SCALING Up
Community of Practice

Dear Colleagues,

We are pleased to share with you Newsletter #22 of the Scaling Up Community of Practice (CoP).

In this Newsletter we report on our 6th Annual Workshop which took place from 8-23 November, 2021. We are very grateful to over 900 participants who attended, to the 48 panelists and moderators, to the chairs of our nine working groups who planned the sessions, and to the staff from MSI who helped us implement the workshop. Many of you attended this gathering which included 12 sessions over two-plus weeks. We were particularly pleased to see many speakers and participants from the Global South this year.

As you will see from the summaries in this Newsletter of take-aways from each of the Annual Workshop sessions, the substantive contributions of the 12 sessions represent significant, informative learning outcomes. Video recordings and related materials for each of the sessions can be found at *https://www.scalingcommunityofpractice.com/events/2021-cop-workshop/* (scroll down to and click on each relevant session on the right side of the webpage).

Following the Annual Workshop, we circulated a *survey* to CoP members and other workshop registrants seeking feedback on the Workshop and on past and future cross-cutting work. We gratefully acknowledge the responses we received and will report in due course on the overall results.

The CoP ExCom met after the completion of the workshop and, as we also report in this Newsletter, reaffirmed the decision, taken in 2020, to focus more attention on cross-cutting themes and on outreach. Despite our continuing commitment to remain a volunteer-based CoP, this will require a small budget to support selected thought products and to defray a few administrative costs such as maintaining the CoP website and expanding participation by CoP members in the Global South. To that end, the ExCom set up a Resource Mobilization and Finance Committee and will be seeking a second round of voluntary financial contributions from Sustaining Members and others able to support our collective efforts for the two-year period 2022-2024.

In addition to takeaways from each of the Annual Workshop's 12 sessions, Newsletter #22 contains a report on the recent ExCom meeting, an update on the status of the CoP's knowledge work on selected cross-cutting themes, and references to recent publications and other relevant items that have come across our desks. In the next newsletter we will resume reporting on activities of our members based on your submissions.

As always, we welcome your feedback and suggestions related to this Newsletter and, more generally, on the CoP and the working groups. And, of course, we are grateful for your support, in-kind or financial, in making the CoP a success for all of us.

With many thanks for your participation in the CoP and with our best wishes to all for a happy holiday season and a healthy and productive New Year 2022,

Larry Cooley, MSI, and Johannes Linn, Brookings

Report on the meeting of the Executive Committee of the Scaling Community of Practice (CoP)

The Executive Committee (ExCom) of the Scaling CoP met on 15 December 2021. The following ExCom members were in attendance: Amar Bhattacharya, Robert Chase, Colin Christensen, Natalie Colangelo, Christine Galavotti, Laura Ghiron, Julie Howard, Hisham Jabi, Reda Josifi, Kristen Molineaux, Gaelle Simon, Ruth Simmons, Heather Simpson; Larry Cooley and Johannes Linn, Co-Chairs. The following agenda points were discussed.

1. Review of 6th Annual Workshop:

- Larry and Johannes thanked the Working Group chairs for their efforts in organizing the Annual Workshop and in pulling together session summaries for Newsletter #22, which will be issued before the holiday break.
- ExCom members praised the substance, participation (esp. from the Global South) and organization of the sessions and thanked the Co-Chairs for their leadership and the MSI team for its outstanding support.
- Members raised the following issues for further consideration:
  - Consecutive sessions are preferable to parallel ones;
  - The link to cross-cutting themes in some of the working group sessions worked well;
  - Spread out the Workshop sessions over a longer time period to avoid overburdening the audience;
  - Organize shorter events (1hr); they are preferable to longer ones (2hrs);
  - Explore a hybrid in-personal-virtual format to enhance the interpersonal interaction, while not losing the broader participation possible with the virtual format;
  - Consider an overall summary of main themes emerging from the event as was done last year; given financial constraints and the individual session summaries in this Newsletter, the ExCom agreed to not pursue this option.
- These issues will be considered in the preparation for the 7th Annual Workshop in 2021.

2. Status of the CoP's cross-cutting knowledge work:

- Larry provided the background to the CoP's cross-cutting work, which got underway only about 18 months ago. He noted that future cross-cutting knowledge works will depend on resource mobilization.
- Johannes and Larry briefed the ExCom on the status of CoP work on four principal cross-cutting themes (see the summary in the next section of this Newsletter).
- ExCom members welcomed the progress with high-quality crosscutting knowledge work, but noted that in future the CoP will have to revisit its "business model", and

should look to strengthen its outreach and visibility and tailor its messages, at least in some areas, to the needs of specific sectors and thematic areas. They noted that this could best be achieved by the Working Groups taking up specific issues for further refinement and articulation.

3. Fundraising

- Larry and Johannes reported on the approach and status of the previous round of CoP fundraising. They noted that the limited resources generated to support efforts in 2020 and 2021 are almost exhausted creating a sense of urgency for the ExCom's newly established Resource Mobilization and Finance Committee, which will start work in January 2022. It's first order of business will be to develop a document that explains to potential funders the accomplishments of the CoP to date, outlines intended priorities for 2022 and 2023, and links that to projected resource requirements. The committee will also help in outreach to current and potential Sustaining and Contributing Members seeking their continued support. Ideas from other CoP members about possible funding sources would be greatly appreciated and should be sent to Larry Cooley or Johannes Linn.
- The ExCom agreed that this is an urgent task and that it needs to be considered in the context of an exploration of a midterm strategy of how the CoP is to develop and grow. It also encouraged the Committee to explore different forms of funding, but noted that preference should be given to raising core resources from Sustaining Members over seeking to attract support for specific programs.

Update on Crosscutting Knowledge Work by the Scaling CoP

Based on the discussions at the 2020 Scaling CoP Annual Workshop, the CoP's ExCom commissioned Richard Kohl to prepare a background paper to identify key crosscutting scaling issues the CoP might wish to address. In the CoP's first Working Paper, Richard highlighted the development of a "New Consensus" on scaling and identified eleven topics that warrant further analysis and production of knowledge products by the CoP:

- Articulating and elaborating the "New Consensus"
- Risk, uncertainty and de-risking
- Costing and economies of scale and scope
- Variance of impact and robustness
- Demand-driven scaling
- Digital technology and scaling
- Partnership and collaboration
- Scaling and systems change
- Principles of scaling
- Mainstreaming the new consensus
- Information, monitoring and evaluation, and learning for the New Consensus

Based on this paper, the ExCom decided to tackle the last four items first with its existing resources and made considerable progress during 2021:

Scaling and Systems Change: Richard Kohl prepared an Issues Paper that served as an input to a CoP-wide webinar and for the discussion of the scaling and systems change issue at the First Plenary Session of the 6th Annual Workshop (see below). A blog summarizing the main conclusions of this work will be posted on the CoP website by February 2022.

Principles of scaling: The ExCom decided to explore whether a set of general principles could be developed to guide scaling practice. Richard Kohl and Johannes Linn prepared a draft background paper on Scaling Principles in which they propose a set of 8 principles and 20 lessons, based on a review of the literature, expert interviews, and the authors' experience. They presented this paper for discussion at the Third Plenary Session of the 6th Annual Workshop (see below). Based on the feedback received, they revised the paper, now posted as a CoP Working Paper on the CoP Website. The paper will serve as an input into ExCom preparation and adoption of a short paper focusing on principles and lessons on behalf of the Scaling CoP. Principles will be subject to testing and validation by the members of the CoP for possible further refinement and adaptation to particular contexts (including sectoral, thematic, country, etc.).

Mainstreaming the new consensus: The ExCom decided to pursue this issue on two tracks. On the first track, the CoP's Monitoring & Evaluation Working Group has been exploring issues related to assessing and supporting the "institutionalization" of innovations in governments when the innovation is introduced from outside government. This angle was discussed in four webinars and during the Second Plenary Session of the 6th Annual Workshop (see below). The

ExCom commissioned the preparation of a paper by Susan Igras to summarize insights and lessons based on these discussions and a review of relevant literature. On the second track, the CoP began an exploration of how development donors can mainstream scaling into their operational and funding practices. Key issues regarding donor mainstreaming were discussed at the Second Plenary Session of the 6th Annual Workshop (see below). Based on this discussion, Johannes Linn has prepared a blog posted on the Brookings website, and the ExCom will be considering what further work to carry out on mainstreaming during 2022.

Information, monitoring and evaluation, and learning for the New Consensus: The Monitoring & Evaluation Working Group has been tackling this topic since its inception six years ago and will continue to explore ways to expand on this work and develop appropriate knowledge products.

The ExCom circulated a survey to CoP members and Annual Workshop registrants seeking feedback on the cross-cutting work carried out so far and on priorities for further work. The ExCom will also consider how best raise the financial resources required to make continued cross-cutting knowledge work possible. **Please let Johannes or Larry know if your organization might be able to offer any form of financial or non-financial support for this important undertaking by the CoP or if you have ideas about possible sources**.

Remember the Scaling CoP Website!

www.scalingcommunityofpractice.com

The official website for our Community of Practice has now been live for over a year.

In addition to a landing page with details about the CoP's activities, publications and events, it includes dedicated pages for each of the CoP's nine Working Groups.

It includes archives of all past Newsletters and events including recordings of all 12 sessions of recently-completed 6th Annual Workshop; allows for event and information posting from all CoP participants; and includes functionality for new members to register for the CoP and for its Working Groups.

Each Working Group page also includes a repository of archived and contributed materials from members curated by the Co-Chairs of that Working Group.

CoP members are encouraged to share blog-length (800-1000 words) contributions on scaling and to repost any blogs that they have published elsewhere. Please contact scalingCOP@msi-inc.com with any submissions.

We also plan to encourage members to use *#scalingCoP* as a Twitter hashtag for items likely to be of interest to the scaling community.

Any questions or comments about the website can be directed to scalingCOP@msi-inc.com.

Working Groups of the Scaling Up Community of Practice

The CoP hosts nine working groups (WGs). These are listed below with the names and e-mail addresses of the chairpersons. For more information on the agenda of each working group and on how to join and contribute to a working group, please visit the CoP Website (www.scalingcommunityofpractice.com) or contact the respective chairperson(s). You can also reach out to Larry (LCooley@msi-inc.com) or Johannes (jlinn@brookings.edu).

Working group topic and coordinators

Education
Heather Simpson (Room to Read) Heather.Simpson@roomtoread.org
Gaelle Simon (MSI) gsimon@msi-inc.com

Fragile states
Jonathan Papoulidis (World Vision) jpapouli@worldvision.org
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Monitoring and evaluation (M&E)
Larry Cooley (MSI) LCooley@msi-inc.com
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Report on the 6th Annual Workshop of the CoP

Our 6th Annual Workshop featured three plenary sessions and nine working group sessions, one for each of our nine working groups. The main takeaways from the 12 two-hour sessions of this Workshop are summarized below, as provided by the working group chairs and/or session moderators. Links to session videos and slide presentation are included for each session.

Plenary Session 1

Monday November 8, 2021

Scaling & Systems Change

This plenary session discussed the relationship between scaling and systems change. The CoP's 2020 Annual Workshop highlighted the relationship between scaling and systems change as an issue needing to be explored further. In this first plenary, speakers summarized the key insights that have emerged from the past year's CoP exploration of the scaling and systems change topic, based on a working paper by Richard Kohl and illustrated with examples from different sectors. We also reviewed progress with the CoP's work on crosscutting issues and knowledge products.

The recording and materials from this session can be found here.

Speakers:
- *Richard Kohl*, Founder and Principal at the Center for Large Scale Social Change LLC
- *Liz Vance*, Program Director of Systems Change for Workforce Development at International Youth Foundation, Co-Chair of the CoP's Youth Employment Working Group
- *Lennart Woltering*, Scaling Catalyst at CIMMYT, Co-Chair of the CoP's Agriculture & Rural Development Working Group
- *Jenny Perlman Robinson*, Senior Fellow for Global Economic and Development in the Center for Universal Education at Brookings Institution, Co-Chair of the CoP's Education Working Group

Moderators:
- *Larry Cooley*, President Emeritus and Senior Advisor at Management Systems International, Co-Founder and Co-Chair of the Scaling Up CoP, Co-Chair of the CoP's Monitoring & Evaluation Working Group
- *Johannes Linn*, Senior Fellow at Brookings Institution, Co-Founder and Co-Chair of the Scaling Up CoP

Takeaways
- In most cases scaling and systems change have to go hand-in-hand to achieve lasting transformational change at scale.
- However, more has to be done to meld the two approaches in theory and practice; scaling and systems change experts come at the question of how to reach impact at scale not only from different perspectives and use different analytical tools, but also use different languages and hence often talk past each other.

- Effective implementation of systems change generally stretches over years and requires careful planning and execution following principles very similar to those that apply to scaling.
- For systems change, there is a tension between ambitious goals and the feasibility of effecting lasting transformation in terms of capacity, resources and political support.
- All scaling efforts need to explicitly consider systemic enabling factors (opportunities and constraints).
- The larger the scaling ambition, the more extensive systemic constraints will often be, and hence the more systemic change will be needed.
- For scaling, there is a tension between keeping the scaling process simple and effectively addressing systemic constraints.

Plenary Session 2

Wednesday November 10, 2021

Mainstreaming scaling in governments and donors

This session summarized lessons from the CoP's work on (a) institutionalization of an innovation in host governments and on (b) mainstreaming a focus on scaling within donor organizations. The session featured perspectives from civil society, government, and funders.

The recording and materials from this session can be found here.

Speakers:
- *Larry Cooley*, President Emeritus at MSI, Co-Chair of the Scaling CoP and Co-Chair of the CoP Monitoring & Evaluation Working Group
- *Rajani Ved*, Former Executive Director, National Health Systems Resource Centre, Government of India
- *Noam Angrist*, Executive Director and Co-Founder of Young1ove, Botswana
- *Johannes Linn,* Non-Resident Senior Fellow at the Brookings Institution, Co-Chair of the Scaling CoP
- *Robert McLean*, Senior Program Specialist at IDRC
- *Elaine Tinsley*, Private Sector Specialist at World Bank, Co-Chair of the CoP Social Enterprise Working Group
- *Gwyn Hainsworth*, Senior Program Officer at Bill and Melinda Gates Foundation

Moderators:
- *Laura Ghiron*, President at Partners in Expanding Health Quality & Access, Member of ExpandNet Secretariat, Co-Chair of the CoP's Health Technical Working Group
- *John Floretta*, Global Deputy Executive Director at J-PAL, Co-Chair of CoP Monitoring & Evaluation Working Group

Takeaways

Segment 1*: Institutionalizing scaling initiatives in governments*
- The session focused primarily on the role of intermediaries in helping governments to scale, sustain, and institutionalize innovations into their systems – specifically on the roles that National Health Systems Resource Center (NHSRC) (working within government) played in scaling primary and community health programs in India and Young1ove (working outside but closely integrated with government) in scaling a "Teaching at the Right Level" remedial program in Botswana.

- One theme of what makes a successful intermediary partner is the capacity to work both "on the ground" to support implementation by frontline workers (e.g. teachers, nurses), and at the policy-level with ministries. Both NHSRC and Young1ove saw bringing insight and experience from practice back to inform government policy as an essential part of their roles – e.g. facilitating bottom-up feedback not just top-down policy and implementation rollout support.
- At the policy and higher levels of government, both organizations are advocating for change, identifying and investing in "champions" at senior and middle-levels, and identifying funding streams to sustain the program in the future.
- At the delivery levels of government, both organizations also focused on helping to sustain motivation, helping to ensure that the program fits into other required duties of teachers and nurses, codifying tacit knowledge about how to implement with high-quality, and engaging with the broader community. Noam made the case that having the "originating organization" continue to provide directly-delivery in a small number of locations provided useful R&D in support of ongoing adaptation of the model.
- An intriguing theme for further exploration is what we are learning about how to grow and sustain intermediary organizations able to catalyze and sustain scale for interventions that seek to be embedded into government systems.

Segment 2: *Mainstreaming scaling in donor agencies*
- To achieve development and climate targets, to avoid doing harm, and to improve their own authorizing environment, donors need to focus on scaling up development and climate action impact.
- Few donors appear to have mainstreamed scaling into their funding strategy and practices throughout their organizations; for most, it remains an agenda for only some of their programs, units or individuals within the organization, if it features at all.
- Including impact at scale in the organization's mission and strategy is a necessary, but not sufficient condition; scaling-oriented institution-wide policies, guidelines, management and staff incentives, and training (of staff and consultants) are required for effective mainstreaming to overcome the ingrained project practices and institutional silos; and monitoring and evaluation have to incorporate the scaling dimension.
- Donors have to focus not just on scaling an innovation or a project, but on scaling impact; this may require a portfolio approach to project design and management, where the overall impact of the portfolio is the focus of management attention, rather than the delivery of individual project impacts.
- Overcoming organizational inertia and potential resistance will take time and require sustained effort, listening to staff and managers, and an organizational change management effort that is best led from within the organization, rather than developed and inserted by outside experts/consultants (although outsiders can advise on design, implementation, monitoring and evaluation).

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Plenary Session 3

Tuesday November 23, 2021

Principles, lessons, and guidelines for successful and sustainable scaling

During this session, Richard Kohl and Johannes Linn presented their underline on the principles, lessons and guidelines for scaling prepared for the Scaling Community of Practice as a basis for the possible adoption of a set of common scaling principles by the CoP. Speakers and participants contributed comments on the paper. The session ended with a discussion of potential future cross-cutting knowledge work to be undertaken by the CoP.

The recording and materials from this session can be found here.

Speakers:
- *Richard Kohl*, Strategy and Scale Consultant
- *Johannes Linn*, Nonresident Fellow at Brookings, Co-Chair of the Scaling CoP
- *Santiago Levy*, Former Vice President at IADB, former Deputy Minister of Finance, Mexico
- *Ruth Simmons*, Professor Emerita at University of Michigan, Member of the CoP's Executive Committee
- *Charles Kabiswa*, Programs Director at Ecological Christian Organization, Uganda

Moderator:
- *Larry Cooley*, President Emeritus at MSI, Co-Chair of the Scaling CoP

Takeaways:
- The Kohl-Linn paper presents important scaling principles and lessons, usefully structured and thoroughly explained. Comments focused on the following aspects as deserving special emphasis.
- Scaling needs to be considered from the outset of the innovation/intervention process: "Begin with the end in mind!"
- Scaling frequently requires changing attitudes, mindsets and social norms.
- Scaling pathways need to be designed and implemented to assure financial/budgetary and political sustainability.
- Tensions and tradeoffs between scope, quality, speed, equity and resources need to be explicitly and transparently considered.
- Technical and administrative capacity constraints need to be addressed frankly and in detail.
- Scaling goals and strategies need to be adapted during implementation in light of evidence gathered.
- Multistakeholder engagement is critical.
- Toolkits and case examples for the application of the Principles need to be developed.

Working Group Session 1

Tuesday November 9, 2021

Youth Employment Working Group Session

Session Title: *How can we Engage Private Sector Actors to Promote Youth Employment? Cluster Based Approaches – Case Study Aerospace Cluster Chihuahua, Mexico*
The session featured a case study exploring scaling issues in Mexico's aerospace industry including the role played by industrial "clusters" and other workforce development strategies, and the role of partnerships with private sector actors more generally. The session also included an introduction to the Youth Employment Working Group and an opportunity for participants to suggest priorities for the group work in 2022.

The recording and materials from this session can be found here.

Introduction:
- *Jess Ngo*, Technical Manager at Management Systems International, Co-Chair of the Youth Employment Working Group

Speaker:
- *Rene Espinosa*, President of the Mexican Aerospace Federation and Plant Manager at Metal Finishing in Chihuahua Mexico

Moderator:
- *Liz Vance*, Program Director of Systems Change for Workforce Development at IYF, Co-Chair of the Youth Employment Working Group

Takeaways
- *Meeting Labor Market Demands and Understanding Future Needs:* Before choosing to focus on the Aerospace sector, IYF examined clusters within Chihuahua that had a high demand for jobs (volume of employment and quality of employment), particularly looking at roles where companies were pirating staff from other companies. The Aerospace cluster mapped functions they needed to have in their supply chain. This helped them generate a strategic plan for growth in their sector which included identifying skills needed, as well as the number of workers needed to meet their growth strategy. They then conducted an industry gap analysis to determine the critical skills youth needed to be employed in this sector. Chihuahua was the first region in Mexico to modify the technical training curriculum and number of training hours required, adapting them to what the sector needed and what they foresaw as future needs in the industry. The Aerospace Cluster continues to do a survey on technical and soft skills needs every two years.
- *Early Wins Critical to Stakeholder Buy-in:* Being able to achieve quick wins early helped the program change the minds of skeptics. The Aerospace Cluster was able to have interns practicing in their factories within 6 months of program start-up and had graduates within 18 months.
- *Relationship Building with Public and Private Sector Institutions is Key:* It's important to understand information and training flows between education providers, authorities, and state. Significant engagement with different stakeholders from the private and public sector is needed to develop this kind of ecosystem. IYF had a dedicated local staff member at the local foundation who is now working with the Secretary of Education. She played the "honeybee" role to convene and establish relationships with key

stakeholders and IYF also supported her in developing these skills. Having a local staff member integrate into the local system is key to the sustainability of this work.

- *Transforming Education Curriculum Needs to be Driven by Private Sector:* Education institutions need to understand the needs and plans of local business instead of starting with what the education sector thinks is needed. The Aerospace Cluster and Index continue to move this work forward, but education institutions are now incorporated into the cluster as members. Although there is a minimum fee to participate, education institutions see the value in being members of this ecosystem.
- *Requires Significant Investment in Time and Human Resources:* The Cluster had to invest significant time, but they did because they knew the effort was worth it. IYF, as the intermediary, also invested significant time and resources to establish relationships, convene stakeholders and adapt curriculum. They had a curriculum developer and numerous technicians who met with multiple firms for a month of meetings.

Working Group Session 2
Friday November 12, 2021

Fragile States Working Group Session

The session focused on scaling social protection/safety nets in fragile contexts, with a focus on Ethiopia. The session explored how scaling frameworks and methods can help address the challenges of implementing and sustaining large-scale social safety nets in hard places, as well as determining what the widespread delivery of safety nets in fragile contexts can tell us about the dynamics and drivers of scaling in these places.

The recording and materials from this session can be found here.

Speakers:
- *Ugo Gentilini,* Global Lead on Social Protection, World Bank
- *Michael Munavu*, Task Team Leader, Ethiopia Productive National Safety Net operation
- *Pallavi Roy*, Senior Lecturer in International Economics, CISD, SOAS University of London, Research Director, Anti-Corruption Evidence Research Partnership Consortium

Moderators:
- *Jonathan Papoulidis*, Executive Advisor on Fragile States at World Vision, Co-Chair of the Fragile States Working Group
- *Rob Chase*, Social Protection and Jobs Manager of the Africa Region at World Bank, Co-Chair of the Fragile States Working Group

Takeaways:
- The conversation was timely given the massive scale up of social protection activities across the world in response to increased vulnerability during COVID. In fragile and conflict affected settings, this scale-up has entailed increased engagement with government-led social protection systems and humanitarian actors.
- To better understand these dynamics, the session examined Ethiopia's Productive Safety Net Program (PSNP) and World Bank support for it. This program has operated at scale for more than 15 years, bringing together government, development financing agencies, and non-government actors to develop and strengthen systems that support vulnerable populations at wider scale--including in rural, urban and disaster prone areas.

- As Ethiopia has confronted increased fragility, the social protection system has needed to adapt, testing its resilience to institutional shocks.
- In particular, recent conflict dynamics in the country have highlighted the importance of the World Bank taking what can be called an outcomes-based approach to scaling---which is to say, the scaling method is focused on meeting a developmental outcome through various, adaptive means instead of trying to scale a particular program model or innovation through a fixed delivery mechanism.
- Because the formal system for delivering the country's national safety net was disrupted by conflict in some areas, the World Bank has pivoted its approach to promoting social protection outcomes by facilitating the efforts of multiple actors, including government agencies, donors and humanitarian partners – recognizing that the latter will work in parallel to formal systems to provide emergency cash transfers.
- The World Bank continues to monitor the efforts of multiple partners to help channel support and resources, and to measure aggregate impact and fill in gaps where possible.
- These efforts provide unique insights into how a multilateral institution has attempted to informally coordinate an "ecosystem" for scaling social protection, where the outcomes are pre-determined (helping the most vulnerable) but the pathways, partners, implementation methods and resources must be adapted based on the situation.

Working Group Session 3

Monday November 15, 2021

Health Working Group Session

Session title: *Seeking to mainstream a scaling mindset within non-governmental, technical, and implementing organizations*
The Health Technical Working Group session built on Plenary Session 2's theme of mainstreaming a scaling up focus by highlighting experience with seeking to mainstream a scaling mindset within non-governmental technical and implementing organizations. It was conducted as an informal conversation that addressed both successes and challenges, with considerable participation of attendees.

The recording and materials from this session can be found here.

Introduction:
- *Laura Ghiron*, President at Partners in Expanding Health Quality & Access, Member of ExpandNet Secretariat, Co-Chair of the CoP's Health Technical Working Group

Speakers:
- *David Leege*, Senior Director, Impact, Learning, Knowledge and Accountability at CARE
- *Callie Simon*, Adolescent Sexual and Reproductive Health Team Lead and Senior Advisor at Save the Children US
- *Olayinka Umar-Farouk*, Deputy Project Director, Risk Communications at Johns Hopkins Center for Communication Programs

Moderator:
- *Rebecka Lundgren*, Associate Professor, Center for Gender Equity and Health at University of California San Diego

Takeaways

- David Leege, Callie Simon, and Olayinka Umar-Farouk shared experiences in infusing scale up perspectives within their organizations. These included:
  - *From day 1, any step in the scale-up process has to be in the budget, workplan, owned by somebody, and be counted in the monitoring, evaluation and learning (MEL) plan. We can't assume scaling up is going to happen by magic.*
  - *You need to emphasize "systems orchestration with catalytic impact."*
  - *Collaboration and partnership are essential—you can't do everything with your own organization operating on its own.*
- Audience questions were posed and discussed in the chat box, and additional participants were invited to share reflections on incorporating scale up mindsets and processes within their own organizations. Some reflections included:
  - *We had to consider not "Does the pilot project work," but "What happens beyond the pilot?"*
  - *We had to create grounded, manageable, evidence-based expectations through global co-creation workshops with stakeholders.*
  - *We had to identify what to scale and what not to scale, and to be flexible.*
  - *We had to use a phased approach to adapt each component to fit into government systems, and map out a process for transitioning components incrementally over to full government ownership*
- Common requirements highlighted in the comments included:
  - a vision of scale up;
  - ownership--who owns, who does, who pays?
  - a theory of change, i.e., a pathway to scale;
  - a framework and set of tools;
  - a scale up mindset, even when it can feel threatening to existing roles and jobs;
  - shared learning and adaptive management.

Working Group Session 4
Tuesday November 16, 2021

Agriculture and Rural Development Working Group

Session title: *Understanding scaling and systems change in the context of food systems transformation*
The session built directly on themes raised during Plenary #1 exploring the relationship between scaling and systems change.

Presenters emphasized the urgent need for scaling knowledge and practice to address the daunting level of need and the complex challenges to our global food systems. This session discussed how the concept and practice of scaling have changed over the last decade, and how the evolving "new consensus" on scaling relates to food system challenges and opportunities. Speakers discussed the relationship between scaling and systems change/transformation in the context of pressures for food systems to shift from a productivity-centric focus to meet multiple objectives including food security, nutrition, conservation and climate. What analyses, tools and capacities will be needed to facilitate meaningful, sustained impact at scale in this new context?

The recording from this session can be found here.

Speakers:
- *Larry Cooley*, President Emeritus at MSI, Co-Chair of the Scaling CoP

- Co-Founder, Scaling Community of Practice, and Founder/President Emeritus, MSI
- *Susan Chomba*, Director of Vital Landscapes, World Resources Institute/Africa and former lead, Regreening Africa Initiative, CIFOR-ICRAF)
- *Ndidi Nwuneli*, Co-Founder Sahel Consulting: Agriculture and Nutrition, Ltd. and AACE Foods

Moderators:
- *Julie Howard,* Non-resident Senior Advisor at Center for Strategic and International Studies, Co-Chair of the Agriculture and Rural Development Working Group
- *Lennart Woltering*, Scaling Advisor at CIMMYT, Co-Chair of the Agriculture and Rural Development Working Group

This session served as the first in a series of three events focused on innovations in scaling, part of the Global Agriculture Innovation Forum. The Forum was jointly sponsored by Purdue University's International Programs in Agriculture and the U.S. Department of Agriculture's Foreign Agricultural Service.

Takeaways:
- The 2018 Scale Up Conference at Purdue University represented a watershed in our understanding of scaling in smallholder agriculture. The collective insights and experiences shared at the conference were summarized in the Scale Up Sourcebook. We are now at a second inflection point on scaling in agriculture, characterized by two insights:
  - First, up to now scaling in agriculture has largely focused on scaling innovations that increase agricultural productivity. We are now *moving to a food systems approach featuring multiple objectives* that include productivity, but also impacts on nutrition/health, the environment, incomes, equity, and resilience. The result is that scaling is now even more complex than before.
  - The second insight to emerge is that we should not focus on scaling specific technical interventions, but on *scaling outcomes*.
- *The involvement of the private sector is critical for scaling*. Although we tend to think of medium-large businesses as "the private sector" there are different categories, and we need to be aware of their unique strengths and issues.
  - First, farmers – they are critical for adoption of technology, and driven by incentives and the simplicity of the innovation. The key issue for this group is ensuring that the most vulnerable are not left behind.
  - Second, micro & small enterprises (MSMEs) – they are the largest group in the food ecosystem, and drivers of innovation, policy and systems change. Key issue: MSMEs are fragmented, so support for collaboration across the ecosystem is critical.
  - Third, medium and large businesses – this group is the most visible and potentially catalytic, capable of driving scaling with MSMEs and farmers in their supply chain. They are responsive to pressure from public opinion or government policy intervention, but can also influence key stakeholder groups themselves. Key issues: awareness of potential greenwashing and nutrition washing (i.e., promotion without substantiation), and the need to assure governance/accountability for their commitments and those from government.
- *There are no silver bullets*: different technologies will be suited for different agro-ecologies and types of farmers. Instead of focusing on bringing one technology to scale,

we need a suite of technology tools that can be adapted to specific environments and types of farmers. These technologies must be co-designed with farmers. Research and development need to work together, not separately. Research is needed to help us better understand the characteristics of adopters and non-adopters; improve how we assess progress against multiple objectives; and track impacts that show up on different time-scales.

- *Complex objectives don't always require complex interventions* (e.g., mobile money). If there are multiple objectives, trade-offs will have to be weighed and choices made. Key to resolving the complexity of scaling given multiple objectives is to expand the circle of stakeholders in the conversation, including the most vulnerable. Different stakeholders will push on different parts of the equation – in this way choices and trade-offs will be identified. The discussions should aim to identify a shared vision, and focus on how to expand the pie in ways that will have a positive outcome for all participants. In these discussions it is important to rely on scientific evidence, and to be very honest about the evidence we have and don't have.
- *Collective action to bring diverse stakeholders together is hard work*, very resource intensive, and requires an intermediary organization to do the heavy lifting. Funding intermediary efforts aimed at facilitating collective discussion and action for change is an ideal role for donors. Focusing on accountability, and improving the quality of data – especially locally collected and owned data - is critical to transparently track progress on commitments and outcomes.

Working Group Session 5

Wednesday November 17, 2021

Climate Change Working Group

Session title: *Implication of CoP 26 for the Accelerated Scaling of Climate Change Solutions*
The event was structured in two main segments. The first was a high-level panel reflecting on COP26 and the way forward. The second session of the event was for members of the scaling up Working Group to reflect on the panel discussion to better understand what it means for the scaling up initiative in general. The participants had a chance to tackle, in a moderated discussion, actions to be implemented and how the scaling up COP can support international financial engagement on climate action.

The recording and materials from this session can be found here.

Speakers:
- *Lord Nicholas Stern*, IG Patel Professor of Economics and Government at the London School of Economics
- *Yannick Glemarec*, Executive Director, Green Climate Fund
- *Amal Lee Amin*, Director, Climate Change at CDC
- *Amar Bhattacharya*, Senior Fellow, Brookings Institute and Co-Chair of the CoP's Climate Change Working Group

Moderators:
- *Amar Bhattacharya*, Senior Fellow, Brookings Institute and Co-Chair of the CoP's Climate Change Working Group
- *George Zedginidze*, Head of Knowledge and Change Management, GCF and Co-Chair of the COP's Climate Change Working Group

Takeaways:
Segment 1: *Reflection on COP26*

- *Amal-lee Amin* stressed three dimensions from COP26 – (1) the actions needed to meet the target of USD 100 billion investments per year and to have a clear plan for delivering on it; (2) the need for doubling adaptation finance; and (3) the broader issues associated with climate finance.
- *Amar Bhattacharya* focused on the link between the climate agenda and scaling up highlighting four dimensions of scaling: (1) **Cooperation** and ambition regarding how to address and manage the limited carbon budget; (2) investments and **Innovation**, including the urgency of a technology breakthrough agenda; (3) the centrality of **Policy** concerns the capacity of countries to design and implement a system transformation and carbon pricing; (4) mobilizing **Finance** through the private sector, partnerships, and scaling up multilateral funds and institutions.
- *Yannick Glemarec* pointed out three existing gaps and an emerging one. The existing gaps before COP26 were an emission gap, an adaptation gap and a finance gap. A fourth gap that is emerging is a trust gap between developed and developing countries due to the USD 100 billion goal under the UNFCCC process not yet having been met. COP26 dramatized the need to mobilize the USD 100 billion goal before COP27 to prevent this trust gap from widening. COP26 also evidenced progress in recognizing that climate change is happening and that increased finance for adaptation is essential and highlighted the fact that the scale up must be supported by a variety of financial instruments in addition to grants.
- *Lord Nicholas Stern* emphasized the deepening in general understanding since Paris that led to the Net Zero commitment. This includes an enriched understanding that goes beyond the issue of emissions and takes into consideration biodiversity, protection of ecosystems, and breakthrough in technologies. Moreover, the scale up in the constituency for climate action was evident at COP26. It saw massive participation from the private sector and the presence of several Prime Ministers and Heads of State, which was not always the case with previous COPs.

Segment 2: *Accelerating and scaling up climate innovation and investments*

- Yannick Glemarec gave a presentation highlighting GCF's four-pronged approach for green market creation and development based on his paper recently launched at COP26. Read the full paper here.
- The presentation included unpacking the main and exploring the barriers to climate innovation in developing countries. GCF's approach is designed to overcome these barriers and to accelerate and scale up climate innovation in developing countries by:
  - helping to nurture a supportive regulatory environment and public support in developing countries;
  - deploying GCF resources to accelerate innovation;
  - de-risking investment to deploy new climate solutions at commercial scale; and
  - strengthening domestic financial institutions to support the widespread adoption of commercially proven climate solutions.

Working Group Session 6

Thursday November 18, 2021

Nutrition Working Group

Session title: *Where is the anemia target for young children? The missing WHA nutrition target. Perspectives on home fortification for children under five.*

The Home Fortification Technical Advisory Group – co-chaired by Nutrition International -- and the Scaling CoP's Nutrition Working group co-hosted this event which was incorporated as a side event during a 'Nutrition for Growth Summit' organized by the Home-Fortification Technical Advisory Group (HFTAG), in collaboration with Nutrition International and UNICEF. The session covered technical issues such as the burden of anemia and iron deficiency in children, the best available interventions to address the problem, and the importance and process for setting global targets. This was followed by an overview of applicable scaling frameworks and lessons from economics for scaling home fortification. The session concluded with a panel of government policymakers from Rwanda and Nigeria discussing the potential for home fortification, and a call for the WHA Target on Anemia to be revised to include the reduction of anemia in children in addition to women.

Speakers:
- Dr. Mandana Arabi (Vice President, Global Technical Services, Nutrition International)
- Dr. Kathryn Dewey (Distinguished Professor Emerita of Nutrition, University of California Davis),
- Youssouf Koita (Head of Nutrition, UNICEF Rwanda)
- Grainne Moloney (Senior Advisor, Early Childhood Nutrition, UNICEF)
- Dr. Lisa Rogers (Technical Officer, World Health Organization),
- John Uruakpa (Deputy Director and Head of Micronutrition Deficiency Control, Ministry of Health Nigeria),
- Dr. Stanley Zlotkin (Inaugural Chief of the SickKids Centre for Global Child Health and Professor of Pediatrics, Public Health Sciences, and Nutrition Sciences, University of Toronto)
- Dylan Walters, Project Director at Nutrition International, Co-Chair of the CoP's Nutrition Working Group

Takeaways (for scaling):
- The human capital and economic burden of anemia in children is significant, and it is estimated that childhood anemia is associated with a 2.5% decrease in wages in adulthood. Early estimates from a new NI cost of inaction tool suggest the economic cost of childhood anemia may be much greater than anemia in women (up to 10x) and closer to that of stunting. There is strong evidence on intervention efficacy and public health effectiveness of anemia reduction interventions (MNP and SQ-LNS) and plenty of cost-benefit and cost-effectiveness analyses (on MNPs).
- However, there is a need for WHO guidance on small-quantity, lipid-based nutrient supplements (SQ-LNS) and research on the cost-benefit of SQ-LNS. There is also a lack of good coverage data globally on home fortification.
- There is an urgent need to address the knowledge gap on the science of scaling and application of this knowledge towards scaling home fortification.

- There are five approaches to large-scale change, including traditional scaling, scaling from a systems perspective, transformational scaling, narrow systems scaling, and broad systems scaling. Depending on context, one or the other may be more suitable.
- For sustainable scaling of home fortification interventions, costing of scale-up should be done from a systems perspective rather than traditional scaling. It is highly recommended that costing and modelling for scaling should be conducted to inform target setting, as it can lead to realistic and achievable target setting.
- Sustainable scaling of home fortification programs requires political commitment at the country level, and exploration of the best delivery platforms through public and private channels (or a combination of both). To create demand for home fortification intervention programs, it is crucial to incentivize households and the private sector to adopt and adhere to interventions.

Working Group Session 7

Thursday November 18, 2021

Education Working Group Session

Building on the themes raised in Plenary #2 and in the M&E Working Group, the Education Working Group examined challenges and opportunities to institutionalizing (embedding), within formal education systems, initiatives originating from outside the system. During this session, panelists highlighted strategies and lessons learned from implementing partners working with governments to ensure institutionalization; presented findings from a multi-country study on practices that support or hinder institutionalization; and (re)introduced the "Institutionalization Tracker" which measures the progress of efforts to integrate an initiative into the education system.

The recording and materials from this session can be found here.

Speakers:
- *Hebah Foda*, Scaling and Learning Manager, Ahlan Simsim Early Childhood Development Program, Jordan
- *Masooda Bano*, Principal Investigator for the Research on Improving Systems of Education (RISE) and Professor of Development Studies at the University of Oxford Department of International Development
- *Jonathan Stern, Ph.D.,* Senior Research and Evaluation Specialist, International Education, RTI International
- *Molly Curtiss Wyss*, Project Manager and Senior Research Analyst, Center for Universal Education, The Brookings Institution

Moderators:
- *Gaëlle Simon*, Technical Director at Management Systems International, Co-Chair of the Education Working Group
- *Jenny Perlman Robinson*, Senior Fellow for Global Economic and Development in the Center for Universal Education at Brookings Institution, Co-Chair of the Education Working Group

Takeaways:
- *Need for a common understanding of sustainability*: Something is sustainable if it continues beyond the end of a project. Sustainability is more than checking a box, more

than capacity building, more than the government giving its blessings for an external initiative. It requires testing and deep understanding of how local systems can support and sustain a change – and a strategy for achieving that end result needs to be designed from the start and revisited frequently.

- *Engagement with local communities*: While a lot of the focus is on government when talking about institutionalization, the linchpin might be engagement with local communities. How much an initiative is embedded within and owned by the community plays critical role in institutionalization and sustainability. This is well illustrated in the case of Pratham where community initiative helped to sustain valuable interventions n when government support waned.
- *Institutionalization doesn't necessarily mean the entirety of a project or model is embedded in an administrative system:* It might be sufficient to embed just be few elements that respond to a pressing need or gap.
- *Those aspects easiest to integrate/embed are those that most closely resemble the existing system:* Elements that tended to be sustained were the ones that built off something that existed in the system as opposed to introducing something new to the system -- e.g., curricular reforms, where a process is already in place versus more dramatic overhauls to system where new processes/structures/changes in norms are required.
- *Role of flexibility versus evidence*: Programs often need to adapt in order to align with emerging priorities or adjust to variability in local context.
- *Long term nature of institutionalization:* Pratham experience in Bihar showed for programs to be embedded systematically, 7-8 years was not enough. True institutionalization took 10-15 years, and can take even longer.
- *Inherent tensions between institutionalization and donor financing*: Development organizations often need to demonstrate quick wins/outcomes to legislatures or other funders. This can conflict with a scaling process that requires working with local and government partners over time to implement an initiative that is embedded and sustained by the government.
- *Evolving role of originating entity*: There is often not a clear moment of handover from the originating organization to the government. In many cases, it is an evolving process where the originating organization might continue with some new, differently-focused role, such as monitoring and evaluation, research and development, branding and outreach, etc.

Working Group Session 8

Friday November 19, 2021

Monitoring & Evaluation Working Group Session

The session organized by the M&E Working Group (MEWG) was divided into two parts. The first part focused on the most effective means for assessing and tracking institutionalization/sustainability by governments of innovations and new practices that originate in NGOs, summarizing insights from a series of webinars on this topic sponsored by the MEWG earlier in the year. The second part of the session discussed and solicited input to the 2022 learning agenda and action priorities for the Working Group.

The recording and materials from this session can be found here.

Speakers:
- *Larry Cooley*, President Emeritus at MSI, Co-Chair of the Scaling CoP and Co-Chair of the CoP Monitoring & Evaluation Working Group
- *John Floretta*, Global Deputy Executive Director at J-PAL, Co-Chair of CoP Monitoring & Evaluation Working Group

Respondents:
- *Jenny Perlman Robinson*, Senior Fellow for Global Economic and Development in the Center for Universal Education at Brookings Institution, Co-Chair of the Education Working Group
- *Ruth Simmons*, ExpandNet, Member of the CoP's Executive Committee
- *Ben Piper*, Director of Global Education at Bill & Melinda Gates Foundation, Ethiopia

Takeaways

- Larry Cooley summarized the Monitoring & Evaluation Working Group's (MEWG) learning agenda since the Group's establishment almost seven years ago. The MEWG has produced tools and/or lessons on the following topics: a 3-tier framework for organizing M&E during scaling; Scalability Assessment; budgeting for MEL in pilot projects; use of case studies, comparative case studies, RCTs and dashboards to inform scaling; and the use of Real-time Scaling Labs.

- The MEWG concluded in past sessions that scaling outcomes could be grouped into 3 categories: Coverage, Efficacy, and Institutionalization; and it prioritized during 2021 the development of tools and thought-products that focus specifically on the use of M&E tools to assess and inform institutionalization of improved practices into government organizations and budgets. This work took the form of 4 webinars sponsored by the MEWG Group that will be summarized in paper to be issued in March or April. These four webinars focused, respectively, on the perspectives of NGOs in the Education and Health sectors, the perspectives of a range of donor organizations, and the perspective of actors inside host governments. Special attention was given to lessons from successful efforts to scale the use community health workers and to scale "teaching at the right level" in several countries. The MEWG group also focused on the development and use of an "Institutional Tracker", a maturity model to plan and to track Institutionalization, which has been adapted for sectors including Education, Health, and Child Welfare.

- Summarizing the results of the Education Working Group's session on supporting Institutionalization of improved practices in the Education Sector, Jenny Perlman Robinson emphasized lessons including that institutionalization in government is much enhanced by selecting changes that resemble the prevailing system and are relatively easy to reconcile with the prevailing budget. She also noted the importance of the organization that originally developed the new practice evolving its own role over time and be willing to "let go" of branding and strict fidelity to the initial model.

- John Floretta summarized eight lessons from the webinar series on M&E related to institutionalization. These lessons included, among other things, the need for metrics to assess progress from governments "countenancing" interventions to their actually "owning" those changes as integral elements of their national systems. Another relevant learning concerns concerned the changes needed need in order for project-funded M&E functions to be institutionalized within government.

- Ruth Simmons summarized the ExpandNet approach to institutionalization, initially developed for use in family planning and subsequently extended to an array of health interventions and to several other sectors. This body of work includes a wide range of tools, including a tool and checklist called "Beginning with the End in Mind," an "Institutional Mapping Tool," and guidelines for multi-stakeholder alliances to plan and track needed system changes.

- Ben Piper, now with the Bill and Melinda Gates Foundation, was until recently at RTI where he was Principal Investigator for a major study summarizing eight successful cases of learning at scale. He emphasized the value of identifying a few key metrics that can be tracked and used by governments and by others on a nearly real-time basis. He

gave practical examples of the effective use of this kind of information, including by line workers and mid-level bureaucrats implementing the program. He also stressed the importance of metrics of demand, indicators of changed incentives for bureaucrats and service providers, measures of motivation among service providers, and metrics of the extent to which governments spend their own money in support of those changes.

- These perspectives from invited speakers were followed by a question and answer session that included observations about fostering a scaling mindset, attribution versus contribution, the movement of interventions from branded interventions to becoming the "new normal", and the importance of donors and NGOs deferring to local voices in strategy formation as well as measurement.

- The session concluded with the presentation of a list of MEWG's priorities for 2022 and an invitation for comments on the list and/or to add additional recommendations for topics. Some of the items identified for possible attention during 2022 include: deepening the work on institutionalization and on costing analysis, examining successful efforts to enhance the generation and use by governments of scaling metrics and analytics, and deepening our knowledge of fit-for-purpose external M&E systems.

Working Group Session 9

Monday November 22, 2021

Social Enterprise Innovation Working Group

Session title: *Scaling through Social Franchising: Lessons Learned from Jibu Water and Kidogo*
Social franchising offers the chance to scale through the guided growth and development of local entrepreneurs. This session took a look at Jibu's experience and lessons in deploying a franchise model to expand clean water kiosks in seven African countries and at Kidogo's experience using a franchise model for scaling ECD interventions for marginalized populations in East Africa. The session also examined how the differences in national regulatory and enabling environments impacts the decision to enter into new markets and scale.

The recording and materials from this session can be found here.

Speakers:
- *Galen Welsch*, Co-Founder at Jibu
- *Sabrina Habib*, CEO and Co-founder Kidogo

Moderators:
- *Elaine Tinsley*, Private Sector Specialist at World Bank, Co-Chair of the Social Enterprise Working Group
- *Colin Christensen,* Global Policy Director One Acre Fund

Takeaways:
Jibu
- *Description*: Jibu is a social franchise company present in seven African countries creating affordable access to drinking water through an innovative franchising model that empowers local entrepreneurs and their communities.
- *Franchising model*: Jibu finances the initial franchise launch while franchisees pay a one-time licensing fee and an ongoing flat fee per liter of water sold. Franchisees package and distribute water within a 2km exclusive territory and customers pay once for empty

cylinders or bottles, and then only for refills. Jibu supports franchisees with training, financing, regulatory support, economies of scale to buy supplies, in addition to a strong brand, efficient technology, and innovative packaging.

- *Key factors to scale to new markets***:** Analyze the country environment to understand if there is demand, identify if regulatory relationships can be built, find local partners either on the commercial or philanthropical side, and build local partnerships.

Kidogo
- *Description*: [Kidogo](#) is a social enterprise that improves access to quality, affordable early childhood care and education in East Africa's low-income communities. It uses an innovative social franchising approach to identify, train, and support female entrepreneurs (Mamapreneurs) to start or grow childcare micro-businesses. Kidogo has been doubling its reach every year since its creation in 2014 and is now serving 30 communities across 7 African countries reaching 9500 children and 502 local franchisees.
- *Franchising model***:** Kidogo is a conversion-based franchise model, since they offer training to existing childcare operators and at the end of the 3-month training program those who meet quality standards are invited to become a franchisee. Kidogo provides a renovation to the childcare spaces that then become part of Kidogo's network and receive ongoing coaching, training, and support.
- *Challenges and lessons learned*: Focus on the needs of franchisees, build a local technical support team (franchising officers), build trust with the community, simplify the business model, maintain service quality leveraging subsidies and grants if necessary, and be prepared to work on developing the ecosystem (demand, regulations, etc.).

In what ways could the government help catalyze the social enterprise sector?
- Have a holistic approach on taxes and concessions.
- Cultivate the support of social enterprises in fulfilling government duties, and partner with them.
- Have well documented and consistently administered regulatory processes that ensure quality control.

Publications and Other Initiatives

General

LeapFrog investments named Pioneer in Transformation Impact
https://leapfroginvest.com/press-releases/leapfrog-investments-named-pioneer-in-transformational-impact-by-financial-times-and-ifc/

> The Financial Times and the IFC have named LeapFrog their inaugural **Pioneer in Transformational Impact**. This award, part of the Transformational Business Awards, was honored LeapFrog's long-standing commitment to Profit with Purpose. The judging panel pointed to the commercial success and impact at scale of companies like Goodlife, ARM Pensions and BIMA – with LeapFrog companies together providing healthcare or financial tools to 221 million people across 35 countries.

The politics of scaling. By Sebastian Pfotenhauer, Brice Laurent, Kyriaki Papageorgiou and Jack Stilgoe. *Social Studies of Sciences*. 2021

https://journals.sagepub.com/doi/pdf/10.1177/03063127211048945

> The authors assert that a fixation on 'scaling up' has captured current innovation discourses. Perhaps most visible in the rise of platform technologies, big data and concerns about a new era of monopolies, they assert that scalability thinking has also permeated public policy in the search for solutions to 'grand societal challenges', 'mission-oriented innovation' or transformations through experimental 'living labs'. In this paper, the authors explore this scalability zeitgeist as a key ordering logic of current initiatives in innovation and public policy. The paper explores platform technologies, living labs, and experimental development economics to analyze how scalability thinking is rationalized and operationalized. The authors suggest that social analysis of science and technology needs to come to terms with the 'politics of scaling' and focus in on three constitutive elements of the politics of scaling: solutionism, experimentalism and future-oriented valuation.

Agriculture and Rural Development

Insights on scaling of innovations from Agricultural Research for Development: views from practitioners. By Lennart Woltering and María Boa Alvarado. *Knowledge Management for Development Journal Online first*, August 2121.
https://www.researchgate.net/publication/353932453_Insights_on_scaling_of_innovations_from_Agricultural_Research_for_Development_views_from_practitioners

> Despite a growing body of literature on how to scale innovations that contribute to the Sustainable Development Goals, there has been little attention for how scientists and program managers engage with the scaling process in practice. Through 36 interviews, the authors found that the dominant understanding of scaling was output and beneficiary-focused, rather than outcome and society-focused as the latest literature suggests. This has implications on how scaling is approached in projects on the ground, and on the role of an agricultural Research for Development organization such as the International Maize and Wheat Improvement Center (CIMMYT) in bridging science and development. The authors recommend more reflection on the scaling process and more use of scaling tools to better link scientific knowledge to results on the ground.

Syngenta Foundation: When expert comments turn into a quizzing

Is scaling an art or a science? How important is coercion? What's the 10/90 rule, and who decides what to scale? Which organizations are doing this all best? The Syngenta Foundation for Sustainable Agriculture (SFSA) recently put these and numerous other questions to CIMMYT's Lennart Woltering. Lennart was one of the experts SFSA asked to comment on its position paper on scaling (https://www.syngentafoundation.org/sites/g/files/zhg576/f/2021/09/01/sfsa_03_scale_final.pdf). "He took us to task on several points", says SFSA's Paul Castle, who interviewed Lennart in return. "The comments were really helpful, but we felt we couldn't just leave it at that. I'm delighted we didn't." You'll find the interview on https://www.syngentafoundation.org/news/news/scaling-road-not-destination and https://www.syngentafoundation.org/news/news/unsexy-topics-paralysis-and-dancefloor. Contact: Castle Paul CHBS <paul.castle@syngenta.com>

Children and Youth

Scaling up programs to address violence against children

The **INSPIRE Guide to Adaptation and Scale Up** was launched on Wednesday, December 1, 2021. This webinar was the fourth in a series on adaptation and scale up funded by the Oak Foundation and led by MSI. Recordings of all 4 sessions can be found here.

1. Webinar 1 on A Framework for Thinking about Scaling (password: scalingwithmsi)
2. Webinar 2 on Assessing Scalability (password: scalingwithmsi2)
3. Webinar 3 on Real-time Scaling Labs (password: scalingwithmsi3)
4. Webinar 4 on the Launch of the INSPIRE Guide to Adaptation and Scale Up (incl. transcript)

Please visit the INSPIRE website to view and download the tools, the tutorial video, and the guide referenced in the session.

The Guide was created as a resource for the adaptation and scale-up of a country's unique action plan to address violence against children.

Climate Change

Accelerating and scaling up climate innovation: How the Green Climate Fund's approach can deliver new climate solutions for developing countries. By Yannick Glemarec. Green Climate Fund *Working Paper No. 4*9 November 2021. https://www.greenclimate.fund/document/accelerating-and-scaling-climate-innovation-how-green-climate-fund-s-approach-can-deliver

Climate innovation is critical to avert catastrophic climate change, but investment in new climate solutions is hampered by a range of barriers. This Working Paper first identifies the main barriers to climate innovation in developing countries, focusing on each stage of the innovation chain, from the emergence of innovation to its deployment and eventual widespread adoption. Many of these barriers are related to the policy and regulatory environment as well as to technical and macro-economic constraints. They result in high perceived risk to investors and limited access to long-term affordable financing for climate innovators and entrepreneurs, especially in developing countries. The paper then outlines the Green Climate Fund's four-pronged approach to overcome these barriers and to accelerate and scale up climate innovation in developing countries. The first prong is to establish a conducive policy and institutional environment for novel climate solutions. The second prong is to catalyze climate innovation by piloting new

technologies, business models, financing instruments, and practices to establish proof of concept. The third prong is to use scarce public resources to de-risk early investments that will establish a commercial track record for new climate solutions and crowd-in private finance. The final prong of GCF's approach is to accelerate the widespread adoption of commercially proven climate solutions by enhancing the capacity of domestic financial institutions to originate and access capital markets to finance climate investments.

Education

Girls' education at scale. By David K. Evans, Amina Mendez Acosta, Fei Yuan. Center for Global Development. *Working Paper 594*, October 2021.
Full paper: https://www.cgdev.org/publication/girls-education-scale
Summary blog: https://www.cgdev.org/blog/girls-education-going-what-works-what-works-scale

Many educational interventions boost outcomes for girls in settings where girls face educational disadvantages, but which of those interventions are proven to function effectively at large scale? In contrast to earlier reviews, this review focuses on large-scale programs and policies—those that reach at least 10,000 students—and on final school outcomes such as completion and student learning rather than intermediate school outcomes such as enrollment and attendance. Programs and policies that have boosted school completion or learning at scale across multiple countries include school fee elimination, school meals, making schools more physically accessible, and improving the quality of pedagogy. Other interventions, such as providing better sanitation facilities or safe spaces for girls, show promising results but either have limited evidence across settings or focus on intermediate educational outcomes (such as enrollment) or post-educational outcomes (such as income earning) in their evaluations.

Scaling personalized learning technology in Malawi: Lessons from our sandbox with one billion. By Laurel Schmitt. *EdTechHub*, 17 August 2021.
https://edtechhub.org/2021/08/17/scaling-personalized-learning-technology-in-malawi-lessons-from-our-sandbox-with-onebillion/

In Malawi, the Ministry of Education is working with nonprofits, onebillion, and VSO Malawi, to provide 150,000+ children access to literacy and numeracy software and 650 families recently received a tablet to support learning at home during the pandemic. Now, the government is interested in scaling up these programs to the national level, so EdTech Hub, a global research-to-practice program of which R4D is a partner, ran a 3-month sandbox — the Hub's approach to real-world experimentation — to explore opportunities and barriers. This blog highlights key takeaways and lessons from the process.

Sexuality education

In a recent webinar, Rutgers International in The Netherlands presented a framework on the roles for NGO's and CSO's to sustainably scale up sexuality education. The four step framework for scale up was published in a report by the Centre of Excellence Program. They are:

1. Understanding the context
2. Make the case and engage in dialogue
3. Establish the building blocks
4. Implementation and scale-up

The framework draws heavily on MSI's scaling toolkit and its launch featured speakers, including Larry Cooley, who shared advice and lessons from his extensive experience scaling up education and health programs. Other speakers detailed the framework's 4 steps and provided examples from Ghana, Indonesia and Benin.

Key lessons from the webinar:
- Less than 5% of validated interventions ever reach scale
- The intangible but essential importance of a trusted and credible intermediary
- The need to link sexuality education to an existing local issue of concern
- The importance of a clear MoU and scale-up plan with roles and responsibilities
- The design of pilot projects that test cost-effectiveness and acceptability
- Alternative mechanisms for coordination at every level during roll-out
- Steps for integrating sexuality education into pre-service teacher training and into existing education system data collection procedures
- Ways to maintain commitment and prevent backlash throughout the entire process

Video recording: https://youtu.be/NP-M3UYrwNc
Report: RUTG2102_Design_Scale-up-Report_LM_0709-1.pdf (rutgers.international)
Contact: Jahou Nyan j.nyan@rutgers.nl

Environment

Belize's Big Blue Debt Deal: At Last, A Scalable Model? By Celemence Landers and Nancy Lee, Center for Global Development, 10 November 2021
https://www.cgdev.org/blog/belizes-big-blue-debt-deal-last-scalable-model

> In early November 2021, the Government of Belize alongside the U.S. Development Finance Corporation (DFC) and the Nature Conservancy (TNC) announced the financial close of the largest blue bond for Ocean Conservation to date. The program enables Belize to convert its existing Eurobond (i.e., foreign currency bonds issued on the international market) into blue debt that it will use to implement its national marine conservation agenda. This program is part of a global TNC Blue Bond for Conservation program.

Health

Scaling up Business Plans in Tajikistan: a qualitative study of the history, barriers, facilitators and lessons learnt. By Sarah Werner et al., *Global Health Action*, Volume 14, 2021, Issue 1.
https://www.tandfonline.com/doi/full/10.1080/16549716.2021.1947552

Objective: To describe the history and process of implementation of Business Plans and to identify barriers, facilitators and lessons learnt from scaling up Business Plans.
Methods: Set in a qualitative research design, the authors conducted a desk review of project and official documents and seventeen semi-structured interviews with key stakeholders at national and sub-national levels between May and July 2020. They used an interview guide informed by the ExpandNet/WHO framework and analyzed the data following a content analysis approach facilitated by MAXQDA.
Results: With the participation of various user organizations and resource teams, and through a variety of strategic scale-up choices, Business Plans have been scaled up from a vertical pilot project to institutionalized health management tools covering 45% of Tajikistan's PHC facilities. The most prominent facilitators for scaling up Business Plans were the institutionalization and integration of the tool into the Tajik health system, the close collaboration with Community Health Teams, the high acceptance of the tool among the users, the advocacy through champions and policy-makers, and the large dissemination network. The most outstanding barriers to scaling up Business Plans were insufficient financial or human resources, general weaknesses in health governance, the lack of a strategic scale-up plan and strategic decisions, the lack of motivation or overall vision to implement Business Plans at a large scale and difficulties in donor coordination.
Conclusion: To ensure the continuity of scaling up Business Plans, developing a scale-up strategy, strengthening cross-sectoral collaboration and participation during scaling up, and capacitating the user organizations of Business Plans are important next steps.

Mobilizing private finance

Time to deliver: mobilizing private capital at scale for people and planet. Impact Taskforce. 2021
https://www.impact-taskforce.com/media/gq5j445w/time-to-deliver-final.pdf

This report provides the summary conclusions of the Impact Taskforce, an industry-led Taskforce that was invited by the G7 Presidency to help answer the following critical question: "How can we accelerate the volume and effectiveness of private capital seeking to have a positive social and environmental impact?" The report presents the case for urgent action, provides actionable recommendations, and sets out a clear pathway as to how private capital can be mobilized at scale in support of key global sustainable development targets.

Social inclusion

The State of Economic Inclusion Report 2021: The Potential to Scale. Andrews, Colin; de Montesquiou, Aude; Arevalo Sanchez, Ines; Dutta, Puja Vasudeva; Paul, Boban Varghese; Samaranayake, Sadna; Heisey, Janet; Clay, Timothy; Chaudhary, Sarang. The World Bank. 2021.
https://www.worldbank.org/en/topic/socialprotectionandjobs/publication/the-state-of-economic-inclusion-report-2021-the-potential-to-scale

Economic inclusion programs help boost the income and assets of the world's poorest individuals and households with a "big push" of coordinated interventions – usually a combination of cash or in-kind transfers, skills training or coaching, access to finance, and links to market support.

The State of Economic Inclusion 2021 Report reveals that economic inclusion programs are on the rise in 75 countries around the world, reaching approximately 20 million

households and benefitting nearly 92 million individuals. See this short <u>multimedia presentation</u> for summary.

This unprecedented surge is driven by the scale-up of government-led programs that build on investments in social protection, livelihoods and jobs, and financial inclusion. This trend is set to continue, especially in areas affected by conflict, climate change, and shocks.

The report examined over 200 programs across 100 organizations and highlights adaptations of economic inclusion interventions to meet specific challenges in Bangladesh, Peru, India, and the Sahel region.

Women's economic empowerment is a key driver of economic inclusion programming, with nearly 90 percent of programs surveyed in the report having a gender focus.

The Report is a result of a unique collaboration under the <u>Partnership for Economic Inclusion (PEI)</u>. PEI is a dedicated platform to support the adoption and adaptation of national economic inclusion programs working with a variety of stakeholders, including national governments and bilateral, multilateral, NGO, research, and private-sector organizations. PEI is also launching an online and open-access <u>PEI Data Portal</u>. The data portal underscores a commitment to open access information to support global learning and program implementation.