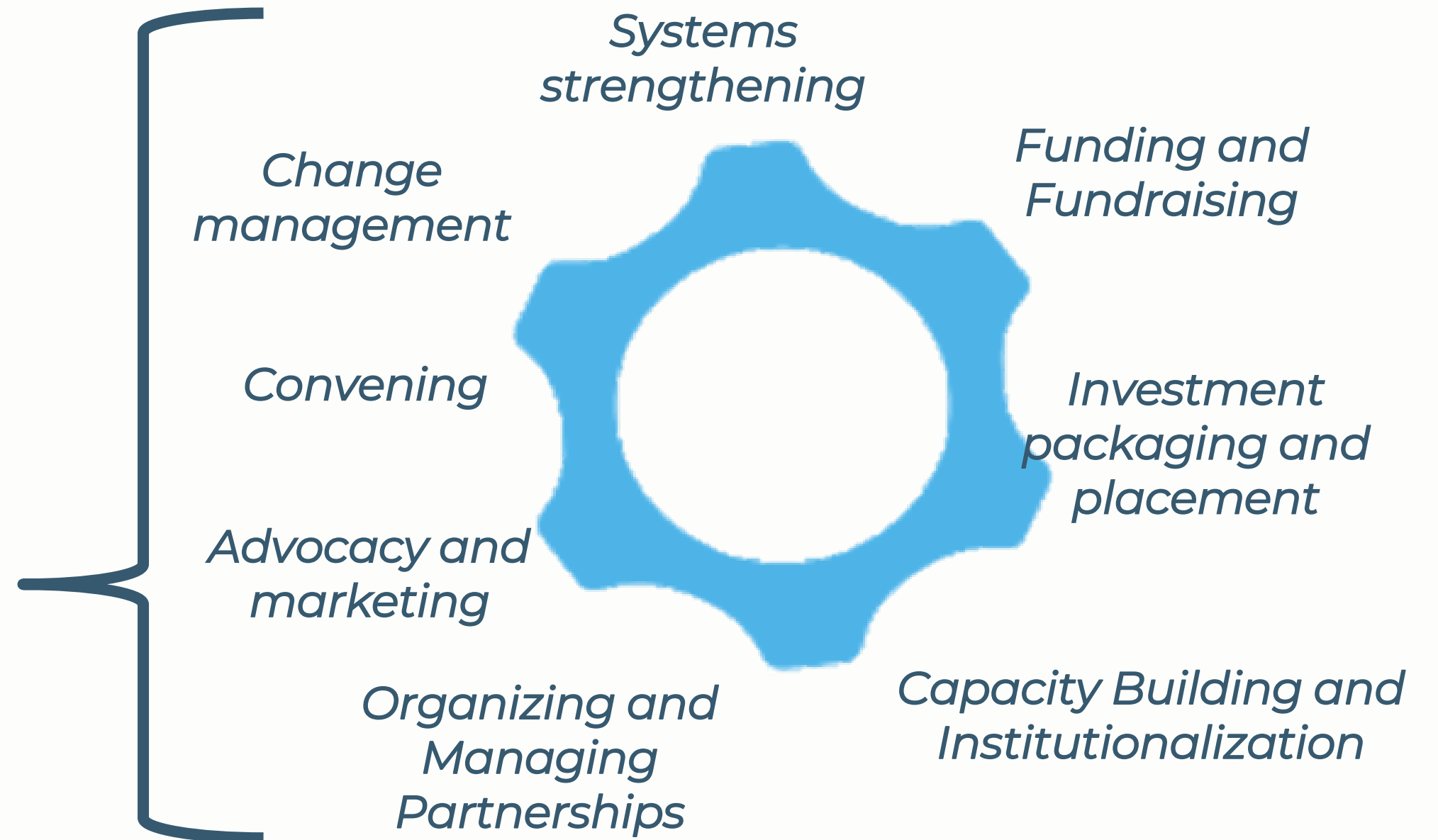"Is there something that could cause the rate of change to go from incremental to exponential?"

"Who is responsible for the scaling?"

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Selected Good Scaling Practices

1. *Build Scaling in from the beginning in the Innovation -*

2. *Have a clear vision of sustainable impact at scale*

3. *Apply scalability criteria and assessments throughout the project or grant making cycle.*

4. *Either align innovations with systems constraints or build in (and fund or otherwise support) relevant systems change.*

5. *Continually develop and use evidence on scalability and progress on scaling.*

13

6. *Mainstream Localization and Locally-led development.*

7. *Fill or support the intermediary function, especially referrals for future hand-off and funding .*

8. *Partnerships and handoffs are critical to scaling.*

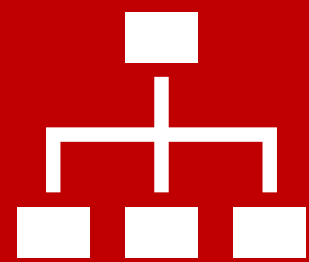9. *Scaling is intrinsically adaptive, dynamic, iterative and flexible.*

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Intermediaries support scaling with more than money

Systems strengthening

Change management

Convening

Advocacy and marketing

Organizing and Managing Partnerships

Funding and Fundraising

Investment packaging and placement

Capacity Building and Institutionalization

How to Integrate those Practices into STDF

Mainstreaming Scaling

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Defining Mainstreaming Scaling

The deliberate and systematic integration of a focus on achieving sustainable impact at scale across all facets of an organization's operations and work streams.

Mainstreaming requires moving beyond ad hoc or opportunistic scaling efforts to embedding a scaling approach deeply within the organization's strategies, business models, policies, procedures, resource allocation processes, management practices, and staff mindsets and incentives.

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What drives mainstreaming?

- Measurable scale targets
- Integrated into org. culture
- Integrated into ToC, logic models, and MEL
- Mission, vision, and strategy
- Internal Support: Dedicated unit, human, and financial resources
- Into project innovation, and grant design and review
- Framework, tools and guidance

- *Integrate the scaling perspective throughout the organization (graph).*

- *Mainstreaming doesn't happen on its own. It involves a systematic, long-term change process.*

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Slide #17

Words to Live (scale) By

'A bad [weak] system will defeat a good innovation every time ... system structures—not individuals—determine outcomes'
— *paraphrased and adapted from Edward Deming*

"Policy decisions are rarely made on the basis of evidence alone; they are shaped by politics, values, and power."
— *Carol Weiss*, pioneer in the field of evidence-based policymaking.

"Evidence does not speak for itself. It must be interpreted, contested, and championed—often in a deeply political arena."
— *Annette Boaz*, from *What Works Now?* (2019)

"Plans are worthless, but planning is everything ... No strategy survives first contact with reality."
—*attributed to U.S. General Dwight D. Eisenhower in regard to D-Day*

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THANK YOU

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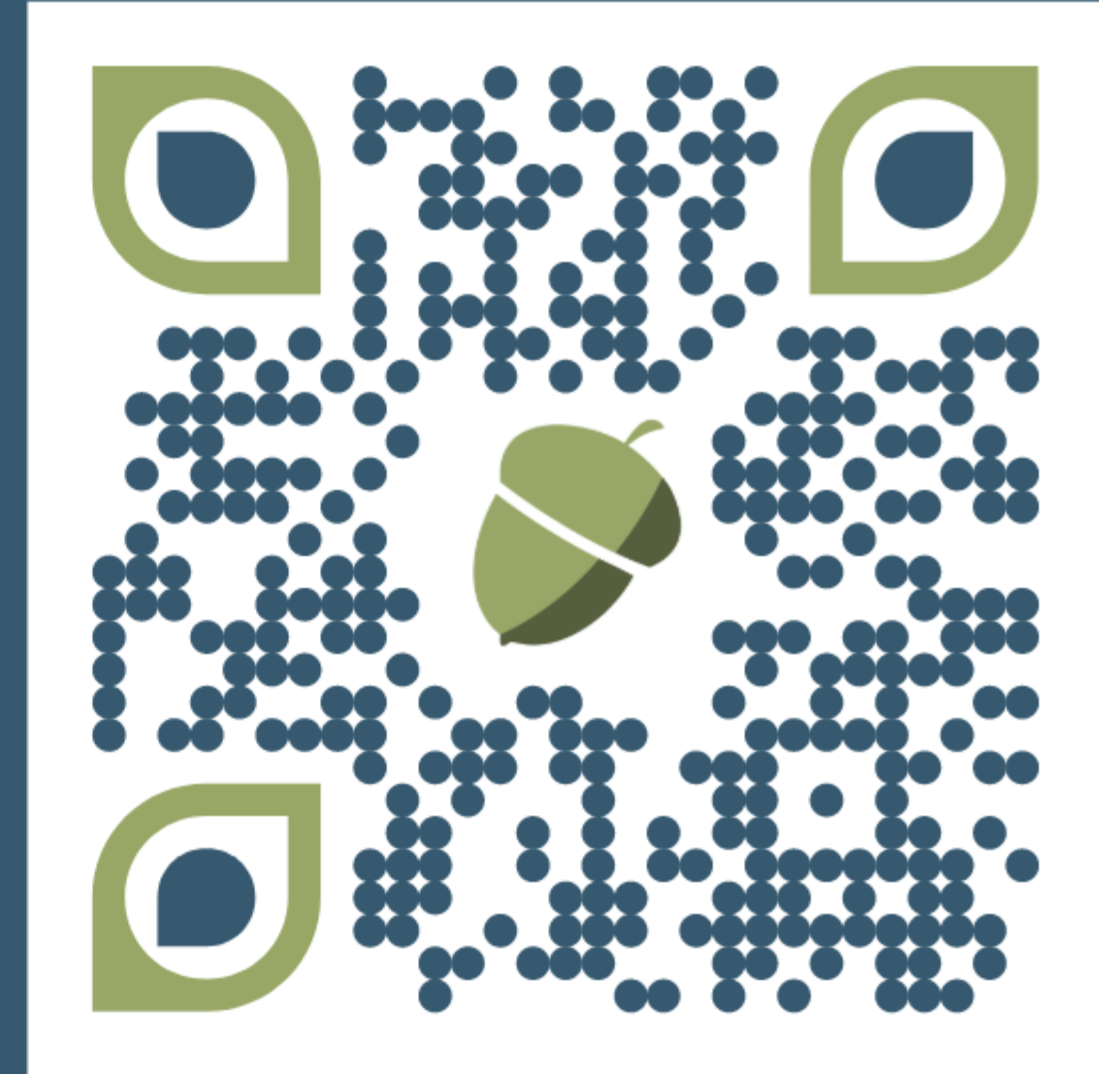
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