



What is scaling?

An innovation can be said to have successfully scaled if it is delivered sustainably in numerous schools or settings. If implementing and using an approach is straightforward, like getting pupils to use a new app, innovations can scale relatively easily. However often a deep and lasting change in teacher's beliefs and behaviour is needed for a project to scale effectively, and this can be more difficult to achieve.



Why does SHINE think planning for scale is important?

SHINE funds innovations because we want to find approaches that will scale. Our aim is to help teachers develop and build their great idea so that it can improve outcomes for large numbers of disadvantaged children in lots of schools. Finding other schools or settings who want to use your innovation is one element of scaling, but the design of the innovation and support given to teachers using the approach will influence whether scaling will be successful. Planning for scaling in advance increases your chance of success.

What does the guidance and research say about scaling projects?

Case studies of projects that have successfully scaled in a range of sectors suggest that these factors can support scaling:

- ◆ Make the innovation as simple, cheap and easily replicable as possible
- ◆ Develop talent
- ◆ Have a clear story
- ◆ Build an evidence base
- ◆ Build a business model for scale
- ◆ Harness partnerships and communities of practice
- ◆ Address potential barriers to behaviour change.



Scaling a complex innovation requires deep and lasting change to teacher beliefs and behaviour, which is difficult to achieve. Case studies of successfully scaled complex innovations suggest you should:

- ◆ Plan effective professional development
- ◆ Shift ownership to those delivering the innovation
- ◆ Make sure the people delivering the innovation believe in your aims and approach.

What might this look like in practice?

Make the innovation as simple, cheap and easily replicable as possible

While it is tempting to make your innovation perfect, it's worth thinking early on about whether you could simplify the approach or reduce costs so it's more replicable in the future. If your innovation is complex think about how easy it would be for other people to implement it correctly; you may be better off making the innovation simpler and easy to replicate rather than having an intricate innovation that only you can deliver correctly. If your innovation will cost more than schools will be prepared to pay think about changes that would reduce costs but deliver the same outcome.

Develop talent

Think about the professional skills and expertise that will be needed to scale your innovation (e.g. marketing, web design or coding, delivering training, sales, leading a team, administration etc). You may already have some of these skills or may wish to develop them yourself; think about how and when you would do this. It may be better to delegate other roles; consider whether people currently working on the project would need additional training or if it may be necessary to bring new people on board, when this may need to happen and how you would manage this financially and organisationally.

Have a clear story

Having a clear story about why you think your innovation is important can help get other people on board. Develop an elevator pitch: a 30-second synopsis of why your innovation is needed, what you hope to achieve, how the approach works and how people can get involved.

Build an evidence base

Monitoring and evaluation should be an integral part of the development of your innovation. Initially it will help you understand what is and isn't working so you can make improvements to your approach. Once you have a final version of your approach, evidence that it improves outcomes will give you confidence that delivering the approach more widely will improve children's learning and will help with marketing.

Develop a business model for scale

Your innovation will need to be financially sustainable in order to scale successfully. There are lots of different business models that could be used, but whichever you pick will need to provide consistent funding that will meet the costs of delivering the approach in increasing numbers of setting. Our document [What Makes a Good Sustainability Plan](#) includes advice about financial sustainability.





Harness partnerships and communities of practice

Strong partnerships with agencies, organisations and communities that share your aims can help to drive change and spread the word about your innovation.

Address potential barriers to behaviour change

Think about all the things that might prevent your innovation from scaling successfully: carrying out a pre-mortum can help you to identify, and address, potential barriers early on. During a pre-mortum all the people involved in your innovation imagine that you have reached the end of your project and that it has failed. Together you list all of the things that went wrong, and then develop a plan for what you'll do if any of these barriers come up in reality.

Plan effective professional development

Training in how to use your approach should equip people to deliver the innovation correctly and independently. They should leave the training understanding how it can, and cannot, be modified and still achieve its aims. This means they will be able to deliver the approach well in different contexts or to meet the needs of different children. Our document [What Makes a Good CPD Plan](#) provides information about effective professional development strategies.

Shift ownership to those delivering the approach

Ensuring the people delivering your innovation feel ownership for its implementation and success will increase the chance they will use it correctly and keep using it over time. Design the training and resources for your approach so people understand that the responsibility for delivering the innovation and monitoring impact lies with them. Being clear about the time and resources needed to successfully implement the approach before schools sign up can increase the chance that those delivering the approach are given the capacity to really own it.

Make sure the people delivering the innovation believe in your aims and approach

People are most likely to sustainably change their behaviour if they believe there is a problem needs really fixing, and that your approach is the best way to fix it. Successful CPD often starts with a call to action highlighting the problem you are trying to fix; using outcome data from delegate's schools or locality can help build a sense of urgency about the issue. A clear explanation of why your approach will improve the issue, such as an evidence-informed Theory of Change or evidence of impact from a robust evaluation, should be included in CPD.



Useful reading

[Social Finance \(2021\). Changing Lives, Changing Systems: Building Routes to Scale.](#)

[Cordingley and Bell \(2007\). Transferring learning and taking innovation to scale. Curee.](#)

Following advice in the SHINE guides '[What Makes a Good CPD Plan](#)' and '[What Makes a Good Sustainability Plan](#)' may also help in developing your scaling plan.