MAINSTREAMING SCALING INITIATIVE CASE STUDIES

Catholic Relief Services (CRS)

Matthew Will, Erin Baldridge and Rudy Blackwell
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SCALING
COMMUNITY OF PRACTICE

Mainstreaming Scaling Initiatives

Case Studies

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MAINSTREAMING SCALE

A Case Study of Catholic Relief Services (CRS)

by

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A Case Study for the Initiative on Mainstreaming Scaling in Funder Organizations For the Scaling Community of Practice

www.scalingcommunityofpractice.com

Preface

The Scaling Community of Practice (CoP) launched an action research initiative on mainstreaming scaling in organizations in January 2023. This initiative has three purposes: to inform the CoP members and the wider development community of the current state of support for and operationalization of scaling in a broad range of development funding agencies; to draw lessons for future efforts to mainstream the scaling agenda in the development funding community; and to promote more effective funder support for scaling by stakeholders in developing countries. (For further details about the Mainstreaming Initiative, see the Concept Note on the COP website).

The Mainstreaming Initiative is jointly supported by Agence Française de Développement (AFD) and the Scaling Community of Practice (CoP). The study team consists of Richard Kohl (Lead Consultant and Project Co-Leader), Johannes Linn (Co-Chair of the Scaling CoP and Project Co-Leader), Larry Cooley (Co-Chair of the Scaling CoP), and Ezgi Yilmaz (Junior Consultant). MSI staff provide administrative and communications support, in particular Leah Sly and Gaby Montalvo. The principal component of this research is a set of case studies of the efforts to mainstream scaling by selected funder organizations. These studies explore the extent and manner in which scaling has been mainstreamed, and the major drivers and obstacles.

The case studies also aim to derive lessons to be learned from each organizations experience, and, where they exist, their plans and/or recommendations for further strengthening the scaling focus. The present case study focuses on Catholic Relief Services and its strategic effort to institutionalize catalyzing outcomes at-scale. It was prepared by Erin Baldridge, Rudy Blackwell and Matthew Will of Catholic Relief Services, as an in-kind contribution to the Scaling Community of Practice. Johannes Linn, Lawrence Cooley and Richard Kohl provided external peer review of the first version.

Contents

Acronyms

APP	Annual Program Plan
BD	Business Development
CASCADE	Catalyzing Scale through Evidence
COP	Community of Practice
CP	Country Program
CRS	Catholic Relief Services
EMECA	Europe, Middle East and Central Asia
FGD	Focus Group Discussion
FASTER	Faith-Based Action for Scaling Up Testing and Treatment for Epidemic Response
HR	Human Resources
IDEA	Institutional Donor Engagement & Advancement
IDFP	International Development Fellows Program
IHD	Integral Human Development Framework
JD	Job Description
KML	Knowledge, Management and Learning
LACRO	Latin, America, and the Caribbean Regional Office
MARCOM	Marketing and Communications
MEAL	Monitoring, Evaluation, Accountability and Learning
MSD	Market Systems Development
M2	Mission and Mobilization
NGO	Non-Government Organization
PCS	Partnership Capacity Strengthening
PEPFAR	US Presidents Emergency Plan for AIDS Relief (PEPFAR)
SCP	Strategic Change Platform
SARO	Southern Africa Regional Office
TOC	Theory of Change
USAID	United States Agency for International Development

Executive Summary

This research was conducted by CASCADE to assess CRS´ progress toward becoming an organization that catalyzes outcomes at scale and identify contributing factors. Based on this learning, recommendations were made to boost efforts toward catalyzing humanitarian outcomes at scale, a central part of CRS' Vision 2030: In Their Own Hands.

CRS, an international, faith-based NGO, started as a post-WWII emergency response organization. In the last two decades, CRS has evolved from consistently working *through* local actors, to working *with* them, to now aspiring to work *for* them. CRS aims to transform systems to aid the vulnerable. Over the past 4 years CRS has spent $8 million of discretionary funding and raised an additional $45 million for the strategic change platforms (SCP)-global initiatives for learning and impact at scale. Simultaneously, CRS chose to invest its $1 million-per-year legacy grant from GHR Foundation on institutional strengthening for scale (CASCADE).

Key Lessons (see more lessons on page 38):

- Colleagues are adapting systems thinking and scale mindset, primarily within scale initiatives. Broad institutionalization is a work in progress.
- CRS staff generally believe scale initiatives should rely on private funding. This discourages Country Program (CP) and Regional leaders, to work with scale initiatives as they are incentivized to seek donor funds.
- Progress has been made in adapting business processes for scale, but they are not yet integrated or institutionalized in CRS, affecting the ability to catalyze outcomes at scale at the CP level due to lack of guidance.
- Vision 2030: In Their Own Hands strategy, has silos between strategic initiatives and breaking them down could enhance our ability to catalyze scale. While there are some early initiatives to un-silo, they are based on volunteerism and lack a birds-eye/strategic view. This can lead to exclusion of key staff or departments that should be included in strategic discussions, which can reinforce the silos.

Top Findings (see more findings on page 39):

- The Vision 2030: In Their Own Hands strategy, of catalyzing outcomes at scale was responsive to an emerging way Country Programs and Regions were addressing the needs of their context. Numerous case studies provided empirical evidence of CRS having instances of working at scale even before Vision 2030 was finalized. This report confirms that CRS is on-track, building on emerging instances of catalyzing scale to now institutionalizing scale, despite being in the early stages of this long-term change process.
- CRS is developing methods for measuring scale, but for the most part they are still in early stages and require testing. At the global level, CRS lacks a system for strategic learning for scale which would guide understanding of significance and changes needed.
- Strategic thinking has fostered a supportive environment for scale, with staff aligning their efforts to support the strategic approach.
- CRS´ approach to scale is evolving to combine direct service delivery, connect with systems thinking, and catalyze outcomes at scale.
- At all levels, CRS is undergoing a mindset shift about scale. Senior leaders are actively promoting scale, demonstrating their commitment, and providing incentives across regional and global teams.

Top Recommendations (see more recommendations on page 40)

- CRS leaders in CPs, Regions and Global Teams should continue to prioritize creating a shared understanding of what CRS means by catalyzing outcomes at scale and how our regular work can set the foundation for being a catalyst when done intentionally.
- CRS should develop a system for strategic learning about the extent to which we are progressing towards and catalyzing outcomes at scale. The system should be data light and strategic learning heavy, continuing to measure a few key indicators.
- At the level of Vision 2030: In Their Own Hands strategy, the strategy team should consider which strategic approaches or strategic initiatives would benefit from increased collaboration to institutionalize scale and enhance CRS' ability to engage at the scale of the problems we seek to address.
- Country or Regional Strategies focused on scale should be accompanied by an adaptive multiyear funding plan. Currently, the annual program planning process (APP) limits the country program's ability to project for longer-term change initiatives.
- CASCADE should prioritize development and accompaniment of processes for strategic planning, design, adaptive management and Monitoring, Evaluation, Accountability and Learning (MEAL) for scale.
- CRS should use discretionary funds to put in place a "scale" fund. This fund can complement non-SCP specific scale related initiatives that are showing promise but need additional investment to advance to the next level. This should **not** be a pilot fund (which typically is used to innovate and scale) but rather can be used to fit unique needs (such as funding staff required between donor funded projects, generating evidence, and demonstrating change CRS approaches bring about) that are identified in a scaled vision.
- CRS should explore ways blended finance models can be more widely applied to contribute to the resource needs for scale initiatives.

Recommendations for funders (see more recommendations on page 42)

- Funders should carry out activities that are aimed at catalyzing outcomes at scale and expand their definition of how they go about working at scale to include concepts such as catalyzing response at the scale and nature of the problem and shifting the conditions that hold the problem in place.
- Funders should increase the duration of agreements, allowing the time it takes to scale.
- Funders need to make institutional changes within their own structures to become organizations that support catalyzing permanent local actors to affect change at scale.
- Funders should design funding agreements with high levels of adaptability in mind.
- Funders should consider providing institutional strengthening funding to enable intermediary organizations to work more effectively as a catalyst for outcomes at scale.
- *Funders should consider designing funding opportunities that challenge implementing partners to contribute, collaborate, engage toward collective impact with systems actors and not create time-bound parallel systems to achieve short term results.*

Conclusion

CRS has been working for 20 years with an articulated intent to support permanent local actors and shift unjust systems and structures (Integral Human Development). With the recent strategic priority in Vision 2030: In Their Own Hands, of catalyzing outcomes at-scale, CRS is enhancing its work to work at the scale of the problem. CRS is on track to becoming an organization that catalyzes outcomes at scale. There is still much to be done to institutionalize this way of working. Continued leadership, mindset shifts, practical accompaniment and strategic learning will help fulfill this vision.

Purpose

Overall Questions

CRS launched its Catalyzing Scale through Evidence (CASCADE) project in early 2020. The goal of CASCADE is to strengthen CRS' capacity to catalyze humanitarian and development outcomes at scale. As CASCADE has progressed and is moving into phase 2, CASCADE wants to know: what is CRS history in relation to institutionalize our ways of working to catalyze outcomes at scale? This question refers to effectiveness as it seeks to understand how what we have done has contributed to institutionalizing scale. This question refers to efficiency, as it seeks to build evidence about how we should spend our resources going forward.

- *What has been achieved in relation to CRS institutionalizing ways of working to catalyze humanitarian outcomes at scale?*
- *What has been done to contribute to institutionalizing catalyzing humanitarian outcomes at scale?*
- *What should CRS do to move forward based on what we have learned about institutionalizing ways of working to catalyze humanitarian outcomes at scale?*

Intended Use

This research has three overall uses. As follows:

- Guide CASCADE to make strategic choices in what activities contribute to desired outcomes.
- Explore how CASCADE or other staff in CRS have plausibly contributed to institutional change for catalyzing outcomes at scale, to be used as evidence for the final report for GHR Foundation.
- Develop a Case Study for the Scale-Up Community of practice that demonstrates lessons CRS has learned through institutionalizing scale and recommendations we would provide to funders.

Flow of this paper

This paper consists of two parts. The first part (pages 10 to 24) reviews the history and the current structure of our organization that aims to achieve large-scale outcomes. The second part (pages 24 to 43) presents some recent examples (from the last 3 years) of how our organization is institutionalizing catalyzing outcomes at scale, along with the findings, lessons, and recommendations derived from these instances.

Methodology

The research used Grounded Theory. As the name suggests, it is valuable for creating theory that emerges from context and experience. Grounded Theory uses both qualitative and quantitative methods and theoretical sampling. "The purpose of theoretical sampling," as Corbin and Strauss[1] point out, "is to collect data from places, people, and events that will maximize opportunities to develop concepts in terms of their properties, dimensions, uncover variations, and identify relationships between concepts".

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[1] Corbin, J., & Strauss, A. (2008). *Basics of qualitative research: Techniques and procedures for developing grounded theory* [Kindle 2.5.3]. Retrieved from www.amazon.com, p. 143

Thick description[2] was used in the second half of the paper to increase transferability of the research. Thick description provides the reader with the ability to both understand the evidence by which the finding is made and understand the context, thereby judging for themselves transferability to their own situation.

Evidence

Findings and recommendations were derived from the following evidence**.**

- Twenty-six narratives were generated as primary data for the **Institutionalization study**. CASCADE put out a call for and received narratives from CRS colleagues around the world. Their stories addressed successes and challenges, themes, and changes that respondents are seeing that have been integral to institutionalizing scale in a meaningful way.
- I**nstitutionalization journal** was a quality-controlled monitoring technique that used recorded observations and had linked evidence to validate the claims made in the observations.   CASCADE staff contributed to this journal.
- Actual agency **products or processes** which demonstrate Institutionalization.
- Interview notes for the Focus Group Discussions (**FGDs) conducted for a mid-term check-in**, reflected perceived progress and gaps for institutionalizing scale. These were conducted by a Business Development (BD) specialist to inform continued adaptation of the design.
- **GHR Foundation report** documented findings and recommendations that have been identified and reported throughout the CASCADE initiative.
- **52 Case Studies** were developed by the CASCADE team to understand what Scale is for CRS. And provide empirical evidence of CRS work at catalyzing scale**.**
- The **Learning Agenda** engaged two external researchers to produce three pieces of research targeted at building evidence towards components of institutionalizing catalyzing outcomes at scale.
- An **Evidence Matrix** was used as part of a learning dialogue workshop for the team to learn from what has been done, what has changed, what this means towards achievement of outcomes and what should be done the same or differently.
- **Follow-up interviews** based on initial analysis were conducted using theoretical sampling.
- A **developmental workshop** conducted by an external group to unearth key elements related to institutionalizing catalyzing scale.

This report was peer reviewed by **two external groups**. One represents retrospective research and the link to principles-focused evaluation (Utilization Based Evaluation) and the other represents expertise in scale (Scale Up Community of Practice). This report was also reviewed by staff in CRS that have been integral to institutionalizing scale within CRS. These reviews strengthened the quality of the research and overall strength of evidence.

Strength of Evidence

Evidence that supported findings and recommendations was rated as adequate (See Annex 2 for Strength of Evidence Rubric). The reason why the rating is adequate rather than strong is while there were two external groups engaged for this report, they were engaged to give peer review not to assess the extent CRS has progressed towards catalyzing scale. Further, while the institutionalization study gives a good check in on

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[2] Guba, E. G., & Lincoln, Y. S. (1994). Competing paradigms in qualitative research. In N. Denzin & Y. S. Lincoln (Eds.), *Handbook of qualitative research* (pp. 105–117). Thousand Oaks, CA: Sage.

progress towards institutionalizing scale, these are all self-reported changes, and while they cite evidence to validate the claims not all the sited evidence relates to "institutionalizing scale" but might relate to other parts of their story (such as progress towards scale). While remaining valid evidence, this does reduce its strength for claims related to institutionalization.

- The "Nascent Evidence of progress towards institutionalization" section captures progress towards scale through "instances" that have been reported primarily to the CASCADE team. This does not represent a generalized understanding of the extent we are shifting towards catalyzing outcomes at scale, but rather captures instances of this change. We are 3-4 years into the 2030 vision: In Their Own Hands, which would mean that we should be seeing "instances" or "directional change", but we would not yet see or have evidence to report on a whole-of agency shift.
- The overall timeline of our history in relation to institutionalizing catalyzing outcomes at scale (as described in Figure 1) is an attempt to capture major shifts in CRS' way of working or thinking. There are likely numerous points of change missing on this timeline (and other sectors that are not mentioned). However, this is the chain of events that were generated through the teams call for evidence and follow-up interviews. Absence of evidence does not mean that there were not other substantial contributors to this change, it simply means it was not discovered during this research project.

Section One: History of becoming an organization that catalyzes outcomes at scale.

Overview of our Journey

CRS is an international, private, faith-based NGO and is the Relief and Development arm of the US Conference of Catholic Bishops. With over 80 years of experience as an implementor of humanitarian aid and development, CRS works in over 100 countries and has over 7,000 staff, and an, annual budget of 1.3 billion (13% of which is discretionary funds; 87% is from institutional funders). 94% of funding goes directly to programming. CRS is a part of Caritas Internationalis, a confederation of over 160 Catholic relief, development and social service organizations operating in over 200 countries and territories worldwide. CRS is one of the top ten recipients of two large donors: USAID Bureau of Humanitarian Affairs and the Global Fund to Fight AIDS, Tuberculosis, and Malaria. CRS receives most funding through competitive grants from a wide variety of institutional donors. CRS also fundraises from private donors. Our Vision 2030 strategy, In Their Own Hands focuses on five broad goal areas while allowing for adaptation to local contexts. Our humanitarian and development projects are implemented in partnership with an extensive network of over 2,000 civil society, government and private sector actors.

CRS was founded as an emergency response organization, directly meeting immediate needs of those most affected after World War 2. This rich history of responsive service delivery shaped the approaches CRS would develop over the years to meet the needs of the poorest more effectively. Approaches that are rapid and

effective for meeting the most immediate needs don't often rely on permanent local system actors and often do not shift the conditions within a system that hold problems in place which is important for catalyzing outcomes at scale. Over time CRS began to make a shift towards strengthening systems. Where international funders increasingly required a system strengthening approach, CRS learned to work with and through health systems to have impact at a much larger scale particularly in HIV and later in Malaria. These experiences, due both to the scale of the disease burden and the donors' stated commitment to strengthening permanent local systems, provided CRS with a new way of thinking about the reach our work can have when working through the systems that are present at the scale of the need. The shift to work with systems and local permanent actors happened faster in some sectors than others.

An illustrative timeline of some of the milestones along CRS' ongoing journey to becoming a scaling organization is captured below (see Figure 1). In 2002 CRS created a conceptual framework (the Integral Human Development Framework) which placed our programming squarely on the impact of people and identified the need to shift systems and structures for people's wellbeing. In 2012 there was a large strategic push in CRS to focus our work on strengthening partners capacity and local leadership. At the same time in 2012 or earlier, the Latin American and Caribbean Regional Office (LACRO) region began to focus more on influence and facilitative approaches given the changing donor landscape and the need for CRS to adapt to an intermediary role. One large donor in LACRO also challenged the CRS teams there to identify the largest threats to the most vulnerable and how CRS can have an impact at that scale. The resulting research, Tortillas on the Roaster, shaped the way CRS LACRO thought about CRS' role in addressing large scale problems.

In 2014, CRS held its first Vatican Impact Investing Conference in collaboration with the Dicastery for the Promotion of Integral Human Development, CRS Board members and sector experts which led to the creation of a team focused on impact investing and blended finance. This was followed in 2017 by intentional onboarding of private sector engagement advisors and cross department collaboration to develop and implement strategies for creating 'shared value' with local companies and integrating these private sector partnerships into the design and implementation of programs. Impact investing, blended finance and private sector engagement all take a systems approach, working through and with local partners / businesses / financial institutions to achieve scale and sustainability.

Elsewhere, primarily in African countries, CRS was implementing multi-country systems change projects focusing on strengthening the capacity of systems supporting vulnerable children: Coordinating Comprehensive Care for Children (4Children). Building on the work of 4-Children, in 2016, CRS entered the MacArthur Foundation 100&Change competition, for a $100 million grant to fund " a single proposal that promises real and measurable progress in solving a critical problem of our time". This competition challenged CRS to view problems differently. CRS did not win but finished in the top 4. The experience of approaching a singular solvable problem through a scale lens changed how senior leadership viewed the overall strategy. The 100&Change competition was on the mind of many leaders while developing the Vision 2030 agency strategy, *In Their Own Hands*, that centered on catalyzing transformational change at scale. In the strategy, CRS identified and invested in six Strategic Change Platforms (SCPs) that support and test new ways of working to catalyze outcomes at scale. CRS also chose to focus its institutional strengthening grant from GHR Foundation on a new 4-year project for Catalyzing Scale through Evidence (CASCADE) that would strengthen CRS' capacity to scale humanitarian and development outcomes through influence. CASCADE generated evidence and created tools to strengthen CRS capacity to catalyze outcomes at scale. Lastly, regions and CPs are making organizational and programmatic shifts to work with permanent local actors to bring about scaled change.
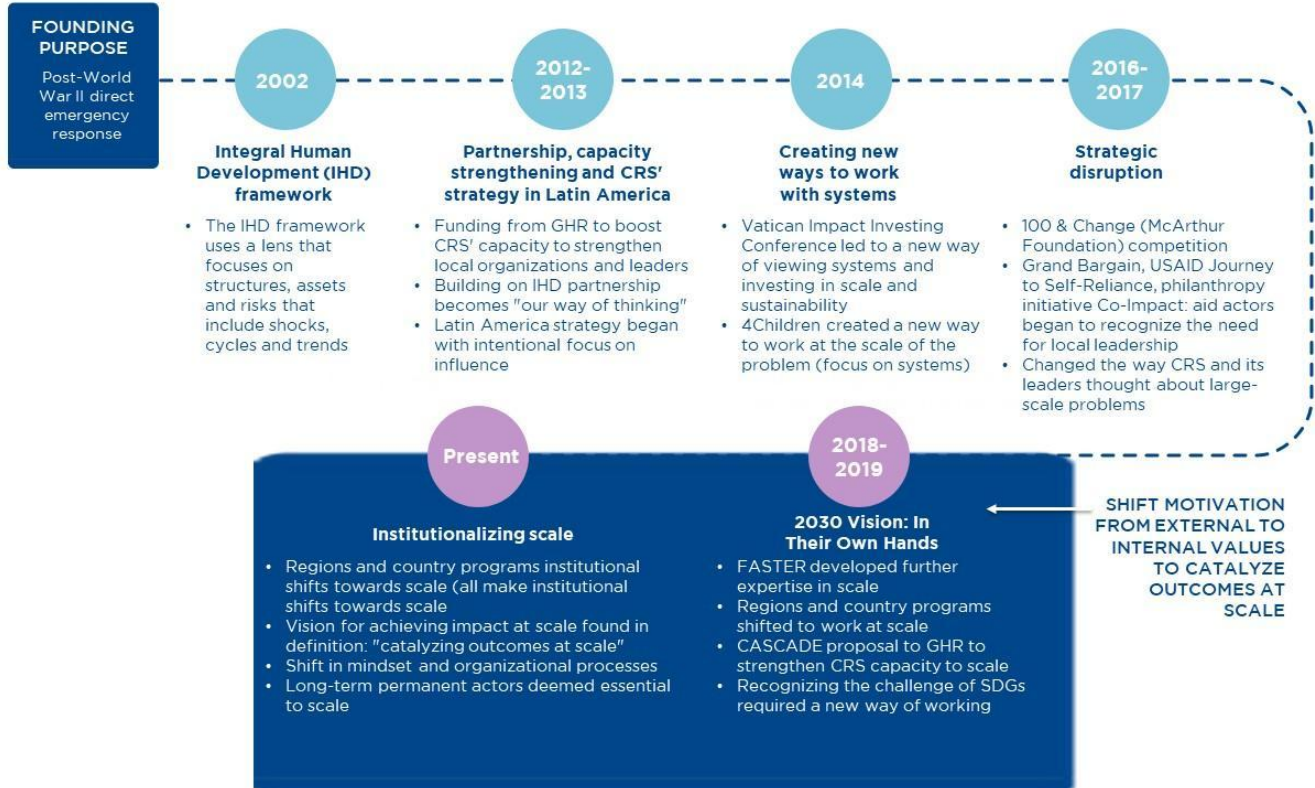
FIGURE 1: EVENTS THAT CONTRIBUTED TO INSTITUTIONALIZING CATALYZING SCALE

From 2020-2022 CRS has documented case studies of scale that were either completed or ongoing. All case studies collected started prior to 2017. Very few cases started out as intentional scale initiatives, most gradually came to a recognition of the opportunity for scale because of following development principles of sustainability and subsidiarity. Among these, 4 Children and FASTER are two initiatives that had notable impact on CRS' way of thinking about our ability to partner and influence policy to create change at scale.

Further Historical Background

Integral Human Development framework: guiding CRS to work within systems

In 2002 Catholic Relief Services staff identified the need for a common framework that was people centered and systems focused.   What started as a conversation between technical advisors and country program staff, turned into development of an organizational conceptual framework.   The Integral Human Development (IHD) conceptual framework is a diagrammatic representation that helps to guide our thinking, and to understand more clearly the world of people challenged by poverty, including both their strengths and their needs. The power of the IHD in developing CRS understanding of scale was a complex understanding of people (and their assets) within systems and structures, and our mandate to understand and work within or on the systems and structures that affect people's lives.
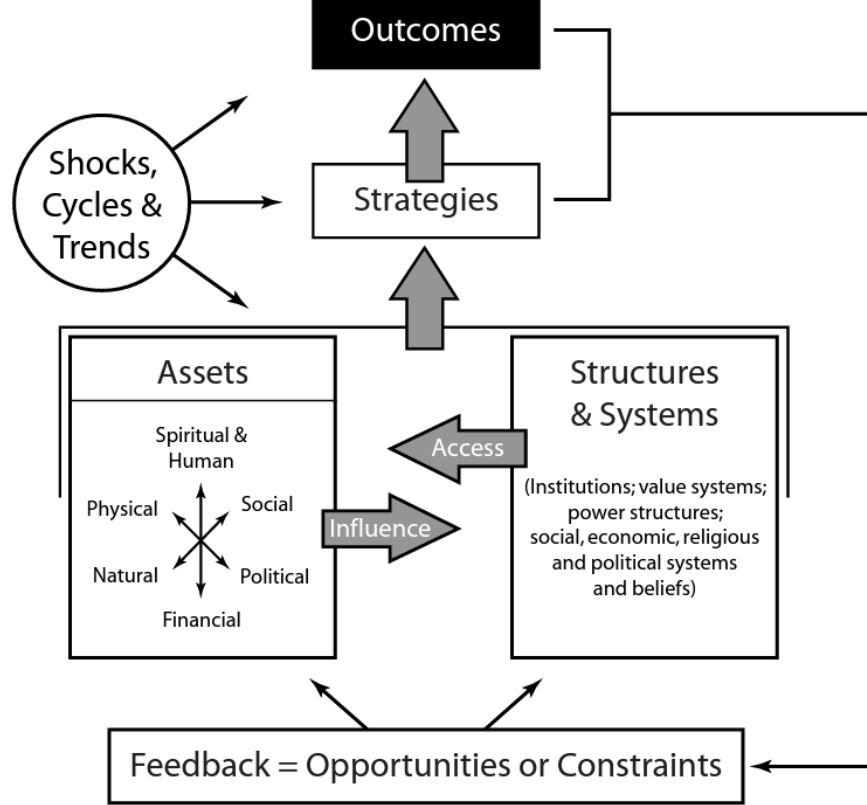
Partnership Capacity Strengthening (PCS)

CRS has focused on strengthening local partners since the 1950s, although working with partners was not originally conceptualized as "Partnership Capacity Strengthening". Rather, it was part of the way CRS worked,

without articulating it as such. This was because of the general understanding of subsidiarity as a way of working. In 2000, CRS agreed on partnership principles as a way of creating a common understanding and way of working with partners. In 2012, CRS used the opportunity of a legacy grant from GHR Foundation to professionalize how CRS works with partners. This grant went from 2012 to 2019 and increased the number and diversity of partners CRS works with. It also increased the quality and intentionality of our work with partners. This grant was the precursor to the current legacy grant that funds the CASCADE initiative.

One example of the links between the work with PCS and what CRS has learned about working at scale is within the Holistic Organizational Capacity Assessment (HOCAI) tool. This tool was informed by the extensive capacity strengthening work done under the CRS-led AIDSRelief project. This 10-country project (2004-2013) funded through the US President's Emergency Plan for AIDS Relief for PEPFAR projects supported the transition of not only HIV care and treatment services to local faith-based health systems, but also required concomitant institutional strengthening to manage and sustain these services. Within the module on sustainability (in HOCAI), there is a focus on "political sustainability" (interacting with political actors). More recently, the ability to think politically or have "political acumen" was seen in research done by CASCADE as a major enabler for CRS' work to catalyze outcomes at scale. The evolution of PCS was that in the past, CRS worked **THROUGH** local partners. In the early 2000s, CRS shifted to work **WITH** local partners, and now CRS is aspiring to work **FOR** local partners. Finally, the highest-level change within the CASCADE Theory of Change (TOC) which describes pathways to institutionalizing scale within CRS is "permanent local actors support populations to live in dignity", which shows the strong link from PCS to Catalyzing outcomes at-scale.

Latin American and Caribbean Regional Office (LACRO)

The LACRO region was one of the early innovators working at scale. In 2013, The LACRO *Vision for Change Strategy* began with a 10-year goal to become a catalyst for positive change at scale. The landscape of funders was changing with the major donor reducing the amounts of funding going to this region. This created a pressure to do work differently. The region began to shift towards the use of sectoral groups that eventually became platforms and working as catalysts at scale. To achieve this strategy, the region picked a limited number of problems which became cross-national platforms (and lasted 10-15 years rather than a traditional 3–5-year project); connected key stakeholders together and worked at a convening level; made evidence matter and communicated influence on a wider audience. This strategy was successful and updated recently.

LACRO has also been the first region to embrace and scale blended finance initiatives, starting with Azure, an initiative that combines technical assistance and loans through financial institutions to expand access to clean water. Launched in 2018 in El Salvador, Azure has leveraged 5.6x external funding (compared to CRS contributions) and has reached 900,000 people to date. From the start, CRS has taken a Market Systems Development (MSD) approach in its impact investing work in collaboration with LACRO.   With Azure, for example, national government water agencies, local municipalities, financial institutions and private technical service providers are all part of this sustainable solution to provide access to clean water to local communities in need.

The updated LACRO strategy (2020-2030) invested in four regional platforms each of which:

- Build on successful regional experience;
- Are cost effective and evidence based;
- The problem is of large enough scale and links to the agency strategic goals and outcomes;
- Can be approached through strengthening local leadership.

The updated platforms included: Youth, Water Smart Agriculture; Peacebuilding and EMPOWER (Emergency). In FY 2020, LACRO developed the first influence report that measured the impact of our influence on people's lives vis-a-vis the platforms. The work LACRO did in these early years has influenced many parts of the agencies thinking.

4Children and FASTER

Coordinating Comprehensive Care for Children (4Children) (2014 – 2019) and Faith-Based Action for Scaling Up Testing and Treatment for Epidemic Response (FASTER) (2019-2022) were global projects funded by PEPFAR through USAID and the Centers for Disease Control (CDC) respectively. 4Children was designed to strengthen the child protection and social services system to address the needs of vulnerable children, particularly children affected by AIDS. FASTER was designed to address critical policy, strategy, and operational obstacles to pediatric testing and treatment, serving as a proof-of-concept platform to inform national scale-up. improve policy and practice for improved access to HIV testing and treatment of underserved populations, especially children. These projects both helped CRS expand the support it could provide from direct service delivery interventions to now include policy, strategy, and system level interventions with key stakeholders in the countries supported.

4Children and FASTER were the first and second global technical assistance projects CRS managed. There were numerous shifts within these initiatives which built our understanding and capacity to work at the scale of the problem. Two examples stand out:

- Under 4Children, CRS successfully positioned itself as a key social welfare sector partner with multiple national governments, working with line ministries responsible for child welfare and other national

stakeholders to adopt, roll-out, and utilize standards of practice such as the global Case Management Package. This gave CRS the opportunity to widen its influence through leveraging extensive technical expertise.

- Under FASTER, CRS was able to work with national government counterparts to streamline regulatory processes, strengthen government and civil society collaboration, test innovative service delivery and quality improvement strategies, and help national governments roll out improved testing and treatment strategies, many of which subsequently were incorporated into national guidelines and absorbed into funding mechanisms supporting the HIV response.

In both projects, the kind of staff that were needed to shift systems were of a different skill set and seniority. CRS strengthened their national staff profiles in countries where 4Children and FASTER worked. Many of the staff hired in these programs have become leaders within CRS offices where they work. Further, these staff are at the level of seniority that they can influence government to achieve the outcomes of the initiative, which previously was not as common for CRS staff.

The shifts in 4Children, were also seen in CRS-led bi-lateral PEPFAR awards where CRS was responsible for strengthening aspects of the national and sub-national social service and health systems. Not only did these initiatives lead towards building a new way of working in CRS, but the 100&Change MacArthur Foundation submission (which was important to shifting how CRS thought strategically about scale, below 100 & Change) can be traced back to 4Children. The proposal that eventually became Changing the Way We Care, which dealt with childcare reform and reintegration of children from residential care facilities to family-based care had its inception in small a small component of 4Children. As part of the 100&Change MacAurthur Foundation submission, when the agency sent out a call for key problems that were **solvable, impactful, and aligned with CRS's strengths**, what had been a small part of 4Children became the flagship proposal, allowing CRS to address long-standing support to residential care facilities that had been part of the agency's Title II food security programming. In hindsight CRS can see it was used to demonstrate a new way of considering working at the scale of the problem.

100&Change

In 2017, CRS was awarded $15 million as a semi-finalist in the MacArthur Foundation's 100&Change competition, which asked participants to present a bold solution to a critical problem facing the world. The process within CRS that led up to the award was instrumental in influencing the agency more broadly, ultimately contributing to CRS´ strategy, Vision 2030: In Their Own Hands, and its commitment to catalyzing transformational change at scale. There was a genuine agency-wide commitment (from the highest levels) to pursue the 100&Change competition which required the agency to think differently. The agency asked colleagues to step outside of our traditional project management mindset and instead think about complex global problems and come up with creative and catalytic solutions to address those problems at scale (and develop a scaling strategy). This was quite new for CRS and the call for ideas for the competition went out to the entire agency. CRS received more than 100 responses from staff all over the world. There was strong leadership from the top, executives, the HQ communications team, and CRS assumed a much higher profile on social media than before, as we actively promoted our proposed solution for the competition and worked to engage outside support for our bid. This competition challenged CRS to view problems differently, and while CRS finished as a semi-finalist, the experience of approaching a singular solvable problem through scale changed how senior leadership viewed the overall strategy.

Impacting Investing and Private Sector Engagement

Impact investing is a way of leveraging private capital to create positive social and environmental impact while generating financial returns. It also enables CRS to increase the overall funding available for catalyzing outcomes at scale. CRS and the Vatican's Dicastery for the Promotion of Integral Human Development have been exploring the potential of impact investing since 2014, when they organized a conference with CRS Board members, sector experts and clergy/women religious. The conference was supported by Pope Francis, who encouraged CRS and other Catholic institutions to engage in impact investing as a way of serving the poor and vulnerable.

Since then, CRS has formed a small team to advance this type of work and to develop a unique vision of Private Sector Engagement (PSE) that is aligned with the integral human development framework. For impact investing, the team has three main objectives: 1) to use blended finance, or a combination of philanthropy and loans, to advance development outcomes aligned with CRS' Vision 2030: In Their Own Hands, targets, 2) to invest a percentage of the CRS reserve in institutional quality impact funds, and 3) to be a global advocate/voice for moving financial capital into impact investing. CRS' first impact investment was a loan to Lafaza, an organic vanilla wholesaler and retailer operating in Madagascar. The working capital loan enabled Lafaza to continue purchasing product from farmers previously supported by a USAID-funded food and nutrition security program. Leveraging this experience, CRS has since established two blended finance vehicles, which offer technical assistance alongside loans, to water service providers and small agricultural cooperatives and enterprises, respectively.

CRS has also developed a unique vision for PSE that is aligned with the integral human development framework. Further, CRS has advanced a market systems development (MSD) approach that enables it to influence local public and private systems to be more inclusive, resilient, and environmentally sustainable as reflected in [the CRS Approach to Market Systems Development.](#) Working with systems is a precursor to catalyzing change at scale. For example, CRS' Haiti Country Program, in collaboration with multiple headquarters departments, designed and pioneered a new programmatic approach to strategically utilize Title II commodities, partnering with the local private sector. This type of approach to commodities is being advanced in other RFSA and program designs.

The Vision 2030: In Their Own Hands Strategy

The 100&Change competition coincided with the Vision 2030: In Their Own Hands, agency strategy development process and was referenced often in discussions that led to the new agency strategy, *In Their Own Hands*. This also led to the creation of the Strategic Change Platforms (SCPs), which were created to support and test new ways of working to catalyze outcomes at scale. Ultimately, the problem chosen to address was that of children separated from their families and living in institutional care around the world, and *Changing the Way We Care* was born. Later, this became one of the six SCPs.

As part of the Vision 2030: In Their Own Hands strategy, development working groups were tasked with drafting thought papers to kickstart agency reflection on strategic issues for the next agency strategy. These thought papers were intended to be the *beginning of the analysis for how to be a catalyst at scale* and served to facilitate discussions during the first phases of the strategy process. Within the thought papers there was a shift "from projects to platforms" which reflected on the potential to work at scale. This work posed new evidence for the need to shift to a more scaled and long-term approach to our work. Further, the team reflected on the size of the development problems and solutions posed by the SDGs and the extent CRS had contributed to moving the needle in these issues. While the evidence showed CRS had substantial contribution, it became clear that compared to the scale of the problem a new way of working was needed.

Vision 2030: In Their Own Hands, reflected the importance of leadership and commitment from all levels within the agency for a new way of approaching development and achieving social change "at scale." It highlights the importance of a commitment to a new vision, with all major departments of CRS endorsing and promoting this new way of thinking about scaling our work. The 100&change competition helped inform how CRS worked at a strategic level towards identifying challenges that required CRS to work at the scale of the problem.

CRS mission and guiding principles call on us to put the needs of the most vulnerable first. CRS recognize that while CRS continues – and will always continue – to help people who are vulnerable meet their basic needs and foster just communities, the scale of the problems CRS aims to address are much larger than the scale of CRS programs. The credibility and relationships that CRS has built in many countries and contexts offer opportunities for us to contribute to making an impact beyond our own direct programs by convening, influencing, and catalyzing other actors.

While CRS achieves impacts in many sectors through implementation of projects with local partners, its *Vision 2030: In Their Own Hands Strategy* aspires to achieve transformational change at scale by breaking out of traditional project paradigms to mobilize and collaborate with a wide array of actors working toward a common goal.

Our strategy has interdependent and mutually reinforcing approaches that help us focus and align resources toward achieving our goals. Specific strategic approaches are 1) Catalyze, 2) Expand and Diversify 3) Mobilize & 4) Empower (See Figure 3 below).

FIGURE 3: VISION 2030: IN THEIR OWN HANDS

Under the strategic approach 1: "Catalyze Humanitarian and Development Outcomes at scale" CRS has 3 specific strategic initiatives which include: (1.1) Accelerate progress toward our goals through strategic investment in new approaches to catalyzing results at scale, through six strategic change platforms; (1.2) Transform our approach to evidence, learning and outcomes measurement to support collaborative implementation and influence of solutions at scale; (1.3) Champion local leadership that empowers communities and the institutions that support their development to be as effective and impactful as possible.

Emerging Scaling Continuum

While the narrative above demonstrates CRS story in relation to points in time and groups that influenced our journey to becoming an organization that aspires to catalyze outcomes at scale, it does not cover the organizational processes or "ways of working" that have emerged in that same time. Below is the continuum that reflects the developmental understanding. The emerging approach demonstrates that likely there will need to be a mix of approaches along this continuum of direct services to catalyzing outcomes at scale in any given initiative. As an example of this need, research conducted by CASCADE demonstrated that the technical credibility and relationships gained by CRS through direct service delivery led to having a seat at the table to inform policy or government implementation of policy.

TABLE 1: EMERGENT WAYS OF WORKING WITH SCALE

Direct services by CRS or through a local partner	Direct services and changing systems.	Catalyzing outcomes at scale
- Evidence-based targeting of specific populations with greatest need for optimal stewardship - Applying tested models or solutions to common problems. - Donor-responsive project management: achieving deliverables in scope on time. - Effectively addressing an expressed immediate need. - Meaningful partnership with local civil society actors based on shared vision. - Forming trusting relationships with stakeholders through our reputation of delivering on our promises. - Gain deeper, experience-based, understanding of the challenges, the stakeholders and their positions and the environmental opportunities and challenges. - High quality and standardized results-based MEAL including Classic evaluations: formative, summative, accountability, monitoring – all focused-on project/program outcomes. - Robust measurement for attribution results the intervention brought about. - Shared indicator measurement framework. Reports common results across regions, program areas or projects by using umbrella type indicators. - Staff Skills such as managing direct delivery of goods and services,		- Working at the scale of the problem to shift the conditions within a system that hold the problem in place. - Strategic thinking throughout that links multiple projects to catalyze scaled change. - Impact is a transformed, sustainable system with long term permanent actors achieving outcomes at scale. - Systems actors develop and facilitate the enabling environment that is needed to change the system. - Systems actors lead the change while CRS accompanies the effort. - Adaptation in the face of changing systems; outcomes and activities may shift in the face of a changing system. - Coordinating and enhancing capacity of systems actors for collective impact. - Evaluation of systems transformation that includes examining progress towards outcomes achieved at scale, transformed systems, adaptability and responsiveness and adherence to principles. - Measurement of collective impact: impact the collective intervention brought about and to which CRS was one contributor. - Shared strategic learning framework that includes but is not limited to common indicators.

results-based budget management and reporting.	● Staff skills such as facilitating group processes, political acumen, building on the existing systems and high degree of flexibility.

Strategic Change Platforms

To work in new ways in order to achieve scale in specific sectors, especially catalyzing scale and to test new ways of catalyzing impact at scale, CRS invested in six strategic change platforms. The six **Strategic Change Platforms** (SCPs) were created as a flagship initiative under Approach #1 (*Catalyze Humanitarian & Development Outcomes at Scale)*. The SCPs are specific and targeted platforms designed to test new ways of working to catalyze outcomes at scale and support the goals of Vision 2030: In Their Own Hands. Below is a snapshot of progress of each strategic change platform. Note that while it is still early in implementation, CRS anticipates for many of the platforms' results will compound as enabling environments and systems are strengthened.

SCP1: Fostering Just & Cohesive Societies: SCP 1 supports humanitarian & development outcomes being enhanced through systemic integration of social cohesion & justice (SC&J). In FY 2022, SCP 1 successfully integrated SC&J into multiple initiatives, projects, processes and sectors in CRS. They conducted 24 learning collaborations; 102 staff have taken the SC&J CRS online learning course; 187 staff have viewed the SC&J job aids; and 72 staff have used the SC&J Self-Assessment tool. In FY 2022, SCP 1 conducted 14 influence events with bilateral or multilateral partners.

SCP2: Safe, Dignified Homes & Communities: SCP2 believes a safe home and community is the starting point for recovery. The platform plans to reach at least 1.5 million through direct programming by 2030, while building on those results to identify and facilitate system changes by innovating and collaborating with partners in the government, humanitarian and the private sector to reach 8 million more through scaled outcomes. Since the strategy launch in FY20, the platform supported 1,902,134 people (965,364 in direct programming, and 936,779 through influence and scaling efforts). (Find a full report [here](#))

SCP3: Transforming Livelihoods & Landscapes: SCP 3 works with rural communities and small-scale producers to restore degraded lands as a means to enhance food, water and livelihood security, thereby helping people to adapt to climate change. SCP3 has a ten-year target to restore 1.6 million hectares of land and increase yield by an average of 40% for 1 million farmers. In FY 2020-2022, 897,190 hectares of land have been restored and 715,072 farmers have increased yield.

SCP4: Accelerating the End of Malaria Across Sectors: SCP 4 has the purpose to create malaria multisectoral programming that will accelerate the end of malaria. In FY 2020-2022, SCP4 conducted seven evidence generation projects to pilot new ways to eradicate malaria and advocated or influenced six global consortiums or organizations.

SCP5: Strengthening Families for Thriving Children: SCP 5 supports children to thrive in safe and nurturing families through strengthening care reform. Government supported to shift away from residential toward family-based care as a way of serving families. From FY 2020- 2022, 385,700 children and adolescents were living in safe and nurturing families.

SCP6: Scaling Youth Livelihoods & Leadership: Strengthen employment and entrepreneurship systems to foster an enabling environment where millions of opportunity youth have agency and sustainable livelihoods. In FY

2020-2022 CRS contributed to 153,601 youth that completed training programs and 62,689 youth were employed (formally or self-employed).

CRS chose to invest its $1M per year legacy grant from GHR Foundation in institutional strengthening for scale (CASCADE). At the same time, over the past 4 years CRS has invested its own discretionary funding ($8M) and spent additional private funding ($45M) for the strategic change platforms- our global scale initiatives which generate learning and impact about different ways of influencing impact at scale. These investments could have been directed at any number of priorities but committed to catalyzing outcomes at scale, they have supported major institutional shifts and created positive impact for populations around the world.

Catalyzing Scale Through Evidence (CASCADE)

In coordination with the Vision 2030: In Their Own Hands strategy and the six SCPs, it was critical to capture and track learning and evidence to strengthen outcomes at scale agency wide. As a result, CRS **launched its Catalyzing Scale through Evidence (CASCADE) project in early 2020.** CRS was awarded an institutional strengthening grant from GHR Foundation that was just extended to continue through 2030. The goal of CASCADE is to strengthen CRS' capacity to catalyze humanitarian and development outcomes at scale. CASCADE's 2023 Theory of Change specifies two end of program outcomes:

The CASCADE team funded strategic initiatives to learn about scale. CASCADE obligated nearly $1Million to SCPs*(see annex 1). CASCADE's direct funding to SCP **supported steps in the SCP's influence journey** with the long-term objective of supporting SCP progress toward achieving scale.

In the first three years of CASCADE, CRS has made progress towards generating evidence that informed CRS's understanding and practice of catalyzing outcomes at scale. Highlights of these changes include:

- CASCADE has developed an understanding of how CRS engages in scale and strategies to go about institutionalizing scale within CRS. This is captured in the recently developed definition of ***Catalyzing Humanitarian and Development Outcomes at Scale***: *CRS collaborates with, convenes, and accompanies a variety of stakeholders within systems to support local actors to achieve humanitarian and development outcomes that are equitable, inclusive, and at the scale that is appropriate for the size of the problem.* CASCADE facilitated a highly participatory process to gradually coalesce around this definition of how CRS engages in scale.
- CRS is using evidence to support a "Mindset Shift" across the agency to move from a hands-on approach of "business as usual" to a facilitative approach of "catalyzing scale." Being a *catalyst*, rather than a *do-er* implies a shift in the way CRS works and this is shifting across regions.
- CRS developed 52 case studies which capture journeys to scale and made progress towards institutionalizing learning from influence journeys to improve capacity to scale.

- Case studies began to illustrate the various ways in which CRS works toward scale. This CRS grounding, combined with existing literature on scale, formed the basis for the scaling strategies and scaling processes described in our Scale 101 e-learning course (currently available to all colleagues) as well as the influence strategies described in our Scale 102 e-learning course (reviewed and tested by many colleagues, currently in draft form).

- CASCADE facilitates an annual scale course for country program-level leaders, rooted in practical examples from various geographic and technical areas, which has contributed to an increase in the shared understanding of how CRS engages in scale and what leaders can do to support their teams.

- CASCADE has conducted qualitative analysis of 48 of the 52 case studies which yielded learning on 1) **enabling and challenging factors to scale** and 2) **staff skills and characteristics for scale**. This research has informed numerous processes and deepened our understanding of scale.

- CASCADE has begun to integrate skills and characteristics needed for scale into hiring and professional development. CASCADE wrote a brief for the Scale-up COP to capture our understanding of **staff skills and characteristics for catalyzing outcomes at scale**. CASCADE is contributing to updating two of CRS' Cross-Cutting Capabilities to incorporate the skills and characteristics needed for scale: Influence & Representation. In addition, staff skills and characteristics for scale have been incorporated into hiring, such as the International Development Fellows program (IDFP) which now asks scaling questions in hiring interviews.

- CASCADE is in the process of updating existing guidance, tools and processes based on learning from our own scaling experiences and external evidence on scaling. This includes findings from previously mentioned research to update CRS project design guidance (ProPack), CRS project management guidance (Compass).

- CASCADE has developed and is piloting a MEAL for scale design process. This MEAL system builds from research that was done to understand measurement for Scale. The system is designed for systems change and adaptive measurement and management processes.

- CASCADE has been creating a common understanding of scale to support leadership at all levels of the agency to promote scale; facilitate learning about scale within and across platforms and the agency at large; and advising CRS teams on the organizational change needed to realize our Vision 2030: In Their Own Hands Strategic approach of catalyzing humanitarian and development outcomes at scale.

- CASCADE created a scale repository: **a centralized location for tools, guidance and other resources CRS teams have used to support their scaling work.** This allows staff to search through a wide variety of internal and external resources (ranging from project specific templates to general scaling literature) knowing these have been useful to a CRS team working on a scale initiative. Resources can be filtered by user, resource type, key word and goal or program area.

The CASCADE Theory of Change has two End of Program Outcomes. One outcome focuses on Scale-Specific initiative while another focuses on Scale-Sensitive initiatives.

CRS' Scale-Specific initiatives contribute to impact at scale achieved by system actors. This often requires long term commitment and will be done where conditions are in place or can realistically be influenced. When CRS is working as a catalyst for scale achieved by others, our actions contribute to the impact *they* achieve and sustain. System actors are permanent actors who are most closely connected to the population, their opportunities, their needs, and can influence the conditions that hold a problem in place. System actors are religious institutions, government, civil society, and private sector actors who will be with the population for the long run.

CRS' Scale-Sensitive initiatives are designed to work with system actors, with scale in mind. Our scale sensitive objective will be achieved when the default across all CRS programming is to design and implement with the existing systems actors in mind and for increased potential for sustainability and scale. Working on or within existing systems present at the scale of the problem is a starting point, a foundation for more scale-specific work in the future. Not all projects will have the conditions, duration and investment needed to fully achieve outcomes at the scale of the problem. However, designing and implement with actors who would have the potential to affect change at the full scale of the problem, even while CRS is only able to engage in one limited geographic area or on one aspect of this issue will increase the chances for potential scale either autonomously if conditions change, or with support if more investment becomes possible.

Working in a **scale sensitive** manner means starting by working with systems in mind and moving to transforming the underlying conditions that hold a problem in place within a system. Working on the conditions alone does not bring about catalyzing scale. This becomes **scale specific** when the systems and the systems actors engage each other to affect change at the scale of the problem. The results of this interaction can be impact at scale. This differs from a traditional understanding of scale which could increase the number of people benefiting from a solution without shifting the underlying conditions. While this leads to an earlier spike in success in the long term it can be less sustainable.

The TOC also demonstrates how the outputs (such as developing guidance and accompaniment), immediate outcomes (such as having a broad set of business processes for catalyzing outcomes at scale) and intermediate outcomes (such as CRS prioritizing catalyzed impacts as much as direct achievement) lead to the End of Program Outcomes (see annex 3).

Teams that work with Catalyzing Outcomes at Scale in CRS

CRS is demonstrating commitment to catalyzing outcomes at scale through new investments and dedication of existing talent for scale initiatives. This effort was organized and funded as an explicit initiative, not relying on "unfunded mandates". In partnership with CASCADE and the six SCPs, the teams / staff below collaborate closely to contribute to CRS becoming an organization that catalyzes outcomes at scale. These teams include but are not limited to:

- **SCP Cross-cutting support team:** Knowledge Management & Learning (KML), Marketing and Communications (MARCOM), Institutional Donor Engagement & Advancement (IDEA). The Strategic Change Platform cross-cutting (SCPX) team is a CRS privately funded investment initiative launched in February 2022 in response to SCP demand for support. The team's primary objective is to support six SCPs that act as catalysts for CRS' scaling initiatives. Composed of a Knowledge Management and Learning Advisor, a Strategic Communications Manager and a Resource Mobilization Coordinator, the SCPX team operates across platforms, disciplines and departments within CRS. They work collaboratively to promote coordination, break down silos and encourage cross-learning. The team collaborates closely with CASCADE to support the foundations for scaling work within CRS. All SCPX members are also officially "Change Agents" working with CASCADE on institutionalization.
- **Scale Change Agents:** In 2022 CASCADE invited Regional Directors and Directors of teams who support the SCP scale initiatives to nominate a CRS colleague to become a Change Agent, volunteering for a 12-month commitment to be a catalyst to achieve outcomes at scale. Part of the nomination criteria from the Regional Director was to identify individuals who are influential within their team and external networks to become early adopters of scale. Change Agents receive professional development opportunities from CASCADE and are among the first to learn about new resources they can use to support a shared understanding of catalyzing outcomes at scale among their spheres of influence. The group is made of 26 Change Agents that represent different regions around the world who are raising awareness, building a shared understanding, and peer-to-peer learning and support catalyzing outcomes at scale.
- **Partnership Capacity Strengthening (PCS)** provides resources and technical support to assist colleagues around the world who engage with our partners and works with them to strengthen their organizational and programmatic capacities to ensure that long-term, permanent and local actors are able to solve their nations problems with autonomy. This ties directly to the CRS agency strategy *In Their Own Hands*. CASCADE works closely with PCS by collaborating on various activities to ensure the work CRS is doing contributes to creating

enabling environments and sustainable solutions. These enabling environments position actors with the potential to make change at scale.

- **Impact Investing (II) and Private Sector Engagement (PSE)** team structures and invests in blended finance initiatives, and provides resources and technical support to CRS' local and regional teams. Through highly collaborative, cross-departmental processes, II/PSE began refining and professionalizing CRS' unique vision for impact investing and PSE and has been on the forefront of development industry trends. This work has grown significantly starting with a small global team, leading now to 4 Regional Technical Advisors, a vibrant Community of Practice and a new agency cross cutting KPI.
- **Market Systems Development (MSD) steering committee**: A cross-departmental team made up of members from the Humanitarian Response Department; Impact Investing & Private Sector Engagement; Program Implementation and Quality Assurance; Global Supply Chain Management; and CASCADE. MSD is a facilitative approach that seeks to fully understand the role of all actors within the market system and works with them to make improvements that will allow the most vulnerable and marginalized communities to access what they need within the market system. When CRS is effective at market system development, we are playing a truly catalytic role by reaching the most vulnerable communities to solve the core problem with sustainable solutions, regardless of the sector (such as food, water, sanitation, health services, employment, inputs, etc.). When CRS programming uses MSD approaches consistently, we will build a much stronger foundation (staff capabilities, processes, approaches) to be a catalyst for outcomes at scale.
- **Governance Technical Advisors**: CRS' works with government and government structures where scale approaches can help strengthen our work. There is one global Governance advisor and one Governance STA who sits on the Africa Justice & Peacebuilding Working group.   While we are starting to be able to rely on these positions for needed insight into governance and scale, we still are not staffed to the level that would be ideal.
- **Mission and Mobilization (M2):** M2 aligns with the new agency strategy to build a movement of individuals throughout the countries in which we serve to support CRS' vision to uphold human dignity through the realization of integral human development. The main goal is to affect transformational change at scale or the world's most vulnerable by influencing US systems and structures and increase private resources by building a movement of individuals. One strong example is CRS' language and approaches found in the new USAID Local Capacity Strengthening Policy. By bringing local actors (partners) to USAID; providing evidence and stories about transition and capacity strengthening from CPs; and M2 and OverOps fostering excellent USAID relationship management--CRS had tremendous influence over the new policy. This policy is an important milestone to set the pre-conditions for locally led impact at scale.
- **Donor engagement and acquisition teams (IDEA and Charitable Giving):** These teams are influencing not only institutional funding, but the mechanisms used to fund impact at scale. CASCADE will continue to work with business development colleagues (regional and HQ) to strengthen their capacity to integrate scaled thinking from the earliest phases of project/initiative design to the close of the project. Charitable Giving is currently using Journeys to Scale case studies when speaking with donors to highlight the value of flexible private funding when working toward large scale systemic change.

What are distinguishing characteristics of how CRS works to catalyze scale?

***CRS defines working to Catalyze Humanitarian and Development Outcomes at Scale* as:** *CRS collaborates with, convenes, and accompanies a variety of stakeholders within systems to support local actors to achieve*

humanitarian and development outcomes that are equitable, inclusive, and at the scale that is appropriate for the size of the problem. CRS' vision for our role in scale is to support permanent actors to change conditions that hold a problem in place.

CRS invests discretionary funds to complement donor-funded projects in ways that increase the chances of scale. CRS enhances the impact of institutionally funded projects through its use of discretionary funding (private funding). Of the 52 case studies currently in CASCADE's Journeys to scale dashboard, 71% report having invested private funds in some way to advance the scale initiative. Private funds were most often in addition to larger institutional donor funds, either bridging between donor-funded projects that made up the scale initiative or supplementing with influence activities the donor-funded project did not cover.

Influencing systems at scale takes time and CRS has long term presence. Starting in 1943, CRS has maintained a long-term presence in countries and communities around the world. Having a long history in the regions we serve gives CRS the credibility and trust to work at-scale. CRS has extensive understanding of local systems, fosters deep relationships with long term permanent actors and lays the groundwork for staffing all prior to a funding award. CRS' long-term presence not only provides for extensive efficiency gains but also positions CRS to be able to work as a catalyst or support specific long-term permanent actors as catalysts.

CRS accompanies long-term permanent actors at the scale of the problem. CRS' Vision 2030 strategy is entitled *In Their Own Hands* because CRS is committed to local leadership. CRS knows that strong local institutions are critical to sustainable development and just societies. We also know that only building the capacity of partners funded by CRS and other donors to implement projects is insufficient. The target is for permanent local actors to lead their own development, including policy advocacy, resource mobilization, activity design and implementation. The ultimate goal is sustained impact for the most vulnerable. Thus, increasingly CRS plays the role of collaborator and advisor, facilitating and supporting efforts by an array of local actors (civil society, private sector and government) to effectively operationalize policies and strategies to benefit marginalized and vulnerable populations. CRS recognizes the focus on catalyzing scale links to a wider shift in international development which aligns with CRS' long-held commitment to subsidiarity.

CRS has multiple teams whose work supports catalyzing outcomes at scale. As a response Country Program and Regional progress to catalyzing Systems Actors at Scale CRS has made multiple intentional investments in improving our capacity to be a catalytic organization. CRS has multiple teams dedicated fully to catalyzing outcomes at scale. These include but are not limited to six strategic change platforms and CASCADE whose focus is institutionalizing catalyzing outcomes at scale. Further, CASCADE has mobilized scale change agents who represent teams throughout the institution, shifting mindsets and processes towards working at scale. Finally, CRS is leveraging other long-term institutional focuses such as Partnership Capacity Strengthening & Local Leadership, Impact Investing, Market Systems Development, Governance, and Mission and Mobilization. This infrastructure gives CRS a unique level of technical and operational commitment to becoming a catalyst for scale.

Section two: Current instances of institutionalizing scale

Nascent evidence of institutionalization (thematic discussion)

*The thematic discussion in this section draws upon the following **evidence**:*

1 – Institutionalization Study- Stories submitted in response to a call for narratives that demonstrate progress toward institutionalization of scale. CASCADE received *twenty-six stories from CRS colleagues around the world. Their stories addressed successes and challenges, themes, and changes that respondents are seeing that have been integral to institutionalizing scale in a meaningful way.*

2- Institutionalization Journal – Ongoing Journal entered by the CASCADE team that typically has evidence products linked to reported change.

3 – Agency Products and Processes - Actual agency **products or processes** which demonstrate Institutionalization.

4 – Interview notes - Interviews and Focus Group Discussions (FGDs) were conducted during the mid-term of phase one and for this research process.

5- Report to GHR Foundation- Annual progress reports to GHR Foundation recorded progress and learning.

6 – CASCADE Case Studies- 52 case studies were collected to demonstrate and learn from scale in CRS.

7- CASCADE Learning Agenda Research- Three pieces of research were conducted to consider characteristics and skills that are important for scale, enablers and challenges for scale and measurement for scale. These drew from the 52 case studies mentioned above as the source of data.

8- CASCADE Evidence Matrix- A tool used to weave together evidence from multiple sources. This is not typically the "primary" source but rather a tool used for reflection, analysis, and documentation.

Evidence is cited using <u>superscript #</u> in the below text that aligns with the numbering above following each method.

Systems Conditions

Figure 2 show six interdependent conditions of systems change[3] that typically play significant roles in holding a problem in place:

- The top level captures the structural changes of policies, practices, and resource flows.

- The middle level captures the relational changes including the relationships and power distribution among systems actors.

- Lastly, the lower level are the changes in knowledge, attitudes, habits of thoughts or deeply held beliefs at the individual level.

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[3] [1] Kania, Kramer, and Senge 2018. "The Waters of Systems Change." The framework depicted here draws upon the extensive literature behind systems change and systems thinking. The six conditions depicted here draws from a variety of academics and practitioners and was depicted with the aim to support social sector institutions in developing systems change strategies by illuminating key internal and external leverage points that support sustainable progress at scale.
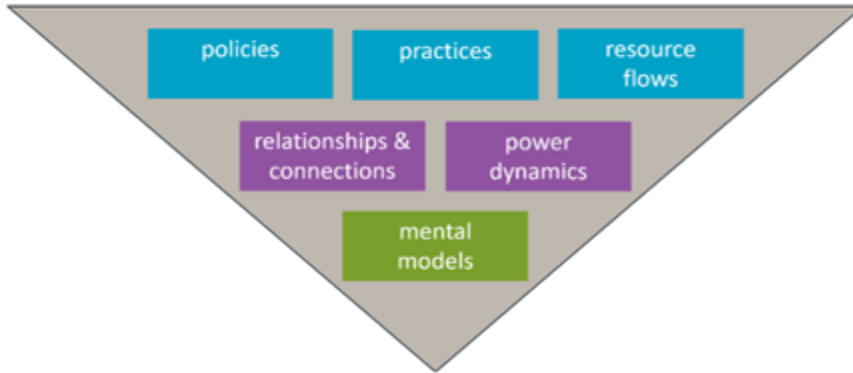
Figure 4: Conditions that hold the problem in place

Therefore, the six conditions capture structural, relational, and individual changes. Themes of institutionalization that came out of this research have been categorized by these conditions. Further, respondents of the institutionalization study were asked to signify which condition their story demonstrated had changed. We focus on each of these conditions because research shows that shifts in system conditions are more likely to be sustained after changes with these six conditions.

Conditions that hold the problem in place and levels of institutionalization.

Finding:

1) To institutionalize scale, multiple conditions within the organization (policy, practice and resource flow; power relationships, and mindsets) need to be changed to reinforce one another. Of the 26 instances of institutionalizing scale, eighteen submissions reported changes across all conditions in their specific story.

2) After more than three years of strategic focus on catalyzing outcomes at scale, we would expect to see instances of change starting to emerge as an indication of our progress. This expectation is confirmed by numerous instances in this report and the 52 case studies generated by CASCADE that demonstrated empirical evidence about CRS catalyzing outcomes at scale long before Vision 2030: In Their Own Hands. Further, the case studies and other evidence in this report demonstrates Vision 2030: In Their Own Hands was responsive to Country Program and regional innovation towards working with catalyzing outcomes at scale. We are **on-track** and moving in the right direction despite being early in this long-term change process.

Evidence: As described above, CASCADE put out a call for stories that demonstrate progress toward institutionalization of the practice of being a catalyst for scale. Respondents were asked to select which condition of the organizational system changed within their story. They could select all options that applied. Of those who responded eighteen reported changes in policies, policy implementation and resource flows, fifteen reported changes in the relationships, connections and power dynamics and twenty-two reported change in knowledge, attitudes, and practices (Mindsets) (See Figure 4). 58% (14 out of 24) of respondents signified all three conditions (policy, power relationships and mindsets) were strengthened in their instance.

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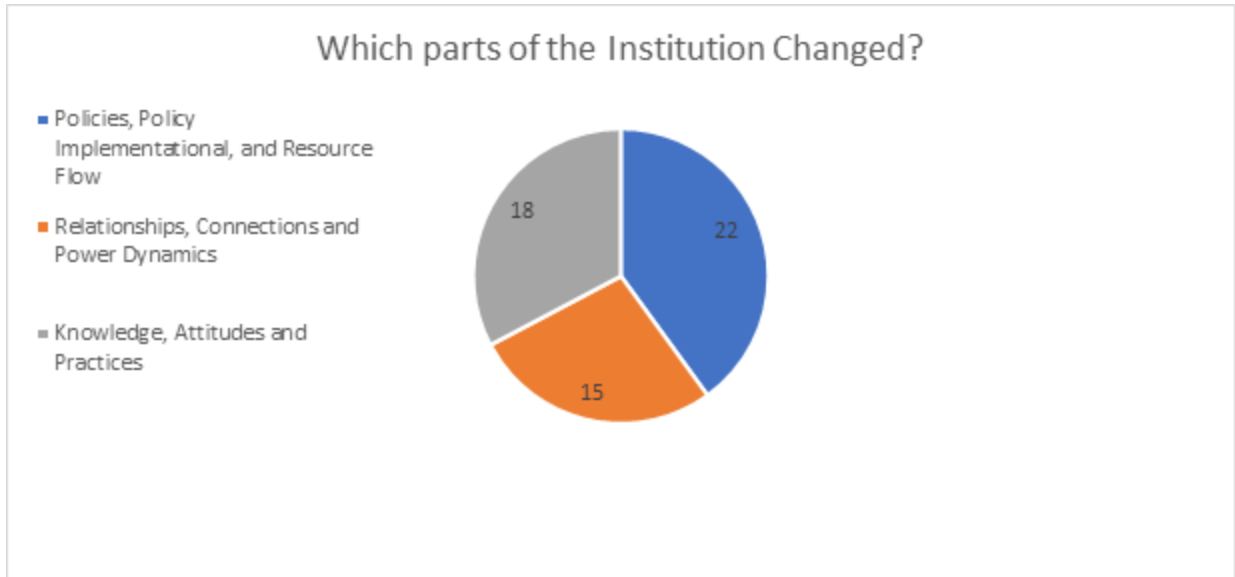
Figure 5: parts of the organiztion that have changed

The form also asked respondents to rank the level of institutionalization their story demonstrated. Of those who responded to that question, twelve reported either "nascent" or "enablers developing", another twelve reported either "institutionalizing" or "being institutionalized".

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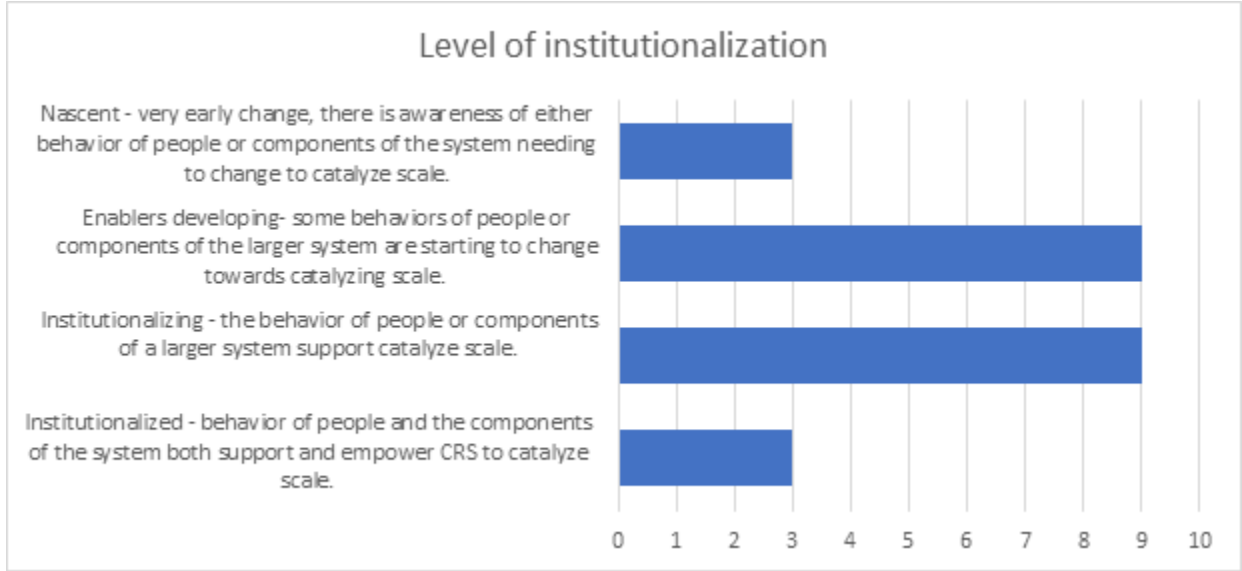
Figure 6: Levels of institutionalization

In the 24 cases, 58 % (14 out of 24) of respondents signified all three conditions (policy, power relationships and mindsets) were strengthened in their instance. Of those who reported that their level of institutionalization was either *enablers developing* or *institutionalizing* 66% (12 out of 18) co-signified that all conditions (policy, power relationships, and mindsets) had changed in their instance.

CASCADE developed research (52 cases from multiple sectors and geographies) from 2020 – 2022 which created empirical evidence and demonstrated that CRS has been working with initiatives to catalyze outcome at scale for over a decade. These case studies demonstrated that while not framed as "catalyzing outcomes at scale" when initiatives were being conducted CRS staff, country programs and regions were organically working in a manner that lead towards catalyzing scale. The recent 2030 strategy emerged to a large extent as a response to these Country Program initiatives[6].

Policy, Practice or Resource Flows

Multiple instances reflected change in policy, practice and resource flows that are leading to institutionalization of scale. These are reflected in the themes below:

- Recruiting for and strengthening scale competencies,
- Measuring progress towards and achievement of catalyzing scale,
- Strategic planning for catalyzing scale,
- Leveraging funding (discretionary and blended) for scale, and
- Linking projects to create a long-term scaled vision.

Recruiting for and strengthening scale competencies.

Finding: CRS has built the evidence base and begun to integrate scaling competencies for staff into various **HR processes** such as JDs, Professional Development, and programming that identifies and trains young talent. Further, a specific need to governance or political acumen has been identified.

Evidence: Through research, CASCADE identified staff *skills and characteristics* that would be critical to achieve a scaling mindset. The Bangladesh Country Program (CP) incorporated scaling principals into their HR staffing skills rubric. The CP included skills for catalyzing scale in JDs, scaling questions during interviews and incorporated scaling methods into initial program planning[1]. Further, CRS' International Development Fellows Program (IDFP) recruits young talent to prepare them for a career in international relief and development work at CRS or elsewhere. This 12-month Fellowship creates a pipeline of talent that will often stay with CRS for many years. Interviews during the IDFP selection process have now incorporated a question that is focused on CRS' definition of catalyzing outcomes at scale. The interview guide also prompts panelists to be on the lookout for skills and characteristics that relate to scale[2]. Finally, after Senior Management had taken a professional development course on scale the Pakistan team met for months discussing what catalyzing scale meant for their CP. After identifying steps they could take to institutionalize scale, they made it a requirement for JDs for new recruitment[1].

While considering how to *increase skills of the current work force* CASCADE developed Scale 101, which is a e-learning course available on CRS Learns that covers scaling terminology within CRS, supports key scaling concepts with case study examples, and supports a common understanding of what CRS means by Catalyzing Outcomes at Scale. This course is a preliminary building block to strengthen our workforce to collaborate with long-term permanent actors at scale[3]. There has been early success of staff with limited background with CASCADE using this course to generate learning in workgroup settings about scale[2]. Scale 102 is also being developed.

Both the research on Enablers and Challenges for Scale and on Skills and Characteristics for Scale reported political acumen (or thinking and working politically) was important for scale. However as is reported in the section on teams that support scale in section one, CRS has limited staff in these roles.

Measuring Catalyzing outcomes at scale

Finding: CRS is developing multiple ways to **measure scale** or **progress towards scale**. Methods are at the global, platform, regional and Country Program levels. However, for the most part (other than the use of Outcome Harvesting), these methods are all early in their development and need further time to be tested and developed. Further, while the influenced global results are a strong start and unique among our peers, at the global level we lack a system for strategic learning which would guide understanding of what the results mean and what we should change as based on the evidence.

Evidence: To measure strategic intent and **direction of influencing long term permanent** actors **towards catalyzing** outcomes at scale LACRO region commissioned a "Influence Report". This report represents LACRO's effort to collect and analyze quantitative evidence of its influence on policy and outcomes beyond its traditional population of project participants. The report covers a series of Key Performance Indicators (KPIs) on scale and financial leverage, as reported by over 30 institutional actors across seven countries in the region. Further, the region used the Most Significant Learning technique to understand what the region *was learning about influence and catalyzing outcomes at scale*[2] .

SCP 2 is developing a **Learning Framework** (MEAL system) for their global platform. At the same time as SCP 2 global is developing a TOC, two country programs are creating country program level MEAL systems (as a pilot). The global MEAL system is linked to SCP 2 country program MEAL systems through a "nested" theory of change. It is still too-early-too-tell the extent this will be effective. However, the intent is nesting the global and local TOCs will link to create strategic learning at both the country and global levels. Early signs are promising. Staff have reported use of the global TOC to create an understanding of strategic intent for SCP country programs and for managing towards outcomes and Country Programs have identified the TOC is making it clear how they could "measure" scale or progress towards scale[2].

Another way this is being measured is part of measuring catalytic results, CRS has developed indicators that measure the scale of outcomes we influence in addition to direct delivery.   These are aggregated across country programs. CRS has selected nine Global Results indicators that include an "influence" component. Other global results measure only direct and indirect participants. Each indicator is calculated differently.

This gives CRS a means to understand the number of participants we are impacting through catalyzing scale vis-a-vis direct delivery as well as our combined results[3].

SCP 5 has used outcome harvesting to be able to understand progress and change. This was chosen as the method for SCP 5 because when they began the initiative the who, what, where and when of the intuitive at a CP level was uncertain. They then identified they needed a means to assess progress retrospectively. While this has worked well there has been challenges to shift staff to use this method that are used to traditional M&E methods. Further, outcome harvesting is a method, not a full system as such it has limitations.

Strategic Planning for Catalyzing Scale

Finding: **Strategic thinking** has been key in creating the enabling environment for scale. It has been important to lay out parameters about the strategic intent and where and how to work together and contribute to scaled

impacts. When this has been done at a higher level global, regional, or SCP CPs, staff self-organize to align their efforts with the general approach.

Evidence: Europe, Middle East and Central Asia (EMECA), and LACRO, ASIA and Southern Africa Regional Office (SARO) include a focus on influence and *scale in their regional strategies*. LACRO's early focus on this is featured at the introduction of this report. In 2019, the Asia strategy prioritized working with the government and *shifted to a convening role*. In 2020, the ASIA regional meeting focused on influence and explored existing examples of influence in their CPs, staffing, and technical approaches. The region required all CPs to name one priority influence area in their country strategy by sector and key issue and draft an influence hypothesis. Country teams received reviews of their hypothesis and joined together for influence discussions based on their sector. Some of these influence hypotheses have evolved into scale initiatives[1].

The first paragraph of the EMECA strategy states "*Advancing local leadership is essential to realizing outcomes at scale*, rooted in our guiding principle of subsidiarity and instrumental in achieving agency commitments to the Grand Bargain and Caritas Internationalis localization commitments." Further, the strategy sets the expectation that "all our programming should be guided by a scale mindset" and goes on to list and describe "Key Principles of a scale mindset" [4].

The Malawi team developed a comprehensive ToC to capture *the strategic link* between its investment in housing programs in relation to other parts of the work. This ToC provided a common vision for change in the housing market system and used a blended approach to ensure all programs (direct delivery and market systems development) contribute to the same outputs and outcomes. Similarly, CRS Bangladesh embraced a strategic approach that focused on coordination and collaboration. They then used this framing to collaborate with SCP2 Homes and Communities and local partner, Caritas Bangladesh, to draft a Shelter and Settlement Strategy to have a long-term common vision that was inclusive and sustainable[1].

Further, as was mentioned previously the TOC for SCP 2 has not only started the path for measurement but has been reported to *create a shared vision* of what scaling for homes and communities entails. This has been utilized as a management tool to communicate strategic intent to Country Programs that seek to align programming with the global vision[2].

Leveraging funding for scale

Finding: CRS mobilizes private funding to support catalyzing scale as this is an area with limited funding from traditional institutional donors to be used for catalyzing scale to fill gaps where traditional funders do not fund. CRS uses discretionary funding and blended finance to leverage catalytic impact.

Evidence: Recent research found that 75% of a sample of 51 case studies *used discretionary funding* to supplement existing funding: supporting activities for scaling that projects had not planned or funders would not fund, such as maintaining key staff between traditional project cycles; conducting research to demonstrate success; convening key actors, or trying new approaches[6]. For example, this was used in including social cohesion as part of the Monthly Interval Resilience Analysis (MIRA), working towards institutionalizing market monitoring, using landscape-focused efforts in humanitarian contexts, and building our capacity for anticipatory action to mitigate impacts of food security shocks[1].

The recent response to the food crisis is another good example. CRS used *private funding to leverage non-traditional funder opportunities* to create innovative programming outside of traditional funding demands. This builds proof of concept that supports many newer approaches[2]. One example is working towards

institutionalizing market monitoring using landscape-focused efforts in humanitarian contexts and build our capacity to anticipate and mitigate the impacts of food security shocks[1].

Further, the EMECA strategy explicitly discusses resourcing catalyzing scale through private funds. The strategy states, "Leveraging for Impact: CRS will prioritize using private funds to play a catalytic role with local actors who can have an impact at scale, leveraging our resources to design or launch initiatives aligned with our scaling vision." This directly demonstrates leadership prioritizing investment in scale.[4.]

Another way *CRS leverages finances is through Blended Finance.* Alongside Vision 2030 In Their Own Hands, CRS Impact Investing has adopted an approach that increasingly utilizes blended finance – or philanthropic funding alongside investment capital – to achieve development results. In many cases, this blended finance takes the form of a technical assistance program or facility that works alongside an investment fund. The technical assistance is a key element in getting investment candidates ready for investment and providing necessary support to investees to ensure strong execution of their business plans and – ultimately – repayment of financing. For example, CRS has established two blended finance vehicles – Azure and Isidro – which have enabled CRS to *catalyze additional scale with our impact investing initiatives*. The Azure blended finance vehicle and use of grant funding to de-risk investments has enabled CRS to leverage outside investment capital of $11 million, and total funding (including grants) of $16.3 million.

Align projects to strategic intent of a long-term vision to effect impact at scale.

Finding: In many contexts CRS has demonstrated an ability to link together multiple projects within a longer-term scaled vision for gradual progress toward impact at a larger scale.

Evidence: Research conducted using case studies of journeys to scale found than in a little under half of cases Country Programs continued gradual progress toward scale through multiple donor-funded projects over time. This was not always done with an overarching scaling strategy in mind. Often private funds were used to maintain skeleton systems that were needed to bridge one funder to another to build momentum to gain funding and from there a vision for scale gradually emerged. From this finding, a model is being proposed by CASCADE to influence country strategy and project design processes. Ultimately, it would be better if funders had an 8-to-12-year funding cycle to create impact at scale. Until that happens, CRS is proposing to link traditional projects cycles under one overarching scale vision supporting permanent local actors to achieve discreet milestones toward longer-term scaled vision (See Figure 7 below)[7].
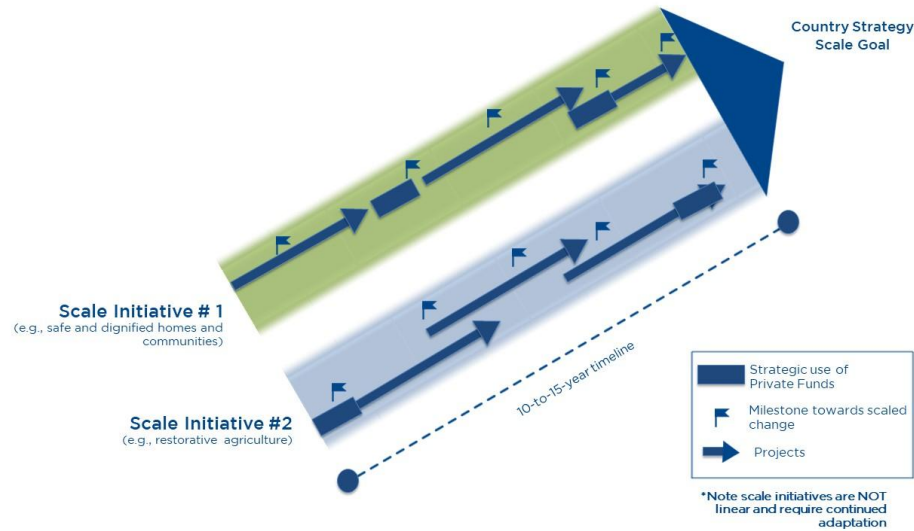
FIGURE 7: PROJECTS WITHIN A SCALED VISION

Relationships, Connections and Power Dynamics

Multiple instances reflect change in relationships, connections and power dynamics that are leading to institutionalization of scale. Evidence was used to generate the below themes:

- Un-siloing departments and technical areas to enable engagement at the scale of the problem,
- CRS is developing an understanding of our relationships with local systems actors on a continuum from direct delivery to catalyzing outcomes at scale.
- CRS is diverse: institutionalization doesn't mean standardization.

Breaking down silos

*Finding: **Breaking down silos*** (internally) and enabling engagement at the scale of the problem. CRS has seen success by engaging the problem at its scale and ***convening*** or ***un-siloing*** departments or sectors and SCPs. This often requires extensive work of identifying the strategic reason or particularly complex problem behind the purpose of convening and intentionally breaking down silos through taking strategic approaches that lead towards convening.

*Evidence: **Mission and Mobilization*** (M2) has a goal to "affect transformational change at scale for the world's most vulnerable through influencing US systems and structures and increasing private resources." Starting in the Fall of 2018, M2 worked collaboratively (***broke down silos***) with Operations, MARCOM, Charitable Giving and OverOps teams to develop a new strategy focused on scaling efforts to create meaningful policy change for the communities we serve. The team reported (and legislators confirmed) this ultimately resulted in coordinated structure and effectively influenced the *Global Child Thrive Act*, a law that mandates the integration of early childhood development into USG international humanitarian and development assistance programs[1].

The formal establishment of a ***private sector engagement technical team*** was another action that has broken down silos in a strategic grouping. The team supports colleagues across departments and geographies to integrate private sector perspectives into strategies, outreach and communications plans, and program design

and implementation. The Impact Investing and Private Sector Engagement team launched and continues to advance an effort to institutionalize systemic development at CRS in partnership with CASCADE, Global Supply Chain Management, Procurement, Agricultural Livelihoods, Humanitarian Response Department, Strategic Change Platform 2 (Homes and Communities), and IDEA. **Bringing together these groups** has been part of "changing the way CRS works" from being a deliverer of goods or services towards being more catalytic by working with and through local public, private, and nonprofit systems to make them stronger, more resilient, and impactful[1].

To work **at the scale of the problem**, sectors or technical areas work together to influence the wider system. For example, the Agriculture and Livelihoods team collaborated with SCP1 to **incorporate social cohesion & justice** into their updated technical resource. The updated version of this module will be called "Organizational Competencies for Collective Action". It is important to un-silo sectors. For development to happen, people need to trust one another, be able to listen and come to consensus and work together. This is the focus of SC&J and is necessary for all sectors to work at the scale of the problem[1].

CRS has developed approaches, such as the **Magic Triangle**, to emphasize un-siloing. The Magic Triangle is an approach to design that **brings together MEAL, Business Development, and Marketing and Communications** to achieve impact at scale collecting evidence and sharing it effectively to influence specific stakeholders. The Magic Triangle started in LACRO as an important tool for un-siloing to do catalytic work. It has been used in other regions, such as CARO. This spread of this tool is primarily done through staff that have used it in one region moving to another region or using it at a global level[1].

While still a nascent-level change, representatives from the PCS/LL, Systems/MSD, and Scale/CASCADE teams met face-to-face to discuss and i**dentify emerging ways to connect and integrate** these three distinct and important components of our Vision 2030: In Their Own Hands strategy. Within our agency, a growing body of evidence is emerging that suggests how our contribution to increasing the competence, confidence, and leadership of **local actors can only be maximized and sustained through a systems approach.** While this is still early, this group will work together to develop a common understanding, propose changes to our design, management and MEAL processes; and develop JDs for positions that have the skills and characteristics that are needed to work within systems[2].

The creative tension CRS faces within the spectrum of direct service delivery and working at scale.

Finding: CRS is developing an **understanding of the various ways we can contribute when we work with local systems at the scale** of the problem. Depending on the situation our role can be a mix of service delivery (direct delivery), connecting across and/or strengthening systems actors, and working to catalyze outcomes at scale. However, CRS needs to institutionalize how to use direct delivery and catalytic or facilitative methods in a more strategic and layered manner.

Evidence: While CRS still has a long way to go before fully institutionalizing the practice of being a catalyst for scale-- the concepts, ideas, and rhetoric have **gained traction in the past three years**. CRS will not stop delivering lifesaving support to those in need in favor of only playing a purely facilitator role. The question of how we fulfill our mandate on a continuum from direct service delivery to catalyzing outcomes at scale is in part a question about our **relationship with systems actors**.

In many contexts, CRS' direct implementation remains a priority. For example, in the food crisis response we see the scale of the problem requires a two-pronged approach of direct delivery and systems change[2]. To achieve impact at scale, it is critical to have the right staff and stakeholders for projects funded from direct delivery models to achieve long-term impact. The FASTER initiative and 4Children are examples of projects that hired staff to shift existing systems (and engage relationships differently)[9]. These examples show that often how we relate to systems actors will need to be a layered approach.

The Market Systems Development report[3] identified three models (figure 8) of how to **engage market actors**. Model 1 is relevant when markets no longer function, and Model 2 when markets are functioning sufficiently and people need immediate access to products and services. Model 3 represents a fundamentally different way of working. Here CRS influences the way in which markets work by facilitating market actors to change the way they operate so that they maintain improved practices after external funding ends. CRS does not lead, but plays a temporary, catalytic role, leaving behind a market that functions more effectively and more inclusively over the long-term.

CRS literature and interviews with CRS staff (as referenced in the MSD report) revealed the agency, often underutilizes the potential of Model 3, which involves more strategic and facilitative engagement with market actors and uses model 1 and 2 in stable environments which can disempower sustainable change. The newly developed CRS MSD approach strikes a balance between the three models, especially in stable contexts where market systems are more developed and fewer gaps exist in critical market functions. By applying Model 3 more frequently and rigorously, CRS can shift conditions that hold the problem in place and increase likely hood of catalyzing development outcomes at scale.
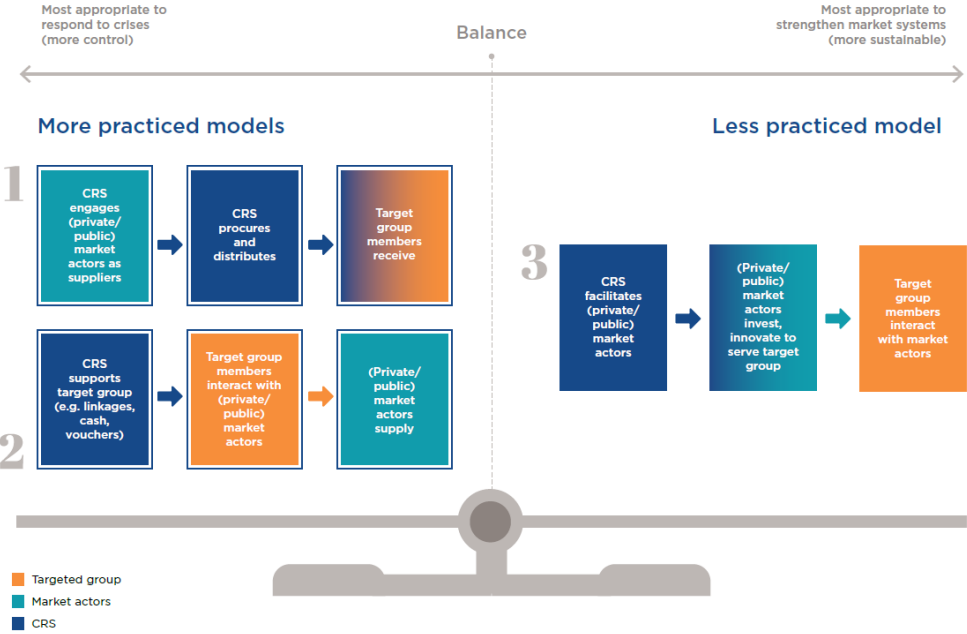

FIGURE 8: DIFFERNET CRS MODELS TO ENGAGE MARKETS

Organizational change: Institutionalization doesn't mean standardization.

Finding: CRS is an organization that places the needs of the people we serve at the highest priority. This includes practicing subsidiarity and recognizing those closest to the problem should be the ones solving it. As such institutionalization of scale in CRS will look different in every context.

Evidence: Not everyone is expected to scale everything, it depends on the region, and catalyzing outcomes at scale can look different in each region. For example, in Central Africa, CRS will play a more direct implementing role through 2030 to strengthen local leadership and sustainability. In Central Africa CRS works within existing systems and structures and begin to scale where CRS is not implementing. In the Asia region, CRS plays a technical assistance role to government and the government country strategies. These examples show how scaling can take hold at different times and within different contexts and remain flexible as contexts change or emergencies strike[5].

Knowledge, Attitudes and Practices (Mindset)

Multiple instances reflect change in knowledge, attitudes and practice (Mindsets) that are leading to institutionalization of scale. Evidence generated the below themes:

- The Mindset shift conversation starter has been used to create shifts for organizational practices.
- Case studies (development of and use) and professional development have been important to create mindset shifts
- CASCADE support for scale is built on the premise of plan more for the <u>use</u> than the <u>product.</u>
- Executive, Board Leadership and Regional Leadership promote catalyzing outcomes at scale which demonstrates a larger organizational mindset shift and creates incentive.

The Mindset shift conversation starter and reflection is a useful tool to generate mindset shifts and start conversations about what these shifts mean.

Finding: The explicit focus on understanding what is different about working at scale and supporting colleagues to understand the mindsets that most enable scale has been helpful to setting a shared understanding. The mindset shift conversation starter is a useful tool to frame an evolution of our way of working and thinking. This tool has been used in numerous ways and has contributed to changing organizational practices.

Evidence: To help support this shift that is required for scale CASCADE created a **Mindset Shift One-Pager and Workbook** to spark conversation and to provide the user a place to think about and plan for the ways to shift, when appropriate, from an implementation role where we are achieving outcomes directly, to a catalyst role where we amplify the ability of other actors to achieve outcomes at scale. These materials help support colleagues to think about the differences between being the "do-er" and being a "catalyst." These resources are being used throughout the agency to generate conversation about the differences between a more traditional project implementation mindset and a strategic catalytic mindset. In May of 2023, The Mindset Shift documents were used at the EMECA Strategy Planning meeting to incorporate scaling into their thinking as they embarked on a strategic planning process. The region then picked up many of the mindset shifts presented in the conversation starter and framed them as principles in their final regional strategy. See Figure 9 below for an excerpt from the final EMECA regional strategy published in July 2023 stating that "all our programming should be guided by a scale mindset" followed by a list and description of each mindset.

Catalyzing Outcomes at Scale

Catalyzing outcomes at (optimal) scale: CRS collaborates with, mobilizes and accompanies a variety of stakeholders, within existing systems, to support local actors to achieve humanitarian and development outcomes that are equitable, inclusive, and appropriate for the size of the problem.

CRS' vision for transformational change is grounded in supporting local actors to achieve humanitarian and development outcomes at optimal scale. Optimal scale differs from traditional definitions of scale, which focus on reaching the greatest number of people possible; instead, optimal scale focuses on reaching the scale appropriate to the size of the problem, balancing the magnitude, variety, equity and sustainability of impacts in a way that stakeholders endorse. Across our diverse country contexts, our transition to catalyzing outcomes at scale will look different and use a phased approach. In a given CP, some projects may not immediately have specific scale targets, reflecting our programming diversity and focus on local priorities. Yet, all our programming should be guided by a *scale mindset* that moves us toward our strategic vision.

> **Optimal scale focuses on reaching the scale appropriate to the size of the problem, balancing the magnitude, variety, equity, and sustainability of impacts in ways that stakeholders endorse.**

Key principles of the *scale mindset* include:

- *Commit to a Problem:* CRS will commit to addressing a problem rather than to any specific approach or methodology for doing so.
- *Catalyzing Outcomes:* CRS will systematically transition away from an implementation role, where we achieve the outcomes ourselves, to serve in a catalyst role, where we amplify the ability of those closest to the issue to achieve the outcomes.
- *Building Trust:* CRS will build trust with and between stakeholders involved in solving the problem and seek collaboration opportunities to influence change at scale. Rather than competing for funding to directly serve more people, CRS will mobilize resources with and for strategic stakeholders to tackle the problem together.
- *Strategic Planning:* CRS will focus on strategic planning, rather than only project planning. CPs will develop a strategic vision to catalyze change for an identified problem, recognizing that change likely requires more time and resources than one project.
- *Systems Thinking:* CRS will analyze the multiple systems that influence the identified problem or that set the conditions that hold the problem in place, avoiding siloed sectoral thinking. Working within systems is a precondition of reaching optimal scale. While not all projects may have a specific scaling vision, they should all be grounded in systems thinking.
- *Coalitions and Networks:* CRS will build and maintain long-term relationships with and between stakeholders in the system who play a role in delivering outcomes at scale. CRS will move away from the mindset of engaging implementing partners (i.e., partners with only a project-specific role) and toward strategic and diverse stakeholder engagement that serves the vision for change.
- *Facilitating Collaboration:* CRS will facilitate collaboration with and between stakeholders involved in the multiple systems addressing the problem, rather than viewing ourselves as managers overseeing others' work.
- *Leveraging for Impact:* CRS will prioritize using private funds to play a catalytic role with local actors who can have an impact at scale, leveraging our resources to design or launch initiatives aligned with our scaling vision.

FIGURE 9: EMECA PRINCIPLES OF SCALE MINDSET

Another example of how regions are using The Mindset Shift resources can be seen in the acute food crisis from 2022 to 2023. Regions such as the Sahel and East Africa are facing combinations of food insecurity, compounded with drought; lack of governance; or elevated food prices that lead to near famine. CRS is responding to urgent needs while also thinking and working at a systems-level on some of the systemic conditions that hold the food insecurity problems in place.

Working at scale requires a substantial Mindset Shift. CASCADE, SCPs and Change Agents are promoting specific mindset shifts. For this Mindset Shift to take hold across the agency, their needs to be proper buy-in and incentive from every level of management. For example, in the EMECA region as part of the annual budgeting process, the Regional Director included a question in one of the required worksheets asking Country Representatives to state for every privately funded request whether it related in any way to scale or not and to explain. Simply including this question signals to country leaders that scale is a priority for use of private funds[2].

Case studies and professional development are important for shifting Mindsets.

Finding: Case studies of CRS' experiences of working toward scale and professional development based on lessons from these and scale literature have been used to shift mindsets and staff have applied their new understanding to change organizational practices.

Evidence: CASCADE developed 52 case studies of instances of scale across regions and sectors in CRS. These case studies were a base of knowledge which was used for other research products. Also numerous respondents of the institutionalization study also credited the case studies with shifting their mind-set for example Bangladesh CP credited the case studies as contributing to informing its understanding of scale and by doing so contributing to its investment for both CRS and Partner ie. Including Scaling questions during interviews, strategy development and coordination efforts. Further, others reported case studies helped colleagues understand and see what they can do to catalyze scale and noted the fact that these are CRS experiences which demystified the subject matter making it feel more feasible[4]. Finally, respondents also reported that the process of telling the story for the case study itself built their understanding of scale[8].

Participants (speakers and students; including senior leaders) of a professional development course reported the course aided them to gain a common understanding of what CRS means by catalyzing outcomes at scale, how that differs from other ways they may have been thinking about scale and learned of practical examples of how they can lead teams to work toward scale. Leaders who have taken this course have gone on to influence others in their CP/teams[8]. For example, the Pakistan Country Program were inspired by these courses to consider as a Senior Management Team what the new understanding of scale meant for them practically.   They met for months to do so. This turned into them ensuring every JD has specific skill requirements related to scale[1].

Executive, Board and Regional Leadership promote catalyzing outcomes.

Finding: Senior organizational leaders are promoting scale. This not only demonstrates vision for and commitment to scale at the highest levels of the organization but creates incentives for all those who report to them. This is happening within headquarters and regions as reflected by all regional Annual Program Plans (APP) referencing scale as part of their plan for the coming year (FY 2024).

Evidence: A presentation was given to the board in the March meeting on what it means for us to work at scale. One board member noted that "this seems perfectly aligned to our identity" and describe well in his own words that this means we're not the ""doer"" but ""leaders"" (this was later discussed as ""conveners"" and ""facilitators").

Board members then asked:

- How are we preparing our staff around the world to play this role?
- It seems like an important cultural shift how are we changing mindsets?

Another respondent had said he had felt confused about what we meant by "scale" early in the strategy but now it makes sense and fits with our identity and the way we should be working[2].

On the March 2023 quarterly Overseas Operations meeting there was extensive discussion about Scale and Influence and the extent our results are leveraging impact. Evidence was reported using the global results and global influence results. On this discussion twenty-six times the word influence was used and eight times scale. This discussion was initiated by reflecting on agency KPIs, which the Global Results reflect. The KPIs and what we are measuring show what we increasingly value[2].

Further, the president regularly in board meetings and leadership meetings promotes catalyzing scale as a top priority and challenge for CRS[8].

Finally in the 2024 Regional Annual Program Plans all regions integrated scale as part of their planning. This reflects regional buy-in, resourcing, and an annual strategic planning process moving programming towards work at scale[3].

Overall Gaps and Lessons

As mentioned previously, CRS is on track to become an organization that catalyzes outcomes at scale. CRS is currently in year four of a twelve-year strategy. Organizational change of this type takes several years. By now (year 4), we should have seen some examples (instances) of how our new organizational practices (institutionalization) are working in scale specific initiatives and this report demonstrates we have. However, we are still early in adopting this as a way of working for the wider organization. Below are some of the main gaps and lessons:

- While significant expansion of mindsets is being witnessed around the world among CRS managers and Staff in favor of systems and scale thinking, this is seen primarily among teams actively working on scale initiatives and there is still a long way to go for this to be institutionalized[8].
- CRS staff generally have the impression that scale initiatives must be primarily privately funded. We know this is not true, but this perception makes it less attractive to CP and Regional leaders who are mandated to reduce use of private resources and attract more donor funds[8].
- While there are instances of use of design processes, assessment, MEAL and HR to enable scale, these are not yet institutionalized or integrated into most standard processes in CRS this not only impacts our ability to catalyze outcomes at scale, but it also impacts CP level motivation and incentives to work in this way as they do not have guidance[8].
- Technical resources are important to have, but the process for making them known, practiced and shared is just as if not more important.- Not all resources that are created are widely adopted. As a result, it is important to build and maintain ongoing relationships with teams who are working on catalyzing scale so that we can effectively connect them to and accompany them with use of resources in a timely manner[5].
- Within Vision 2030: In Their Own Hands there are siloes between strategic initiatives which if reduced would likely increase CRS ability to catalyze scale. While there are some early initiatives to un-silo, they

are based on volunteers and lack a birds-eye / strategic view. This can lead to exclusion of key staff or departments that should be included in strategic discussions not being included, which can reinforce the silos.
- Measuring collective impact requires a high degree of strategic learning. Influenced outcomes from CRS Global Results are unique among our peers as a way of measuring the results to which our influence is plausibly contributing [7]. However, CRS does not have a whole organizational learning framework.

Findings Summary:

Overall

- To institutionalize scale, multiple conditions within the organization (policy, practice and resource flow; power relationships, and mindsets) need to be changed to reinforce one another. Of the 26 instances of institutionalizing scale, eighteen submissions reported changes across all conditions in their specific story.
- After more than three years of strategic focus on catalyzing outcomes at scale, we would expect to see instances of change starting to emerge as an indication of our progress. This expectation is confirmed by numerous instances in this report and the 52 case studies generated by CASCADE that demonstrated empirical evidence about CRS catalyzing outcomes at scale long before Vision 2030: In Their Own Hands. Further, the case studies and other evidence in this report demonstrates Vision 2030: In Their Own Hands was responsive to Country Program and regional innovation towards working with catalyzing outcomes at scale. We are **on-track** and moving in the right direction despite being early in this long-term change process.

Policy, Practice or Resource Flows

- CRS has built the evidence base and begun to integrate scaling competencies for staff into various **HR processes** such as JDs, Professional Development, and programming that identifies and trains young talent. Further, a specific need to governance or political acumen has been identified.
- CRS is developing multiple ways to **measure scale** or **progress towards scale**. Methods are at the global, platform, regional and Country Program levels. However, for the most part (other than the use of Outcome Harvesting), these methods are all early in their development and need further time to be tested and developed.   Further, while the influenced global results are a strong start and unique among our peers, at the global level we lack a system for strategic learning which would guide understanding of what the results mean and what we should change based on the evidence.
- **Strategic thinking** has been key in creating the enabling environment for scale. It has been important to lay out parameters about the strategic intent and where and how to work together and contribute to scaled impacts. When this has been done at a higher level global, regional, or CP, staff self-organize to align their efforts with the strategic approach.
- *CRS mobilizes private funding to support catalyzing scale as this is an area with limited funding from traditional institutional donors. This funding is used to fill gaps where traditional funders do not fund. CRS uses discretionary funding* and blended finance to leverage catalytic impact.
- In many contexts CRS has demonstrated an ability to link together multiple projects to create a longer-term scaled vision.

Relationships, Connections and Power Dynamics

- ***Breaking down silos*** (internally) and enabling engagement at the scale of the problem. CRS has seen success by engaging the problem at its scale and ***convening*** or ***un-siloing*** departments or sectors and SCPs. Identifying strategic partnerships that un-siloing often requires extensive work of identifying a particularly complex problem (un-siloing is done to approach the problem at its scale).
- CRS is developing an **understanding of the various ways we can contribute when we work with local systems at the scale** of the problem. Depending on the situation our role can be a mix of service delivery (direct delivery), connecting across and/or strengthening systems actors, and working to catalyze outcomes at scale. However, CRS needs to institutionalize how to use direct delivery and catalytic or facilitative methods in a more strategic and layered manner.
- CRS is an organization that places the needs of the people we serve at the highest priority. This includes practicing subsidiarity and recognizing those closest to the problem should be the ones solving it. As such institutionalization of scale in CRS will look different in every context.

Mindsets

- The explicit focus on understanding what is different about working at scale and supporting colleagues to understand the mindsets that most enable scale has been helpful to setting a shared understanding. The mindset shift conversation starter is a useful tool to frame an evolution of our way of working and thinking. This tool has been used in numerous ways and has contributed to changing organizational practices.
- Case studies of CRS' experiences of working toward scale and professional development based on lessons from these and scale literature have been used to shift mindsets and staff have applied their new understanding to change organizational practices.
- Senior organizational leaders are promoting scale. This not only demonstrates vision for and commitment to scale at the highest levels of the organization but creates incentives for all those who report to them. This is happening with global teams and regions as reflected by all regional Annual Program Plans (APP) referencing scale as part of their plan for the year.

Recommendation for CRS:

The recommendations below come directly from the findings (above) which are linked directly to the evidence presented in Section 2. They are done in this way to be responsive to the current progress and gaps and also be made based on our current trajectory.

- **R1)** CRS leaders in CPs, Regions and Global Teams should continue to prioritize creating a shared understanding of what CRS means by catalyzing outcomes at scale (while keeping a focus on people who are vulnerable) and how all our regular work can set the foundation for being a catalyst when done intentionally. We have learned from LACRO Region that consistent focus, repetition and technical understanding are needed for this to remain top of mind for colleagues in their day-to-day work. For example, *CRS should focus on institutionalizing HR processes for scale*. Further *the technical resources that have been used for shifting mindsets should continue to be integrated as a base for all processes within CRS such as prerequisites for design or MEAL systems for scale. Finally, CRS should increase technical abilities in governance as this is a vital part of working to shift systems and catalyze scale.*
- **R2A)** CASCADE should develop a way to track and learn about progress towards institutionalization of scale that accounts for the wider organization.

While we can make an evidence-based claim that CRS is on track toward institutionalizing scale, the evidence is based on "instances" coming mostly from those working on scale specific initiatives or who support scale initiatives indirectly.   This is appropriate for this stage of the strategy and the change process. However, we do not currently have a means of measuring change within those who have not been identified as working on scale specific programming in the wider agency.

- **R2B)** CRS should develop a cross departmental system for strategic learning about the extent we are progressing towards and catalyzing outcomes at scale. This system should be data light and strategic learning heavy, continuing to measure a few key indicators (using the influence global results and developing qualitative counterparts to these results). The system should place a higher premium on understanding what our progress means towards catalyzing outcomes at the scale of the problem and how we can change how we are working to do so.

- **R3)** CRS needs to develop common understanding (including language) systems change and how to progress systems change in our work (through design, management, and measurement) across the agency and across sectors.

- **R4)** Particularly complex issues require responses at the ***scale of the problem***, this often requires convening departments or technical areas that traditionally did not work together to understand and respond to the multi-dimensional nature of the problem. Increased attention should be given to which departments or teams should be un-siloed to work at the scale of the problem more effectively. The below are three areas that should consider or continue intentional efforts to un-silo:

  - **o** As there are numerous teams that are working on interrelated issues, but often work in silos, at the level of Vision 2030: In Their Own Hands, the strategy team should consider which strategic initiatives or components within strategic initiatives would benefit from increased collaboration to institutionalize scale and enhance CRS' ability to engage at the scale of the problems we seek to address.

  - **o** CASCADE, local leadership, and Market Systems Development teams should continue to work on un-siloing efforts around the common framing of systems change, so that colleagues in country programs around the world share the same understanding of our aspiration to be a catalyst and the role local leadership and systems play in catalyzing outcomes at scale.

  - o Humanitarian response, development activities, and operations should continue to unslio to ensure continuance of a scaled vision that focuses on sustainable systems even in times of crisis.

  - o At the level of scaling initiatives, SCPs should build on process that is emerging as part of SCP 1. During the analysis of the problem in a Country Program, there should be consideration if multiple SCPs or sectors should be a part of the design and implementation process. While this relates to all SCPs, SCPs should continue to consider integrating SCP 1 whenever possible to consider working together to work at the scale of the problem.

- **R5A)** *CASCADE should continue to prioritize development and accompaniment of processes for strategic planning, design, and adaptive management and MEAL for scale. These will gain a higher level of importance as the intentional focus for organizational strengthening goes from SCPs to the wider organization. However, while guidance and documents are developed the priority should remain on accompanying the process, as the learning conversations that come up within the process are often more important than the product.*

- **R5B)** *Country or Regional Strategies focused on scale should be accompanied by an adaptive multiyear funding plan. Currently the APP process is annual. This limits the country program's ability to project for longer term change initiatives.* As one CRS staff member identified, "To allow people to innovate and take greater risks you have to give them more security" - Anne-Marie Slaughter
- **R6A)** *CRS should use discretionary funds to put in place a "scale" fund. This fund can complement non-SCP specific scale related initiatives that are showing promise but need additional investment to advance to the next level.* This should **not** be a pilot fund (which typically is used to innovate and scale) but rather can be used to fit unique needs (such as funding staff required between donor funded projects, generating evidence, and demonstrating change CRS approaches bring about) that are identified in a scaled vision.
- **R6B)** CRS should continue to explore ways blended finance principles can be more widely applied to leverage investment capital from local and international actors and increase the overall funding available for scaled outcomes aligned with Vision 2030: In Their Own Hands.
- **R7)** *The service delivery to institutionalizing catalyzing scale continuum that is described on page 17-18 needs to be further explored to fully understand the ways our experience from service delivery contributes to setting the foundations to be an effective catalyst for scale achieved by others. Further, CRS should consider how to design and adapt throughout implementation using different approaches in this continuum to ultimately catalyze scale. This would likely entail sequencing and/or layering these approaches to achieve long-term scale.* The MSD report, which was a multi-departmental effort is a good starting point to consider the mix of direct delivery and facilitative approaches (See figure 8) to program in a scale sensitive manner.
- **R8)** In the next review of the Vision 2030: In Their Own Hands strategy, it will be important to consider how the organization institutionalizes functions that support scale specific initiatives within CRS' organizational structure post 2030.

Recommendations for Funders

To have a higher likelihood of achieving the SDGs funders should make a series of shifts in institutional practices for managers towards enabling them to work at catalyzing humanitarian and development outcomes at scale. Below are the primary recommendations:

- **RF 1)** *Funders should carry out activities that are aimed at catalyzing outcomes at scale. Further, they should consider expanding their definition of how they go about working at scale to include concepts such as catalyzing response at the scale and nature of the problem and shifting the conditions within a system that holds the problem in place.*

  CRS created a definition of how we as an institution go about contributing to scaled outcomes based on evidence and decades of experience within country contexts. This definition is: *CRS collaborates with, convenes, and accompanies a variety of stakeholders within systems to support local actors to achieve humanitarian and development outcomes that are equitable, inclusive, and at the scale that is appropriate for the size of the problem.* This definition of how CRS contributes to scale differs from a traditional understanding of scale which focuses on innovation and replication, which could increase the number of people benefiting from a solution without shifting the underlying conditions that hold the problem in place. While this leads to an earlier spike in success in the long term, it can be less sustainable.

- ***RF 2)*** *Funders should consider increasing the **time horizon** on funding agreements. Scale takes time and 3–5-year projects does not provide for the time it takes.*
- ***RF 3)*** *Funders need to consider how they will shift their **staff's mindsets and incentivize** themselves becoming organizations that support catalyzing permanent local actors to affect change at scale.*
- ***RF 4)*** *Funders should consider designing (or be open to integrating recommendations from implementors) **funding agreements** with high levels of **adaptability in mind** (with the possibility and at times intention of changing planned outcomes and the ability to measure with adaptability in mind).*

    Catalyzing scale requires systems for adaptive and outcomes-based management and measurement, long time horizons, using various influence approaches, and maintaining staff with relationships over a long period. These are all elements that funders and implementors should consider in a funding agreement and in design of initiatives.
- ***RF 5)*** *Funders should consider providing **institutional strengthening funding to** enable intermediary organizations to work more effectively as a catalyst for outcomes that can be achieved and sustained by permanent local actors (local leadership).*

    Legacy grants from GHR Foundation have had tremendous impact on CRS' strategic direction. The first three years of CASCADE (2020-2023) were funded by GHR Foundation and they have committed continued funding for institutional strengthening through 2030. The flexibility, long term partnership (even prior to CASCADE), and long-term time horizon of this funding has provided CRS with resources that complement all the private investment made through our Vision 2030 strategy to make a substantial organizational shift towards being a catalytic organization.
- ***RF 6)*** *Funders should consider designing funding opportunities that challenge implementing partners to contribute, collaborate, engage toward collective impact with systems actors and not create time-bound parallel systems to achieve short term results.*

    Funders have influence over organizations that goes beyond the discrete project. While not true of all sectors and all funders, there are many examples of where the priorities of funders gave CRS the incentive needed to pursue working in a different way or to feel the freedom to do so. Early work in HIV and AIDS through PEPFAR, the competition with the MacArthur 100&Change Challenge, a major funder in the LACRO region were all examples of situations in which donors supported CRS shifting towards working collaboratively, with systems actors on the conditions that hold a problem in place to catalyze outcomes at scale. While this might have initially been partially externally inspired, CRS' vision 2030 strategy made internal commitments to not only allocate private funds to this vision for impact at scale but raise additional private funds to support the learning journeys of the 6 strategic change platforms.

Annexes

Annex 1: CASCADE funding to SCPs

*CASCADE funding to SCPs

SCP	Total funding	Initiative(s) funded
Fostering Just and Cohesive Societies	$48,384	**Fostering Just and Cohesive Societies** mapped and prioritized networks, fora, and coordination bodies through which it can exert most influence and, based on this and consultations, develop an influence strategy.
Building Safe and Dignified Homes and Communities	$250,000	Leveraging Markets for Scale: The Homes and Communities team contracted the Mazi Group, markets system development experts, and produced a strategic framework to leverage market systems for scaling. The framework and tools are being tested in four countries. Learning from these pilots has informed practical updates to the framework and tools to make them more user-friendly and integrated with existing tools.
Transforming Livelihoods and Landscapes	$125,000	**Soil quality indicators:** Livelihoods and Landscapes has developed a set of indicators to be monitored at baseline and endline in focus countries. Progress on these soil quality indicators should provide strong evidence for the approaches used to transform landscapes and livelihoods and will be important ingredients for influencing others to take these approaches to scale.
Accelerating the End of Malaria Across Sectors	$200,000	**Malaria and Nutrition Integration** CRS Tanzania will collaborate with the ministry of health to build on initial successes integrating nutrition and malaria services. Together they will demonstrate that Malaria Community Case Management can be offered together with community nutrition interventions through Village Health and Nutrition Days, saving families and health workers time and resources and offering a more holistic service. This joint demonstration and learning process will lead to updates to government policy and protocols which will be followed by any organizations working in nutrition or malaria nationwide.
Strengthening Families for Thriving Children	$290,872	**Champion Framework**: Developed a framework and monitoring tools for "Champions" who influence others towards family-based care for children. **Scale Framework**: Developed an evidence-based scaling framework that provides concrete examples and practical guidance for implementing scaling vision at the country, regional, and global levels. **Accompaniment, documentation and learning from support to Sisters' transition process**: Documented lessons learned, and tools developed in the process of accompanying the sisters of the Good Shepherd (RGS) in the transition from residential to family care throughout Mexico. **Faith and Family project**: with *Georgetown University Collaborative on Global Children's Issues,* deepening scholarship and public understanding of the role of Catholic-affiliated organizations and entities in the propagation and prevention of child-family separation.

MAINSTREAMING SCALING INITIATIVES CASE STUDIES

Annex 2: Strength of Evidence Rubric

Level	Description
Strong evidence	Evidence derived from multiple reliable sources such as independent reviews/evaluations, quality assured monitoring data, implementing reports validated by monitoring trips (or remote monitoring tools), and independent research.
Adequate evidence	Evidence derived from a more limited range of sources such as implementing agency reports, records of monitoring visits (or remote monitoring tools) or records of discussions with partners and other stakeholders.
Weak evidence	Includes non-validated assertions, personal opinions and anecdotes.

Annex 3: CASCADE Theory of Change

FOUNDATIONAL ACTIVITIES | **OUTPUTS** | **IMMEDIATE OUTCOMES** | **INTERMEDIATE OUTCOMES** | **END OF PROGRAM OUTCOMES** | **LONGER TERM CHANGE BEYOND 2030**

CRS' Scale-Specific initiatives contribute to impact at scale achieved by system actors

CRS' Scale-Sensitive initiatives are designed to work with system actors, with scale in mind

Longer Term Change Beyond 2030:
- Permanent local actors support populations to live in dignity
- CRS is known externally as a catalyst for outcomes at scale that enable communities to live in dignity
- CRS increases sustainable impact and localization of humanitarian and development work through catalytic and systems approaches

Foundational Activities:
- CASCADE supports CRS colleagues to share a common understanding of catalyzing outcomes at scale
- CASCADE supports leadership to lead a cultural shift toward longer-term planning and CATALYTIC investment
- CASCADE reduces silos with coordination, collaboration and learning across teams and geographies
- CASCADE supports the diversity of contexts and ways in which CRS catalyses outcomes at scale

Outputs:
- Guidance & accompaniment on methods for measuring contribution to outcomes at scale
- Guidance & accompaniment on methods for monitoring progress on influencing outcomes at scale
- Mindset shift & leadership skills for catalyzing outcomes at scale targeted to CRS leaders
- Scale integrated into professional development programs, competencies, capabilities, onboarding, etc.
- Region-specific plans for catalyzing outcomes at scale
- Influence strategy focused on specific institutional and private donors (IDEA & CG)
- Analysis process to discern and communicate (internally & externally) when direct work and when catalytic work is needed and when to sequence/integrate both
- Guidance & accompaniment on using a systems approach in designing and implementing scale initiatives
- Scale initiatives draw on CRS' partnership and capacity strengthening resources to support local entities as the ultimate "do-ers" at scale.

Immediate Outcomes:
- CRS prioritizes impacts we catalyze as much as those we directly achieve
- CRS has a broadened set of methods to monitor influence and measure impact and scale
- CRS leaders (CP, Region, Global) incentivize catalytic work (risk taking, learning, adaptation)
- Staffing structures and HR systems are aligned to catalytic work

Intermediate Outcomes:
- CRS staff in Strategic Change Platforms, Regions and Country Programs implementing scale initiatives are equipped to catalyze outcomes at scale
- CRS has systems, policies and processes that support initiatives to catalyze outcomes at scale
- CRS Influences donors and coordinating bodies to understand the importance of local leadership in sustainable scale
- CRS has private funding mechanisms to enable scale-specific, and supplement scale-sensitive work

End of Program Outcomes:
- Private and institutional donors dedicate funding to scale-specific and scale-sensitive initiatives
- CRS has capabilities, systems, policies and processes to design and implement learn from initiatives that work on or within systems with scale in mind
- CRS adopts a systems approach in designing, implementing and learning from initiatives

PRINCIPLES
- Catalyst for scale of others not do-er at scale
- Local leadership
- Systems thinking
- Learning and adaptation
- Inclusive and equitable outcomes
- Optimal Scale not maximum scale
- Projects as building blocks to larger **strategies** to catalyze outcomes at scale

RISK MITIGATION
- Intentional synergy between our catalyzing role and direct implementation avoid contradictory strategies
- Remaining sufficiently focused on SCPs and scale initiatives (early adopters) and not defusing efforts
- Making the time and space for reflection and learning on catalyzing scale
- Increasing our capacity in adaptive management and non-traditional MEAL approaches
- Bring our board and donors with us as we learn so that catalytic work is supported and funded