

Scaling Community of Practice: Strategy 2023-2025



1. Introduction

The Scaling Community of Practice (CoP) is a network of development and climate change professionals who are working to achieve impact at scale. It hosted its inaugural workshop in February 2015, where a group of 45 invited participants agreed to establish the CoP as a platform for sharing scaling experience and learning across sectors. The CoP's mission is to integrate, distill and consolidate scaling expertise with a view to improving the quality of scaling efforts and encouraging more development and climate actors to adopt a scaling mindset and best practices.

Today, the CoP has grown to over 2,000 members from around the world. This growth is a testament to the value that the CoP provides to its members. It is also indicative of the growing interest in scaling. The idea of developing more scalable and sustainable interventions has moved beyond the "early adopters" and is now attracting broader mainstream interest. The CoP is poised to play an important role in accelerating this transition.

This document lays out how the CoP should grow and change to meet the needs of the development and climate fields¹. The CoP will continue to serve the growing need for scaling expertise by strengthening members' capacity for scaling. It will also help to create an evidence-based, field-tested knowledge base to support the discipline of scaling. Finally, the CoP will continue to be a strong and consistent advocate for scaling.

To date, the CoP has been an entirely voluntary initiative with no formal staff or organization. It has now outgrown this informal, voluntary structure. A dedicated staff

The Scaling Community of Practice (CoP) is a community of development and climate professionals who are working to achieve impact at scale. This community is:

- Cross-sectoral
- Cross-topic
- Global

The CoP *connects, informs* and *empowers* development and climate change actors to implement scalable and sustainable interventions. It does this by:

- Facilitating sharing and cross-fertilization of ideas and best practices across sectors;
- Developing and disseminating scaling knowledge and best practices; and
- Promoting a scaling mindset for development and climate interventions.

The CoP has over 2000 members representing more than 400 around the world.

¹ This document was prepared by the [Center for Nonprofit Strategies](#)



is required to accomplish the CoP’s work in a timely fashion, keep the growing membership engaged, and communicate consistently with the field. Even more importantly, staff assistance will reduce the burden on volunteers so that their time and expertise can be leveraged for maximum impact. Along with program enhancements, this document lays out an organizational structure and funding model to accomplish the CoP’s mission.

2. Theory of Change

Current project-driven approaches are too small, too slow, too short-lived, and often not flexible enough to be sustained, adapted and expanded to deliver population-level benefits. We maintain that achieving the ambitious targets established by the Sustainable Development Goals and the Paris Climate Agenda will require a major shift in practices from the prevailing project-driven focus to one that fully reflects a scaling mindset.

Scaling is the process of reaching more beneficiaries by expanding, adapting, and sustaining successful programs and policies across contexts and over time. It requires beginning with the end in mind—a vision of the desired impact—and then identifying a set of potential scalable and sustainable interventions to achieve that goal. It requires understanding how different interventions will contribute to desired outcomes and trade off against each other; identifying enabling and constraining ecosystem factors; mobilizing sustainable sources of finance; engaging local leaders and partners; and establishing systems for monitoring, feedback, adaptation, and accountability².

This discipline is relatively new and represents a marked shift from traditional project-based operations. Even as funders, governments, and NGOs are recognizing the need to make that shift, they are confronted with a lack of expertise and a dearth of evidence-based solutions and practices. At the same time, examples of successful scaling are emerging across sectors and disciplines. The CoP seeks to catalyze the shift to a scaling approach—i.e., it seeks to mainstream scaling in the development and climate fields.

The diagram on the next page shows how the CoP’s activities work together to accomplish its near-term goals and longer-term impact. The CoP connects scaling experts and their organizations, develops and disseminates knowledge, and promotes a scaling mindset across development fields and topics. It also seeks to engage more funders and practitioners from the Global South to help shape the scaling agenda. This cross-sectoral, cross-topic, and cross-country sharing of ideas, experience and knowledge will help consolidate and advance the field, while creating more demand for scaling expertise. As more organizations—especially funders and governments—adopt a scaling mindset and more scaling experts emerge to the fore, more climate and development interventions will be implemented at scale to yield population-level benefits.

² https://www.usaid.gov/sites/default/files/documents/1865/v5web_R4D_MSI-BrookingsSynthPaper0914-3.pdf; and https://www.scalingcommunityofpractice.com/wp-content/uploads/2022/03/Scaling-Principles-and-Lessons_v3.pdf



Scaling Community of Practice: Theory of Change



3. Programs and Goals

The CoP functions as a platform to facilitate sharing of ideas across sectors and topics; it distills these ideas and discussions into informative knowledge products; and it promotes a scaling mindset and practices among funders and implementing organizations. It accomplishes these objectives via five main programs.

Annual Workshops

Beginning with the inaugural workshop in 2015, the CoP has held in-person two-day workshops in 2016, 2017, and 2019, and virtual workshops in 2020 and 2021. Over 900 participants attended the 2021 workshop, which met in three plenary sessions and nine working group sessions. This event featured 48 panelists and moderators, many of them from the Global South. Summaries of these discussions were widely disseminated via subsequent CoP Newsletters and recordings of the workshop sessions were shared via the CoP website.

The Annual Workshop provides a valuable opportunity for members to share their work and learn from each other, and to formulate and discuss scaling best practices. Going forward, there is an immense opportunity to leverage the interest in this event to promote investment in scaling, especially by funders and governments. We aim to increase the number of attendees from foundations and donor agencies and to have more content on “what it takes” to scale and how to evaluate scaling efforts. We will also continue to build on participation and leadership by scaling experts from the global south.

Working Group Meetings

Much of the organization’s work is conducted by its thematic and sectoral “working groups” which are charged with exchanging scaling experience in their respective areas of interest.³ They are headed by (co)Chairs who are senior thought leaders in their fields and represent a wide range of donors, INGOs and development agencies. Working groups meet virtually on a monthly or quarterly basis. They feature presentations and discussions of particular experiences of scaling and of scaling challenges for their specific field or sector. They also aim to incorporate lessons and approaches from other sectors and thematic areas. Working groups have dedicated pages on the CoP Website, where they post group and member news and publications.

The Working Group Chairs have considerable leeway to determine the program for their groups. Going forward, our goal is to free these volunteers from the more mundane administrative tasks to make better use of their time, energy and expertise. Having staff support to help plan and coordinate activities will allow these respected thought-leaders to play a more valuable role as knowledge generators, networkers, and advocates for scaling. Working group members can also collaborate to design or

³ Currently, there are nine working groups in the areas of agriculture and rural development, education, health, nutrition, climate change, social enterprise innovation, youth employment, fragile states, and monitoring and evaluation.



commission specific thought leadership products or reports; make presentations on scaling at industry conferences; or participate in scaling projects. As an example, the Health Working Group currently provides scaling support to donor-funded development projects in Africa, Asia and Latin America.⁴

Newsletters

The CoP issues quarterly newsletters that are circulated to members and posted on the CoP Website. These newsletters (24 to date) contain announcements from the Executive Committee and working groups, members' news, and information about recent and upcoming publications and events that are relevant to scaling.

The newsletters are an important device to keep our members engaged and to help them feel like they are part of an innovative, vibrant and collaborative community. Cumulatively, they also represent a rich source of information on the evolving scaling research and practice. One of the main roles of the CoP staff will be to proactively keep track of scaling projects and initiatives; identify similarities, linkages, and opportunities for partnership; and to highlight these in the newsletter. We will also feature scaling case studies and success stories, thereby countering skepticism and building a stronger case for investing in scaling efforts.

Knowledge Products

Starting in 2020, the ExCom decided to invest in developing reports and briefings that address cross-cutting issues and questions of concern to the entire membership. After an in-depth review and several interviews with key scaling experts, the CoP released an issues paper that identified high-priority cross-cutting issues for the scaling community. To date, the CoP has taken a deep dive into four seminal issues raised in that report:

- Principles of scaling: what works (or doesn't)
- The relationship between scaling and systems change
- How to mainstream scaling considerations among donor organizations
- How to institutionalize new policies and practices in host governments

These issues were organized into questions, which were enthusiastically discussed and debated at CoP webinars, annual meetings and working group meetings. The CoP also commissioned the development of issue papers that summarized the literature on these topics as well as the outcomes of the network's discussions. These ideas and findings were then disseminated via webinars and blogs on our website. In some cases, members provided examples (or counterexamples) to enrich the discussion and added case studies to the report. The resulting reports provide a scholarly, yet eminently practical, summary of the best thinking in our field.

⁴ The CoP does not wish to compete with its member organizations by implementing projects or serving as a paid consultant. Working groups and other experts may, however, provide light, pro-bono guidance on scaling projects or refer queries to specific member organizations who can provide implementation support.



These reports have provided a model for how the CoP plans to harness the intellectual power of the network to address other important issues. Starting in 2020, the Executive Committee worked to develop a program of knowledge work that consists of cross-cutting scaling issues that are of concern to the entire membership. Some highlights of this proposed work program are presented below.

Scaling Community of Practice: Planned Research Studies

- 1. Elaborating on the basic principles of scaling** by (1) developing tailored recommendations for governments, CSOs and donors, and (2) providing examples, case studies and applications of these principles. In particular, developing tools to help mainstream scaling among donor organizations is a high priority, since their funding practices have a large impact on how development interventions are planned and implemented.
- 2. Monitoring, evaluating and learning from scaling projects.** This requires measuring progress towards achieving large-scale, sustainable delivery and results, while also monitoring the progress and success of the scaling process and the “stickiness” and sustainability of interventions. The Monitoring and Evaluation Working Group has already started work on this issue and has developed a useful framework on Information Needs for Scaling.
- 3. The evolving roles of various partners throughout the scaling process.** This includes the respective roles of the originators/innovators of an initiative; those who are expected to be the “doers and payers” at large-scale; the intermediaries who play a connective and facilitative role between the originators and large-scale deliverers; the funders; and other community observers and stakeholders.
- 4. The nature and role of leadership in effective scaling.** New area of activity for the CoP is the somewhat unique forms of collective and individual leadership required to support scaling given the range of stakeholders and length of time required to ensure sustainable change at scale.
- 5. How to address the trade-offs among reach, equity, quality and sustainability.** The CoP has initiated discussions around how to determine optimal scale by taking account of these four dimensions which sometimes conflict with each other.
- 6. How scaling techniques can help bridge the gap between high-level goals (e.g., SDGs, Paris climate goals) and specific projects and programs.** With a few exceptions (like the Global Fund and GAVI), there is no clearly articulated link between global goals and specific programs. A systematic focus on scaling pathways (which start with a vision of long-term impact and work backwards to consider how best to develop specific interventions for lasting impact at scale) could help close this gap.



Website and Social Media

The CoP maintains a dedicated website where the ExCom, its working groups and members post announcements regarding the CoP's activities, news, events, knowledge products, etc. It also offers opportunities to post announcements and documentation by its members, and offers links to other initiatives on scaling beyond the CoP itself.

Currently, the website primarily houses working papers, blogs, and reports created by members of the CoP. Going forward, the website will be developed into a comprehensive, curated, one-stop-shop for scaling resources. In addition to showcasing the CoP's own knowledge products, this website will also house high-quality papers and articles developed by other organizations; it will link to potentially useful programs and organizations; and will feature a calendar of events and opportunities in the field.

Website resources will be featured and promoted at industry fora and via social media. The staff will help CoP volunteer leaders to participate in relevant social media conversations to promote scaling principles and techniques. Staff will also focus on promoting the CoP's knowledge products so they can be useful to the broader development and climate change communities.

Program Goals

So far, much of the work of the CoP has been focused on building a community of scaling professionals and codifying the fundamental principles and techniques of scaling. Most of the CoP's programs—the Annual Meeting, the newsletter, the Website, and the Working Group Meetings — focus on generating and sharing ideas. Having staff support will enable the CoP to grow its active membership; to generate a wider array of useful products and programs; and to engage more extensively in promoting effective scaling practices in the local and international institutions that support development and climate progress in the global South.

In the next two years, we plan to achieve the following goals:

- 1. Produce practical and useful tools to support scaling by augmenting members' expertise with staff and consultant support.** These reports, tools and briefs will provide the intellectual foundation for the CoP's outreach and member engagement, and will help more development and climate actors to enter the field.
- 2. Consolidate the field by building a coherent narrative around scaling and connecting scaling organizations and professionals from different sectors and fields.** Staff persons will dedicate time to systematically tracking scaling projects and reporting on successes and learnings. They will be able to respond to members' requests for information and tools, and also spot similarities and overlaps that might offer opportunities to partner on scaling projects. While the CoP will not offer any (paid) consulting services, it will refer queries to members who may be able to lead or guide potential projects.
- 3. Promote a scaling mindset and effective scaling practices, especially among governments, foundations and donor agencies.** Funding priorities and practices have an outsized influence on how development and climate interventions are planned and implemented. Therefore, in



addition to building the field’s capacity to implement at scale, the need to inculcate a scaling mindset and effective practices among development and climate funders is essential. The CoP will do this by ramping up education and advocacy with this essential audience. It will develop more content (reports, meetings, webinars) on best practices and will use data, case studies, crowd-sourcing and other arguments to nudge funders towards conducting scaling analyses and developing scaling pathways for the major goals that they want to achieve.

4. Ensure that leaders from the global South have a strong say in shaping the scaling agenda.

The CoP has good participation from Southern scaling specialists but wants to go further. Over the next three years, we plan to attract more Southern development and climate actors to participate in the CoP and to be volunteer leaders for the network. We will also use this platform to showcase and highlight voices and examples from the global South.

5. Grow the membership of the CoP from 2000 to 5000 members. Growth in membership is both an indication that the CoP is accomplishing its education and advocacy mission, and a mechanism for it to reach and influence more organizations. We plan to dramatically grow our membership by disseminating our ideas and materials more actively and intentionally, and by ensuring that our community is an energizing and vibrant place for innovation, networking and learning. In particular, the CoP aims to further expand its membership and leadership from the global South, and to engage additional government and funding agencies in the network. It is our expectation that this expansion will include partnerships with other organizations and networks with complementary mandates.

Member Survey

Since the CoP works with, through, and for its members, the network’s services and offerings will be based on members’ preferences. As the CoP transitions into a formal organization, we will conduct a survey of our members to test specific strategies and programs for advancing the three main elements of our work—connecting members, distilling and disseminating scaling knowledge, and promoting a scaling mindset.

4. Organizational Structure and Governance

Since its founding in 2015, the CoP has been an informal, volunteer-based network. It is housed at Management Systems International (MSI), but it is independent of MSI or any other organization. Founding members Larry Cooley and Johannes Linn lead the initiative and provide overall direction and management of programs. The community has organized itself into sectoral/thematic “working groups” that share scaling experiences in their areas of interest. Working Group Chairs are eminent leaders in their fields and have considerable leeway in setting the program agenda for their groups. The CoP is governed by a 24-person Executive Committee (ExCom), which consists of the Working Group Chairs and representatives of seven member organizations that make a financial contribution to the community (see Funding Model below).

This current informal structure is self-limiting and unsustainable because of the burden it places on the volunteers and the limits it places on what the CoP can do. Moreover, the current structure relies heavily on the voluntary efforts of the founders—Larry Cooley and Johannes Linn—and limits the



potential for succession planning. We therefore plan to gradually transition the CoP into a formal organization with a small staff that will leverage the efforts of our members to grow the reach and impact of the network.

Fiscal sponsor

During the next two years, the CoP will gradually transition into an independent organization. As a first step, it will be housed as a program with a fiscal sponsor that can credibly handle our finances and can provide assistance with HR and administration. The Executive Director (see staffing below) will be hired under the aegis of the sponsoring organization. However, MSI staff will continue to help with some of the administrative and project management functions. This reliance on MSI will decrease as the organization adds staff capacity to handle these functions.

Staff

The CoP plans to engage a small staff (2-3 members) to grow and support the community. The first step towards this will be to hire a part-time Executive Director (ED) who will work closely with the volunteer leadership to shape and grow the CoP's programs and accomplish its near-term goals. The ED will also work with the Steering Committee (see below) to mobilize resources to grow the organization. The ideal candidate for this position will have the intellectual heft to shape the scaling agenda and the CoP's knowledge products; the status to promote scaling actively at global meetings and conferences; and the ability to work collaboratively and productively to engage volunteer leaders and network members.

The rest of the staff team will be composed by the Executive Director based on capacity needs and available funding. We anticipate one part-time hire during the transition period, likely a mid-level Program Manager.

As funds become available, the ED and the Program Manager will transition to full-time status. We also anticipate an additional hire—a (part-time) communication specialist—to manage the CoP's website and social media presence, and to organize the newsletter and other network communications. This will greatly boost the CoP's capacity to grow interest in scaling and disseminate our knowledge products within and beyond our membership.

Membership

Members sit at the very heart of the CoP—they are both substantive contributors to the CoP and the primary beneficiaries of its work. The CoP achieves its mission by informing and empowering its members so that they can create scalable and sustainable interventions and promote a scaling mindset in their fields and in their organizations.

The CoP started out as a small, invited group of scaling experts. Today, it comprises more than 2000 members from 400+ organizations, and includes a range of expertise. As a network that aims to grow interest in scaling, the CoP has intentionally kept membership free of charge and obligation. Anyone



who is interested in learning more about scaling can join the CoP and participate in its activities and events.

Working Groups

As previously noted, Members have the option to sign up for thematic or sectoral Working Groups, although they do not have to do so. Currently, the CoP hosts nine Working Groups. Each is led by a Chair (or co-Chairs) who are responsible for setting the group's agenda and activities. Working Group Chairs also help to identify and engage members in the "work" of the organization, e.g., contributing to knowledge products, leading discussions, and promoting the scaling agenda.

Working Group Chairs lead and sustain their groups and participate in the governance of the organization (see below). They also have the important responsibility of identifying their successors, based on input from members of the Working Group, the Governing Council (see below), and the CoP staff. The CoP's Governing Council will confirm incoming Working Group Chairs as recommended by the outgoing chairpersons.

Sustaining and Contributing Members

The CoP will also seek financial and in-kind contributions from a small number of member organizations. Organizations that commit to contributing at least \$30,000 over two years (in cash or kind) will be recognized as Sustaining Members, will be offered a seat on the CoP's Governing Council, and will participate in setting the strategy and direction for the network.

Organizations or members that make smaller financial donations (i.e., less than \$15,000 per year) will be recognized as Contributing Members.

Governing Council

The CoP will be governed by a Governing Council of approximately 25 members. Since the CoP will be housed with a fiscal sponsor, legal responsibility for the organization resides with the sponsoring organization's Board of Directors. In practical terms, however, the Governing Council will govern the CoP, and will perform functions such as supervising the ED, developing resources, serving as ambassadors, setting program strategy, and providing financial oversight.

This Governing Council (GC) will be composed of:

- Working Group Chairs. Currently there are 9 working groups. Some of them are led by co-Chairs but we expect only one of the co-Chairs to participate in GC meetings.
- Sustaining members. The CoP currently has 7 Sustaining Members and we hope to grow that number to 15. This category includes organizations that make grants in excess of \$30,000 over two years in cash or contribute the equivalent in kind.
- The Co-Chairs of the CoP—currently, Larry Cooley and Johannes Linn



The GC will meet in plenary session (virtually or in person) 2-3 times a year. During the transition period, it will be co-chaired by Larry Cooley and Johannes Linn, who founded the organization and currently lead its Executive Committee.

The GC will have three committees—Budget and Finance; Governance and Administration; and Strategy and Program. GC members will be asked to volunteer to serve on at least one of these committees. Each committee will select a Chair with guidance from the co-Chairs of the GC. Committee Chairs will be confirmed by the full GC. In addition to participating in plenary GC meetings, committee members will meet as required to accomplish their work.

One of the first actions of the GC will be to adopt a set of by-laws for determining how it will function. These by-laws will establish, for example, the quorum for GC meetings, how decisions are made, and term limits for GC members and officers.

Executive Committee

A small Executive Committee (EC) of 5-6 senior leaders will work closely with the ED to guide and support the day-to-day operations of the CoP including the development of programs, knowledge products, and funding opportunities. It will be composed of the heads of the GC committees and the Co-Chairs of the GC.

5. Budget and Funding Model

For the first five years of its existence, the CoP made a strategic decision to operate without official sponsorship or external financial support. Starting in 2019, the organization's leaders reversed course and mobilized a limited amount of funding to commission selected knowledge products, extend participation from the global South, and defray certain administration costs. For the two-year period 2020-2021, the CoP raised funds from seven sustaining members who were each willing to support the CoP with a minimum of \$30,000 in cash or kind for the two-year period. Initial sustaining members included the MacArthur Foundation, Lever for Change, the Bill and Melinda Gates Foundation, the Mastercard Foundation, GIZ, the Eleanor Crook Foundation, and MSI. MSI serves as the trustee of the CoP's financial resources. To date, the CoP has raised a total of \$275K in membership contributions, in-kind support, and small grants.

The continuation of the CoP's work and the transformation of its institutional structure requires new and consistent financing. We anticipate that the CoP will need \$350,000 annually as it transitions into a formal organization. The table below shows the planned budget for 2023-24.

In 2025, we anticipate moving the ED and program manager to full-time status, and also hiring a communication specialist. We also anticipate expanding and improving our programs, including the Annual Meeting and generation of knowledge products. We expect this will grow the organization's budget to approximately \$500,000 per year.



Anticipated Annual Budget for Transition Phase (2023 and 2024)

Staff	\$170,000	Half-time ED: \$100,000 (including benefits) Half-time Program manager: \$70,000 (including benefits)
Annual meeting	\$40,000	Includes travel costs for an in-person meeting and/or online hosting costs for a virtual meeting
Consultant fees	\$60,000	Writing, editing or design services for specific knowledge products
Other costs	\$45,000	Staff travel, website set-up and maintenance, transition costs, laptops, etc.
Fiscal agent fee	\$35,000	10% of annual budget
Total budget for 2023	\$350,000	

As a membership organization, the CoP aims to be supported by its members. While it will not charge a “membership fee”, it expects some of its organizational members to make financial or in-kind contributions to support its work. The CoP will rely on three types of revenue:

- 1. Member Contributions.** The CoP will seek voluntary contributions from a limited number of “Sustaining Members”. The CoP currently has 7 Sustaining Members and we aim to grow this category to include 15 institutional members that commit to an annual contribution of \$15,000. This contribution can be in cash or in kind. For example, MSI currently meets its commitment as a contributing member by providing meeting space and administrative support services to the CoP.

The CoP will also test the feasibility of creating and promoting a new category of sponsorship—“Contributing Member”—for individuals and organizations able to support the CoP financially at lower levels. While this is not likely to yield a large amount of funds, we believe it sets a good precedent and helps us to gauge how well we are engaging and serving our members.

- 2. Institutional support grants.** General operating grants are the mainstay of any organization that creates public goods. We will approach some of our members for such grants, especially to support staff salaries. Our goal is to find two funders who will each make annual commitments of \$100,000 for the two-year transition (2023 and 2024).



- 3. Restricted grants and in-kind contributions.** One of the strengths of the COP is the ability to leverage members' contributions. Many of our members partner with us to fund or co-create specific knowledge products. Others might be willing to contribute travel expenses for conference participants from the global South. Working groups can also develop projects and seek cash or in-kind funds for them. As a general principle, we will seek and accept such funding only where it furthers the priorities adopted by the CoP's members and Steering Committee.

6. Next Steps

Over the next year, the CoP will transition into a formal organization with a professional staff that is dedicated to expanding and enhancing programs in line with the needs and interests of the membership. Once this strategy has been approved by the Executive Committee, the organization's leaders will undertake the following tasks:

1. Share this strategy with the membership and elicit feedback and ideas (especially on organizational priorities and governance structure).
2. Identify an appropriate fiscal sponsor (or other legal structure) and transfer the CoP there.
3. Set up the Governing Council (GC), constitute GC Committees, and adopt by-laws and governance procedures.
4. Hire the Executive Director. Help him/her hire other staff member(s).
5. Conduct a survey of the membership to identify interest in specific topics and activities (e.g., in-person meetings, webinars, reports and briefings, partnership facilitation, etc.).
6. Update the website to make it a content-rich, externally-facing resource on scaling.
7. Continue and expand the CoP's program on crosscutting issues.

