

# Scaling Up, Staying True

by Daniel Browne

A Wallace Conference Report on Spreading  
Innovations in Expanded Learning

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*Wendy Etheridge Smith, Higher Achievement*

**A**cademic tutors, music lessons, sports clubs, travel: Children from middle- and upper-income families have a wealth of opportunities for learning and developing skills outside the traditional school day. For poor children, however, such opportunities can be hard to come by. U.S. Census data indicate, for example, that 18 percent of children from families with an annual income of less than \$18,000 take lessons outside school, compared with more than 40 percent of children from families with an annual income of \$72,000 or more.



*Jessica Donner, Every Hour Counts*

To learn more about how best to fill this gap, The Wallace Foundation has funded a number of national nonprofits that have successfully expanded opportunities for children, embraced independent evaluation of their programs and shown an interest in reaching more kids. In some cases, these grantees provide not only tutoring and enrichment but services such as meals and help navigating high school admissions. At the same time, they are all grappling with how best to work with public schools in order to ensure that students have a cohesive educational experience that is rigorous and well rounded.

In November 2013, representatives of these organizations and other Wallace grantees gathered in Brooklyn, N.Y., along with researchers, experts in nonprofit strategy, communications professionals and foundation staff members, for a topic much on the minds of people in the expanded learning field: how to “scale up” – in other words, serve as many kids as possible – while maintaining program quality and financial stability. The setting was a meeting of a Wallace-supported “professional learning community,” a forum in which grantees share information, compare experiences and generate new ideas in order to strengthen their work and that of the field as a whole.<sup>1</sup>

Will Miller, Wallace’s president, provided context for the day’s discussion by describing the foundation’s approach to scale, making it clear that philanthropic

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<sup>1</sup> The following organizations are members of the professional learning community: BELL (Building Educated Leaders for Life), Citizen Schools, Communities In Schools, Higher Achievement, Horizons National, the Providence After School Alliance, Say Yes to Education, and TASC (The After-School Corporation).

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dollars aren’t enough to solve major social problems. “Wallace has about \$60 million to spend annually to influence a public education system that spends \$600 billion a year,” he said. “The challenge of achieving impact at that scale can be likened to trying to move the elephant by poking it with a straw.” In order to create social value beyond that \$60 million investment, Miller explained, “we ask ourselves a simple question: What are we doing in our initiatives that has the potential to make a meaningful difference for those working in this area who never get a dime from us? ... Our strategy is to inform, inspire and help practitioners, policy makers and leading thinkers to make widespread improvements.”

This strategy is rooted in diffusion theory, popularized by Everett Rogers, a professor of communications studies. One of Rogers’ central insights, Miller said, was that the spread of new ideas, behaviors or products is a social process. “Advertising and mentions in the media will help get the word out about your innovation,” he said, “but they won’t be enough to convince most people to take a risk on an unknown quantity, if it’s truly consequential or complex. They need to hear from their peers that the next big thing is more than just a passing fad, that it’s practical and will make a positive difference in their lives or work.”

He noted that the members of the professional learning community provide inspiration and guidance to other organizations, actively engage the media and policy makers, exchange ideas and best practices, and participate in intensive research studies. “All of that,” Miller said, “is diffusion in action.”

# Doing the Jujitsu

Featured speaker Larry Cooley, president of Management Systems International – a firm that specializes in providing technical assistance (TA) to governments, NGOs, think tanks, foundations and universities – homed in on the who, what, when, why and how of scaling up.

Starting with the question of why, Cooley asserted that a combination of “big problems and small money” has led to a proliferation of pilot projects that never evolve to the point of effecting large-scale change. “We’re overfunding innovation,” he said. “[T]he real talent in this work is the ability to take an idea that works and figure out some way – some jujitsu – that’s going to flip that idea into a big solution, not a little solution.”

Then it was down to brass tacks: Who takes a program model to scale? Cooley emphasized the role of “intermediary” organizations, groups entrusted to connect the major players in a complicated endeavor. He said intermediaries can help adapt programs so they work in settings different from those in which they were first developed. What is it exactly that’s being scaled up? Arguing that simplicity is a prerequisite for broad adoption, he urged the program providers in the room to scrutinize their work; ask themselves, “What’s the ‘it?’” that’s essential to the program; and “be relentless in trying to take away the pieces that they don’t think are fundamental and stick with the pieces that are.” When is the right time to start thinking about scaling up? From the very beginning, Cooley said, because it may prove impractical to redesign a program for mass adoption once it’s proven successful on a small scale.

And the heart of the matter: how to get it done? Cooley noted that methods of scaling up vary depending on how much control remains in the hands of the organization with the original idea. He encouraged organiza-



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tions to think of change as a process consisting of a series of management tasks – “things you can do, not just things you can learn” – because “a task is something you can get good at.” Tasks involved in scaling up include articulating a vision of what success would look like at scale, securing the required resources, and coordinating the necessary organizational and individual actions. *[See box on p. 7 for Cooley’s three steps and 10 tasks for effective scaling.]*

# Management Systems International's Three Steps and 10 Tasks for Effective Scaling

## STEP 1

### **DEVELOP A SCALING-UP PLAN**

#### **Task 1: Create a Vision**

- A. The Model: What Is Being Scaled Up?
- B. The Methods: How Will Scaling Up Be Accomplished?
- C. Organizational Roles: Who Performs the Key Functions?
- D. Dimensions of Scaling Up: Where Does the Scaling Up Occur?

#### **Task 2: Assess Scalability**

- A. Determining the Viability of the Model for Scaling Up
- B. Analyzing the Organizational and Social Context

#### **Task 3: Fill Information Gaps**

#### **Task 4: Prepare a Scaling-up Plan**

## STEP 2

### **ESTABLISH THE PRE-CONDITIONS FOR SCALING UP**

#### **Task 5: Legitimize Change**

#### **Task 6: Build a Constituency**

#### **Task 7: Realign and Mobilize**

## STEP 3

### **IMPLEMENT THE SCALING-UP PROCESS**

#### **Task 8: Modify Organizational Structures**

#### **Task 9: Coordinate Action**

#### **Task 10: Track Performance and Maintain Momentum**

For more information, visit: [www.msiworldwide.com/approach/tools/scaling-up-framework-toolkit/](http://www.msiworldwide.com/approach/tools/scaling-up-framework-toolkit/)





# Avoiding the 'Sugar High' of Too-Rapid Expansion

Cooley then engaged representatives of three expanded learning organizations in a discussion of the challenges they face as they look to grow. Communities In Schools (CIS)



How do you build up consensus that expanded learning is doable, desirable – and necessary?

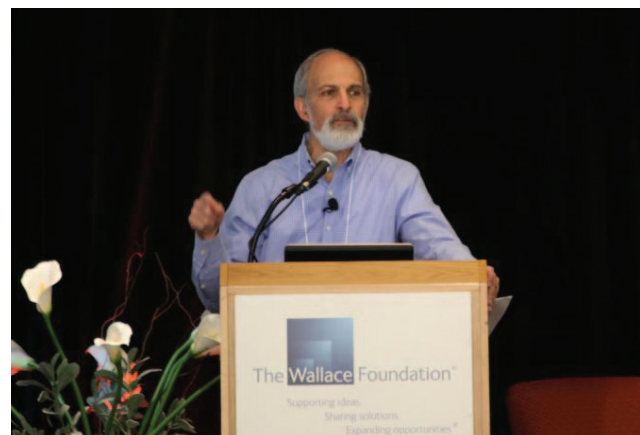


works with partner schools to identify students at risk of not graduating and connect them with services and resources provided by government agencies, health care providers, volunteer organizations and local businesses. Dan Cardinali, president of CIS, explained that it can take several years to make a difference in just a handful of a community's toughest schools. He estimated that the CIS network reaches about 10 percent of the students who would benefit from its model. "Are we actually fundamentally changing public education? Not quite yet," he acknowledged.

Nonetheless, the organization has taken a patient approach to expansion. Imposing change on a system

quickly is like giving it "a sugar high," he said, one that inevitably leads to a crash. To avoid that scenario, CIS takes a painstaking approach, building a local presence before entering any schools; working with three key players – the school district, local businesses and social service providers – on planning; and cultivating acceptance from the school and community members who would be affected. "We allow the system to metabolize who we are and what we do, and we get to work with community partners in an organic way," he said.

Cooley suggested that this deep engagement with the community may be "the secret sauce" that makes CIS effective, because institutional decision makers are reluctant to accept new ideas that they feel they have had no part in developing. Cardinali added that giving its



Larry Cooley, Management Systems International



local affiliates decision-making authority helps ensure CIS is well integrated into each community it serves, thus insulating it from the inevitable churn in school leadership. “We knew that superintendents would come and go, school boards would turn over, but a citizen board of folks ... could very much account for the transitions in leadership, and over 37 years we’ve been able to demonstrate that. We’ve had a really great staying power in communities.”

Lauren Gilbert is vice president of program for BELL, which works with public schools to boost the academic achievement and self-confidence of their lowest achieving students. Gilbert agreed with Cooley’s observation

that a scarcity of public funding has driven governments to look for cost-effectiveness when considering new ideas. She said that when it comes to scaling up, “the number-one limiting factor is economics,” pointing out that expanded learning programs are typically considered a supplement to the standard school day and therefore require decision makers to redirect funding from elsewhere in their budgets or draw on outside resources such as philanthropic dollars and partnerships with community organizations. This observation prompted Cooley to pose a central challenge for expanded learning providers: “How do you build up not only the consensus that [expanded learning is] doable and desirable but [also that] it’s necessary?”



*From left: panel moderator Larry Cooley; Eric Schwarz, Citizen Schools; Lauren Gilbert, BELL; and Dan Cardinali, Communities In Schools.*



*Cadbla Ball, Citizen Schools*



*Fred Brown, Learning Forward, and Jessie Kerr-Vanderslice, Providence After School Alliance*

# Great Programs?

## *Hand Tailored, Not Off the Rack*



For Eric Schwarz, CEO and co-founder of Citizen Schools, the answer may lie in the program model itself. Citizen Schools provides academic support to middle school students and recruits volunteers to work with the kids on projects that expose them to career possibilities. Schwarz explained that part of the way Citizen Schools builds consensus around the need for its services is by turning its volunteers – “people with power,” such as business leaders, lawyers, scientists and architects – into advocates. “We get them into urban schools, get them to see the promise and the potential of those kids, get them to care about it in their hearts, and then try to over time mobilize them to take political action,” he said.

Schwarz’s biggest concern about expanding was that the drive to simplify, as expressed by Cooley, would not accommodate program features that are beneficial but difficult to replicate, resulting in programming that fails to truly bridge the opportunity gap between poor students and their well-off counterparts. “I think what works for upper-income kids is not simplicity,” he said. “It’s actually a hand-tailored suit that’s very well put together that meets particular needs that are often complex.” Schwarz cautioned his colleagues against adopting a one-size-fits-all approach in the interests of scale. “I worry that we will collectively let go of too much,” he said. He pointed to Head Start, which he

said had “made a series of political choices to make scale easier,” as an example of expansion that sometimes came at the expense of important program features, such as its original one-to-five teacher-student ratio. The metaphor of the hand-tailored suit clearly resonated as it was picked up by several speakers over the course of the meeting.

Others embraced the value of simplicity while at the same time recognizing the difficulty of getting it right. Gilbert said that BELL had scale in mind from the outset when it entered into a partnership with the YMCA of the USA, designing a pilot summer learning program for 300 students so that it could work for 60,000. “BELL’s had to let go of some things that we’re not always so comfortable letting go of,” she acknowledged. She said the organization was attempting to situate the pilot in a “zone of fidelity” where it can reach as many students as possible while staying true to the elements that made BELL effective in the first place. Later, an audience member introduced a new metaphor, comparing expansion efforts to the game of Jenga, “where you see how many things you can pull out and still have a structure standing.” She went on to say, “A model that is fairly simple that we can train on, assess for, observe consistently across the board is really necessary to drive for real impact and evidence.”

# The 'WHAT WORKS, MOVEMENT'

In his presentation, “Reflections on Scaling Impact,” Jeffrey Bradach, managing partner and co-founder of The Bridgespan Group, a consultancy, echoed Cooley’s view that service providers need to push beyond the innovation stage and, in Bradach’s words, “support the ‘What Works Movement,’” a reference to the Obama administration’s strategy of helping people and communities in need by investing in nonprofits that have shown they can deliver positive results.

Once an organization has come up with a viable solution to a social problem, Bradach argued, it should devote less energy to tweaking that solution and more to drumming up demand and figuring out how to meet that demand in full. “I have this haunting worry we’re all underinvesting on the demand side,” he said. “[T]here’s 800,000 first-time teenage pregnant mothers that Nurse Family Partnership could serve, but it’s not like they’re all in line outside the door waiting for this intervention.”

Bradach urged the organizations in the audience to ask themselves a basic question: “How intentional is your innovation agenda around scale?” He described various “pathways” by which programs can grow to meet the need for their services. One involves collaborating with stable institutions that already have a broad footprint. Bradach pointed to BELL’s partnership with Y-USA, for which his Bridgespan Group serves as a consultant, noting that 60 percent of the U.S. population lives within three miles of a Y.

Another pathway to exponential growth is for leaders in the expanded learning field to share what they know with other entities and help them put it into practice. Bradach cautioned, however, that effective technical assistance calls for expertise that direct service providers may not have. He pointed out that intermediary organizations can be ideal technical assistance providers but added that they need more resources to reach their full potential. [See box on p. 12 for Bradach’s “10 Pathways to Transformative Scale.”]



Michael Sikora and Jessica Landers Hopkins, BELL

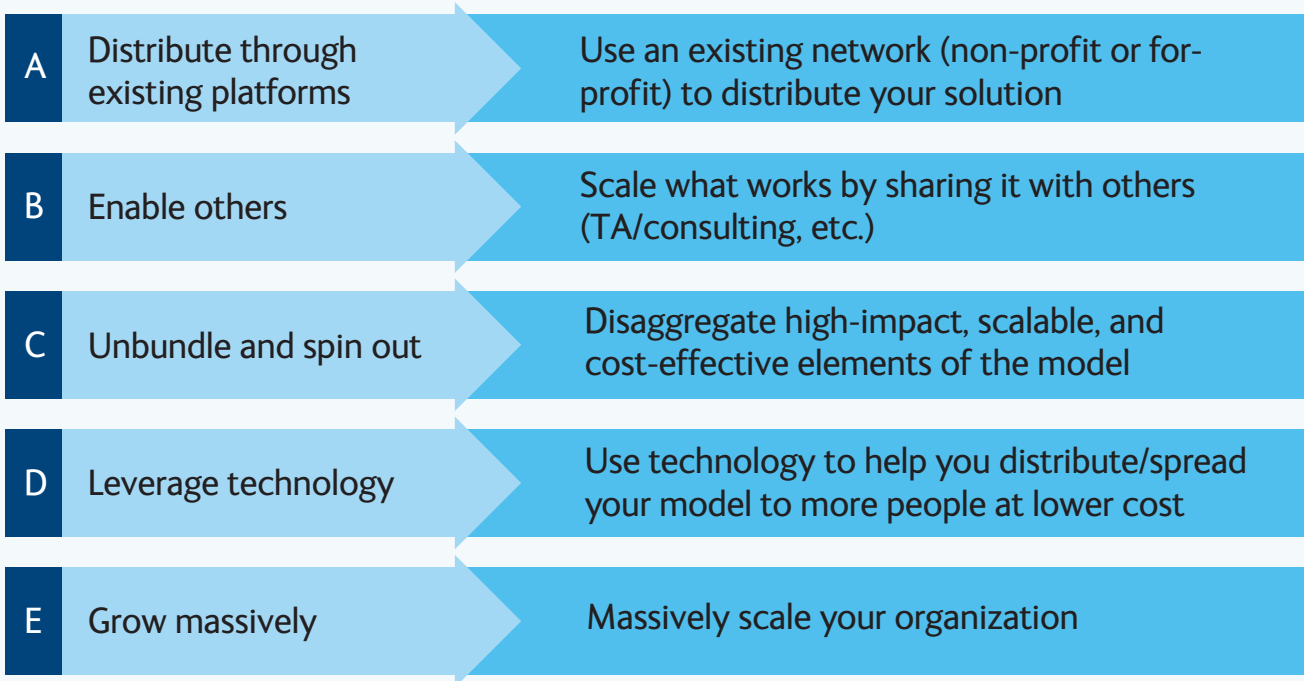


Steve Ross and Monique Fletcher, Say Yes to Education

# THE BRIDGESPAN GROUP'S 10 PATHWAYS TO TRANSFORMATIVE SCALE

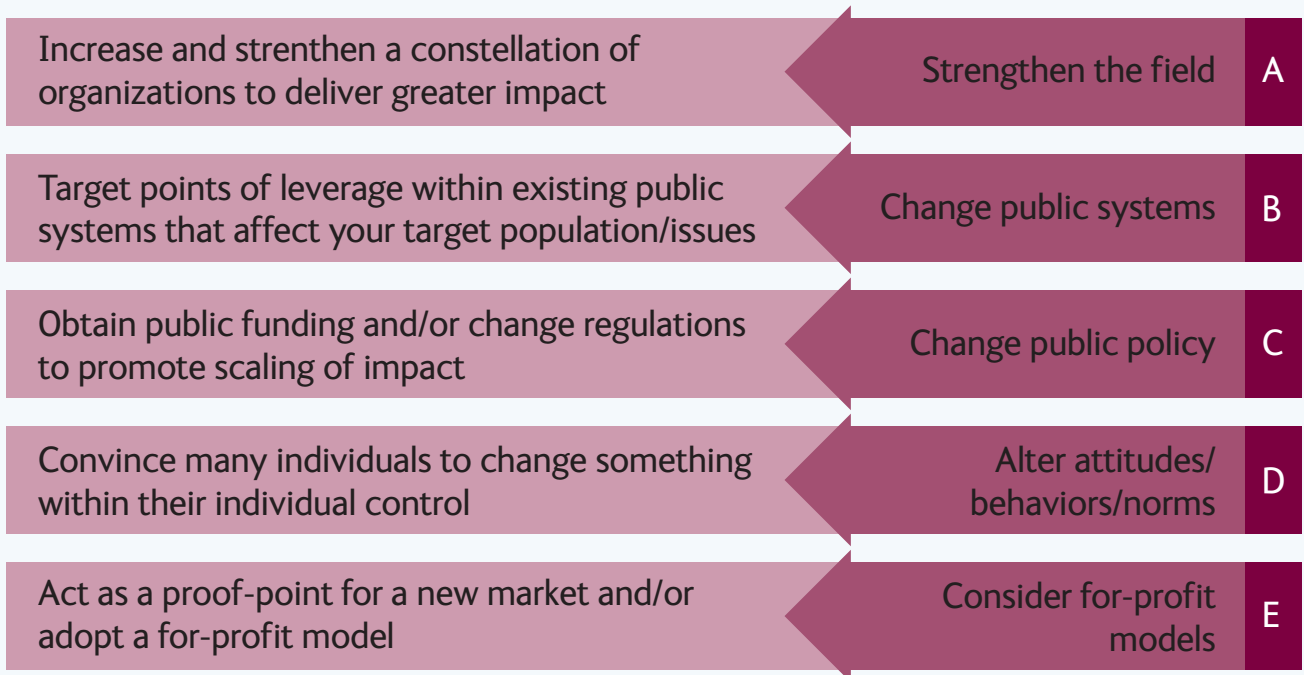
## Organizational Pathways

Building on and expanding what individual organizations do



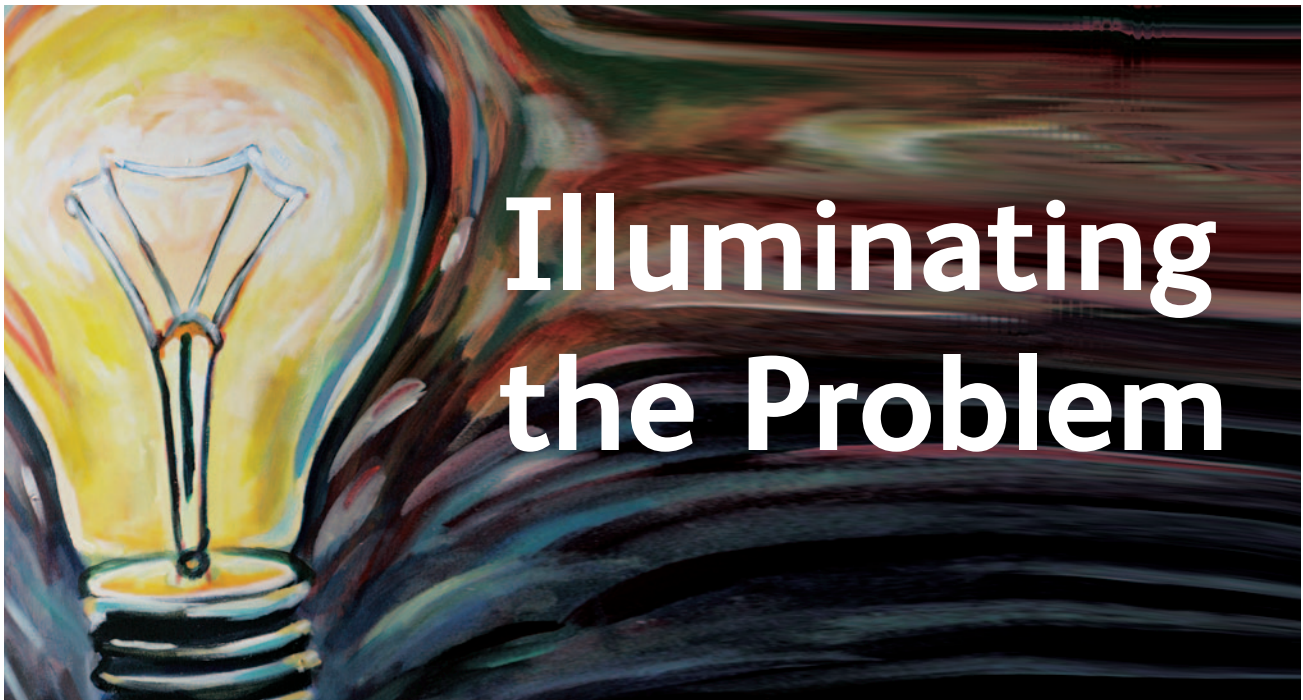
## Field-Building Pathways

Pushing the field and its constellation of actors towards a shared target



For more information, visit: [www.bridgespan.org/Publications-and-Tools/Strategy-Development/Transformative-Scale-Nine-Pathways.aspx#UxnTAPmwLYg](http://www.bridgespan.org/Publications-and-Tools/Strategy-Development/Transformative-Scale-Nine-Pathways.aspx#UxnTAPmwLYg)





# Illuminating the Problem

**A** prerequisite for building and meeting demand for expanded learning is raising awareness of the need it addresses. Lucas Held, Wallace’s director of communications, quoted the author G.K. Chesterton to drive home this point: “It’s not that they can’t see the solution, it’s that they can’t see the problem.” Held was joined by two Wallace grantees to discuss new communications products intended to provide “legitimation” of the need for expanded learning opportunities.

“We tried to discipline ourselves to just talk about one thing [at a time],” said Susan Brenna, chief communications officer for TASC (The After-School Corporation), which is leading a project to connect schools in New York City, Baltimore and New Orleans to community organizations that can provide expanded learning programming. Brenna introduced an [animated video](#) illustrating what TASC has calculated is a 6,000-hour learning gap between poor and middle-class students, part of a concerted effort to deliver messages that are “short and sticky.”

Jessica Donner, director of Every Hour Counts, said that for her organization, which represents afterschool intermediary organizations, “the million-dollar question is, how do we demonstrate the impact of afterschool system-building?” To that end, Every Hour Counts teamed up with the nonprofit American In-

stitutes for Research, a behavioral and social science research organization, to develop a framework for understanding what success looks like for afterschool systems and individual programs. The framework is intended to help program providers, policy makers and funders track their efforts to ensure that they lead to improved outcomes for students.

Later in the day, Frederick Brown, director of strategy and development for Learning Forward – the association for professional development in the education field – affirmed that communicating the value of expanded learning is imperative. “The word ‘expanded’ implies an add-on that is nice but not necessary,” he said. “Expanded learning opportunities should be essential learning opportunities.”

One thing providers need to do to make that sale is demonstrate that their work is in sync with key district reform efforts. So the final discussion of the day focused on how expanded learning providers should consider harmonizing their programming with the Common Core State Standards, the standards, adopted in most states, for what students K-12 should master in English and math. Three representatives from the consulting firm Cross & Joftus, which works with education leaders, offered their take on what alignment with the Common Core might look like for expanded learning providers.

## Getting to the Core of State Standards



Senior Consultant Cheryl Krehbiel asked how many people in the room had read through the standards or appendices in their entirety. She then urged expanded learning providers to roll up their sleeves and dig into the substance of the standards.

“To be effective, you have to become a learner,” she said. “If you’re going to sell yourself to the districts as a partner in moving kids [through the Common Core], you have to be very clear about your role.”

Cross & Joftus shared the results of an effort, undertaken with support from Wallace and the cooperation of several of the professional learning community’s member organizations, to determine what it means for an expanded learning program to be aligned with the Common Core. The consultants concluded that expanded learning programs need not address every one of the state standards, but they should conduct a careful assessment to identify common ground. Specifically, they said that Common Core-aligned programs draw on the standards for their academic curricula; emphasize so-called 21st-century skills such as evidence-based writing and critical thinking; build the problem-solving aptitudes known as “habits of mind;” and assess students on their conceptual understanding of the material, as well as the skills and knowledge they’ve gained.

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Viewing the work of scaling up and aligning with the Common Core as both challenge and opportunity may, in fact, be a common denominator for all the expanded learning organizations in attendance. Developing – and sharing – the most effective strategies for securing funding, recruiting talent and adapting curricula will take years, but the members of the professional learning community know they have partners and colleagues who are committed to their success. As Miller put it, “We have much further to go, but the improvement – district by district, school by school – shows progress is possible ... if we all work together.”



*Sheila Drummond, associate director of Communities In Schools' Diplomas Now effort, was one of about 100 people who attended a November 2013 Wallace conference on spreading innovations in expanded learning.*

The Wallace Foundation is a national philanthropy that seeks to improve education and enrichment for disadvantaged children. The foundation has an unusual approach: funding projects to test innovative ideas for solving important public problems, conducting research to find out what works and what doesn't and to fill key knowledge gaps – and then communicating the results to help others.

Wallace has five major initiatives under way:

- School leadership: Strengthening education leadership to improve student achievement.
- Afterschool: Helping selected cities make good afterschool programs available to many more children.
- Arts education: Expanding arts learning opportunities for children and teens.
- Summer and expanded learning: Better understanding the impact of high-quality summer learning programs on disadvantaged children, and enriching and expanding the school day in ways that benefit students.
- Audience development for the arts: Making the arts a part of many more people's lives by working with arts organizations to broaden, deepen and diversify audiences.

Find out more at [www.wallacefoundation.org](http://www.wallacefoundation.org).