

MAINSTREAMING SCALING IN FUNDER ORGANIZATIONS

LESSONS FOR PRIVATE FOUNDATIONS

Larry Cooley, Richard Kohl, and Johannes Linn
May 2026



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by

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For the Scaling Community of Practice

www.scalingcommunityofpractice.com

¹ This summary draws directly on the documentation prepared for the mainstreaming initiative and posted on the Scaling Community of Practice website (see <https://scalingcommunityofpractice.com/mainstreaming-initiative/>). Two of the authors (Cooley and Linn) are Co-Chairs of the Scaling Community of Practice and the third (Kohl) is the SCoP's Director of Strategic Learning and Practice. Together, the three co-led the SCoP's initiative on mainstreaming scaling in funder organizations with the guidance and support of a High-Level Advisory Group and a small Steering Group of senior foundation representatives -- Bernadette Moffatt from ELMA Philanthropies, Abe Grindle from Co-Impact, Muhsin Hassan from Lever for Change, and Laura Lanzerotti from Bridgespan. The authors greatly appreciate the inputs they received from these groups and from the Secretariat of the Scaling Community of Practice while bearing sole responsibility for the views expressed in this paper.



A. Introduction

The world faces enormous development, humanitarian, and climate challenges at the very time when traditional sources of international financial support are suffering major cutbacks. Likewise, governments in the Global South, the private sectors and civil society are under stress, while communities face major challenges to their cohesion and traditions of civic culture. This puts a premium on ensuring that the available financing shifts its focus from funding innovative standalone projects to increasing the capacity of governments, social enterprises, and the private sector to deliver long-term impacts that address global problems sustainably and at the scale of the problem.

A recent report by the Scaling Community of Practice (SCoP) assesses to what extent and how 28 public and private funders (see the Annex for a full list of case studies) have mainstreamed consistent approaches to scale and scaling into their policies, practices and priorities and synthesizes lessons from their experience.² Case studies for this mainstreaming initiative were purposively selected to examine a wide range of funder organizations known to be making serious efforts to mainstream scaling into their policies, programs and priorities. Following an “action research” approach, funder staff wrote or supported the writing of all 28 case studies.

This note focuses specifically on the implications of the mainstreaming initiative for private foundations that support international development. These organizations potentially play key roles in supporting the pursuit of sustainable impact at scale. The paper concludes that they have made notable progress in their quest for playing a catalytic role, but that in general they have potential to go much further in their pursuit of supporting transformational change in the countries and sectors where they provide support.

The note first summarizes in Section B the general findings and lessons for funder organizations that also apply to philanthropic organizations. It then presents, in Section C, findings and lessons that apply specifically to private foundations.

B. General Findings and Lessons

The main findings and lessons of the mainstreaming initiative can be summarized as responses to the key questions addressed. These findings apply to funders in general, including private foundations working in developing countries.

1. To what extent have funder organizations mainstreamed a systematic focus on scaling?

- Scaling is a topic of rapidly growing and now widespread interest in the funder community.
- Overall, funders have made the most progress in incorporating a scaling focus in statements by agency leadership and embodying it in mission statements. There is frequently a gap between

² See [Mainstreaming Scaling in Funder Organizations: A Synthesis Report – Scaling Community of Practice](#). [Mainstreaming Scaling in Funder Organizations: The Policy Brief – Scaling Community of Practice](#) (2026) The case studies included 3 multilateral development banks, 3 bilateral official development finance agencies, 6 official vertical official funds, six innovation and research funders, 2 large international NGOs (INGOs), and 8 private foundations.



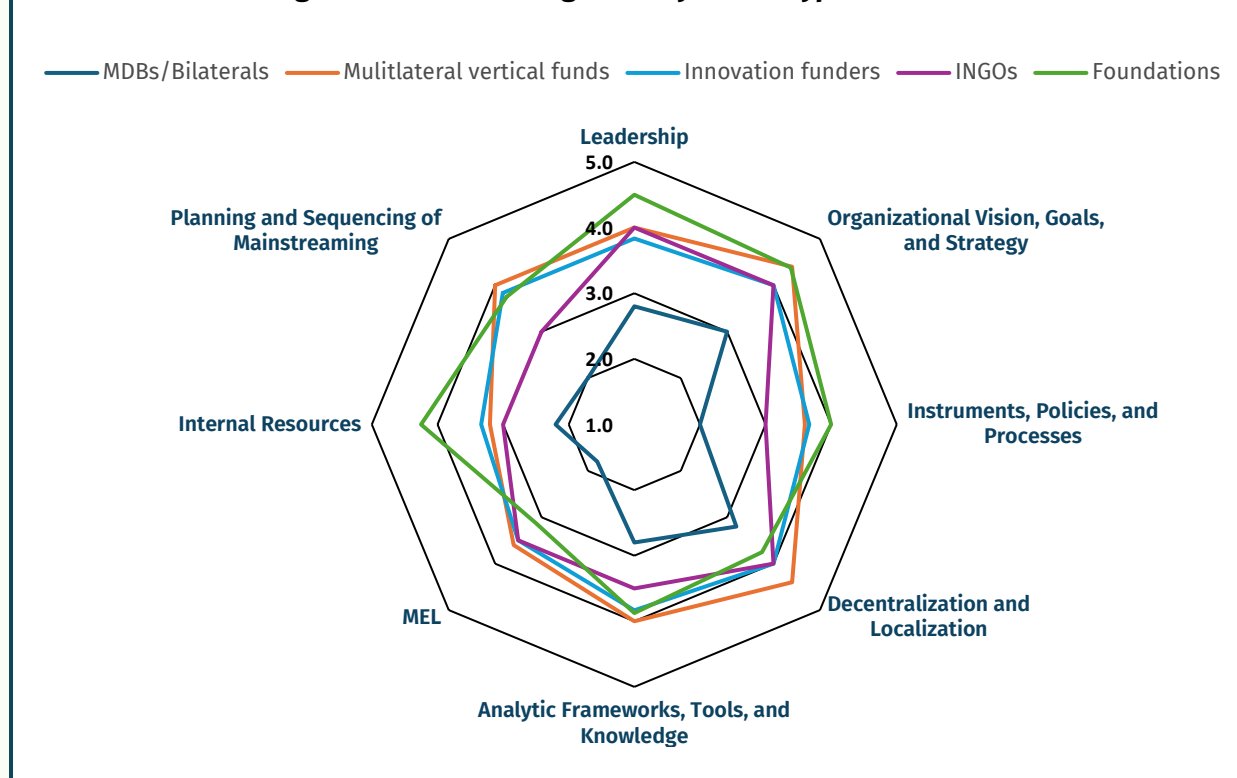
high-level aspirations and implementation of the needed internal changes in incentives, systems and metrics.

- Trade-offs, such as scale and equity, scale and quality, etc., do not get the attention they merit.
- Insufficient attention is paid to funder collaboration, to handoffs among funders, and to engaging institutions with the ability and incentive to fund and provide services over time.
- The distinction between transactional and transformational scaling is of central importance but not widely recognized. Transactional scaling focuses on one off increases in impact, measured against a base line rather than a long-term goal. Transformational scaling requires a long-term vision of scale and scalability from the beginning and measures progress in terms of impact and progress relative to the long-term goal. It has an explicit and sustained focus on systemic change, persistence in engagement, a focus on localization and partnerships, and frequent adaptation in response to lessons learned.
- An AI-based analysis of the case studies, drawing on key elements of the Mainstreaming Initiative's Tracker Tool,³ allows a comparison of mainstreaming across types of funders, by rating them according to eight criteria of mainstreaming drivers (see Section B.4 below). Figure 1, on the next page, summarizes the results of the AI analysis. It shows that foundations, innovation funders, and vertical funders are farthest along in mainstreaming scaling, followed by INGOs in the middle, while Multilateral Development Banks and bilateral official funders lag behind. For foundations, leadership, vision and strategy, instruments, policies and processes are particularly strong, while monitoring, evaluation and learning are relatively weak. The remainder of this section provides a detailed assessment of the mainstreaming experience of private foundations.

³ See <https://scalingcommunityofpractice.com/wp-content/uploads/2025/03/Final-MTT-Abridged-1.pdf>



Figure 1. Mainstreaming score by funder type and factor



2. What funder practices are most critical in supporting transformational scaling?

Initiate scaling from the beginning (“start with the end in mind”). It is not sufficient for funders to focus on scaling at the end of an innovation process or when exiting a project. There needs to be a clear vision from the outset of what successful scaling looks like. The conditions that allow scaling to happen – primarily alignment with domestic priorities and resource and implementation constraints at scale – have to be addressed from the beginning of the scaling pathway.

Incorporate scalability assessment. A systematic assessment of scalability helps guide, monitor, and evaluate the design and implementation of the scaling process by assessing the enabling conditions of scaling – demand, costs, incentives, financing, capacity, political support, etc. – and drawing attention to issues such as complexity; potential opposition; ease of production and delivery by suppliers; ease of adoption by end users; unit cost; and availability of a “funder at scale.”

Integrate systems change with scaling support. Achieving impact at scale requires funders to systematically identify and address institutional, policy, and political constraints alongside scaling investments to increase the probability of successful scaling and impact.

Consider equity and inclusion explicitly. Scaling efforts can unintentionally reinforce inequality or create other unintended consequences such as adverse environmental impacts. Increased inequality is driven by the fact that reaching marginalized and vulnerable groups often requires greater time, effort, and unit cost. Funders should make equity tradeoffs explicit and target optimal – not maximum – scale.



Double down on country ownership and localization. Transformational scaling depends on domestic actors – government, business, and civil society – owning the vision of impact at scale, the solutions and the scaling pathways, and having the capacity and resources to sustain them. Localization too often continues to be interpreted as consultation rather genuine changes in historical power dynamics.⁴

Invest in partnerships with other funders: because no single funder spans the full scaling pathway nor is best placed to undertake all the tasks needed at a given scaling stage, effective scaling requires partnerships – often through country platforms, collaborative financing mechanisms, and coordinated handoffs across scaling stages. All funders are challenged by the often unanticipated costs of developing and maintaining partnerships, which take time, resources and a willingness to harmonize processes, to share control, and to co-brand.

Build support for scaling into monitoring, evaluation and learning. Effective scaling requires monitoring not only outputs but also impacts, enabling conditions, and the scaling process itself. Learning from experience has to be used to revise and update objectives and scaling strategies; support adaptive, flexible management; and ensure accountability.

Elevate the role of intermediaries. The lack of effective intermediation across the scaling pathway contributes to the stubborn persistence of unscaled pilots and the “Valley of Death” for promising innovations and interventions. Funders can be of great assistance when they go beyond traditional project financing and support local intermediaries – or use their own good offices – to broker handoffs across scaling stages, convene partners, and strengthen coordination structures.

3. What are the principal obstacles to mainstreaming scaling that funders have encountered? ⁵

The project mindset – timebound funding delivers outputs, not sustainable impact. Funders typically support time-bound (2-5 year), one-off projects that focus on delivering outputs or at best outcomes, but not necessarily development impact. Moreover, they typically focus on outputs that can be achieved during the project’s duration, but not beyond project closeout.

Misaligned incentives and metrics. Funder middle management and staff feel overburdened with unfunded mandates and resist additional priorities that are added on top of existing mandates. Moreover, they are often rewarded for presenting projects to their management and boards, and for disbursement, on-time delivery, and achieving their output objectives by project end. Staff receive less recognition, if any, for supporting ambitious longer-term goals of scale and sustainability. Similarly, the design and implementation of projects typically do not measure sustainability and scalability by

⁴Country-led cooperation mechanisms for national and international stakeholders – sometimes referred to as “country platforms” – can help align interests and plans, coordinate resources, and support long-term scaling with system change. However, they require institutional support structures, sustained resourcing, strong incentives, and staff mandates aligned with transformational impact, all of which requires the platform participants, including the funders, to focus systematically on scaling approaches.

⁵In addition to the case studies and synthesis reports, there is also evidence for these obstacles in expert interviews conducted in lead up to the mainstreaming initiative (see <https://scalingcommunityofpractice.com/wp-content/uploads/2022/11/Exploratory-Study-of-Mainstreaming-Scaling.pdf>) and in the review of recipient perspectives carried out under the mainstreaming initiative (see <https://scalingcommunityofpractice.com/wp-content/uploads/2024/12/Recipient-perspective-FINAL-2025.06.19.pdf>).



others beyond project end. Follow-up to previous projects is often less valued by management than starting new ones. These incentive structures are often reinforced by governance and board-level expectations.

Lack of alignment with local and national priorities. Funders often fail to align adequately with local and national priorities and ownership.

Institutional strengthening and capacity building are missing, inadequate, or not targeting sustainable scaling. While many funders do some institutional strengthening and capacity building during the project lifetime, often these are incomplete given short project duration. More importantly, they frequently fail to address critical constraints on financial resources that stand in the way of long-term, sustainable scaling.

Poor donor coordination, duplication, and burdensome siloed reporting versus mutually reinforcing activities. Despite decades of efforts at and exhortations for coordination and collaboration, funders operating in the same development space (geography, sector, thematic area, etc.) continue to evidence poor coordination, siloed reporting systems, duplicative efforts, etc. While partnerships are always necessary for successful scaling, international development and climate funders continue to struggle to overcome systemic obstacles to successful collaboration, especially a lack of internal organizational incentives that support and reward effective cooperation with others.

Innovation funding has not been combined with sufficient support for scaling. Supporting “innovation” has become increasingly popular in the past fifteen years, as demonstrated by the proliferation of innovation and challenge funds, incubators, and accelerators. In too many cases, however, such approaches have not been accompanied by efforts to address the shortcomings of local systems and enabling environments that limit scaling and perpetuate development problems. Many innovation funders continue to indulge in “magical thinking,” presuming that scaling will happen spontaneously or is the responsibility of unspecified “other institutions.” Innovation funding generally has not created institutions akin to the role venture capitalists play in taking their investments to market (“catalytic intermediaries”), resulting in the loss of enormous potential.

Monitoring and evaluation methodologies and practice track outputs and outcomes against baseline, not impact against long-term targets and not enabling conditions for scaling. Project monitoring and evaluations focus on delivery against project plans, timely disbursement of funds, and narrow results targets. Monitoring and evaluation processes usually fail to generate data on scalability to support future scaling efforts and rarely examine whether projects put in place conditions for sustainability and scaling impact beyond project end.⁶ More specifically, these systems and metrics typically do not distinguish between need and demand; evaluate the impact and cost effectiveness of competing approaches; assess the extent of changes from existing behaviors and practices required by adopters and implementers; measure unit costs and evaluate potential for economies of scale; identify the role of context, social issues, and the political economy across relevant stakeholders; or assess constraints to scaling in the policy enabling environment or relevant market systems.

⁶ See the review of evaluation methodologies and practices of official funders carried out under the mainstreaming initiative: <https://scalingcommunityofpractice.com/wp-content/uploads/2025/04/FINAL-Evaluation-Guidelines-of-Official-International-Development-Funders.pdf>



4. What factors drive the mainstreaming of transformational scaling within funder organizations?

Leadership must drive support for scaling. Embedding scaling across a funder organization requires leadership at all levels, but sustained change must be led from the top. Governing bodies and chief executives need to set a long-term vision for transformational impact, ensure continuity through leadership transitions, and translate commitments to scale into operational practice. The emphasis on impact at scale should not remain aspirational or merely transactional, but must be matched by changes in incentives, resources, and management systems. Clear direction, accountability, and support are essential to move from rhetoric on scaling to action.

Corporate mission, vision, goals and definitions have to focus on transformational impact at scale. This requires funders to define what they mean by scale and transformational scaling and to establish clear, measurable long-term impact goals. Broad mandates make this more challenging, but evidence shows that the clearer and more specific the institutional commitment to achieving specific sustainable outcomes at scale, the more effectively these commitments are reflected in operational practice.

Financial and operational instruments, policies and practices have to support a scaling approach. Funders' financial and capacity building instruments, operational policies, appraisal criteria, monitoring and evaluation systems must explicitly incorporate scaling considerations and preconditions, shifting the focus beyond short-term project outputs toward long-term, sustainable, and scalable outcomes supported by the needed enabling conditions.

Dedicated organizational, staff and budget resources have to be committed to scaling. Funders that have most effectively mainstreamed scaling have invested in dedicated units, staff, and budgets to build capacity, incentives, and a culture supporting transformational scaling. While centralized support and focused accountability are often necessary initially, scaling must ultimately be owned by front-line operational staff and their managers.

Decentralization can support scaling but is not a panacea for localization. Many funders have realized the importance of localization and especially the larger ones have decentralized their operations by placing staff in country or in regional hubs. This closeness to the client helps with consultation and coordination, but it does not guarantee that funder staff pursue scaling and localization effectively, especially when institutional priorities, resources and incentives are not aligned with national priorities and locally defined needs. Clear institutional direction, aligned incentives, delegated authorities, and resources are needed to ensure decentralized teams support nationally driven, locally defined scaling pathways.

Analytical tools, learning, and knowledge are important for mainstreaming scaling. While more remains to be done, several of the funders we studied have adopted or developed analytical tools, training, and advisory support to enable scaling. Experience shows that these tools and learning capacities make an important difference if, but only if, scaling is firmly embedded in performance expectations, resourcing, and decision-making

Monitoring and evaluation must support the mainstreaming process. Monitoring and evaluating should be used to assess, guide, and drive funders' internal mainstreaming processes by analyzing the extent



to which strategies for organizational change are having the desired effect of institutionalizing a systematic focus on transformational scale⁷.

Mainstreaming ideally follows a planned, phased approach, beginning with leadership commitment followed by clear definitions, alignment of mission, development of policies, allocation of resources, and adoption of tools. In practice, organizations advance through iterative learning and adaptation rather than fixed blueprints.

C. Mainstreaming Scaling in Private Foundations

Findings and lessons of specific relevance for private foundations are summarized in this section. In doing so, it must be stressed that the universe of private foundations included in our sample of 8 (see below) is extremely and deliberately diverse in terms of size (\$9 billion to \$3million in annual spend), multi-sector vs single sector (Education, Agriculture, Land), and location (Global North and Global South). These findings should, accordingly, be interpreted as indicative rather than conclusive.

Table 1. Foundations included in the mainstreaming initiative

Foundation	Area of engagement
Syngenta Foundation for Sustainable Agriculture ⁸	Agriculture and food security for smallholder farmers
Echidna Giving	Girls' education; India, Kenya, Uganda, Tanzania
DG Murray Trust (DGMT)	Combatting inequality; South Africa
Gates Foundation	Multi-sectoral
Lincoln Institute of Land Policy	Land policy
Lever for Change (LFC) ⁹	Multi-sectoral
Co-Impact	Health, education, economic opportunity, gender equality
Fundación Corona	Education, employment, citizen engagement; Colombia

1. Private foundations have a comparative advantage over official donors and host governments in several key scaling functions.

By virtue of working with non-appropriated funds, private foundations face less pressure to demonstrate direct attribution, fewer compliance requirements, more capacity to enter into longer-term engagements and partnerships, and more ability to perform or fund key intermediation functions (see below). While many foundations continue to provide funding in the form of single-donor, short-term, one-off-tightly- managed projects, the case studies provide clear examples of foundations that have used their flexibility to move beyond traditional models to great benefit. In principle, as the

⁷The Mainstreaming Tracker Tool referenced in footnote 3 is a methodology for assessing progress by funders in institutionalized the internal changes needed to support transformational scaling.

⁸ The Syngenta Foundation closed in December 2024.

⁹ A not-for-profit affiliate of the McArthur Foundation.



Lincoln Institute for Land Policy demonstrates most convincingly, foundations also can be more persistent in their support for longer-term scaling pathways since they are usually financially autonomous and not subject political cycles. However, changing priorities of the boards and leaders may lead to lapses in support.

2. Non-financial support is often critical.

Among the foundations we profiled, nonfinancial assistance to grantees and scaling efforts played a prominent role and was frequently cited favorably by board members, staff, grantees, local governments, and other stakeholders. This assistance often included field building and peer learning activities carried out directly by foundation staff or by third parties funded by private foundations. It also sometimes took the form of intermediation tasks, including stakeholder convening, evidence informed advocacy, and investment packaging provided or funded by private foundations to advance specific multiparty scaling efforts. Technical assistance and intermediation support may be delivered directly by foundation staff, through contracted third parties, or through grants allocated to grantees for capacity development.

3. While usually modest in size, single-purpose and domestically-funded foundations have substantial untapped potential.

Until recently, relatively few low- and middle-income countries had private foundations supported by home-grown philanthropists; and those domestic foundations that did exist were often thinly veiled attempts to advance the commercial or political aspirations of the people financing them. But the evidence suggests that many countries – and all regions – have a new and growing array of home-grown philanthropies funded by local wealth, professionally staffed, and operating with non-partisan legitimacy. The DG Murray and Fundacion Corona cases clearly demonstrate that where these foundations exist, they have the opportunity to convene stakeholders, engage government, support scaling and build coalitions in ways not equally available to international foundations or official funders.

4. The philanthropy mindset is beginning to shift from charity towards transformational scaling.

Traditionally, most philanthropy has focused on charity (gap filling/last mile), institution building, innovation, and advocacy. While these functions are still prominent for a majority of foundations, the cases show distinct evidence of a growing number of foundations attentive to the scale of the problems they seek to address and sensitive to the fact that at-scale solutions require patient philanthropy linked to sustainable sources of government and private sector funding and implementation capacity. Where foundations have made these pivots effectively, these have been accompanied by major internal shifts in funding priorities, staffing, allocation of staff time, project guidelines, and MEL. The case studies of Co-Impact, Lever for Change, Echidna Giving and the Gates Foundation provide multiple examples of this shift.

5. Fragmentation is a significant problem.

The number of private foundations and the magnitude of private funding have both increased dramatically in recent years and are now more than twice what they were in the early 2000's. This has



created a major problem of fragmentation.¹⁰ One response has been the growth of collaborative philanthropy. Although these arrangements remain the exception rather than the rule, there is a growing body of experience regarding the organization and governance of these collaborative relationships.

6. Big bet competitions and open calls are increasingly prevalent and have the potential to make enhanced contributions to transformational scaling.

Several of the private foundations we profiled – as well as some official donors and some innovation funders -- use big bets as mechanisms for supporting large scale change. In some cases, these efforts focused exclusively on mobilizing and deploying additional resources; but in other cases, they embodied explicit strategies for transformational scaling. Reviewing the cases through the lens of transformational scaling suggests several ways in which the impact of these mechanisms can be enhanced.

7. While there used to be too few organizations seeking to collaborate with government, now there are too many.

Traditionally, foundations have funded NGOs, universities, and other civil society organizations most of which implemented programs condoned by, but not deeply engaged with, government. Even before the recent, dramatic decline in official bilateral assistance, that position had shifted as more and more private foundations and NGOs embraced the central role governments play in achieving sustainable development and climate goals. The result of this changing perspective was a clamor by foundations and NGOs to get the attention of government. This sometimes has taken the form of efforts to persuade governments to adopt and scale NGO-originated changes. In other cases, it took the form of those organizations going to government seeking ways to be of help in achieving the government’s priorities. Either way, the case studies suggest that the effect was the same – a line at the door of government decision-makers; a proliferation of new advocacy strategies; and a frustration by government officials uncertain about how to respond effectively.

D. Some Concluding Thoughts

The Mainstreaming Initiative and its 28 case studies began in 2023, prior to the implosion of bilateral development assistance and the attendant challenges to development and climate action. In ways large and small, the period saw each of the organizations we analyzed pivot in response. But even before these changes, many shortcomings in the architecture of assistance and action were evident. In our view, the case for change has not fundamentally changed, but the receptivity to making the needed changes is greater than we have seen in recent decades. History demonstrates that opportunities to make fundamental shifts in deep-seated institutional practices occur rarely. It is our sincere hope that the current soul-searching takes us all in a direction that is long overdue – working together in truly collaborative ways to advance important development and climate outcomes at scale.

¹⁰ On the issue of official funder fragmentation, see World Bank (2022), op. cit. <https://thedocs.worldbank.org/en/doc/ef73fb3d1d33e3bf0e2c23bdf49b4907-0060012022/understanding-trends-in-proliferation-and-fragmentation-for-aid-effectiveness-during-crises>. The growing number of private funders has added to the fragmentation challenge.



Annex. Case Study Organizations by Funder Category

Type of organization	Name	Focus Areas
Multilateral Development Banks	Inter-American Development Bank (IDB)	Multi-sectoral; Latin America and Caribbean
	African Development Bank (AfDB)*	Multi-sectoral; Africa
	World Bank*	Multi-sectoral
Bilateral Official Funders	Agence Française de Développement (AFD)	Multi-sectoral
	Deutsche Gesellschaft für Internationale Zusammenarbeit (GIZ)	Multi-sectoral
	USAID Feed the Future (USAID-FtF) (2 studies on agricultural funding)	Agriculture, food security and nutrition
Multilateral Vertical Funds/UN Agencies	Global Financing Facility (GFF)	Health
	International Fund for Agricultural Development (IFAD)	Agriculture, rural development and food security
	Systematic Observations Financing Facility (SOFF)	Weather and climate observations
	Adaptation Fund (AF)	Climate adaptation
	Standards and Trade Development Facility (STDF)	Sanitary and phytosanitary trade in agriculture and food
	Food and Agriculture Organization (FAO)*	Agriculture, rural development and food security
Innovation and Research Funders (official)	Grand Challenges Canada (GCC)	Health
	Consultative Group in International Agricultural Research (CGIAR)	Agriculture, food security, climate change, nutrition and environmental sustainability
	HarvestPlus (Research) and HarvestPlus Solutions (Commercial Delivery)	Agriculture and nutrition
	IDB Lab	Latin America and Caribbean
	USAID-FtF (Research)	Agriculture, food security and nutrition
	Swiss Agency for Development and Cooperation (SDC-Research and Innovation)	Multi-sectoral
INGOs	CARE	Multi-sectoral
	Catholic Relief Services (CRS)	Multi-sectoral
Foundations	Syngenta Foundation for Sustainable Agriculture ¹¹	Agriculture and food security for smallholder farmers
	Echidna Giving	Girls' education; India, Kenya, Uganda, Tanzania

¹¹ The Syngenta Foundation closed in December 2024 after publication of the study



	DG Murray Trust (DGMT)	Combatting inequality; South Africa
	Gates Foundation	Multi-sectoral
	Lincoln Institute of Land Policy	Land policy
	Lever for Change (LFC) ¹²	Multi-sectoral
	Co-Impact	Health, education, economic opportunity, gender equality
	Fundación Corona	Education, employment, citizen engagement; Colombia

Note: * = not expected to be published; these case studies were prepared for the internal learning purposes of the respective funder organization. The published case studies are found at <https://scalingcommunityofpractice.com/mainstreaming-initiative/>. The LFC and Co-Impact case studies are forthcoming.

¹² A not-for-profit affiliate of the McArthur Foundation.

