

The questions in this worksheet are designed to help program staff who believe they are supporting field-building as part of their philanthropic approach, to **think through key assumptions and elements of the work, build team alignment, and strengthen their ability to measure, learn about, and communicate progress.** Questions are designed to prompt reflection; while answers to some questions could certainly be more specifically informed by evaluation and data, surfacing

current understandings within program teams should generate sufficient answers for the purposes identified.

The brief on [Going Deeper: Building a Field](#) (a supplement to [Not Always Movements: Multiple Strategies to Advance Large-Scale Social Change](#)) provides additional resources and related content that might be helpful to teams as they work through the following questions.

▶ What is the broad uptake of new/changed practices meant to accomplish?

1. What do you hope is changed in the world due to a large number of organizations taking up a practice or set of practices?
2. When you think about these outcomes or benefits, how are you thinking about equity and power relative to these results? Who benefits and in what ways? Are there possible adverse impacts to anticipate?



▶ How do you understand the current state?

3. Promoting uptake can include a variety of things: ideas, ideas, skills. What is the nature of the work you are undertaking?

4. How can you define your “denominator”? Promoting the uptake and spread of practice implies that practices are taken up by large numbers of stakeholders. Knowing if you are seeing progress is more than knowing a flat number; you will want to know the total number of people or organizations that you could expect to change. It is also important to think about segmenting your denominator (and numerator) by different characteristics, so you can understand if uptake and benefits are representative of the whole or perpetuating inequities.

Approaches to Scale

What is scaled

Program: A system of projects or services that meets a need for individuals or communities

Idea or Innovation: A new way of thinking about or doing something; new solutions to problems

Technology or Skill: Products, tools, techniques, or practices ¹

Policy: Codified statements that define plans or a course of action

Definition

Copying a program that research has shown to be effective, with the expectation that it can or will produce the same results in different places. Scaled programs often allow for flexibility in implementation to best adapt to the local context.

Spreading an idea among individuals or organizations within a certain area or system (geographic, organizational, professional); ideas can be adapted to fit different purposes or contexts.

Increasing the number of people or places that use or apply a technology, practice, or approach.

Ensuring that ideas expressed as policy are transformed into behavior throughout a place or jurisdiction (e.g., city, county, state, region, country).

Mechanisms

Replication
Adaptation

Communication
Marketing
Dissemination

Marketing
Distribution
Training
Granting

Implementation

Coffman, J. (2010). Broadening the perspective on scale. *Evaluation Exchange*, 15(1), 2–3.
<https://archive.globalfrp.org/var/hfrp/storage/original/application/b09c074129f1943b4a172d23fb8542b5.pdf>

¹ Note that we have used the term *practice* in a broader sense for this piece than the author does here; in our usage, it could potentially refer to any of these elements.



▶ How do you understand the current state? (cont)

5. How do you currently think about the five “Rs” relative to promoting uptake?

The 5 Rs of Scaling Social Impact

Dees, J. G., Anderson, B. B., & Wei-Skillern, J. (2004). Scaling social impact. *Stanford social innovation review*, 1(4), 24–32.

Consideration

Key questions

Current state

Readiness

Is the innovation (or practice) ready to be spread?
 What core elements of the innovation are critical to achieving impact?

Receptivity

What strategy will best ensure that the innovation will be well-received in target communities?
 Are there reasons to anticipate resistance?

Resources

What are the resource requirements for the strategies under consideration?

Risks

How likely is it that an innovation will be implemented incorrectly or will fail to achieve its intended impact?
 What are the potential negative effects on the clients and communities being served?

Returns

What strategy will reach the most locations most effectively?

6. How do you think about how your “theory of scale” is different from the theory of change behind the result of the uptake of practice?

Thinking ahead to measurement

7. Given your reflections on the previous page, who or what, specifically, is changing in the next one to three years? What will be different for them?

8. How will you know who is benefiting? How can you watch for unintended consequences or potential harms?

Shorter-term

Changes among stakeholders expected to take up new practices (primarily organizations)

- Increased awareness or knowledge about new/enhanced practice among key stakeholders and what it takes to implement the practice
- Increased buy-in and support for uptake of new/enhanced practice among organizational leaders and decision makers
- Increased stakeholder capacity and resources to engage in new/enhanced practices
- Increased supports necessary to promote or maintain uptake or spread of practice—for example, processes to test and refine practice, technologies, training/technical assistance
- Changes in internal resource allocation to support desired practices
- Increased/broader demonstration of new/enhanced practices—for example, increased uptake of practices across multiple organizations

Longer-term

Systems-level changes

- Increased codification of useful new practices
- Changes in norms regarding expected practice across multiple organizations, networks, or systems
- Increased and broadened transfer of knowledge that informs new/enhanced practice across networks or sectors
- Increased infrastructure to support uptake and spread of practices—for example, policies, organizational structures, resources

Changes that reflect advancement of social impact

- Widespread uptake of practices is advancing large-scale population or environmental changes