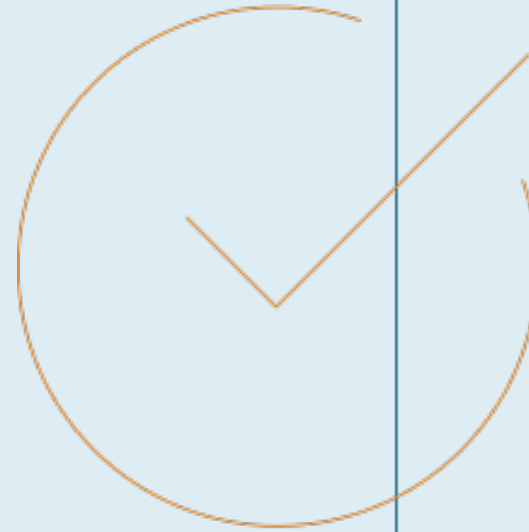
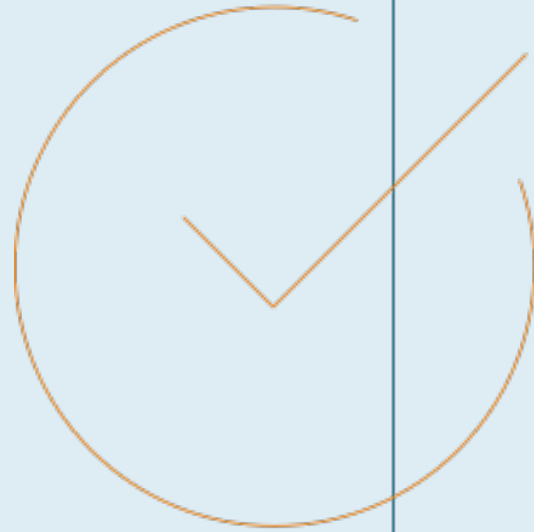


Intro to the *Education Scalability Checklist*



Education WG
Global CoP on Scaling
03/25/2021



Three general points

Education WG
Global CoP on Scaling
03/25/2021

What can the ESC help you with?

(and what not?)



Assess scalability of an education initiative



Plan to make scaling easier



Track whether scalability improves over time



~~Assess desirability of scaling~~



~~Assess whether the education initiative will be effective at scale~~

When and how to use the ESC?



Starting early = Building foundations for ease of scaling



1 x / year throughout the process



Never too late to start



Expand group of users as part of the process

Intended use of the ESC?

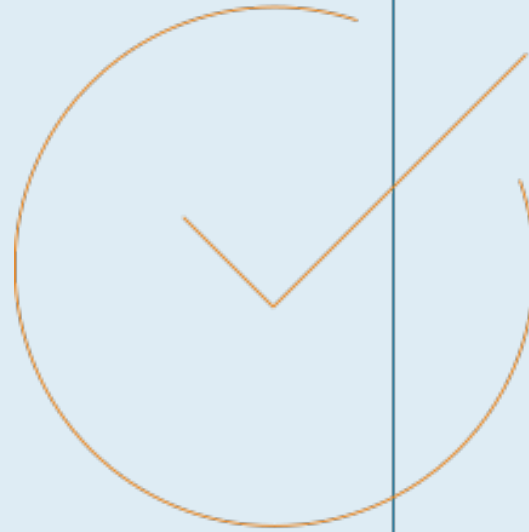
(and what to avoid?)



Diagnostic and planning tool



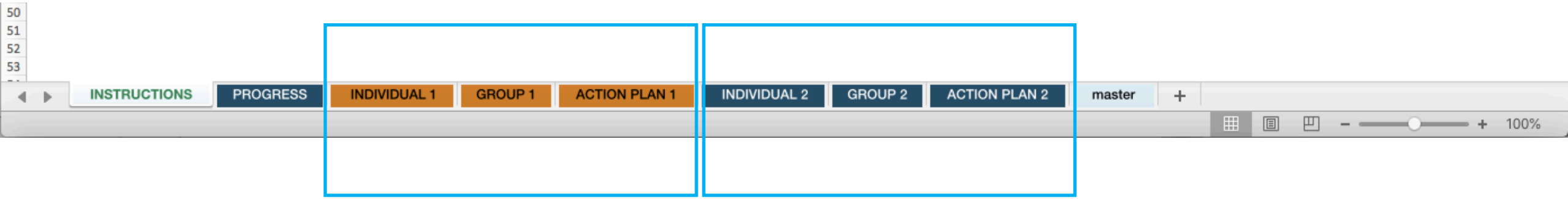
~~One-off scorecard~~



Basic structure of the tool

Education WG
Global CoP on Scaling
03/25/2021

3 recurring sheets to structure the annual ESC exercise



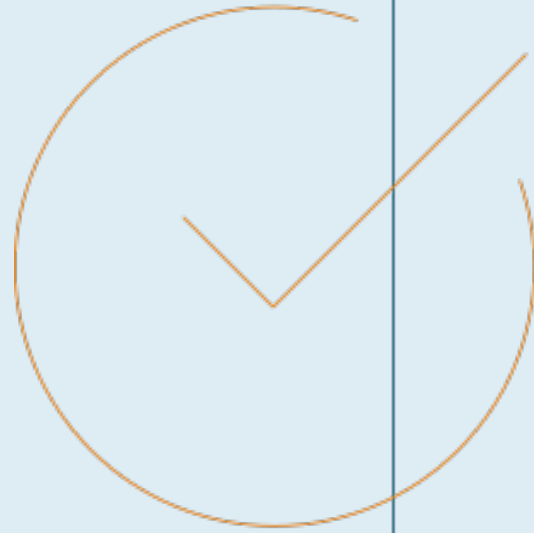
1st diagnostic + planning

2nd diagnostic + planning

3 recurring sheets to structure the annual ESC exercise
+ 1 sheet that automatically tracks change over time



tracker



'INDIVIDUAL' sheet

Education WG
Global CoP on Scaling
03/25/2021

INDIVIDUAL DIAGNOSTIC

Model Categories	Item	A	B	Scaling up is harder >>>>	C	Explanation of Individual Item Score / Comments
A. How convincing is the scaling strategy?	1.	X	Presence of a clear and compelling strategy for reaching scale	-	No articulated scaling strategy	-
	2.	-	Homogeneous problem, target group(s) and setting – geography, language, economy, politics	X	Multiple, diverse problems, target group(s) and/or settings	-
B. Is the initiative credible?	3.	X	Robust evidence that the initiative works in diverse settings and for diverse target groups, incl. ones similar to the given	-	Little or no robust evidence of the initiative working in diverse settings and/or for diverse target groups, incl. ones similar to the given	-
	4.	-	Independent external evaluation of the initiative in the given setting	-	No independent external evaluation of the initiative in the given setting	X
	5.	-	Impact on learners very visible to decision-makers and users and easily associated with the initiative	-	Impact on learners relatively invisible to decision-makers and users and/or not easily attributable to the initiative	X
C. How strong is support for the initiative and the change it entails?	6.	-	Addresses an objectively significant, persistent problem that affects a lot of learners and has significant impact	-	Addresses a problem that is temporary, affects few learners or has limited impact	X
	7.	-	Addresses an issue that is high on the national policy agenda	X	Addresses an issue that is low on the national policy agenda	-
	8.	X	Addresses a need that is sharply felt by potential target groups	-	Addresses a need that is not sharply felt by potential target groups	-
	9.	-	Strong sense of urgency regarding the problem or need	X	Relative complacency	-
	10.	-	Supported by eminent individuals and institutions	-	Supported by few or no eminent individuals and institutions	X
	11.	-	Strong leadership coalition committed to the change and this coalition is expected to stay in place	X	Strong leadership coalition committed to that change or the one in place is volatile	-
	12.	-	Demonstrable support for the initiative among educators and key staff in the education system, particularly the adopting government institutions	X	Lack of support for or active resistance against the initiative among educators and key staff in the education system, part. adopting government institutions	-
	13.	-	Faces limited opposition	X	Faces strong opposition	-
D. Does the initiative have relative advantage over current state of affairs and alternative solutions?	14.	X	Current state of affairs and alternative solutions considered inadequate	-	Current state of affairs and alternative solutions considered adequate or better	-
	15.	-	Clearly established superior effectiveness	-	Clearly established inferior effectiveness	-
E. How easy is the initiative to transfer and adopt by education system, particularly adopting government institutions?	16.	-	Implementable with infrastructure and human resources already present in the education system	-	Requires additional infrastructure and human resources	-
	17.	-	Small departure from current practices of educators and key staff in the education system	-	Large departure from current practices of educators and key staff in the education system	-
	18.	-	Fully consistent with government policy, regulations and structure of the education system	-	Partially inconsistent with government policy, regulations and structure of the education system	-
	19.	X	Few decision makers involved in agreeing to adoption	-	Many decision makers involved in agreeing to adoption	-
	20.	X	Initiative is highly structured	-	Initiative is unstructured	-
	21.	X	Initiative shows low complexity; few components; easily added onto the education system	-	Initiative shows high complexity with many components; integrated package	-
	22.	-	Uptake and quality of implementation are easy to monitor	-	Uptake and quality of implementation require substantial effort in terms of monitoring	-
23.	-	Able to be tested on a limited scale	X	Unable to be tested without adoption at large scale	-	
F. How good is the fit between the initiative and the education system, particularly the adopting government institutions?	24.	X	Strong collaborative relationships exist between originating, intermediary and adopting organizations	-	Inexisting or nascent collaborative relationships between originating, intermediary and adopting organizations	-
	25.	-	Adopting organization has the operational capacity and financial resources to implement at scale	X	No organization with the systems, delivery agents to implement at scale	-
	26.	X	Adopting and intermediary organizations with experience scaling similar interventions	-	Adopting and intermediary organizations lack experience scaling similar interventions	-
	27.	-	Adopting organization has physical presence or strong network and credibility in relevant contexts	-	Adopting organization lacks footprint and credibility in relevant contexts	X
	28.	-	Initiative is consistent with the leadership team, organizational norms and incentives of the adopting organization	-	Initiative is not consistent with the leadership team in place, and / or with existing organizational norms and incentives	X
G. Is there a sustainable source of funding?	29.	-	Substantially lower cost than existing or alternative solutions	-	Higher cost than existing or alternative solutions	X
	30.	-	Budget implications are clear, predictable and justifiable for those who are expected to bear the costs	-	Budget implications are unclear and / or difficult to predict and justify for those who are expected to bear the costs	X
	31.	-	Taking the initiative to scale requires small amounts of funding that can easily be mobilized internally or externally	X	Taking the initiative to scale requires large commitment of funds that are difficult to mobilize either internally or externally	-
	32.	-	Cost of implementation at scale can be integrated in government budget and / or in budget of key implementing organizations	-	Cost of implementation at scale cannot be integrated in government budget and / or in budget of key implementing organizations	X

7 categories containing 32 items or features that describe ease / difficulty of scaling

1. Familiarize yourself with the 32 features

INDIVIDUAL DIAGNOSTIC

Model Categories	Item	A	B	C	Explanation of Individual Item Score / Comments	
A. How convincing is the scaling strategy?	1.	X	No articulated scaling strategy	-		
	2.	-	Multiple, diverse problems, target groups(s) and/or settings	-		
B. Is the initiative credible?	3.	X	Little or no robust evidence of the initiative working in diverse settings and/or for diverse target groups, incl. ones similar to the given	-		
	4.	-	No independent external evaluation of the initiative in the given setting	X		
	5.	-	Impact on learners relatively invisible to decision-makers and users and/or associated with the initiative	X		
C. How strong is support for the initiative and the change it entails?	6.	-	Few learners or has limited	X		
	7.	-	Not on policy agenda	-		
	8.	X	Addresses a need that is sharp	-		
	9.	-	Strong sense of urgency regarding	-		
	10.	-	Supported by eminent individuals	-		
	11.	-	Strong leadership coalition can be expected to stay in place	-		
	12.	-	Demonstrable support for the initiative among educators and/or leading government institutions	-		
	13.	-	Faces limited opposition	X	Faces strong opposition	
D. Does the initiative have relative advantage over current state of affairs and alternative solutions?	14.	X	Current state of affairs and alternative solutions considered adequate or better	-		
	15.	-	Little or no objective evidence of superiority	X		
E. How easy is the initiative to transfer and adopt by education system, particularly adopting government institutions?	16.	-	Requires significant new or additional infrastructure and / or human resources	X		
	17.	-	Large departure from current practices of educators and key staff in the education system	X		
	18.	-	Requires substantial change in government policy, regulations and / or structure of the education system	X		
	19.	X	Many decision makers at multiple levels of the education system, across departments or Ministries involved in agreeing to adoption	-		
	20.	X	Initiative is highly structured	-	Initiative lacks structure	
	21.	X	Initiative shows low complexity; few components; easily added onto the education system	-	Initiative shows high complexity with many components; integrated package	
	22.	-	Uptake and quality of implementation are easy to monitor	-	Uptake and quality of implementation require substantial effort in terms of monitoring	X
	23.	-	Able to be tested on a limited scale	X	Unable to be tested without adoption at large-scale	
F. How good is the fit between the initiative and the education system, particularly the adopting government institutions?	24.	X	Inexisting or nascent collaborative relationships between originating, intermediary and adopting organizations	-		
	25.	-	No organization with the systems, delivery agents, and resources to implement at scale	X		
	26.	X	Adopting and intermediary organizations lack experience scaling similar interventions	-		
	27.	-	Adopting organization lacks footprint and credibility in relevant contexts	X		
	28.	-	Initiative is not consistent with the leadership team in place, and / or with existing organizational norms and incentives	X		
G. Is there a sustainable source of funding?	29.	-	Higher cost than existing or alternative solutions	X		
	30.	-	Budget implications are unclear and / or difficult to predict and justify for those who are expected to bear the costs	X		
	31.	-	Taking the initiative to scale requires large commitment of funds that are difficult to mobilize either internally or externally	X		
	32.	-	Cost of implementation at scale cannot be integrated in government budget and / or in budget of key implementing organizations	X		

3. Attribute score on each item (A-B-C)

2. For the education initiative at hand, give a concrete description of the current situation



How convincing is the scaling strategy?



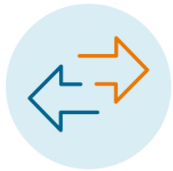
Is the initiative credible?



How strong is the support for the initiative and the change it entails?



Does the initiative have relative advantage over the current state of affairs and alternative solutions?






How easy is the initiative to transfer and adopt by the education system, part. the adopting government institutions?







How good is the fit between the initiative and the education system, part. the adopting government institutions?

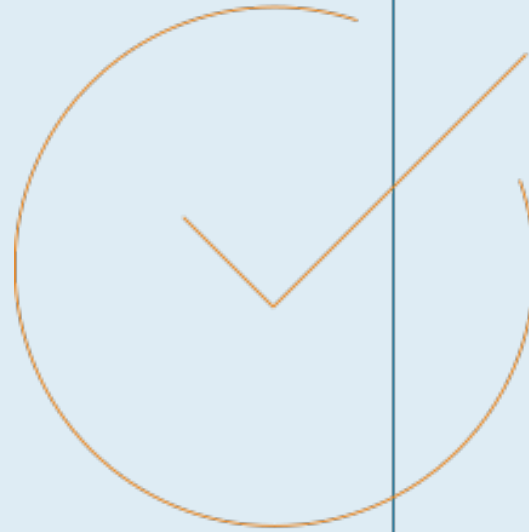


Is there a sustainable source of funding?

Model Categories	Item	A	Scaling up is easier <<<<<	B	Scaling up is harder >>>>>	C
 A. How convincing is the scaling strategy?	1.	X	Presence of a clear and compelling strategy for reaching scale	--	No articulated scaling strategy	--
	2.	--	Homogeneous problem, target group(s) and setting -- geography, language, economy, politics	X	Multiple, diverse problems, target groups(s) and/or settings	--
 B. Is the initiative credible?	3.	X	Robust evidence that the initiative works in diverse settings and for diverse target groups, incl. ones similar to the given	--	Little or no robust evidence of the initiative working in diverse settings and/or for diverse target groups, incl. ones similar to the given	--
	4.	--	Independent external evaluation of the initiative in the given setting	--	No independent external evaluation of the initiative in the given setting	X
	5.	--	Impact on learners very visible to decision-makers and users and easily associated with the initiative	--	Impact on learners relatively invisible to decision-makers and users and/or not easily attributable to the initiative	X
 C. How strong is the support for the initiative and the change it entails?	6.	--	Addresses an objectively significant, persistent problem that affects a lot of learners and has significant impact	--	Addresses a problem that is temporary, affects few learners or has limited impact	X
	7.	--	Addresses an issue that is high on the national policy agenda	X	Addresses an issue that is low on the national policy agenda	--
	8.	X	Addresses a need that is sharply felt by potential target groups	--	Addresses a need that is not sharply felt by potential target groups	--
	9.	--	Strong sense of urgency regarding the problem or need	X	Relative complacency	--
	10.	--	Supported by eminent individuals and institutions	--	Supported by few or no eminent individuals and institutions	X
	11.	--	Strong leadership coalition committed to the change and this coalition is expected to stay in place	X	Strong leadership coalition committed to that change or the one in place is volatile	--
	12.	--	Demonstrable support for the initiative among educators and key staff in the education system, particularly the adopting government institutions	X	Lack of support for or active resistance against the initiative among educators and key staff in the education system, particularly adopting government institutions	--
	13.	--	Faces limited opposition	X	Faces strong opposition	--

	D. Does the initiative have relative advantage over the current state of affairs and alternative solutions?		14.	X	Current state of affairs and alternative solutions considered inadequate	--	Current state of affairs and alternative solutions considered adequate or better	--
	15.	--	Clearly established superior effectiveness	X	Little or no objective evidence of superiority	--		
	E. How easy is the initiative to transfer and adopt by the education system, particularly the adopting government institutions?		16.	--	Implementable with infrastructure and human resources already present in the education system	--	Requires significant new or additional infrastructure and / or human resources	X
	17.	--	Small departure from current practices of educators and key staff in the education system	X	Large departure from current practices of educators and key staff in the education system	--		
	18.	--	Fully consistent with government policy, regulations and structure of the education system	--	Requires substantial change in government policy, regulations and / or structure of the education system			X
	19.	X	Few decision makers involved in agreeing to adoption	--	Many decision makers at multiple levels of the education system, across departments or Ministries involved in agreeing to adoption	--		
	20.	X	Initiative is highly structured	--	Initiative lacks structure	--		
	21.	X	Initiative shows low complexity; few components; easily added onto the education system	--	Initiative shows high complexity with many components; integrated package	--		
	22.	--	Uptake and quality of implementation are easy to monitor	--	Uptake and quality of implementation require substantial effort in terms of monitoring			X
	23.	--	Able to be tested on a limited scale	X	Unable to be tested without adoption at large-scale	--		

 F. How good is the fit between the initiative and the education system, particularly the adopting government institutions?	24.	X	Strong collaborative relationships exist between originating, intermediary and adopting organizations	--	Inexisting or nascent collaborative relationships between originating, intermediary and adopting organizations	--
	25.	--	Adopting organization has the operational capacity and financial resources to implement at scale	X	No organization with the systems, delivery agents, and resources to implement at scale	--
	26.	X	Adopting and intermediary organizations with experience scaling similar interventions	--	Adopting and intermediary organizations lack experience scaling similar interventions	--
	27.	--	Adopting organization has physical presence or strong network and credibility in relevant contexts	--	Adopting organization lacks footprint and credibility in relevant contexts	X
	28.	--	Initiative is consistent with the leadership team, organizational norms and incentives of the adopting organization	--	Initiative is not consistent with the leadership team in place, and / or with existing organizational norms and incentives	X
 G. Is there a sustainable source of funding?	29.	--	Substantially lower cost than existing or alternative solutions	--	Higher cost than existing or alternative solutions	X
	30.	--	Budget implications are clear, predictable and justifiable for those who are expected to bear the costs	--	Budget implications are unclear and / or difficult to predict and justify for those who are expected to bear the costs	X
	31.	--	Taking the initiative to scale requires small amounts of funding that can easily be mobilized internally or externally	X	Taking the initiative to scale requires large commitment of funds that are difficult to mobilize either internally or externally	--
	32.	--	Cost of implementation at scale can be integrated in government budget and / or in budget of key implementing organizations	--	Cost of implementation at scale cannot be integrated in government budget and / or in budget of key implementing organizations	X



'GROUP' sheet

Education WG
Global CoP on Scaling
03/25/2021

GROUP DIAGNOSTIC

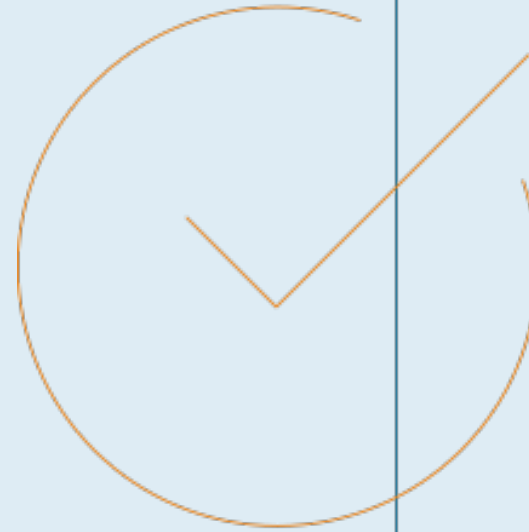
Model Categories	Item	Group Item Score	Group Item Value	Model Category Score	Explanation of Group Item Score / Comments
A. How convincing is the scaling strategy?	1.	B	5	5	
	2.		5		
B. Is the intervention credible?	3.	A	10	3,3	
	4.	C	0		
	5.	C	0		
	6.	C	0		
	7.	B	5		
		A	10	4,4	
		B	5		
	C	0	7,5		
	B	5			
	A	10	5		
	A	10			
	A	10			
	22.	C	0		
	23.	B	5		
F. How good is the fit between the initiative and the education system, particularly the adopting government institutions?	24.	A	10	5	
	25.	B	5		
	26.	A	10		
	27.	C	0		
	28.	C	0		
G. Is there a sustainable source of funding?	29.	C	0	1,25	
	30.	C	0		
	31.	B	5		
	32.	C	0		

2. Attribute group score on each item (A-B-C)

! No need for consensus

1. For the education initiative at hand, agree on a concrete description of the current situation

3. Number scores on categories calculated automatically



'PROGRESS' sheet

Education WG
Global CoP on Scaling
03/25/2021

PROGRESS TRACKER

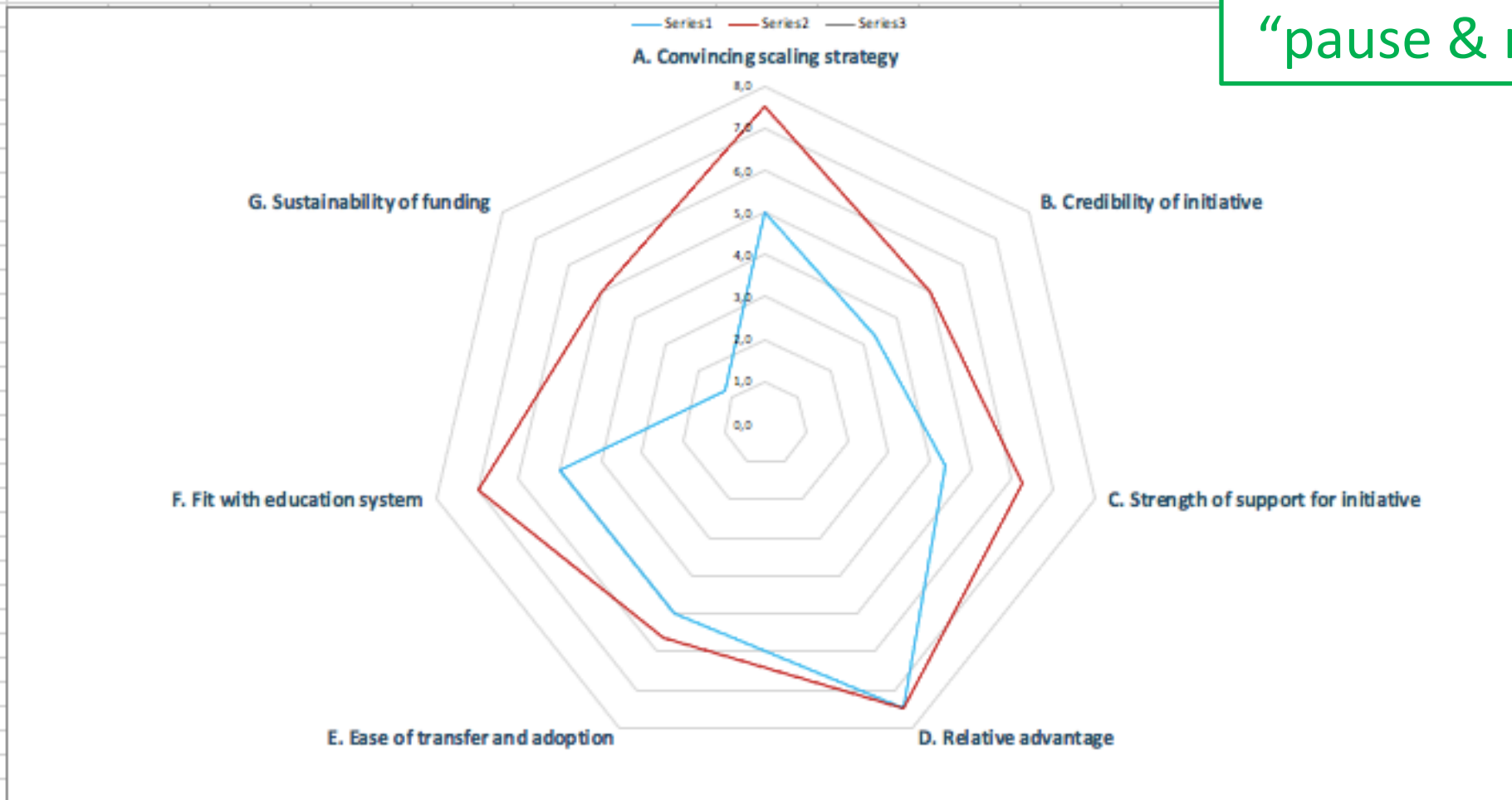
MODEL CATEGORY SCORES

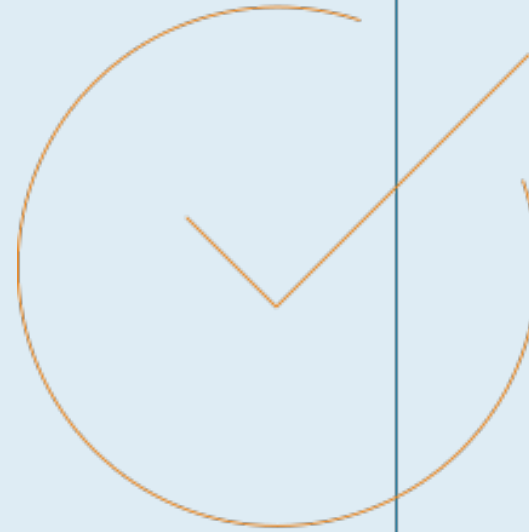
	YYMMDD 1	YYMMDD 2	YYMMDD 3
A. Convincing scaling strategy	5,0	7,5	
B. Credibility of initiative	3,3	5,0	
C. Strength of support for initiative	4,4	6,3	
D. Relative advantage	7,5	7,5	
E. Ease of transfer and adoption	5,0	5,6	
F. Fit with education system	5,0	7,0	
G. Sustainability of funding	1,3	5,0	

Generated automatically

Best used to foster "pause & reflect"

TRACKING CHANGES IN SCALABILITY OVER TIME



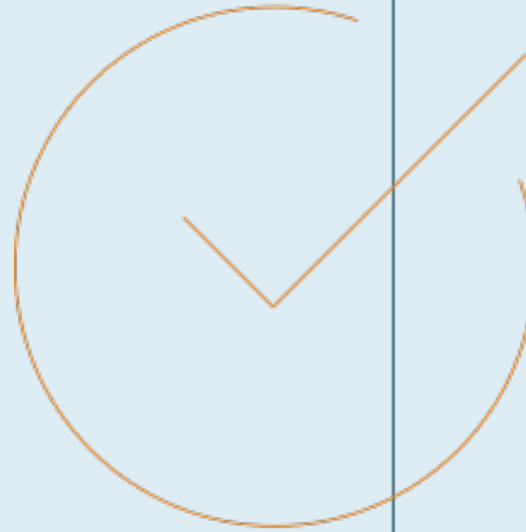


'ACTION PLAN' sheet

Education WG
Global CoP on Scaling
03/25/2021

ACTION PLAN


Action	Who Takes Lead	By When
<p data-bbox="254 714 1656 785">Set priorities for action for (min.) year to come</p> <ul data-bbox="152 885 1783 1056" style="list-style-type: none">• What will really drive forward the scaling process?<ul style="list-style-type: none">• Which obstacles need attention?		




Deeper dive into a few model categories & items

Education WG
Global CoP on Scaling
03/25/2021


EASE OF ADOPTION

 <p>E. How easy is the initiative to transfer and adopt by the education system, particularly the adopting government institutions?</p>	16.	X	Implementable with infrastructure and human resources already present in the education system
	17.	--	Small departure from current practices of educators and key staff in the education system
	18.	--	Fully consistent with government policy, regulations and structure of the education system
	19.	--	Few decision makers involved in agreeing to adoption
	20.	X	Initiative is highly structured
	21.	X	Initiative shows low complexity; few components; easily added onto the education system
	22.	--	Uptake and quality of implementation are easy to monitor
	23.	--	Able to be tested on a limited scale


SUSTAINABLE FUNDING

 G. Is there a sustainable source of funding?	29.	--	Substantially lower cost than existing or alternative solutions
	30.	--	Budget implications are clear, predictable and justifiable for those who are expected to bear the costs
	31.	--	Taking the initiative to scale requires small amounts of funding that can easily be mobilized internally or externally
	32.	--	Cost of implementation at scale can be integrated in government budget and / or in budget of key implementing organizations


SCALING STRATEGY

 A. How convincing is the scaling strategy?	1.	X	Presence of a clear and compelling strategy for reaching scale	--	No articulated scaling strategy	--
	2.	--	Homogeneous problem, target group(s) and setting -- geography, language, economy, politics	X	Multiple, diverse problems, target groups(s) and/or settings	--


CREDIBILITY

 B. Is the initiative credible?	3.	X	Robust evidence that the initiative works in diverse settings and for diverse target groups, incl. ones similar to the given	--	Little or no robust evidence of the initiative working in diverse settings and/or for diverse target groups, incl. ones similar to the given	--
	4.	--	Independent external evaluation of the initiative in the given setting	--	No independent external evaluation of the initiative in the given setting	X
	5.	--	Impact on learners very visible to decision-makers and users and easily associated with the initiative	--	Impact on learners relatively invisible to decision-makers and users and/or not easily attributable to the initiative	X


SUPPORT BASE

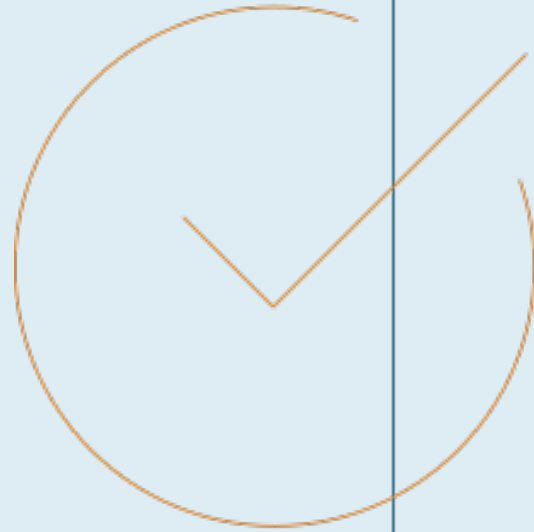
 <p>C. How strong is the support for the initiative and the change it entails?</p>	6.	--	Addresses an objectively significant, persistent problem that affects a lot of learners and has significant impact	--	Addresses a problem that is temporary, affects few learners or has limited impact	X
	7.	--	Addresses an issue that is high on the national policy agenda	X	Addresses an issue that is low on the national policy agenda	--
	8.	X	Addresses a need that is sharply felt by potential target groups	--	Addresses a need that is not sharply felt by potential target groups	--
	9.	--	Strong sense of urgency regarding the problem or need	X	Relative complacency	--
	10.	--	Supported by eminent individuals and institutions	--	Supported by few or no eminent individuals and institutions	X
	11.	--	Strong leadership coalition committed to the change and this coalition is expected to stay in place	X	Strong leadership coalition committed to that change or the one in place is volatile	--
	12.	--	Demonstrable support for the initiative among educators and key staff in the education system, particularly the adopting government institutions	X	Lack of support for or active resistance against the initiative among educators and key staff in the education system, particularly adopting government institutions	--
	13.	--	Faces limited opposition	X	Faces strong opposition	--

RELATIVE ADVANTAGE

 D. Does the initiative have relative advantage over the current state of affairs and alternative solutions?	14.	X	Current state of affairs and alternative solutions considered inadequate	--	Current state of affairs and alternative solutions considered adequate or better	--
	15.	--	Clearly established superior effectiveness	X	Little or no objective evidence of superiority	--

FIT WITH EDUCATION SYSTEM

 <p>F. How good is the fit between the initiative and the education system, particularly the adopting government institutions?</p>	24.	X	Strong collaborative relationships exist between originating, intermediary and adopting organizations	--	Inexisting or nascent collaborative relationships between originating, intermediary and adopting organizations	--
	25.	--	Adopting organization has the operational capacity and financial resources to implement at scale	X	No organization with the systems, delivery agents, and resources to implement at scale	--
	26.	X	Adopting and intermediary organizations with experience scaling similar interventions	--	Adopting and intermediary organizations lack experience scaling similar interventions	--
	27.	--	Adopting organization has physical presence or strong network and credibility in relevant contexts	--	Adopting organization lacks footprint and credibility in relevant contexts	X
	28.	--	Initiative is consistent with the leadership team, organizational norms and incentives of the adopting organization	--	Initiative is not consistent with the leadership team in place, and / or with existing organizational norms and incentives	X



Expected benefits

Education WG
Global CoP on Scaling
03/25/2021

What benefits do we hope the ESC will bring?



Prevent design errors as much as possible



Develop shared language and greater understanding of scaling processes in the education sector



Pay purposeful attention for scaling specific education initiatives



Maintain animo for scaling over time and across multiple stakeholders