



# **Scaling Principles and Lessons**

**A guide for action  
to achieve sustainable development impact at scale**

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A Position Paper of the  
***The Scaling Community of Practice***

## **Acknowledgements**

This paper was prepared for and endorsed by the Executive Committee of the [Scaling Community of Practice](#) on behalf of the Community to support development practitioners in their efforts to achieve sustainable development impact at scale. The paper draws on the experience of many experts whose work was reviewed and who provided their advice and guidance in the preparation of this paper. A detailed list of the literature and experts consulted can be found in the [working paper](#) by R. Kohl and J. Linn, which was commissioned by the Executive Committee as a basis for this statement of principles and lessons. The working paper was presented to and discussed with Community members at the Community's 6<sup>th</sup> Annual Workshop in November 2021. The Executive Committee acknowledges all these contributions with great appreciation.

## OVERVIEW: Eight Principles Respond to Six Key Scaling Questions

### A. What is the vision of scale?

**Principle 1:** Develop from the outset and in a participatory way a context-specific vision of the problem(s) that need(s) to be addressed and of the expected pathway and impact of interventions at optimal and sustainable scale.

### B. What to scale?

**Principle 2:** Define the core elements of the intervention (or intervention package) to be scaled and assess whether it can be sustainably scaled in a particular context.

### C. Who will scale?

**Principle 3:** Identify, engage and coordinate leaders, champions, intermediaries, partners and public/private actors who can play key roles in driving, funding and implementing scaling.

### D. How to plan for scaling?

**Principle 4:** From the outset, identify systemic opportunities, constraints and risks; plan to align with them or address them through system change along the scaling pathway.

**Principle 5:** Develop in a participatory and inclusive way a scaling strategy and implementation pathway(s) to achieve the sustainable scaling vision.

### E. How to implement the scaling strategy?

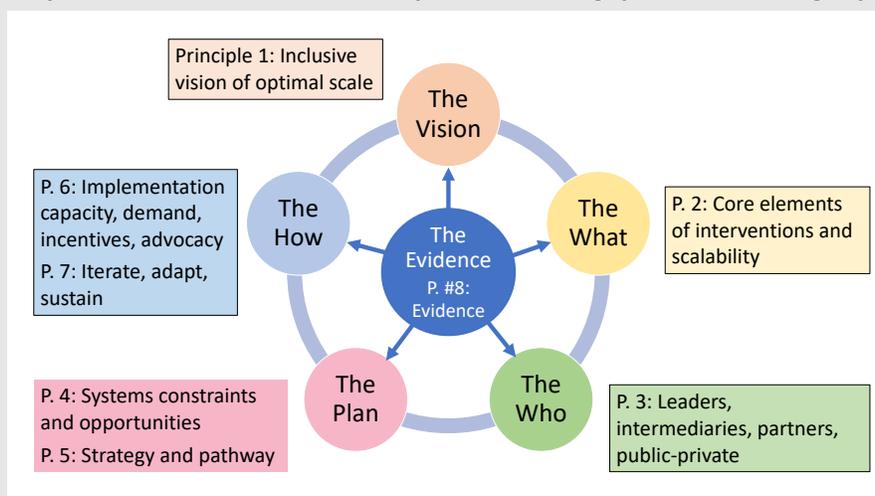
**Principle 6:** In line with the scaling strategy mobilize resources and institutional capacity and create demand for the scaling intervention by aligning incentives and pursuing advocacy to enlist stakeholders and change attitudes, mindsets and social norms.

**Principle 7:** Iterate, learn and adapt the scaling pathway for sustainable impact as long as needed.

### F. Based on what evidence?

**Principle 8:** Base all scaling decisions on relevant evidence and continuous learning.

### A graphic representation of the six interdependent scaling questions and eight principles



Source: Adapted from Kohl and Linn (2021)



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### **Introduction**

Scaling, i.e., achieving sustainable development impact at scale, has increasingly been accepted by international development actors as central to their mission, goals and activities. While a number of scaling management frameworks and tools have been developed, there is a need for a concise statement of scaling principles and lessons that apply broadly across sectoral areas (agriculture, education, health, nutrition, climate, etc.) and are designed to help guide development practitioners. To address this need, the [Scaling Community of Practice](#) has developed a list of scaling principles and lessons.

This paper presents eight scaling principles and 21 lessons that unpack those principles, grouped under six broad questions about how to address the scaling challenge. The principles and lessons draw on a [working paper](#) prepared for the Community of Practice by Richard Kohl and Johannes F. Linn. Kohl and Linn drew on interviews with key informants active on scaling in international development, on a survey of the scaling literature, and on the experience of the Community's experts and practitioners. The Appendix to this paper lists the literature sources used by Kohl and Linn and end-notes in the text provide references to the literature for each of the lessons.

For the purposes of this paper "principle" is defined as a concise statement that represents a general truth and serves as a basis for action, and "lesson" as a general rule of action based on experience with the application of the principle and elucidating the meaning of the principle. Few if any of the principles and lessons are categorical imperatives, as they have their limits in terms of how universally they can and should be applied. The Kohl and Linn working paper explicitly considers caveats and implementation constraints for each principle and lesson. However, the default assumption should be that the principles and lessons are relevant unless proven otherwise.

These principles and lessons apply to innovations, but also more generally to all interventions that hold the promise of development impact at scale. This includes the introduction of technologies, goods or services, practices, policies, and organizational or process changes, whether entirely novel or not and whether from inside or outside an existing system. In recognition of this breadth, this paper generally refers to "interventions", not "innovations."

The paper identifies challenges and gaps in current practice of scaling, but its primary emphasis is on practical principles and lessons that can be applied across sectors and development endeavors. Full-scale adoption and implementation of these principles and lessons may appear a major challenge. But this need not be the case. One option is to use an incremental approach in the application of the principles and lessons, starting with a high-level consideration of their relevance and then pursuing in greater detail those aspects that represent the greatest obstacles or opportunities for successful scaling in a particular case. Readers interested in exploring specific tools in support of applying the principles and lessons presented in this paper may wish to consult the tool kits prepared by [ExpandNet](#), [IDIA](#) and [MSI](#). (See reference section at the end of this paper.) An application of the principles and lessons to three cases of actual scaling can be found in [this paper](#) by J. Linn.



## The Scaling Principles and Lessons

### A. What is the vision of scale?

**Principle 1: Develop from the outset and in a participatory way a context-specific vision of the problem(s) that need(s) to be addressed and the expected pathway and impact of interventions at optimal and sustainable scale.**

**Lessons:** Forming a clear vision encompasses three prime considerations:

- **Begin with the end in mind:**<sup>i</sup> Start with a clear vision of the problem and its sustainable scale and then consider whether a particular intervention is better suited to meet the vision than competing alternatives. This vision should include at a general level who the expected actors and stakeholders are, whether there is not just a need but also real demand, whether the scaling pathway is public, private or mixed, and who will drive and finance the scaling process along that pathway. A corollary of this lesson is that the consideration of scale needs to be integrated into the process of designing an intervention, i.e., as early as possible, rather than waiting until after proof of impact or concept, as is often the case.
- **Aim for optimal, not maximum scale:**<sup>ii</sup> Given limited financial resources and institutional capacity, there are inevitably tradeoffs between numbers of people reached, impact in its multiple dimensions, speed, quality, cost and especially equity. These tradeoffs need to be addressed squarely and transparently in right-sizing a scaling vision. In addition, scaling almost always has multiple, diverse effects beyond its intended impact, such as impact on environment and natural resources, gender and marginalized groups. And because scaling often leverages existing delivery mechanisms and systems to minimize additional cost and the extent of changes needed, it has a tendency to reinforce existing inequities and neglect the “last mile”, i.e., those most difficult to reach. Thus, the search for optimal scale will require ethical judgments, and scaling visions and pathways should be developed with attention to human rights and dignity and to those most disadvantaged.
- **Form the scaling vision in a participatory way:**<sup>iii</sup> Scaling decisions and choices have often been dominated by innovators, funders or implementers. Given the ethical considerations and tradeoffs implied by optimal scale, there needs to be a greater role for stakeholders, including government, communities, users or frontline service providers, and for marginalized groups, including women and girls. These stakeholders in the scaling process not only need to be consulted but need to participate in decision making and to be able to influence what evidence is generated as the basis for decisions. In addition to ethical considerations, participatory approaches generate political commitment, build ownership, create champions, and increase the likelihood of adoption of a new technology, treatment or good or service.

### B. What to scale?

**Principle 2: Define the core elements of the intervention (or intervention package) to be scaled and assess whether it can be sustainably scaled in a particular context.**

**Lessons:** The decision of what to scale involves two key considerations:

- **Focus on core elements of an intervention:**<sup>iv</sup> Scaling standardized models can result in economies of scale and simplify replication. However, often simple replication fails to produce the expected impact when facing different contexts or systemic constraints, or because complex, multi-



component interventions cannot be fully replicated. These issues can be addressed by reframing the intervention in terms of its core components or design features, while allowing other components and features to be adapted to local circumstances or cut.

- **Assess scalability:**<sup>v</sup> Not every innovation can or should be scaled. Innovative interventions have sometimes been scaled despite lack of evidence of impact and/or scalability, because they were pushed by an innovator, funder or government with a vested interest in showing “success” or for particular political agendas. Before proceeding with scaling, interventions should be tested locally on a small scale in diverse contexts against proven criteria regarding sustainable scalability, including clear evidence of impact. Scalability assessment tools are readily available in the scaling literature (see references at the end of this paper). Interventions that require extensive, costly or time-consuming system changes to achieve sustainable impact at scale or whose impact is sensitive to small changes in design or quality will typically be more difficult to scale.

### C. Who will scale?

**Principle 3: Identify, engage and coordinate leaders, champions, intermediaries, partners and public/private actors who can play key roles in driving, funding and implementing scaling.**

**Lessons:** Going to scale rarely happens spontaneously. Four principal sets of actors – mostly organizations, but also individuals – need to engage and cooperate in scaling:

- **Find and convince leaders:**<sup>vi</sup> Without leadership, scaling usually fails. Going to scale requires an actor(s) or organization(s) committed to leading scaling through to success, willing to make decisions, and able to mobilize and coordinate others to support scaling goals, strategy and tactics. Care must be taken not to rely too heavily on a single leader, since a change in leadership can then leave a gap that is difficult to close.
- **Identify and empower one or more intermediaries:**<sup>vii</sup> Intermediaries are actors with skills, capacity and financial resources to facilitate and coordinate the scaling process. They are often needed to support scaling with strategic planning and goal setting, systems analysis, process facilitation, working across organizational boundaries, advocacy and communication, forming and coordinating partnerships, financial and costing analysis, resource mobilization, and monitoring and evaluation. The intermediary role is generally best carried out by a national or local organization, but it is often either ignored entirely, or inadequately filled because the most likely candidates for this role tend to lack the necessary incentives, motivation, resources or capacity. Therefore a deliberate effort will frequently be needed to identify and equip an appropriate intermediary.
- **Create and leverage partnerships:**<sup>viii</sup> There is no scaling without partners. One organization going it alone usually lacks the necessary skills, capacity, resources, political clout and community grounding to scale successfully. Scaling to diverse populations and contexts requires local knowledge, relationships and a network of local organizations. Partners need to be aligned along common goals and jointly mobilize resources for effective implementation and political support of the scaling process, which in turn requires that partnerships have adequate resources, management and governance structures.
- **Ensure that public action and private action are consistent and mutually reinforcing.**<sup>ix</sup> Public and private action typically should go hand-in-hand for successful scaling. Where private commercial activity predominates in a scaling pathway, the public sector usually still plays a significant role, including setting the legal, regulatory and policy enabling environment, and giving permission, approval or sanction for scaling. Moreover, any intervention that reaches large scale and thus



involves a significant proportion of the population can become subject to political contentions. Therefore, the public sector's role always needs to be considered for sustainable scaling. The converse is also true; the private sector typically has extensive and frequently neglected roles to play in scaling interventions through public pathways. And, more often than not, mixed or hybrid pathways, where public action leverages private action and finance (e.g., by sharing some of the risks with private investors) is the best way to achieve sustainable scale.

#### ***D. How to plan for scaling?***

**Principle 4: From the outset, identify systemic opportunities, constraints and risks; plan to align with them or address them through system change along the scaling pathway.**

**Lessons:** "Systemic thinking" is a critical part of successful scaling in the sense that planning for scale needs to pay heed to three aspects of the context, or system, in which it takes place – systemic constraints and opportunities in general, financial constraints in particular, and systemic risk:

- **Map and address systemic enabling factors and constraints:**<sup>x</sup> Interventions often fail to scale because they do not fit within existing systemic constraints (e.g., financial, policy, institutional, political, socio-cultural, etc.). Interventions need to be implementable within constraints at target scale, or those constraints need to be addressed through systems change. Horizontal scaling, i.e., simple replication or expansion, usually has to go hand in hand with vertical scaling, i.e., creating the required enabling conditions through systems change.
- **Pay special attention to financing and cost constraints:**<sup>xi</sup> One of the principal reasons that scaling efforts fail is that the financial resources required to cover the costs of scaling and of sustained implementation at large scale are missing or inadequate. The design of interventions needs to draw on cost-benefit calculations and consider of affordability by users, fiscal and implementation capacity and competing policy priorities. Financing is needed for all the tasks involved in going to scale and sustaining delivery at scale, not only for the one-off costs of initial testing, adoption, capacity building and systems change. A viable, long-term business or funding model that aligns resources with costs is critical. Commercial interventions typically rely on revenues generated from the intervention. Some governmental interventions (e.g., public utilities such as power, water, etc.) can do so, too, which will assist not only in covering costs but also in establishing whether there is a demand for the goods and services provided. However, many publicly provided goods and services cannot generate sufficient revenue or cannot do so in a manner that incorporates the needs of marginalized groups.
- **Assess and address risks:** Scaling is particularly prone to contextual and programmatic risks. There are numerous uncertainties about the quality of implementation and the resulting variance of outcomes, about the existence of demand and profitability at scale for all private actors, and the durability of governments and their policy priorities. Many risks are specific to different scaling stages, and hence need to be assessed and anticipated as far as possible for each stage. This is especially the case as an initiative reaches larger and larger scale and is increasingly affected by national systems, actors and political economy issues.



**Principle 5: Develop in a participatory way a scaling strategy and implementation pathway(s) to achieve the sustainable scaling vision.**

**Lesson:**

- ***Link the vision with the intervention by developing a strategic and sustainable scaling pathway:***<sup>xii</sup> Scaling requires a strategic planning approach that systematically connects the vision of sustainable impact at scale with specific interventions, that anticipates potential implementation challenges (Principle 6) and recognizes that the strategy is not written in stone, but needs to be adapted in the light of evidence and experience. The strategy either has to align with the systemic constraints or incorporate a plan to address them and deal with associated risks. It often needs to involve a phased approach to scaling to allow time for demonstration of impact, for actors to embrace their expected roles, for financing to increase, for policy barriers to be addressed, and for implementation capacity to be built or strengthened. And, like the vision, the strategy needs to be developed in a participatory way.

***E. How to implement the scaling strategy?***

**Principle 6: In line with the scaling strategy, mobilize resources and institutional capacity and create demand for the scaling initiative by aligning incentives and pursuing advocacy to enlist stakeholders and change attitudes, mindsets and social norms.**

**Lessons:** Four considerations underpin the effective implementation of a scaling strategy:

- ***Mobilize resources and institutional capacity for scaling and for sustained implementation at scale.***<sup>xiii</sup> Resources and institutional capacity are critical for scaling and operating at scale. They often have to be systematically created along the scaling pathway to fit the nature of the intervention and the context in which scaling takes place.
- ***Pay attention not only to the supply side of the scaling process, but also the demand side:***<sup>xiv</sup> Evidence of proof of concept is rarely sufficient on its own to inspire scaling actors to play their various roles. Therefore deliberate scaling efforts typically include attention to supply side considerations, i.e., process by which key elements of an intervention are generated, produced and distributed. But experience shows that scaling seldom happens by simple diffusion or attraction, i.e., “build it and they will come.” Therefore the demand side of scaling, i.e., whether the users of an intervention are ready to adopt a different technology, good or service, must not be taken for granted. Marketing as a tool for scaling is well established in commercial practice, but much less so for public or charitable interventions. Therefore the next two lessons are critical.
- ***Align interests and generate incentives:***<sup>xv</sup> Successful scaling will frequently involve changes in mind-sets and even social norms. Scaling can elicit resistance or active opposition from vested interests or simply because it involves significant change in attitudes or behavior for users, organizations and systems. Inertia and resistance need to be anticipated and addressed proactively. To align interests in support of scaling, incentives may be needed, including financial (subsidies and taxes), legal and regulatory incentives, or those based on competition and non-monetary rewards (such as published performance rankings).
- ***Communicate and advocate based on evidence:***<sup>xvi</sup> Communication, education, advocacy, marketing and other outreach activities are needed to complement incentives as a way to enroll all relevant actors and to motivate adoption of an intervention. Enlisting advocates with prominent status, legitimacy and credibility can be critical to success. Monitoring and evaluation need to be designed to support advocacy with decision makers and other stakeholders.



## **Principle 7: Iterate, learn and adapt the scaling pathway for sustainable impact at scale as long as needed.**

**Lessons:** This principle is based on three considerations:

- ***Iterate, learn, and adapt:***<sup>xvii</sup> Increases in scale often create new challenges in the relevant systems, stakeholders, and resources and unforeseen events and outcomes, obstacles and opportunities will occur along the scaling pathway. Therefore, scaling almost always involves continuing adaptation based on continuous feedback loops as one needs to take unforeseen developments as likely and constantly reexamine assumptions, revise the scaling vision and strategy, and adapt activities and tactics accordingly. This is a particular challenge for scaling efforts rooted in traditional project approaches that define specific workplans at the beginning and often aim to implement them rigidly over the limited lifespan of a project regardless of developments on the ground.
- ***Focus on sustainability:***<sup>xviii</sup> Without sustainability, reaching large scale is of no long-term benefit. Many development programs neglect sustainability of impact due to a lack of long-term funding, incentives, accountability and monitoring for sustainability beyond program or project end. Sustainable scaling requires long term engagement, a viable business model, reliable funding, institutional capacity, and ongoing political support beyond the limited time horizon of individual projects. For physical assets such as infrastructure, appropriate operations and maintenance requirements have to be assured.
- ***Maintain a long-term perspective:***<sup>xix</sup> Achieving sustainable implementation at scale often takes more than a decade, especially when changes in systems, attitudes, mindsets and social norms, or policy priorities are involved. Politicians, bureaucrats, business executives and funders tend to have short time horizons; they prefer immediate payoffs over longer-term impact at scale. These time horizons are reinforced and embedded in political cycles and bureaucratic limitations on the duration of engagement. This leads to a heavy emphasis on rapid results through “quick wins” or “low-hanging fruit”. These quick wins can help to build momentum, but they can also create perverse incentives or become a goal unto themselves, blinding actors to the need to create the foundations for sustainable scale. Thus it is important to ensure continued commitment by all actors, including leaders, intermediaries and funders, to advance the scaling agenda across political and funding cycles.

## **F. Based on what evidence?**

### **Principle 8: Base all scaling decisions on relevant evidence and continuous learning.**

**Lesson:**

- ***Collect and apply evidence throughout:***<sup>xx</sup> Evidence is fundamental for all aspects and activities in scaling, as noted in the discussion of the preceding principles. Evidence on impact is critical, but so is evidence needed to set and adapt the vision, to assess scalability, to choose or modify what to scale, and to identify and address systemic enabling conditions and barriers along the scaling pathway, using both quantitative and qualitative monitoring and evaluation approaches. In designing quantitative monitoring and evaluation metrics, it is important to focus not only on the “numerator” (e.g., number of people reached), but also the “denominator” (e.g., the number of people that are ultimately to be reached). As an intervention scales, the metrics of monitoring and evaluation will often also have to be adapted, thus requiring what has been referred to as a “dynamic” monitoring, evaluation and learning (MEL) process. MEL needs to be continued beyond the scaling phase and integrated into ongoing implementation at scale so as to adapt to inevitable



new developments and changes in context, while ensuring that required quality and core characteristics of the intervention are sustained.

## Concluding Comments

The principles and lessons were presented above in a sequential fashion but, as noted in the text and evident from the introductory graphic, they are interdependent, overlap and need to be applied in a holistic and iterative manner. So, for example, the scaling vision (Principle 1) needs to be conceived with many of the other principles in mind, albeit at a high level. And the scaling strategy (Principle 6) needs to anticipate implementation challenges (Principle 7), but during implementation the strategy also may need to be adapted in the light of evidence.

The Executive Committee recognizes that this statement of principles is only the beginning of a process. The principles and lessons need to be tested with application to past scaling experience and to current and future scaling initiatives, and with even more input from experts and practitioners of the Global South than was possible so far. The general principles presented in this paper also could usefully serve as the basis for principles tailored to specific sectors and actors. The Community of Practice will actively disseminate these principles and adapt them as experience is gained with their application. Readers are encouraged to share their experience in the application of the principles with the Community of Practice by sending their comments to [ScalingCOP@msi-inc.com](mailto:ScalingCOP@msi-inc.com).

## References

References to the scaling literature can be found in:

Richard Kohl and Johannes F. Linn. "Scaling Principles." Scaling Community of Practice [Working Paper](#), November 2021.

Tool kits for scaling practice can be found in these three publications:

ExpandNet Website. "Tools and Publications" page, <https://expandnet.net/tools/>. 2022.

International Development Innovation Alliance (IDIA). "[Scaling Innovation: Good Practice Guides for Funders](#)." June 2017.

Jacobs, F., Ubels, J., Woltering, L., Boa-Alvarado, M. (2021). The Scaling Scan: A practical tool to determine the strengths and weaknesses of your scaling ambition. (2nd Edition). Published by the PPPlab and CIMMYT. 2021. <https://repository.cimmyt.org/handle/10883/21507>

Management Systems International (MSI). "Scaling Up from Vision to Large Scale Change: Tools for Practitioners." [2<sup>nd</sup> Edition](#), 2021.

For an application of the principles and lessons in three actual cases see:

Johannes F. Linn. "[Three Case Studies Applying the Scaling Principles of the Scaling Community of Practice](#)." Scaling Community of Practice Working Paper, February 2022.

### Appendix: Literature Reviewed by Kohl and Linn (2021)

	Title	Date and Reference or Link	Authors	Sector	Perspective
L1	Taking Innovations to Scale: Methods, Applications and Lessons	September 2014 <a href="https://www.msiworldwide.com/additional-resources/taking-innovations-scale-methods-applications-and-lessons">https://www.msiworldwide.com/additional-resources/taking-innovations-scale-methods-applications-and-lessons</a>	Larry Cooley and Johannes F. Linn	General	General
L2	Beginning with the End in Mind	2011. <a href="https://expandnet.net/PDFs/ExpandNet-WHO%20-%20Beginning%20with%20the%20end%20in%20mind%20-%202011.pdf">https://expandnet.net/PDFs/ExpandNet-WHO%20-%20Beginning%20with%20the%20end%20in%20mind%20-%202011.pdf</a>	ExpandNet	Health	Primarily Public Sector
L3	Scaling Brief #2: Scaling Principles	December 2020. <a href="https://www.researchgate.net/publication/348382379_Scaling_Brief_2_Scaling_Principles">https://www.researchgate.net/publication/348382379_Scaling_Brief_2_Scaling_Principles</a>	Woltering, Linn and CGIAR	Agriculture	General, Scaling Technical Innovations
L4	Lean Impact: How to Innovate for Radically Greater Social Good	2019. Hoboken, NJ: John Wiley and Sons.	Ann Mei Chang	General	Social Enterprise
L5	Scaling-up is a craft not a science	November 2014. <i>Social Science &amp; Medicine</i> . Vol: 121, pp. 30-38	Neil Spicer et al	Health	Mostly public sector scaling
L6	Seeing, Facilitating and Assessing Systems Change	July 2020. <a href="https://www.rockpa.org/wp-content/uploads/2020/07/Rockefeller-Philanthropy-Advisors-Scaling-Solutions-Report.pdf">https://www.rockpa.org/wp-content/uploads/2020/07/Rockefeller-Philanthropy-Advisors-Scaling-Solutions-Report.pdf</a>	Heather Grady et al.	General	Donors and Foundations
L7	Innovations and Scaling for Impact	2017. Stanford, CA: Stanford University Press.	Christian Seelos and Johanna Mair	General	Social Enterprises
L8	Millions Learning: Scaling Up Quality Education in Developing Countries	April 2016. <a href="https://www.brookings.edu/research/millions-learning-scaling-up-quality-education-in-developing-countries/">https://www.brookings.edu/research/millions-learning-scaling-up-quality-education-in-developing-countries/</a>	Jenny Perlman-Robinson and Rebecca Winthrop	Education	Primarily Public Sector
L9	Nine Steps for Developing a Scaling Strategy	2010. <a href="https://www.who.int/immunization/hpv/deliver/nine_steps_for_developing_a_scalingup_strategy_who_2010.pdf">https://www.who.int/immunization/hpv/deliver/nine_steps_for_developing_a_scalingup_strategy_who_2010.pdf</a>	Ruth Simmons, Laura Ghiron and Peter Fajans	Health	Primarily Public Sector
L10	Pathways to Scale.	2016. <a href="https://www.usaid.gov/sites/default/files/documents/1864/Pathways-to-Scale-Guide-508-final.pdf">https://www.usaid.gov/sites/default/files/documents/1864/Pathways-to-Scale-Guide-508-final.pdf</a>	USAID Global Health Bureau. CII	Health	Mostly technical innovations
L11	Leveraging Government Partnerships for Scaled Impact	September 2018. <a href="https://centers.fuqua.duke.edu/case/wp-content/uploads/sites/7/2020/11/Scaling-Pathways_Leveraging-Government-Partnerships.pdf">https://centers.fuqua.duke.edu/case/wp-content/uploads/sites/7/2020/11/Scaling-Pathways_Leveraging-Government-Partnerships.pdf</a>	Erin Worsham, Kimberly Langsam, and Ellen Martin	General	Social Enterprises

L12	Scaling Impact: Innovation for the Public Good	2019. Ottawa, Canada: Routledge. <a href="https://idl-bnc-idrc.dspacedirect.org/bitstream/handle/10625/57605/Scaling%20impact.pdf?sequence=2&amp;isAllowed=y">https://idl-bnc-idrc.dspacedirect.org/bitstream/handle/10625/57605/Scaling%20impact.pdf?sequence=2&amp;isAllowed=y</a>	Robert McLean and John Gargani	General	General
L13	How and Why Do Social and Sustainable Initiatives Scale? A Systematic Review of the Literature on Social Entrepreneurship and Grassroots Innovation	March 2020. <i>International Journal of Voluntary and Nonprofit Organizations</i> . 31(5) <a href="https://www.researchgate.net/publication/339669404_How_and_Why_Do_Social_and_Sustainable_Initiatives_Scale_A_Systematic_Review_of_the_Literature_on_Social_Entrepreneurs_hip_and_Grassroots_Innovation">https://www.researchgate.net/publication/339669404_How_and_Why_Do_Social_and_Sustainable_Initiatives_Scale_A_Systematic_Review_of_the_Literature_on_Social_Entrepreneurs_hip_and_Grassroots_Innovation</a>	Marion von Lunenburg et al.	General	Social Enterprises Grassroots Activities
L14	Scaling Out, Scaling Up, Scaling Deep	October 2015. Prepared for the J.W. McConnell Family Foundation and Tamarack Institute. <a href="https://mcconnellfoundation.ca/wp-content/uploads/2017/08/ScalingOut_Nov27A_AV_BrandedBleed.pdf">https://mcconnellfoundation.ca/wp-content/uploads/2017/08/ScalingOut_Nov27A_AV_BrandedBleed.pdf</a>	Darcy Riddell and Michele-Lee Moore	General	[?]
L15	Factors influencing the scale-up of public health interventions in low- and middle-income countries	November 2019. <i>Health Policy and Planning</i> 35(2). <a href="https://www.researchgate.net/publication/337258396_Factors_influencing_the_scale-up_of_public_health_interventions_in_low_and_middle-income_countries_a_qualitative_systematic_literature_review">https://www.researchgate.net/publication/337258396_Factors_influencing_the_scale-up_of_public_health_interventions_in_low_and_middle-income_countries_a_qualitative_systematic_literature_review</a>	Bulthuis, Kok, Raven and Dieleman	Health	General
L16	Scaling Up Excellence: Getting to More without Settling for Less	2014. New York: Crown Publishing.	Robert I. Sutton, Huggy Rao	General	Primarily private sector

**End Notes** (references refer to the literature sources cited in the Appendix above)

- i. L1, L2, L3, L4, L8, L9, L13, L15,
- ii. L3, L12 .
- iii. L6, L7, L8, L12, L15,
- iv. L5, L1, L6, L8, L9, L14
- v. L1, L2, L8, L9
- vi. L8, L9, L11, L13, L15,
- vii. L1, L5, L9, L13
- viii. L1, L4, L5, L6, L8, L9, L10, L13, L15,
- ix. L1, L5, L11, L15
- x. L1, L2, L4, L6, L7, L8, L9, L14,
- xi. L2, L4, L5, L6, L7, L8, L14, L15,
- xii. L1, L8, L9, L13, L15
- xiii. L1, L2, L8, L9
- xiv. L2, L5, L8, L15
- xv. L1, L2, L3, L5, L7, L8, L10, L14, L15,
- xvi. by L1, L2, L9, L10, L15,



- xvii. L1, L4, L3, L5, L6, L8, L11
- xviii. L2, L6, L9, L15,
- xix. L1, L4, L5, L6, L10, L11
- xx. L1, L2, L4, L5, L6, L8, L9, L10, L11, L13, L15