

# MAINSTREAMING SCALING INITIATIVE

*Scaling Impact via Open Calls:  
A Mainstreaming Profile of Lever for Change*

Richard Kohl  
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# SCALING IMPACT VIA OPEN CALLS

## A Mainstreaming Profile of Lever for Change

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](http://www.scalingcommunityofpractice.com)

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## Executive Summary

This paper serves to document, as a case study in the Scaling Community of Practice's mainstreaming initiative, how a leading philanthropic intermediary integrates scaling into its operations—so other funders can apply the lessons. Although funded by LFC, the analysis remains that of the author's alone.

The study synthesizes: (i) a review of LFC documentation; (ii) interviews with LFC staff and leadership ("key informants"); (iii) anonymous interviews with leaders from organizations that participated in LFC's open-calls (OCs); and (iv) additional publicly available materials on Big Bets (BBs) and open-call philanthropy. The methods triangulate internal perspectives with external stakeholder experience across multiple OCs.

An analytical framework anchors the assessment in widely used Mainstreaming and Scaling Principles, including the need for: a scaling vision and strategy; shared definitions; scalability criteria in funding instruments; frameworks and tools; localization; dedicated resources; aligned incentives; a capable intermediary; systems-strengthening; and Monitoring, Evaluation, Accountability and Learning (MEAL) for scaling. Special attention is given to the intermediary role because this is the primary role that LFC plays; it does not itself implement or institutionalize solutions; it mobilizes and places capital and builds capacity and partnerships that enable scaling.

The paper distinguishes transactional from transformational scaling and field building. Transactional scaling expands reach within time-bound projects (often 3-5 years), focusing on doing more or replication. Transformational scaling targets long-run, sustainable impact commensurate with the size of the problem—typically requiring 10-15 years, sustainable implementation and funding by domestic actors, and addressing systems level and institutional constraints to those goals.

The findings show that LFC has substantially integrated scaling into its operations. Many individual OCs support scale, field building (systems change), or both. Even for those OCs that don't fit into either of those categories, many other activities do support scaling, from the networking, training and capacity building for those applicants who participate in the Bold Solutions Network (BSN) to LFC's acting as a broker/fundraiser for individual BSN members to the fact that it has expanded the breadth and depth of the "secondary market" for philanthropic funding. Nonetheless, LFC serves as a prime and outstanding example for other funders of how a "whole of organization" approach can support scaling by using multiple, reinforcing mechanisms and approaches even when not all individual activities fully embrace scaling.

### A. Major Findings

1. Integration of scaling varies across Open Calls (OCs), reflecting a tension between LFC's role as a scaling intermediary and funders' control over the goals of each OC. Scaling as a specific scoring criterion is included in around half of all OCs. However, all scoring criteria are aligned with core scaling principles, reflecting that LFC seeks organizations that can dream big and boldly and connect them to the resources they need to execute. For each OC, scale is



determined by the extent to which awardees have access to transformative resources, including those provided from an OC.

2. **OCs mobilize significant capital efficiently and create broader and deeper access to funding.** LFC's OCs open doors to funders and visibility that many organizations, especially those not on traditional philanthropic radars would otherwise lack. Transparency and reach are differentiators from traditional funding approaches. This expanded access is itself a form of scaling.
3. The OC + Bold Solutions Network (BSN) are a "one-two punch" that increases the likelihood of applicants pursuing scaling, especially for applicants that do not receive awards. The combination of participating in an OC, followed by entry into BSN for those who are invited to join, has been highly effective at building confidence, sharpening strategy, and improving readiness to scale by strengthening proposal and increasing organizational capacity. Participants often report a mindset shift - a result of "being seen" by peer and expert reviewers, evaluators and funders - that catalyzes bolder, system-level ambition. Participation in BSN brings greater skills, capacity and networks to achieve them as well as greater access to secondary financing.
4. **Capacity building through peer and expert reviews and finalist coaching is a core contribution.** Feedback embedded in the peer and expert review processes improves proposals and fundraising capacity; finalist coaching frequently focuses on scaling strategy.
5. **LFC's activities have substantial synergies and taken together provide strong support for transformational scaling.** Even when scaling is not a stated objective, LFC's processes often lay the foundations for future scaling and, in many cases, actively support it. When these elements are combined with an expanded pool of funds, wider access to capital, and the feedback, training, capacity building, and networking offered to applicants, LFC creates a set of mutually reinforcing mechanisms that collectively advance transformational scaling across its portfolio.
6. Many individual OCs support field building and transformational scaling, especially those with larger awards, but additional opportunities remain. Some competitions invest in ecosystem-building (institutional strengthening, policy reform) or movement-building (supporting multiple actors aligned to a challenge). These strategies are aligned with transformational scaling and help create the enabling conditions for impact at scale.
7. **LFC fulfills many of the intermediary roles and does so well.** As a funding intermediary, LFC's influence on scaling depends on donor-defined goals, criteria, and award horizons in each competition. The integration of transformational scaling is therefore variable across OCs.



## Preface

The author of this paper is Dr. Richard Kohl, co-leader of the Scaling Community of Practice's (SCoP) Mainstreaming Initiative and its Working Group on Mainstreaming. The paper is based on a review of LFC documents, interviews with selected key informants (KIs) from within LFC, anonymous key informant interviews (KIIs) with the leadership of organizations who participated in its various OCs, and other stakeholders active in or knowledgeable about Big Bets and Open Call philanthropy. This was supplemented by additional research using documents publicly available on the same topics. The author received cooperation and comments from Muhsin Hassan of LFC, Larry Cooley, Johannes Linn and Simon Winter of the SCoP. All their support and input is gratefully acknowledged. The findings and interpretations expressed in this paper are solely those of the author and do not necessarily reflect the views or opinions of these individuals, the Scaling Community of Practice, Lever for Change or the MacArthur Foundation, nor those of senior management or Board of Directors of Lever for Change or the MacArthur Foundation. The author is solely responsible for any errors.

## Abbreviations

BB	Big Bets
BSN	Bold Solutions Network
CGIAR	Consultative Group for International Agricultural Research
DAC	Development Assistance Committee
GSP	Good Scaling Practices
LFC	Lever for Change
HPP	High Potential and Priority Areas
KI	Key Informant
KII	Key Informant Interview
LIIs	Low Information Investors
M&E	Monitoring and Evaluation
MEAL	Monitoring, Evaluation, Accountability and Learning
NGOs	Non-Governmental Organizations
OC	Open Calls
OECD	Organization for Economic Cooperation and Development
SCoP	Scaling Community of Practice
SSIR	Stanford Social Innovation Review
UHNWIs	Ultra-High Net Worth Individuals
USAID	United States Agency for International Development



# Introduction and methods

## A. Background and Purpose of this Study

This paper serves two purposes. First, to support Lever for Change (LFC) in achieving its Mission of helping to find and fund bold, transformational solutions to the world's biggest problems by unlocking philanthropic capital through open, transparent, and equitable competitions, henceforth referred to as Open Calls (OCs). It has a vision of a world in which philanthropy is transparent and inclusive, focused on impact at scale, and supportive of community-rooted ideas and organizations. In addition to its direct impact via the funding it mobilizes, LFC envisions having an effect on reshaping traditional philanthropy; breaking down barriers to access and encouraging durable giving to high-potential organizations and bold solutions globally.

This paper focuses particularly on how LFC has and is supporting the achievement of impact at scale. The analysis is not an evaluation nor is it meant to be a comprehensive or systematic analysis of LFC. In fact, it was beyond the scope of this paper to examine in detail any, let alone all, of the OCs which LFC has managed, which would be necessary to assess fully its impact at scale.

Second, this paper is part of an action research initiative on mainstreaming scaling in funder organizations working in international development being conducted by the Scaling Community of Practice (SCoP). The SCoP launched this initiative in January 2023. This initiative has three purposes: to inform 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](#),<sup>1</sup> see the [Concept Note](#) on the SCoP website).

In 2023-24 the Mainstreaming Initiative focused largely on official donors and actors, e.g. GIZ, IFAD, USAID, though it also included a few studies of foundations. The results of those studies (summarized in [an Interim Synthesis report](#))<sup>2</sup> suggested there was a marked difference in how funders that were either smaller, focused on innovations, were private foundations, or some combination of the three, were integrating and approaching scaling as compared to larger official bilateral and multilateral donors. Accordingly, in 2024-25 the SCoP decided to have a major focus on private foundations and philanthropies to explore further those differences. The present case study of LFC's efforts to mobilize funding for bold, transformational innovations is one of roughly

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<sup>1</sup> The Mainstreaming Initiative is jointly supported by Agence Française de Développement (AFD) and the Scaling Community of Practice (SCoP). In addition to Richard Kohl, the Mainstreaming Initiative team consists of Johannes Linn (Co-Chair of the Scaling CoP and Project Co-Leader) and Larry Cooley (Co-Chair of the Scaling CoP). Staff at Management Systems International provided on going administrative and communications support, in particular Sasha Burgess, Gaby Montalvo and Leah Sly.

<sup>2</sup> Since this report was written in late 2025, the SCoP has published a final report and policy brief on the mainstreaming initiative overall, as well as specific papers for various types of funders and donors, including private foundations. See <https://scalingcommunityofpractice.com/mainstreaming-initiative/#summary-reports>



fifteen such studies and profiles. It provides a significant contribution to that effort, especially given LFC's increasingly influential role in philanthropy.

## **B. Analytical Framework**

### **1. Mainstreaming and Scaling Principles**

This paper makes use of a number of principles developed regarding good practices in scaling generally and in integrating scaling into an international development funder's operation, i.e. mainstreaming. These have been selected into a recent tool developed by the SCoP called the [Mainstreaming Tracking Tool \(MTT\)](#).<sup>3</sup> This paper uses the MTT as a guiding framework. Of the indicators found in the MTT, this study focuses on the ten contained in Annex 1.

Particularly noteworthy and relevant for Lever for Change is number 8, the Role of the Intermediary. Clearly LFC's raison d'être is as a funding intermediary, so that the functions of (i) funding and fundraising; (ii) investment packaging and placement; and, to a lesser extent – capacity building – are particularly relevant. The rest of the principles are also relevant but need to consider that LFC is an intermediary and neither an actual funder, innovator, nor does it scale or institutionalize innovations, programs and solutions itself.

### **2. Field Building, Transactional and Transformational Scaling**

In addition to the ten principles contained in Annex 1, a major question addressed by this paper is the extent to which LFC's work as a funding intermediary supports scaling in general, and specifically whether that is transactional or transformational scaling, or something in between.

The terms transactional and transformational scaling were first introduced in a mainstreaming case study of the Syngenta Foundation,<sup>4</sup> and then more widely adopted into the mainstreaming effort, particularly in the interim [synthesis paper](#)<sup>5</sup> that summarized findings of the first fifteen case studies. These distinctions do not apply to problems that can be solved with a campaign such as polio eradication or where the need is likely to be ongoing, e.g. work on human rights.

Transactional scaling primarily defines scale as the number of people or places reached within the

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<sup>3</sup> The MTT was designed to help funding organizations assess the extent to which scaling has been integrated, set goals for further mainstreaming, and monitor progress in mainstreaming. See Richard Kohl and Larry Cooley (2025) [The Mainstreaming Tracker: A tool for assessing and managing adoption of systematic approaches to scale by development funders](#). <https://scalingcommunityofpractice.com/wp-content/uploads/2025/03/Final-Mainstreaming-Tracking-Tool-V2.pdf>, March

<sup>4</sup> The terms transactional and transformational scaling were first introduced in a mainstreaming case study of the Syngenta Foundation, and then more widely adopted into the mainstreaming effort. *Mainstreaming Scaling: A Case study of SFSA*. Scaling Community of Practice (January 2024). <https://scalingcommunityofpractice.com/mainstreaming-scaling-a-case-study-of-sfsa/>

<sup>5</sup> Kohl, Richard, Johannes Linn, and Larry Cooley. *Mainstreaming Scaling in Funder Organizations: An Interim Synthesis Report*. Scaling Community of Practice (June 2024). <https://scalingcommunityofpractice.com/mainstreaming-scaling-in-funder-organizations-an-interim-synthesis-report/>



defined period and resources of a grant, pilot or project, rather than in proportion to the size of the problem, demand or challenge. Scaling is often thought about simply as doing more; more or bigger projects equals greater scale. Scaling tends to focus almost entirely on simply committing or raising greater resources during a short, fixed time frame (usually 3-5 years), attention to creating long-term sustainability by domestic actors is limited or non-existent. Similarly, creating the foundations for ongoing or continued scaling after the end of a grant also tends to get little consideration.

Transformational scaling targets long-term sustainable impact at large scale i.e. proportional to the size of the problem or challenge. Impact and outcomes are targeted, not outputs, and measured relative to the scale of the problem itself, not the starting point or initial conditions. If transformational scaling is the goal, initial efforts focus less on numbers reached and more on: (i) ensuring a program or innovation is scalable; (ii) reaching a critical mass or tipping point of adopters who then catalyzed adoption by others; (iii) ensuring sustainable implementation and funding by domestic actors, and (iv) creating the foundations or preconditions for continued scaling. Transformational scaling is almost always combined with various forms of systemic change. Transformational scaling usually requires a long-term time frame - 10-15 years or more.

Field Building (and Systems Change). Field building refers to the set of strategies, investments, and infrastructure that help a field - organizations, individuals, networks working on or around a common social issue - to grow in effectiveness, coordination, scale, and systemic impact.<sup>6</sup> It can also include increasing the number of actors in the field and supporting the development and testing of solutions. Field building aims to develop the environment in which many actors operate: shared knowledge and practices, coordination and setting field or sector priorities and an action agenda, resource flows, support and common measurement, and ecosystem supports like backbone organizations. If it is done properly, it can go a long way to create the preconditions for transformational scaling at least in terms of domestic actors with the capacity and partnerships to affect large scale and systems change.<sup>7</sup> Field building can be seen as either supporting or overlapping with transformational scaling.

### C. Methods and Sources

This paper draws on three sources of information: (i) internal documentation and external literature; (ii) interviews with current and former LFC staff and participating organizations; and (iii) interviews with other philanthropic and scaling stakeholders.

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<sup>6</sup> See Lija Farnham, Emma Nothmann and Cora Daniels (2020) "Field Building for Population Level Change" The Bridgespan Group. 27 March, <https://www.bridgespan.org/insights/field-building-for-population-level-change>

<sup>7</sup> Bridgespan found that "field-building efforts are one of the most valuable investments funders can make, but historically such efforts are the least funded." *Ibid.*, see also Lija Farnham, (2020) "A New Role for Funders in Field Building Toward Social Change: Moving from Driving the Car to Filling the Tank", Grantmakers for Effective Organizations, March 30, <https://www.geofunders.org/news/a-new-role-for-funders-in-field-building-toward-social-change-moving-from-driving-the-car-to-filling-the-tank/>



## D. Structure of this Paper

The rest of this paper is divided into three sections. Section II provides a brief summary of OCs and BBs, their differences, and some of the criticisms that OCs and Big Bets have received. Section III looks specifically at Lever for Change. It summarizes its history, origins and purpose; current mission, vision and goals; how it operates; and provides an analysis of the extent to which it has mainstreamed the scaling principles and practices.

# Open Calls and Big Bet Philanthropy: Definitions and Debates

Over the past decade, philanthropy has seen a shift toward larger, more competitive, and more public forms of grantmaking. Two prominent models leading this transformation are Open Call (OCs) and Big Bet (BB) Philanthropy. These approaches often intersect – many OCs are BBs, and some BBs are OCs. Nonetheless, each was developed to address a distinct weakness in the philanthropic ecosystem: OCs respond to inequitable access to funding, while BBs address the insufficient scale of resources and ambition. As background to an analysis of LFC, this section briefly describes both approaches, their differences and the criticisms that have been leveled against them.

## A. Defining Open Calls and Big Bets

### 1. Open Calls

Traditional philanthropy has been criticized as distributing funds based on who an organization or its staff knows—its ability to cultivate a relationship with a program officer or foundation—rather than on the merits of the proposal. OCs aim to democratize access to funding, and to surface new, bolder ideas through transparent and competitive processes that catalyze large-scale impact by elevating high-potential organizations working in neglected sectors and geographies. OCs invite proposals from a wide range of organizations, typically through a multi-stage application and review format. There are now a large and growing number of OCs. Some of the best-known OCs are the MacArthur Foundation’s 100&Change, Rockefeller Foundation’s Food Systems Vision Prize, a widely known new philanthropic prize of the past two decades, the XPRIZE.<sup>8</sup>

### 2. Defining Big Bet Philanthropy

Big Bet philanthropy refers to large multi-million-dollar commitments (or more) by philanthropists or foundations to solve complex, systemic problems and achieve durable, scalable solutions. BBs

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<sup>8</sup> Writing in the Chronicle of Philanthropy in late 2023, the CEO of Lever for Change, Cecilia Conrad, noted that: “The number of large, application-based prizes and competitions in philanthropy has grown from 36 between 2005 and 2009 to almost 600 from 2015 to 2020, according to research Lever for Change commissioned.” Cecilia A. Conrad (2023) “Why Competitions Can Actually Level the Philanthropic Playing Field”. The Chronicle of Philanthropy October 25, <https://www.philanthropy.com/article/why-competitions-can-actually-level-the-philanthropic-playing-field>



were created in response to a perceived weakness in traditional philanthropy that grants were too small and too short in duration to allow for the kind of long-term, sustained efforts to address and solve major global and social problems at scale. They are described as aiming either to solve major societal challenges or, more modestly, to achieve significant impact on complex problems such as education, global health, climate change, or gender justice. Examples of BB funding include Co-Impact, which offers BBs in systems change areas like women’s leadership or health equity and the Audacious Project which aggregates large funding commitments from a coalition of donors for select bold ideas.

### 3. Commonalities and Differences

Many OCs are BBs and the converse is also true; *100&Change* being the classic example given the \$100 million size of the award. Both seek to support transformational solutions with measurable impact. Both have introduced new forms of funder collaboration such as pooling funds, e.g. Co-Impact, public engagement, and competitive approaches of one form or another. Both can be open to any global issue or, alternatively, target a specific problem or geography. The most important difference is that OCs explicitly aim to be inclusive, transparent, and broaden access to funding. By contrast, BBs can be OCs but are often invite-only or selective; most of the awards or prizes offered by OCs qualify as BBs, and this is true of those managed by LFC.

### B. Criticisms of Big Bets and Open Calls

BBs have been subject to criticism from several observers, notably Kevin Starr, the executive director of Mulago Foundation.<sup>9</sup> These criticisms, which are generalizations and don’t necessarily apply to all BB funders or LFC in particular, include:

- **Misplaced ambition and the significant—often unintended—consequences of failure.** Recipients and funders frequently frame big bets as near-certain successes, which increases the stigma associated with failure.
- **The funding cliff.** A major concern of many critics of BBs and therefore OCs is that recipients expand their organizational size, staff and budget that become unsustainable once the Big Bet funding finishes. Open Call prizes are almost always one-off grants, though in principle nothing prevents the funder from making an additional grant when the award period ends.
- **Not all bold and transformative ideas are necessarily scalable.** Available evidence—largely anecdotal—suggests that BBs and OCs tend to work well for technological innovations but may be less effective for complex socio-economic challenges. They appear to be less impactful when implemented in low-resource weak governance settings, or both.<sup>10</sup> The

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<sup>9</sup> See Kevin Starr (2024) “Big Bet Bummer: We need big bet philanthropy. We also need it to change.” [Stanford Social Innovation Review](https://www.mulagofoundation.org/articles/big-bet-bummer), 25 April 2024. <https://www.mulagofoundation.org/articles/big-bet-bummer>

<sup>10</sup> Some of the arguments are that: (i) prizes fit well-specified, engineerable goals; poverty is a “messy system of wicked problems.”; (ii) Measurement & attribution: tech outcomes are observable; social change requires systems shifts; (iii) Adaptation over time: complex problems need iterative, locally driven learning—not fixed solutions; (iv) Time horizon & durability: big bets can be episodic; complex change needs patient, broad support; and (v)



emphasis on being disruptive and challenging established norms and interests can actually be counterproductive when addressing issues that have significant political and distributional dimensions. In many cases, the larger the change from the status quo, the more scaling is likely to engender opposition and provoke resistance from vested political and economic interests or encounter major constraints in implementation because of weaknesses in governance, capacity, infrastructure and sustainable funding, or both.

- **Most BBs and even many OCs are biased toward the well-known and well-resourced.** Despite the emphasis on inclusion and broadening access to more organizations, many OCs emphasize criteria like feasibility of actual implementation (especially at large scale) by highlighting indicators like a seasoned, experienced leadership team and an organization's track record of achieving results on the ground. These criteria favor large, well-established organizations that have been around for several years.
- **Grant or award size remains small relative to the size of the problem.** While many individual prizes and grants are much larger than those commonly given by foundations to individual grantees, the aggregate number and size of BBs remain relatively limited. Similarly, the size of the funding, e.g. \$10 million, is still vastly inferior in most cases to the size of the problem or challenge being addressed. An estimate of the size of BB philanthropy provided by ChatGPT found the pool of BB philanthropy to be around \$10-15 billion<sup>11</sup> compared with total U.S. philanthropic giving of around US \$600 billion in 2024. Of that sum, foundations' grants were around US \$100 billion.<sup>12</sup> Estimates of the funding needed to achieve the Sustainable Development Goals are \$2.5-4 trillion.<sup>13</sup> Even if philanthropy's role is only to catalyze domestic resources in developing countries along with Official Development Assistance (which was \$223 billion in 2023), the gap remains large. The size of OC prizes is compounded by their duration and one-off character; if a 3-5-year grant of \$10 million plus was renewed 2-3 times it would likely have a cumulative and exponential impact that would allow for transformational scale beyond simply \$20-30 million plus.
- BBs and OCs conflate growth with scale. While there is a great diversity within what BBs and OCs fund and their selection criteria, many focus on organizational expansion of the grantee itself as the mechanisms for scaling and linear growth rather than the systems changes and exponential growth (and economies of scale and scope) necessary to solve problems

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scaling and implementation constraints: even great ideas depend on strong public systems and private ecosystem capacity. Many social sector solutions, even if implemented through public-private partnerships, run through or work with government agencies, provider networks, and policy change

<sup>11</sup> See Abby Schulz (2025) "Giving Jumps to \$593 Billion. A Strong Economy and Soaring Markets Helped." *Barrons*. June 24, <https://www.barrons.com/articles/charitable-giving-stocks-economy-5c9db142> and NPTrust. *Charitable Giving Statistics* <https://www.nptrust.org/philanthropic-resources/charitable-giving-statistics/>

<sup>12</sup> See Abby Schulz (2025) "Giving Jumps to \$593 Billion. A Strong Economy and Soaring Markets Helped." *Barrons*. June 24, <https://www.barrons.com/articles/charitable-giving-stocks-economy-5c9db142> and NPTrust. *Charitable Giving Statistics* <https://www.nptrust.org/philanthropic-resources/charitable-giving-statistics/>

<sup>13</sup> See OECD (2022), *Global Outlook on Financing for Sustainable Development 2023: No Sustainability Without Equity*, OECD Publishing, Paris, <https://doi.org/10.1787/fcbe6ce9-en>.



sustainably at scale i.e. achieve transformational scale. This is what Starr calls a “doer-at-scale transition” wherein a strategic shift is affected from an organization or social enterprise performing direct services to enabling and empowering other entities to replicate its proven solution on a much larger, exponential scale.<sup>14</sup>

- **The cost and effort of application is high, and the probability of being awarded a grant is low.** For example, there were 755 and 869 applicants for the *100&Change* awards of 2021 and 2025, respectively. The percentage chance of becoming a recipient was 0.13% and 0.11%, respectively, and probably less for smaller, less well-known organizations. Similarly, Open Calls are criticized as being resource-intensive to administer.

## Lever for Change: History, Mission and Vision, Goals and Operations

### A. History and Background

Lever for Change (LFC) was launched in 2019 as a philanthropic affiliate of the MacArthur Foundation. Its creation was directly inspired by MacArthur’s pioneering *100&Change* initiative, a \$100 million competition designed to solve a single critical social challenge. The *100&Change* competition is fully funded by the MacArthur Foundation. First announced in 2016, it attracted over 1,900 applicants from 27 countries and set a new standard for large-scale, open-call philanthropic competitions. The high quality and volume of proposals submitted revealed a significant gap in the funding ecosystem: many credible, high-potential solutions e.g. finalists and other highly ranked proposals, lacked access to the kind of large philanthropic capital being offered by *100&Change*.

This insight led to the formation of LFC to help highly promising innovations and organizations gain access to the necessary funding to realize the potential of their solutions. LFC’s name symbolized a strategic approach – “leveraging” large grants and the visibility of open competitions to catalyze “change” on a systems level. It is important to note that LFC was not only founded to link *100&Change* applicants to funders. At a deeper level, it was founded to solve an even broader “market failure” in the philanthropy ecosystem. First, for philanthropists who either didn't have a team or foundation to connect them to social change organizations looking for funding. Secondly, for philanthropists and foundations who weren't funding outside of their networks, to identify new opportunities for funding outside their networks. And the mirror image, to open up funding to organizations who had historically found it difficult to obtain funding via traditional mechanisms. Third, using all of the proposals, curation and due diligence from Open Call competitions as a resource to the larger philanthropic field, i.e. to shorten the pipeline development by using the “secondary market” of proposals received via OCs.

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<sup>14</sup> See Kevin Starr’s Linked-In Post from 2024 and the Spring Impact PPT linked to that post, [https://www.linkedin.com/posts/kevin-starr-mulago\\_scale-vs-growth-ugcPost-7202484873398292481-217P/](https://www.linkedin.com/posts/kevin-starr-mulago_scale-vs-growth-ugcPost-7202484873398292481-217P/) as well as Spring Impact “Scale versus Growth: What are the Key Differences?” <https://www.springimpact.org/2023/09/scale-vs-growth-what-are-the-key-differences/>



To achieve this vision and address this market failure, LFC positioned itself as both a grantmaking platform and a philanthropic advisory service, matching vetted projects with potential donors and supporting large-scale social change initiatives with tools, networks, and technical support. A signature feature of its overall approach is leveraging the power of networks. Thus LFC, in evaluating applications, has established an extensive and growing network of peer reviewers and experts who provide evaluations and feedback on proposals rather than a large staff of experts.

## B. Mission, Vision and Goals

LFC's mission is to unlock philanthropic capital and connect donors to solutions that address the world's most pressing problems. It envisions a philanthropic sector that is transparent, equitable, and focused on bold, transformative ideas that can scale. Regarding scaling principle 1 from Annex I, LFC very much has a vision of having impact at scale. At the same time, LFC also sees its role as serving as an intermediary; providing a service to funders interested in using OCs as a mechanism for achieving their goals. As not all funders (nor award recipients) have as a goal achieving sustainable impact at scale, so too not all OCs target, at least not explicitly, supporting scaling.

To a great extent, LFC has fulfilled that vision, at least as measured in dollar amounts. As of this writing in 2025, LFC-run OCs had directly accounted for \$1.5 billion and influenced the giving of an additional \$1 billion, bringing the total amount unlocked funds to more than \$2.5 billion; it has worked with more than 500 organizations worldwide. Moving forward, LFC's goal is to unlock \$10 billion in funding for organizations by the end of 2030.

LFC's vision and strategy have a qualitative as well as quantitative dimension. In a recent article in SSIR,<sup>15</sup> LFC's leadership team implicitly fleshed out the guiding principles of LFC's vision by articulating six additional elements. While not using the terminology of transformational scale or scaling principles, the specific points align with many of the key elements. These are:

- i. building durable (social change) organizations, especially financial sustainability such as having their own endowments;
- ii. large budgets and long timelines - building on the motivation to achieve transformational scale that was behind *100&Change*;
- iii. leverage existing infrastructure, systems and partnerships - citing the example of a health institute that was able to leverage its prize via its relationships with the health care infrastructure in Texas;
- iv. achieve critical mass - the importance of achieving economies of scale and scope and exponential growth. Critical mass is central to transformational scale in that when a

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<sup>15</sup> Conrad, C., Molyneaux, K., & Bowermaster, D. (2025). "Durable Capital for Durable Impact", *Stanford Social Innovation Review*, <https://doi.org/10.48558/DCFG-TG96>, <https://ssir.org/articles/entry/big-bet-philanthropy-durable-capital#>



tipping point of innovation adopters is reached, it leads to spontaneous adoption by others without that having to be explicitly driven via scaling efforts and activities;

- v. encourage experimentation - in the process of transformational scaling, innovations often need to be continually adapted and modified through a learning and adaptation feedback loop as new challenges are confronted as scale increases that are not just quantitative but qualitative, systemic, and institutional;
- vi. emphasizing collaboration and partnerships - this is completely aligned with scaling principle 8; partnerships are central to scaling, especially for funding and implementation at scale and sustainable institutionalization

LFC's strategy is to achieve these goals and to expand OCs globally, including in the Global South, improve the feedback and evaluation ecosystem for participants, and increase the utility and funder engagement with the BSN. It is also exploring and experimenting with other ways of increasing its impact and leveraging its experience, relationships and assets, such as applying AI to the curation and matchmaking of its large database of organizations and proposals that have participated in the various OCs that it has run and managed.

LFC has a clear scaling vision and guiding principles for implementing that vision. A fully articulated strategy for scaling up its own impact is still emerging, but the elements are already present across its Open Calls, Bold Solutions Network, and philanthropic advisory work.

### C. Definition of Scale

LFC's working definition of scale is close to the transformational definition of scaling. Rooted in the MacArthur Foundation and the *100&Change* competition, its culture and philosophy are largely aligned with transformational scaling, as are the criteria used by *100&Change*.

In terms of OC's, LFC operates across a spectrum of scaling approaches, from more transactional to more transformational and field-building.<sup>16</sup> Each OC uses a different scoring rubric and criteria, determined by the funder in consultation with LFC staff. Table 1 summarizes the scoring rubrics found in a sample of seventeen OCs run by LFC over the last several years. As can be seen, roughly half - 9 of 17 - included scalability as one of their criteria; and many include language under other scoring criteria that the innovation be scalable, though not necessarily that it will be scaled in this grant.<sup>17</sup> Only five of the seventeen Open Calls surveyed included sustainability and only two

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<sup>16</sup> For 100&Change, applicants must address a serious global problem of substantial scope and address a significant proportion of that problem. "Scale" can be achieved in some combination of three ways: reach (people affected), depth (transformative systems change), or spread (policy adoption or replication). Specifically, 100&Change requires that applicants address in their proposals: (i) Is the scope of the impact clear and significant? (ii) Is there a plausible path to reaching the scale proposed? (iii) Does the solution have the potential for broad uptake or replication? (iv) Will the solution change systems, not just provide isolated relief?

<sup>17</sup> For example, "Does the evidence suggest that the solution can be adapted to other contexts, such as expanding to new populations or geographies?"



explicitly included systems change.

**Table 1. Scaling Rubric Criteria**

<b>Criteria</b>	<b>Number</b>
Transformative, Bold, Impactful, Innovative	17
Feasible	14
Scalable or Leverage	9
Community Based or Inclusive (Localization)	9
Equitable or Just	5
Durable or Sustainable	5
Evidence Based	4
Systems-Based or Systemic Change	2

In almost all cases it is explicitly stated, or implied, that scaling will occur by growing the size of the grantee, rather than embedding the innovation in local implementing organizations. For example, the scalable criterion for the Open Call Action for Women’s Health states: “Does the team have a sustainable vision for this growth, including demonstrating an understanding of how their organization fits into broader efforts?” For some issues and organizations, especially those for whom advocacy and awareness raising about issues like human rights or gender or racial equity is their core function, scaling through growth makes sense and handing off/phasing out to local organizations doesn’t. However, for other organizations, such as those working in service delivery in health or education, sustainability and continued scaling through handing off/phasing out does seem to be what scaling should aspire to; the “doer-at-scale transition” referred to above wherein there is a strategic shift from direct delivery to enabling and empowering other entities to implement the proven solution at larger scale.

A rough qualitative judgment is that approximately 60% of recent competitions emphasize more transactional scaling, 30% incorporate significant field-building elements, and about 10% are closer to transformational. Even though individual OCs are limited to four criteria in their scoring rubric, taken together, all of the criteria found in scoring rubrics are aligned with the elements of transformational scaling and scaling principles in Annex 1. This diversity suggests that LFC already has experience supporting multiple scaling pathways; the opportunity now is to codify that learning and make it more explicit in competition design and guidance.

Thus, LFC’s role is to propose and model strong scaling criteria and practices, recognizing that ultimate decisions rest with funders; this positions LFC as a trusted intermediary that can gradually shift norms across multiple donors. For some funders scaling is not their intention nor what they want to focus on - many want to focus on innovation. For LFC, there is a tension between serving as an intermediary that either supports scaling or serving as one that supports funders in a variety



of ways - meeting them where they are. While clearly that is a tension inherent in LFC's model, it does seem that LFC could "nudge" potential and actual funders more in the direction of scaling generally and transformational scaling in particular.

## D. Pillars and Operations

Lever for Change works through three pillars:

- **Open Calls (OCs):** Lever for Change serves as a platform for other philanthropic organizations and donors to launch or collaborate on open calls. LFC has two types of OCs. The first are large-scale, donor-funded global competitions modeled after *100&Change*, with total award amounts of \$10 million to \$100 million with one or a handful of awards. Those awards, even when scaling is not an explicit award criterion, are usually used by recipients to scale or expand their activities. The second type of OCs are field building ones that often have large total award amounts e.g. Yield Giving awarded \$360M, Action for Women's Health will award \$250M, and generally a large number of recipients.
- **Bold Solutions Network (BSN):** A curated network of top-ranked applicants from open calls, designed to connect promising organizations with new funders and partners and provide peer networking opportunities and access to training and capacity building in areas like fundraising and leadership development.
- **Philanthropic Advising:** Providing services to philanthropists looking to identify and support high-impact organizations and ideas at scale. They offer a curated list of vetted organizations ready for funding i.e. organizations that have gone through the Peer Review and Expert Panel (see below), and an online philanthropic 'matchmaking' platform that connects high-performing, trusted innovators with funders prepared to give at any level. Thus, there is substantial overlap between the matchmaking of the BSN and its Philanthropic Advising.

### 1. Open Calls

This section summarizes the data on Open Calls (OCs) and the process by which they occur. The ten steps of the OC process are summarized in Box 1 on the next page,



### **Box 1. Steps in the Traditional OC Process<sup>18</sup>**

1. **Engagement with Donors:** Define goals, focus area, size and determine suitability of open call with donor's objectives
2. **Open Call Design:** Establish: (a) theory of change; (b) timeline (c) eligibility criteria and rules; (d) award structure (e) evaluation criteria; and (f) the application questions.
3. **Outreach and Application:** Launch of the Open Call with targeted outreach to diverse and global networks.
4. **Administrative review:** LFC staff review applications to ensure compliance with eligibility criteria and rules of the Open Call.
5. **Participatory Review:** Valid applicants score and provide feedback on each other's submissions, promoting transparency and shared learning. Scoring is both quantitative and qualitative, and normalized for outliers and how individual peers score compared to others.
6. **Evaluation Panel Review:** Reviews by subject-matter experts that have been identified by LFC staff as having expertise relevant to the specifics of an individual OC theme. As with Participatory Review scoring is both quantitative and qualitative, and normalized for outliers and how individual peers score compared to others.
7. **Analysis, Due Diligence, and Finalist Selection:** LFC staff analyze scores and feedback from all rounds of review, conduct light due diligence on top-scoring applications, and work with donor team to select finalists.)
8. **Technical Assistance and Additional Due Diligence:** Finalists receive support to revise and improve their proposals, accompanied by capacity building and training. This is provided by consultants. This phase is normally 2-3 months but can be shorter or longer depending on donor's objectives and timeline. While Finalists revise their proposals, LFC conducts additional due diligence on the finalists including financial and legal health as well as reputational risk assessments.
9. **Awardee Selection:** Finalists submit refined proposals drawing on coaching and advising. They also conduct virtual visits with donors as an additional avenue to share more about their revised proposals. Awardees are then selected by the funder of the OC.
10. **Post-Competition Support:** Top applicants i.e. finalists as well as other highly rated/ranked proposals are invited to join the Bold Solutions Network where they receive access to capacity building support and elevation opportunities across LFC funder networks.

<sup>18</sup> The process is the same for the field-building open calls with the exception that there are no finalists. So right



## **Key statistics**

**Duration.** The typical duration from the launch of an open call date to when awards are announced is on average 16 months. Open Calls that receive a large number of applicants - 1,000-1,500 - take longer than those that receive fewer applicants. Considering the upfront time of initial engagement with the donor, on average an OC requires 18-24 months from start to finish.

**Applications.** The average number of applicants is around 500 (when the largest competitions are excluded), ranging from the 80-90 in competitions with the smallest number of applicants to 7-800 for the two *100&Change* competitions (2021 and 2015). MacKenzie Scott's Yield Giving, which offered 361 awards totaling \$640 million, had over 6,000 applications.

**Average Total and Expected Value.** Excluding the two *100&Change* competitions as outliers, the average chance of becoming a recipient was 2.25%, the expected value<sup>19</sup> of submitting a proposal was \$138,427, with a range from \$48,458 to \$275,568. Evidence from LFC shows that it takes four or five person days (32-40 hours) to prepare a proposal.<sup>20</sup> Assuming that the value of applicant's staff time is around \$500/day including benefits, this leads to a cost of \$2,000 to 2,500 for an application or an ROI of application is between 10:1 and 137:1.

**Inclusivity of smaller, less established organizations.** In some of the interviews conducted for this study, key informants stated that they believed that the chances of receiving an award are higher for larger, more established applicants. Analysis shows that the situation is more complicated for that. First, LFC has worked hard to both surface bold and uncommon solutions and organizations and to persuade funders to select smaller and lesser-known organizations as finalists and recipients. External evaluations have shown that it has been successful in achieving the latter goal. The experience of recipients differs significantly if one distinguishes between field-building OCs and what might be called Big Award OCs.<sup>21</sup> Taking a very small sample of both, we found that in the Action for Women's Health OC, recipients had average annual revenues of \$0.93 million and median revenues of \$0.50 million. By contrast, five recipients from three Big Awards recipients had average and median annual revenues of \$7.4 and 6.5 million respectively.

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after Evaluation Panel review is "Analysis & Due Diligence" and then to "Awardee Selection". Each of these steps is roughly 1-1.5 months.

<sup>19</sup> The expected value is calculated by multiplying each possible outcome by its probability and then adding those results together. For example, if there are 500 applicants for a \$10 million award, then the expected value =  $\$10,000,000 \times 1/500$  (or 0.2%) = \$20,000

<sup>20</sup> In the latest round of *100&Change*, 40% (of 329 respondents) report spending more than 50 hours on their application. 82% reported spending at least 31 hrs. In the Yield Giving Open call, which is not a proposal application, 65% of respondents reported spending 30hr or less. Folks spend more time on the traditional open calls that ask for a solution/proposal.

<sup>21</sup> Field Building Open Calls are those where the total amount of award money is \$20M-\$100M or more, it has many recipients (20-100+ organizations), and each recipient receives a smaller grant (often \$1M-\$5M). Big Award Open Calls have one or a few winners and larger individual prizes, i.e. above \$10 million.



**Substantial, intangible benefits.** Many applicants report significant unquantifiable benefits even if they are not invited to join the Bold Solutions Network (BSN). These include:

- the ability for an organization and its partners to frame problems/solutions themselves rather than to fit a funder’s strategy,
- the opportunity to align internal staff and stakeholders to a larger vision of the organization,
- the value of the feedback during the peer and expert reviewing stages, let alone the coaching provided to top organizations who join the BSN. They use this feedback to improve their proposals and work, and this often can lead to additional funding from other sources.

This suggests that the criticisms of OCs and BBs from a decade ago have been significantly addressed, at least in the case of LFC. This is in fact the result of a conscious effort; LFC took these criticisms seriously and has explicitly worked to create a system that addressed them. As a result, in the context of an OC, organizations are asked to share their vision, their solution, and how they frame the problems. In this context, without the pressure of having to align with a foundation’s strategy, organizations propose their best understanding of the problem and their soundest solutions without having to worry about aligning with a foundation’s strategy. They tend to think beyond their own organization and are already building on partnerships in the ecosystem, i.e. often those solutions involve partnership in ways that traditional philanthropy does not. Thus, it seems likely that even when scaling is not included explicitly as one of the criteria in the rubric, LFC’s OCs are supporting scaling in ways that traditional philanthropy does not.

### **Funding**

Funding for Open Calls comes from a management fee, informed by the expected applicant pool and award amount.

### **Post Award Monitoring, Evaluation, Accountability and Learning (MEAL)**

Post award MEAL is done by the funder and not LFC, though LFC often helps structure or enable them. Funder’s MEAL requirements vary widely; institutional donors tend to require much more than individual funders, the latter often apply something approximating Trust-Based philanthropy.<sup>22</sup> Many funders require MEAL plans, semiannual or annual progress reports on program implementation, budget expenditures, challenges and course corrections and outcomes achieved relative to the proposal. At the conclusion of the award period, grantees are typically

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<sup>22</sup> Trust-based philanthropy is an approach where due diligence is significantly minimized compared to what many official donors and foundations have traditionally required for grants. The goal is to rebalance power between funders, nonprofits, and communities by centering equity and long-term, mutually accountable relationships; in practice it emphasizes multi-year **unrestricted** support, streamlined applications and reporting, transparent and responsive communication, shared learning/feedback, and “support beyond the check”. See for example Olliff, W., & Love, K. (2023, November 21). *Weaving trust-based philanthropy into a participatory initiative*. The Center for Effective Philanthropy. <https://cep.org/blog/weaving-trust-based-philanthropy-into-a-participatory-initiative/>



asked for a comprehensive narrative of project results and impact metrics (as defined by grantee and funder). All LFC awards are one-off with no expectation of additional awards, though funders are of course free to do so in the future should they wish.

### **Integration of and Support for Scaling in Open Calls**

Many Open Calls have explicitly integrated scaling into them through their scoring rubrics or at least contain some criteria that support scaling indirectly. At the same time, there are a number of areas in which greater support and integration of scaling could be done.

**Role as an Intermediary.** It is important to start with the obvious, LFC's role as a scaling intermediary. Annex II contains a frequently used sequence of stages of Innovation and Sustainable Scale. The intermediary function usually occurs later in the process, covering primarily Stage 4 - Transition to Scale and Stage 5 - Scaling. There are several intermediary roles that need to be played by some organization at this stage.

1. LFC, through its OCs, fills the roles Funding and Fundraising and Investment Packaging and Placement, and does so well, and in those cases where awards explicitly or implicitly target field building and systems change, also covers the role of driving those processes as well.
2. Partnerships also play an important role in LFC's activities, most obviously with donors and BSN support organizations. Partnerships are also a direct consequence of participation in BSN for many applicants.
3. LFC has been quite influential by setting an example and thought leadership in its publications in SSIR and elsewhere, it has done less in convening to promote itself and its approach.
4. Crowding in Funding and Greater access to funding for neglected or undervalued organizations and innovations. While not traditionally defined as scaling, it seems obvious that expanding Who gets funded is in fact a form of scaling. It is difficult to know what exactly the counterfactual is, i.e., how many of the award recipients and innovations would not be able to access resources from other sources. There is abundant anecdotal evidence that at least some of the organizations receiving funding would not have gotten it otherwise, and certainly not in the amounts received.
5. Size and duration of funding. LFC requires that the award size offered be at least \$10 million for the traditional model or \$1 million for its field building model, so by definition these are BBs. For many grantees this is the largest single gift that they have ever received. The size of the grants, especially the ones that are well above \$10 million, are clearly sufficient to work at much larger scale for most recipients, and probably in most LMIC countries make substantial progress in scaling and approach full scale (in the OCs where that is the goal). Grants are paid out over a 3-5-year period, though in some of the field building OCs the entire sum is paid out up front.

The implicit model in the OCs reviewed for this paper is that the other Intermediary functions are to be done by the grant recipient, such as institutionalization and systems change. Given that it appears that much of the funding mobilized by LFC is for transactional scaling, whether these other roles are being filled varies widely across competitions.



## **2. Bold Solutions Network**

Finalists, and sometimes semifinalists or organizations that scored well, are admitted to the BSN. They benefit from free access to additional financing, peer networking, training and capacity building, coaching, and intangible benefits such as networking. Additionally, LFC works to elevate their profile with funders through creating curated lists, amplifying them on their website, and supporting them to attend donor engagement events.

### ***Additional funding***

The principal benefit to BSN members is the potential for additional financing. Members are showcased to a wider philanthropic audience beyond the initial competition, providing ongoing visibility, credibility, and funding opportunities.<sup>23</sup> In addition to having a profile in the BSN database, individual LFC staff often undertake “bespoke” matchmaking with funders, and philanthropic advisors, even after an organization may formally leave the BSN. As a result of these efforts, around forty percent of members receive funding through various BSN mechanisms and seven percent of members have been contacted by other donors. Of the \$2.6 billion LFC has unlocked to date, around \$1 billion has been unlocked via various “brokering” processes and BSN related activities.

BSN members report that both going through the OC and the training they received helped them improve the quality of their proposals and internal fundraising capacity. Seventy per cent applied learnings from the OC process to apply for other grants:

*“Being named a finalist in a Lever for Change competition gave our organization credibility far beyond the funding—it positioned us as a global leader in our field.”*

*“Being part of the Bold Solutions Network gave us a seal of approval that resonated with other funders. It helped us secure an additional \$2.5 million in funding.”*

### ***Peer Networking and Collaboration.***

One of the foundational benefits of the BSN is access to a vibrant network of mission-driven organizations. Member organizations have frequent opportunities to engage in peer learning sessions, virtual and in-person convenings, and thematic roundtables. These platforms enable organizations to share scaling strategies, address common challenges, and form collaborations. Networking within the BSN fosters long-term partnerships and joint ventures that can amplify the reach of transformative innovations. “The peer conversations were invaluable. We met other organizations we’re now collaborating with on a shared data initiative. That wouldn’t have happened without BSN.” Interacting with mission-aligned peers often catalyzes cross-pollination of

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<sup>23</sup> Members are highlighted in donor-facing materials, including its donor briefs and curated funder showcases, ensuring they remain ‘in play’ for future funding rounds. Each organization has a profile that contains an overview, a 90-second video, key information, and a link to the organization’s website to learn more about their work. Visitors can search the BSN database by subject, location, Sustainable Development Goal (SDG), or beneficiary population to view top organizations and/or solutions in their interest area.



ideas, informal learning, and even future collaborations. These trusted peer connections can sometimes be as valuable as funding, offering emotional support and strategic insight.

### **Training, Capacity Building and Coaching**

BSN members gain access to extensive training and capacity-building resources. LFC offers structured workshops and on-demand webinars in areas such as strategic planning, fundraising, systems change, monitoring and evaluation, and governance. These programs are developed and delivered in collaboration with top-tier consulting firms and nonprofit capacity-building experts. Each of these offerings is designed to be practical, interactive, and tailored to the needs of scaling nonprofits. In addition to general training, BSN members often receive one-on-one or cohort-based coaching.

### **Intangible Benefits: Visibility, Credibility, and Reputation**

Membership in the BSN often leads to significantly enhanced credibility and visibility within the philanthropic and social innovation ecosystems. Organizations have reported that being an Open Call finalist and having passed rigorous peer and expert review processes offers a form of third-party validation. This stamp of excellence can be instrumental in unlocking conversations with new donors, building legitimacy in crowded issue spaces, and strengthening the case for support. As one member stated, “Just being in BSN got us into rooms we had never been invited to before.” The visibility provided through LFC’s communications, including curated donor briefs and external exposure via media partnerships, amplifies awareness of member projects and missions well beyond their traditional audiences.

Perhaps most profoundly, members describe how inclusion in the BSN transformed the way they view their own impact and potential. The rigorous application and feedback process, combined with access to LFC coaching and visibility, often leads to a mindset shift – from modest incrementalism to bold system-level ambition. Being “seen” by LFC and a network of evaluators and funders often reinforces the belief that their idea is not only viable but scalable and fundable at a transformative level. One nonprofit leader reflected, “I didn’t know we were ready to scale until others saw it in us. That validation gave our whole team a new sense of purpose.”

## **Summary**

LFC has integrated scaling into its work and operations in multiple ways. It is squarely in its Mission and Vision, and its operational principles e.g. financial sustainability, long timelines, systems strengthening, partnerships, experimentation and adaptive management. While scaling is explicitly included in only roughly half of the OC scoring rubrics, all of the other common criteria contribute to or are substantially aligned with transformational scaling – Durable/Sustainable, Equitable, Localization and Feasible. This is a particularly noteworthy accomplishment given that funders ultimately decide what the scoring rubrics are, not LFC.

LFC has built on this foundation by integrating scaling in other ways: actively soliciting and promoting applications by smaller, less established organizations, ensuring that the review process



doesn't favor larger, longstanding organizations, and working to mobilize funding for non-award recipients and additional funding for recipients. Perhaps most important are the multiple mechanisms by which it builds the capacity of applicants to scale; the feedback process during Open Calls, the coaching of finalists and the multiple types of coaching, training and networking provided to BSN members. As noted above, LFC checks most of the boxes in serving as a scaling intermediary.

As impressive as the individual actions and mechanisms are, what stands out is that because of the synergies between the different elements, the whole is greater than the sum of its parts. This is clearly evidenced by the last subsection above - that because of participating in the OC process and BSN, applicants experience a mindset shift and have greater capacity and access to networks and financing to realize their expanded, system-level vision.

In combination, LFC's open call design, the Bold Solutions Network, and its emerging advisory work already contribute to transformational scaling and field building in several domains.



## Annex 1. Mainstreaming and Scaling Principles

- (1) A scaling vision and strategy for the organization overall. This sets an overall vision of the organization's expected or aspirational impact at scale development outcomes and for individual units, such as an innovation unit. Preferably this vision is one of transformational scaling, defined below.
- (2) Commonly understood and shared definitions and language/lexicon of scaling, which is widely accepted and used within the organization
- (3) A scaling is incorporated into competition applications.
- (4) Scaling frameworks, tools and knowledge products support management and staff in applying scaling in their work, preferably combined with training, coaching and other types of support (e.g. an internal scaling support unit) to develop competence in scaling.
- (5) Localization. Local actors, especially at the community and grass roots level, are involved in the development and subsequent implication of competition applications. This is not merely consultation; local actors have a substantive role and power in decisions.
- (6) Explicit, dedicated financial resources to fund scaling.
- (7) Organizational culture and incentives for management, staff and individual units support scaling.
- (8) Partnerships and the role of a scaling intermediary. A scaling intermediary leads, drives and enables scaling through scaling and institutionalization. The functions of the Intermediary are, among others: (i) funding and fundraising; (ii) investment packaging and placement; (iii) capacity building and institutionalization; (iv) organizing and managing partnerships for scaling; (v) advocacy, marketing, knowledge dissemination and awareness raising; (vi) convening; (vii) change management; and (viii) systems strengthening. Central to this function is creating, strengthening and managing partnerships for funding and implementation at scale and sustainable institutionalization.
- (9) Systems Changes and Strengthening. Funding criteria and grantee proposals address and relieve constraints on scaling. These often included institutional and capability building of key implementers (Doers), reforms to the policy enabling environment, and building stakeholder buy-in and mobilizing support for scaling, including addressing potential losers and opposition.
- (10) Monitoring, Evaluation, Accountability and Learning (MEAL) frameworks and indicators to support scaling. This has three components: (i) generate and use evidence during innovation piloting or the early stages of a project scalability, to be used in decisions as to what, whether, and how to scale; (ii) track progress in scaling to allow for real-time learning and support adaptation and flexibility; and (iii) evaluate the extent to which sustainable impact at scale - transformational scale - has been achieved and lessons learned. Decisions about scaling are informed by evidence, i.e. about whether, what and where to scale, for strategic pivots and changes in innovation, activities and tactics during implementation



# Annex II. Innovation to Scaling and the Intermediary Role

## The Six IDIA stages of Scaling

### A High-Level Architecture for Scaling Innovation



### Key Intermediary Roles (relevant to stages 4 and 5)

1. Funding and Fundraising
2. Investment Packaging and Placement
3. Systems Strengthening (of ecosystem, e.g. policy enabling environment)
4. Capacity Building, Change Management and Institutionalization
5. Convening, Advocacy and Marketing (depending on whether the scaling pathway is public, private or both)
6. Organizing and Managing Partnerships
7. Driving and Managing the Entire Scaling and Institutionalization Process

