

SCALING & SYSTEMS CHANGE



Fundamentals, Insights and Case Study Reviews

June 2023



Foundation

BHP Foundation



ACKNOWLEDGEMENT OF COUNTRY

We acknowledge the past, present and future generations of Traditional Owners from the lands on which our contributors are based, and we celebrate the stories, culture and traditions of the Indigenous peoples across all the lands, waters and oceans in which we live, work and enjoy.

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FOREWORD

The BHP Foundation has a bold vision of “an equitable and sustainable future for people and planet”. We support partners that are the best in their fields around the world to reach their goals, with a strong focus on sustainability of outcomes. And we know that all of the work, of all of our partners, is only the start to address the global sustainability challenges we face. Therefore, the requirement to ‘scale’ a project-level idea or investment is inherent in this model. The only way to achieve our vision is if the incredible work of our partners inspires a chain-reaction of activities to support more people across greater areas of our planet.

This series of “Scaling and Systems Change” conversations was illuminating in unpacking what it actually means to scale and create change at a systemic level, how it can be done successfully, and importantly, the pitfalls to avoid.

My thanks go to our speakers Lennart, Lisa, Sonali, Anna, Cedric and Carey who generously shared their time and insights. Also to our Ampliseed network of incredible partners – it’s your activation of these scaling ideas that will ensure our work is not just a drop in the pond and that the positive effects can continue to ripple out for generations!

Melinda Macleod,
Program Director, Environmental Resilience,
BHP Foundation



Indigenous fire management in Australia © Indigenous Desert Alliance





EXECUTIVE SUMMARY

[Ampliseed](#) is a learning and leadership network that connects seven Projects supported by the [BHP Foundation's Environmental Resilience Global Program](#) that are aiming to change the way conservation at landscape scale is achieved. The role of Ampliseed is to support the Projects to succeed by sharing knowledge, embedding lessons learned, and weaving a connected community of practice. The network is co-designed by its members and facilitated by the [Pollination Foundation](#).

Common to all our member Projects is an interest in scaling their work to achieve significant impact, and strengthening their ability to influence systems change to reverse the twin challenges of biodiversity loss and climate change. For this reason, Ampliseed invited several experts and Project leaders to share their scaling experiences with network members so that collectively we could identify the insights that are most applicable to our work in environmental resilience.

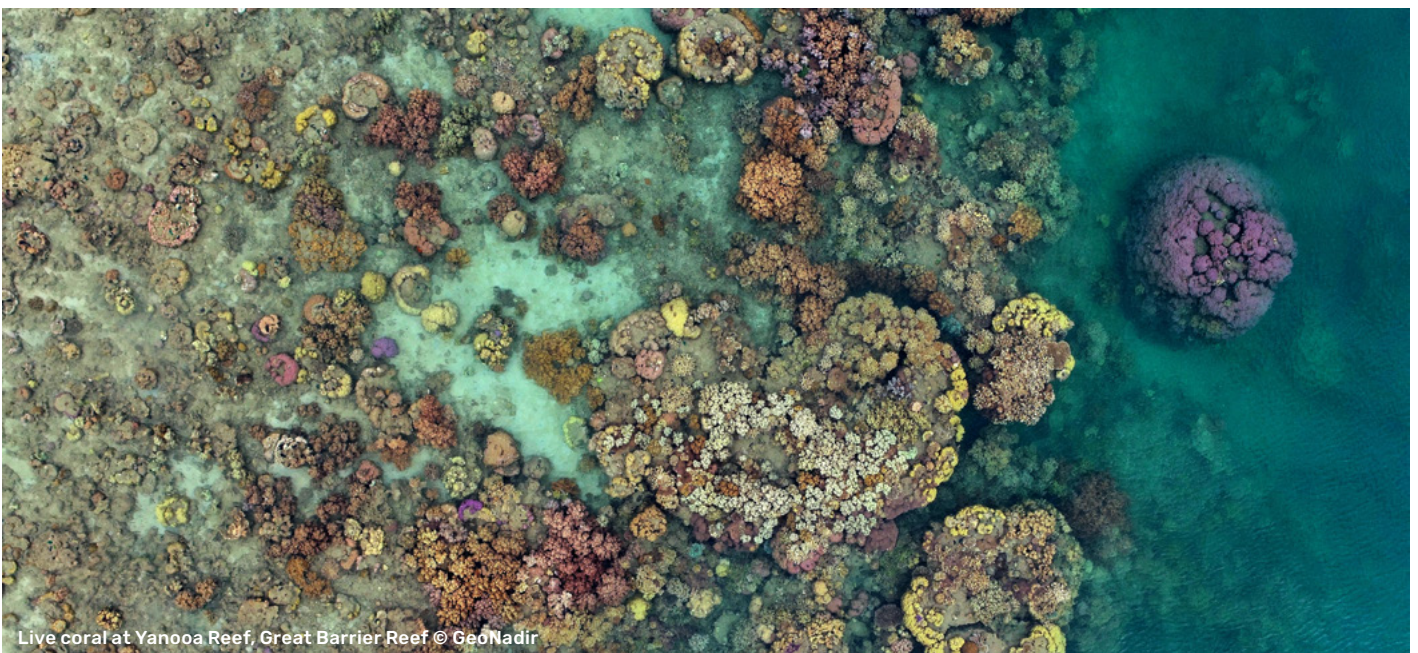
This report captures the presentations and case studies and consolidates the key insights from the series of workshops on scaling and systems change that we held in 2022 and 2023.

The first chapter, *Scaling and Systems Change 101* with scaling expert Lennart Woltering, introduces scaling theory and explores what this means in the context of creating longer-term systems change in the field. Scaling for sustainable development requires teams to identify and plan for the challenges that emerge when moving between the controlled environment of pilot projects to the complexities of scaling in the real world.

A successful scaling strategy must consider the diverse range of innovations and actors involved in the process, the different roles and skills required, and the need for sustained investment into coordination and leadership. By addressing these issues and adapting to real-world situations, organisations can increase their chances of achieving long-lasting, large-scale impact.

The second chapter, *Scaling Lessons from the Private Sector* with business strategist and digital marketer Lisa Miller, shares experiences on rapid scaling from tech start-ups in the private sector. It focuses particularly on the impact that this may have on organisational structure and personnel, highlighting the importance of a learning culture that celebrates what is learned from failures as well as successes.

The third chapter provides *Scaling Case Studies and Lessons Learned* from projects supported by global philanthropy organisation the BHP Foundation. It includes three separate case studies drawn from various sectors and countries, including education, natural resource governance, and environmental resilience. These experiences provide a fascinating window into the different strategies and approaches that BHP Foundation partner organisations have adopted to maximise their impact and create lasting, positive change. Abstracting lessons across all three examples emphasises the importance of collaboration, capacity building, adaptability, documenting and sharing impact, leveraging technology and data, addressing systemic barriers, focusing on sustainability, and learning from successes and failures.



Live coral at Yanooa Reef, Great Barrier Reef © GeoNadir



CHAPTER SUMMARIES

Chapter 1: Scaling and Systems Change 101 with Lennart Woltering

Background

Achieving sustainable development goals requires a shift from a singular focus on scaling innovations to embracing ways to catalyse systemic change. In this chapter, scaling expert Lennart Woltering shares his experiences and knowledge to explore what drives scaling and what factors affect success. These include recognising individual and system wide resistance to change, phasing out/scaling down unsustainable practices, and engaging the public and private sector to ensure the longevity of initiatives. By investing in local capacity, adopting a process-oriented approach, and addressing deeper systemic issues, we can create transformative change that goes beyond linear scaling. Lennart shares important concepts to consider when planning for scale, including the importance of shared vision, local ownership, and a systems thinking approach to foster social change movements.

Ampliseed Insights

- Foster shared vision and ownership.
- Invest in local capacity.
- Engage local, private, and public sectors.
- Be adaptive and flexible.
- Embrace change and expect resistance.
- Balance growth with phase-out/scaling down.
- Approach scaling as a complex system.
- “Stand on the shoulders of giants” – there are some great tools you can use, and people with lived experience to support you in your journey.

Chapter 2: Scaling Lessons from the Private Sector with Lisa Miller

Background

The private sector, particularly tech start-ups, has much to teach us about rapid scaling and adapting to new challenges. Drawing from 20 years of experience in seeding and scaling tech companies, including Canva, Lisa Miller shares her lived experience in redesigning organisational structure and teams to sustain growth and scale. Key to success is the balance between holding a big vision and taking small, actionable steps towards that vision. It is essential to create a learning culture that allows for both successes and failures, with a multidisciplinary team that can scale various aspects of the project. Coaches play a crucial role in fostering a supportive environment where team members can grow, develop, and innovate. The process of scaling involves continuous experimentation, learning, and adaptation while keeping the focus on the team’s capabilities and how they contribute to the larger goal.

Ampliseed Insights

- Embrace a learning culture.
- Focus on team dynamics and psychological safety.
- Balance structure with flexibility.
- Develop leadership skills.
- Encourage innovation across all teams.
- Leverage the unique strengths of your team.
- Adopt an ecosystem approach to scaling.
- Be open to change and adaptation.
- Start small and iterate.
- Use storytelling to share your vision.

Chapter 3: Case Studies and Lessons Learned from BHP Foundation Projects

Background

This collection of case studies delves into the experiences of three organisations that have successfully scaled their initiatives, uncovering valuable lessons and insights for others aiming to expand their reach and amplify their impact.

- *Case Study 1, Education Equity Program:* UN Women's Second Chance Education Program provides learning and training opportunities to women affected by crisis. The program, which has been successfully piloted in six countries, focuses on scaling deep, scaling up, and scaling out. Scaling practices have included addressing gender-based barriers and providing transformative life skills; engaging in advocacy; "training the trainers"; promoting civic participation; and working with governments to secure support and policy reform. Expanding the program's reach and adapting it to various contexts involves partnering with organisations that share its values and commitment to transformative change.
- *Case Study 2, Environmental Resilience Program:* The Great Barrier Reef Foundation (GBRF) experienced rapid growth after being awarded a \$443 million grant by the Australian Government in 2018. GBRF shares their experience of adapting quickly to be a large-scale grant program delivery organisation and the strategies they used as public scrutiny about the use of funds increased. By focusing on their core values and principles, building the right team, and adopting flexible strategies, the GBRF was able to retain their identity while scaling up and delivering impact on a much larger scale.

- *Case Study 3, Natural Resource Governance Program:* The Open Contracting Partnership (OCP) works to transform public procurement by making it more transparent, efficient, and equitable in over 50 countries. They have focused on providing legislative guidance, advocacy, capacity building, and technical data support, while gathering evidence from countries implementing open contracting to measure progress towards building systemic change. OCP scales for impact through multiplying beneficiaries via replication and amplifying impact through collaboration, and maintain a strong focus on measuring impact.

Amplified Insights

- Build collaboration and local partnerships.
- Focus on capacity building and sustainability.
- Respond to change with adaptability and flexibility.
- Work with others to tackle underlying systemic barriers.
- Document and share impact.
- Leverage technology and share data.
- Learn from and iterate on successes and failures.



KEY TAKEAWAYS

Scaling impact requires a long-term perspective, ensuring that projects can continue to deliver results even after the initial funding or support has ended. Scaling should be approached as a complex system with multiple factors, leverage points, and interconnections needed for long-term success.

Stage 1 - Foundations

- Foster shared vision and ownership
- Establish strong team dynamics and nurture psychological safety
- Embrace a learning culture and encourage innovation across all teams
- Start small, test and iterate

Stage 2 - Enabling Environment

- Develop realistic scaling ambitions – be really clear on **Why** – what is the systems change you want to make? **Who** are you doing it for **and what** do they need?
- Check you are scaling all the 'essential ingredients' for sustainable growth
- Invest in local capacity and empower local partners
- Welcome change and anticipate resistance - balance structure with flexibility
- Balance growth with phase-out – sometimes you need to scale-down

Stage 3 - Collaboration & Impact

- Use storytelling to share your vision
- Build collaboration and local partnerships - engage local, private, and public sectors
- Document and share impact, leverage technology and share data
- Work with others to address systemic barriers (e.g. political turnover, funding challenges, and cultural barriers)

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SCALING & SYSTEMS CHANGE 101



LENNART WOLTERING, GIZ & INTERNATIONAL MAIZE AND WHEAT IMPROVEMENT CENTER (CIMMYT)



[Lennart](#) is a scaling catalyst at the International Maize and Wheat Improvement Center (CIMMYT), where he assists scientists and development practitioners in expanding the impact of their work beyond project boundaries. He advocates for a shift in mindset around scaling from “reaching many” to include sustainability, responsibility and systems change. Passionate about translating academic research findings into practical application, he developed the Scaling Scan tool that helps users quickly identify bottlenecks and opportunities for scaling. Beyond CIMMYT, Lennart advises a range of development organisations, alliances and donors on scaling strategies. Lennart chairs the Agriculture and Rural Development working group of the [Global Community of Practice on Scaling](#), a community of more than a hundred donors, scientists and development experts. He works for the German Development Cooperation (GIZ) and is a core member of the GIZ/CGIAR Task Force on Scaling.

Abstract:

Achieving sustainable development goals requires a shift from a singular focus on scaling innovations to embracing ways to catalyse systemic change. In this chapter, scaling expert Lennart Woltering shares his experiences and knowledge to explore what drives scaling and what factors affects its success. This entails recognising resistance to change, phasing out unsustainable practices, and engaging with public and private sectors to ensure the longevity of initiatives. By investing in local capacity, adopting a process-oriented approach, and addressing deeper systemic issues, we can create transformative change that goes beyond linear scaling. Lennart’s introduction to scaling shares important concepts to consider when planning to scale, and discusses the importance of shared vision, local ownership, and systems thinking as key elements in driving sustainable development and fostering social movements for change.

Introduction – The Scaling Challenge

Scaling for sustainable development is a process that often starts with the research and development of an innovation or solution, moves to a proof of concept, continues through a pilot project, and then finally aims to scale up to make a significant impact.

Essentially, we discover something, we get proof of concept, we pilot it, and then we say, “This is fantastic. Let’s scale it!”. However, despite the enthusiasm surrounding this scaling process, many projects fail to achieve their desired outcomes. I’d like to discuss with you the challenges of scaling for sustainable development, and offer insights into how to overcome these obstacles.

Scaling is often hampered by the disconnect between the controlled environment of a pilot project and the realities of the real world. We do a lot of projects where the measure of success is “more adoption of the innovation” during the project. Let me share an example from Honduras on some infiltration ditches where a farmer basically digs a ditch and that stops some of the problem of soil erosion. Figure 1 is a graph showing the adoption of the project over a 10-year period. What is quite rare about this graph is that they continued measuring after the end of the project, and this is where you see the adoption goes down quite drastically.

I often hear the adage that “pilots never fail, pilots never scale”. And this is at the core of the scaling problem – many projects fade out after the funding ends, and the adoption of innovations decreases significantly.

Essentially, you can think of the gap between the pilot project and the real world as two “black boxes” that need to be addressed: first, moving from the pilot context to the real world at scale; and second, the sustainability of scaled innovations after scaling.

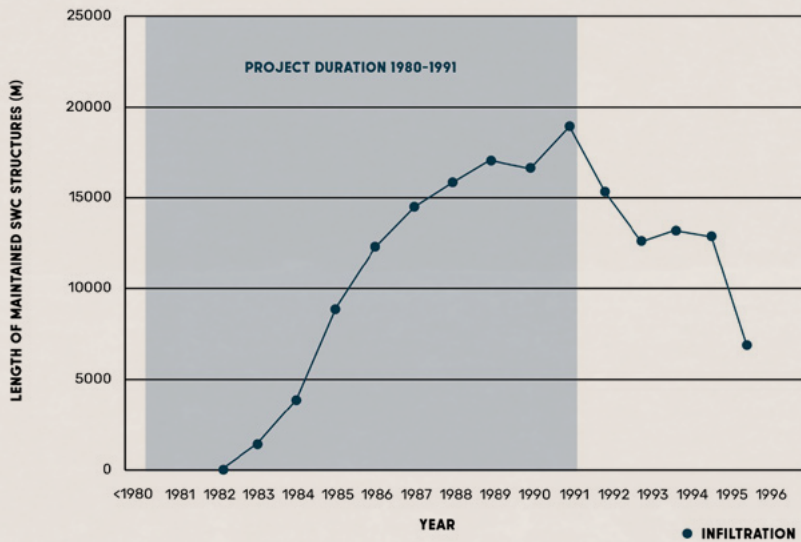


Figure 1: Innovation adoption during project and afterwards
 Hellin and Schrader (2003), [https://doi.org/10.1016/S0167-8809\(03\)00149-X](https://doi.org/10.1016/S0167-8809(03)00149-X)

Transitioning from the pilot context to the real world at scale is something we know a lot about. For example, there are different [tools and frameworks](#), there are plenty of books and articles written on the topic, and there is a [Global Community of Practice on Scaling Development Outcomes](#). So I'd like to share four key lessons that illustrate these understandings.

Lesson 1: Controlled Environments vs. Real World

Most pilot projects operate in controlled environments with strong leadership, external management, strong support for partnerships, and resources for capacity strengthening. You can decide you want something to happen, and basically pay a partner to do it – it's quite transactional. By default, pilots rely on unsustainable grants that have a fixed start and end date. They are also often shielded from politics and markets, which allows for smooth operation in a very controlled environment (Figure 2).

However, once the project concept is scaled, it faces a completely different set of challenges, such as political interference, market forces, and resource constraints. Therefore, the success of a pilot project is not always indicative that it will achieve success at scale.

We often see two common scaling strategies that are rewarded because donors fund them. The first involves “doing a bigger project” – repeating the pilot in a larger controlled environment; and the second is thinking “this innovation is so fantastic it will scale itself”.

However, both strategies have their limitations, because a successful pilot is no guarantee for success at scale. A larger controlled environment may not address the real-world challenges, while innovations often require additional support to scale effectively. The more a project is designed to work in a controlled environment, the less likely it is to succeed at scale. Projects must be designed with the understanding that the real world is very different from the controlled environment of a pilot.

Figure 2: Project often work in a controlled environment, which shields them from the risks of the 'real world'



Scaling for sustainable development requires adapting to real-world situations rather than simply expanding pilot projects. This involves understanding the local context, addressing the root causes of problems, and collaborating with local partners to co-design appropriate solutions. By grounding projects in reality and adapting to real-world challenges, organisations can increase their chances of achieving sustainable, large-scale impact.

Lesson 2: Adoption vs. Scaling

Scaling requires a thorough understanding of both adoption and scaling, which are often confused terms. To ensure the success of an innovation, it is crucial to recognise the differences between these two concepts.

Adoption refers to the end-users embracing and using an innovation. For example, in the context of sustainable development, this may mean farmers adopting new practices or technologies.

Scaling goes beyond the end-user; it involves the entire value chain embracing the innovation. Policymakers, service providers, the private sector, and the public sector must all adopt the innovation for it to be effectively scaled.

Lesson 3: Scaling Ecosystems to Support Multiple Innovations

Scaling requires the convergence of multiple initiatives to create a sustainable ecosystem that supports adoption. It might work for a project to measure success by asking 'did the user adopt our innovation'? But this doesn't mean there is an ecosystem that can sustain that adoption beyond the end of the project. The scaling process takes time and resources, as it involves coordinating different sectors and actors. A successful scaling strategy must consider the diverse range of innovations and actors involved in the process.

The scaling process is not only about a single innovation but also about creating an ecosystem that supports multiple innovations. Consider, for example, the adoption of electric vehicles. In the beginning it was all about technical innovation – battery strength, charging time, etc. But scaling required advancement in many areas beyond battery technology – we needed innovations in infrastructure (where to put charging stations), market strategies (cars that originally looked like square boxes are now designed to look attractive), and policy (incentives, promotions etc).

These innovations needed to scale in parallel, demanding time and resources to support the entire ecosystem.



Women carrying firewood © Annie Spratt



Figure 3: Innovations may require changes in order to deliver at scale

Lesson 4: Collaboration and Coordination to Access Different Skills

Scaling requires a multidisciplinary and multi-actor approach, as well as different roles and skills at various stages. As the scope of the project expands, the requirements and strategies for scaling change, necessitating different governance structures, resources, and skills. Collaboration and engagement are crucial for addressing gaps and ensuring that each stakeholder can focus on their areas of expertise.

Figure 3 shows an example of scaling that starts with transporting people via a bicycle. You can scale a little bit by carrying a few more people on your bike, but it's pretty limited. If you want to bring more people to your destination, the vehicle will need to change. You may need to buy a minivan. Now you'll need a driver with a licence driving on a paved road, probably built by the government. And then you may reach the limits of the minivan and you'll need to change again to a bus, so even the different phases of scaling have different needs, implications and participants.

This example reveals how scaling is multi-actor, with many kinds of innovations that all need to happen together. You need to focus on what you do best, and then build a good stakeholder collaboration strategy to see how other organisations can fill the gaps. So, successful scaling demands strong coordination and leadership to navigate the complexities of multi-actor initiatives.

A good learning from the private sector is that the people who are developing the innovations are usually not the same people who do the marketing of it – you cannot expect the scientists, for example, to also be good at delivery of scale. Separation of delivery and marketing acknowledges that different skills are required for each phase and that expecting innovators to manage both aspects can be unrealistic.

The Scaling Scan: A Three-Step Tool

So as these four lessons have shown, scaling innovations in sustainable development is a complex process that involves understanding context, accommodating multiple innovations, and fostering effective collaboration.

[The Scaling Scan](#) is a free, user-friendly, rapid, and accessible tool designed to help local actors understand and navigate the scaling process. It comprises three steps to facilitate discussions on scaling and to help users adapt scaling strategies to their specific context. It's available in French, English and Spanish, and it's only 17 pages long so you don't need a PhD in scaling to understand it.

The first step of the Scaling Scan involves understanding the context in which the innovation is being scaled. Factors such as geographical location, target audience, and available time can greatly influence scaling strategies. For example, scaling in Kenya and Ethiopia would require different approaches due to their distinct environments.

The second step identifies ten essential ingredients for successful scaling. These ingredients – which include elements such as a strong innovation, user demand, a viable business model, and financial support – constitute the enabling environment that you need for successful scaling. By paying attention to these ingredients, you can ensure that you are also innovating in the areas necessary for scaling, such as with the earlier example of the electric car.



The final step involves identifying gaps in the scaling process and collaborating with relevant stakeholders to address them. The Scaling Scan can be used to create a visual representation of current efforts, and identify areas that need additional focus. This multidisciplinary approach helps to ensure you're considering all the necessary ingredients and opportunities to maximise collaboration. It also helps you to think not only about what you can influence, but also what is outside your sphere of influence – you might not have the team to manage a particular policy, or perhaps you don't think existing policies will change much under the current government. So, this helps with decision points about how more or less ambitious you can be about scaling in your local context.

The Scaling Scan has been successfully used in [various formats](#), from 30-minute sessions on your phone to multi-day workshops. One common finding is that users often realize their innovations may not be as scalable as they initially thought. This is because they may have focused too much on tweaking the innovation, rather than focus on the obstacles in the context that hold back scaling, such as poor access to finance, or lack of business models for other organisations to support the scaling.

The tool also highlights the importance of piloting innovations in real-world conditions and testing the scalability of other components, like finance and collaboration. Undertaking a Scaling Scan of your project helps you to identify if your solution is sustainable beyond your direct involvement.

The Scaling Pyramid

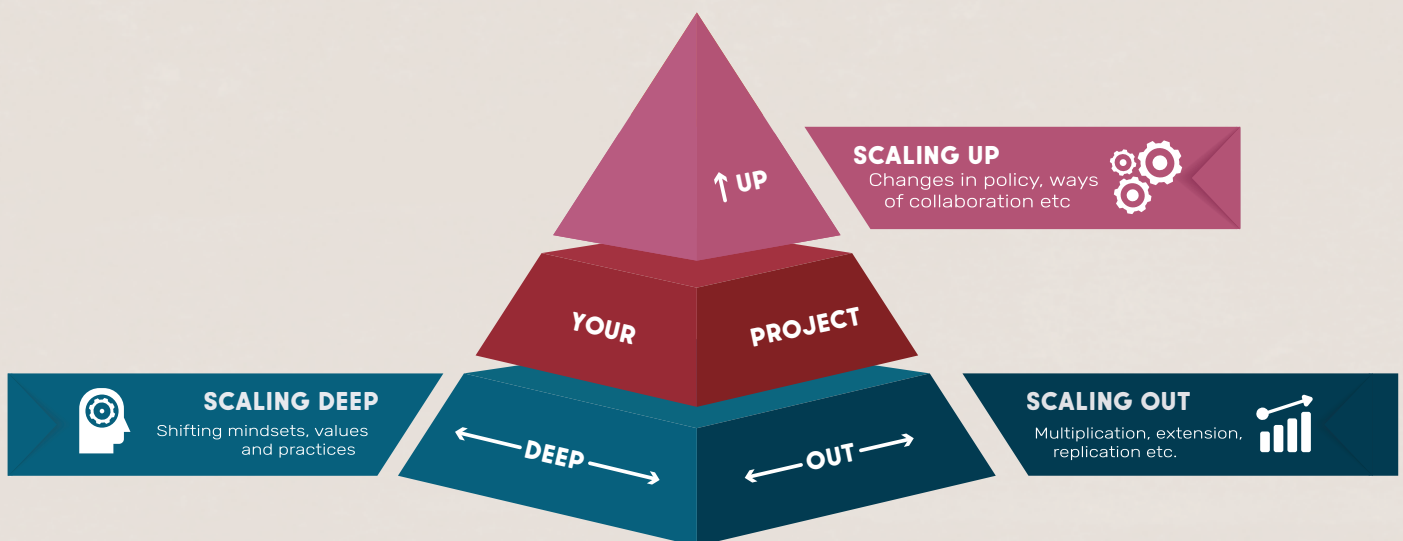
In the world of innovation and projects, the concept of scaling can be understood in many ways. Understanding the difference between approaches that scale out, up, and deep, can play a crucial role in determining the success and sustainability of projects.

Scaling out refers to the multiplication or replication of a project or innovation. This is often the end goal of many projects. However, to scale out more efficiently, it's important to also consider **scaling up**, which involves changes in policies and collaboration with others to facilitate scaling out. Balancing between scaling out and scaling up is vital for project success.

Scaling deep, on the other hand, is about shifting mindsets, values, and practices. This approach is often overlooked, but it is essential for project sustainability. If end users and policymakers do not internalize the benefits of a project or innovation, the impact may be short-lived and collapse after the project ends.

To ensure a balanced approach to scaling, it's important to pay attention to all three aspects: scaling out, up, and deep. Analysing the shape of a project's "scaling pyramid" can help identify areas that need more attention (Figure 4).

Figure 4: Scaling pyramid



Scaling for Systems Change

Now we need to look at why even successful scaling doesn't always lead to the sustainable changes that we are looking for. This is what is happening when people feel they did this fantastic project for five years, but it was basically an island of success, not really connected to something bigger.

You can do something great, but it won't necessarily influence the system in which it operates. You really need to start with the question "What do we want to achieve with scaling?". Is it to show that our innovation is indeed so great that everybody should be using it? (Maybe that's a private sector mindset...) With the kind of work we are doing for the public good, it's usually about something greater than the innovation. We work on very wicked problems, like food systems change, land restoration, or climate change. Just one innovation to fix the problem will not work, we need a systems change approach.

One of the insights that shocked me a few years ago, is that basically what we see as the problem is the result of a system working perfectly well. It's just not working the way that we want it to work.

Applying the iceberg model in Honduras

We were working with a Catholic Relief Service team in Central America, and we asked how can we apply system thinking tools to find new entry points for very sticky persistent problems, for example, to land degradation? Basically, soil is lost a hundred times faster than it forms, so if you don't do anything, the system is geared to degrade land.

We took one simple systems thinking model called the iceberg model – which basically says you need to look beyond what's visible to consider the 90% of the iceberg that's under the water – [and applied that to land degradation](#). We asked what are the structural issues that make land degradation such a normal thing to see, because it is basically everywhere. For example, there is underinvestment in research and development, there is very insecure land tenure, there are policies that basically give away control over natural resources to foreign companies, etc.

And that's just the policy. But what is feeding that? What is allowing those structural issues, those rules and laws to happen? Basically, a mindset of exploitation around agriculture is one element – just aiming to get the maximum out of the land in the shortest time. And then surrounding this is the whole issue of poverty, and differences in caring about what happens in urban vs rural areas. This mindset makes it almost logical that there is this underinvestment in research and development, and that there is no secure land tenure, because people are thinking short term. Considering all this, it's actually not really a surprise that there is so much land degradation. If you want to change all this, you then also need to surface positive model models that can lead to better structures and that can lead to better outcomes.



Santa Cruz de Yojoa, Honduras. © Esteban Benites



The project in Honduras focused on addressing soil degradation by working with youth groups – showing the link between the land degradation to social degradation issues such as violence and gangs. By understanding the underlying causes of degradation (experiences with not paying attention to the environment), the project was able to encourage community governance of the lands, and engage in multi-stakeholder activities such as working with the water sector, that led to restoring the land. This systemic approach led to more stable and sustainable results compared to just fixing the problem – it's the difference between treating it as a tame problem like a flat tyre, and a wicked problem that is more systemic.

From Project to Process

To sustain change at scale, projects should focus on changing underlying structures and supporting mechanisms within the system. This may involve addressing policy, investment flows and mindset changes. Engaging with local communities and stakeholders is crucial for fostering long-term positive change.

It's also essential to consider the potential consequences and implications of scaling. While scaling up a project or innovation can bring about positive change, it can also have negative repercussions. Understanding the responsibility that comes with scaling is vital for ensuring that the outcomes align with the values and priorities of the communities involved.

As we strive to achieve the sustainable development goals, it is vital that we recognise and address the resistance to change. Often, we focus on increasing the adoption of a single innovation without considering the need for broader systemic transformation. However, scaling alone does not guarantee sustainable development, as it can lead to more of the same without driving meaningful change.

One of the challenges we face is recognising that [certain practices must be scaled down, to create space for new, more sustainable solutions to emerge](#). This is well known in the energy sector where coal power plants make space for wind and solar energy sources, and the same principle applies in the food sector - think about meat consumption. We need to be just as intentional about scaling “down” as we are about scaling “up,” and recognise that phasing out unsustainable practices may be even more difficult due to the vested interests of, or resistance to change by, incumbent actors.



Waterfall in Honduras © Parker Hilton

Conclusion

In conclusion, scaling innovations alone does not guarantee sustainable development. A shared vision of change, local ownership, and an iterative approach are crucial for success. Tools such as the Scaling Scan can be instrumental in determining what makes sense in a specific context. Systems thinking is essential for addressing multiple aspects of a problem and fostering collective action. By focusing on addressing multiple pain and leverage points within a system, rather than simply scaling a single innovation, we can create a social movement for change that addresses power relationships and mindsets. Ultimately, by addressing these deeper systemic issues, we can create a better system that produces better results.

Amplified Insights

- *Foster shared vision and ownership*: Engaging local actors in creating a shared vision of change promotes local ownership and leadership, which are crucial for the long-term success of scaling efforts.
- *Invest in local capacity*: Scaling efforts should focus on building local capacity for innovation, collaboration, and scaling itself. Empowering local actors leads to more sustainable, contextually relevant solutions.
- *Engage local, private, and public sectors*: Sustainable scaling relies on the involvement of many types of stakeholders, including the local, private, and public sectors. Engaging these groups from the beginning ensures that the scaling process is well-supported and sustainable.
- *Be adaptive and flexible*: Scaling is not a linear process, and it requires constant evaluation and adaptation. Being open to change and adjusting strategies as needed is vital for successful scaling.
- *Embrace change and resistance*: Scaling involves change, and resistance to change is natural. However, it's essential to take the time needed to understand and address the concerns of those affected by the transformation.
- *Balance growth with phase-out/scaling down*: When scaling, we need to identify which elements need to be expanded but also those which need to be phased out or scaled down. This helps to create room for new, more efficient, and sustainable solutions.
- *Use systems thinking*: Scaling should be approached as a complex system with multiple factors, leverage points, and interconnections. Systems thinking – examining the relationships, interactions and dependencies – allows you to build a more holistic understanding of the issues and potential solutions.
- *Stand on the shoulders of giants*: Tools like the Scaling Scan can help determine effective scaling strategies and pathways for a specific innovation, taking into account contextual factors and stakeholder needs.





SCALING LESSONS FROM THE PRIVATE SECTOR

2



LISA MILLER, WEDGETAIL



[Lisa](#) studied Advanced Science, specialising in the fields of zoology and evolutionary biology, before starting her career as a scientist at the Australian Museum. After transitioning into technology in 2004, Lisa spent 18 years developing products and scaling leaders and teams at some of the fastest-growing companies in Australia, including Canva. She is now uniting her passion for conservation and technology at [Wedgetail](#), an organisation devoted to regenerating biodiversity and sustainably financing the transition to nature-positive systems.

Abstract

The private sector, particularly tech start-ups, has much to teach us about rapid scaling and adapting to new challenges. Drawing from 18 years of experience in scaling global tech companies, including Canva, Lisa shares her experience in redesigning organisational structure and teams to manage scaling successfully. Scaling requires a balance between having a big vision and taking small, actionable steps towards that vision. It is essential to create a learning culture that allows for both successes and failures, with a multidisciplinary team that can scale various aspects of the project. Coaches play a crucial role in fostering a supportive environment where team members can grow, develop, and innovate. The process of scaling involves continuous experimentation, learning, and adaptation while keeping the focus on the team's capabilities and how they contribute to the larger goal.

Introduction

There's a lot to learn from private sector about scaling, especially start-up scaling. What I bring to the conservation sector, after 18 years of working in tech scaling a global company, is to apply an entrepreneurial mindset to the incredibly important twin challenges of biodiversity loss and climate change.

When I started with the design platform Canva, we had fewer than a hundred staff and under a million monthly active users. I came in to develop the growth team which at that time had five people. In my first year we scaled the product growth team to 190 people, and we thus had to start redesigning the structure of the organisation including the teams needed to deliver the work.

By the time I left, we'd scaled to 1500 people, and Canva now employs over 3500 people with one hundred and twenty-five million monthly active users. With this rapid scaling – in users, in team members, revenue and product features – Canva has had to scale a whole ecosystem to support this growth.

Coming out of tech sector and into the conservation space, I'm now running an organisation where we're trying to do business differently. At Wedgetail, we're aiming to have a unique impact by restoring and conserving biodiversity through sustainable investment. Rather than traditional philanthropy, we are leveraging our own capital to create a business model around how you sustainably invest in biodiversity, and we're also investing in start-up businesses focused on climate and nature solutions. What we bring to our investments and business incubation is entrepreneurial insights.

Multidisciplinary Teams and the Capacity to Scale

The team is what enables an idea to come into the world and to be successful. Multidisciplinary start-up teams are core to a product's success, because not only are you thinking about product design but also the other critical elements like finance, growth, recruiting and all the systems that enable the business to grow. Key to a team's success particularly early on are generalists that have capacity to lean in and explore areas they don't know a lot about. For example, at one stage when we were still growing and were by some standards relatively large, we needed to assess the opportunity for acquisition. No one on the team had done mergers and acquisitions before, and I was asked to look into the opportunities and assess what we should do. Basically, we convened a small team, did some research and wrote up briefing notes on the pros and cons of acquiring a number of companies. The result was we actually acquired several successfully,

based on this research we figured out together. Today, Canva has a sophisticated mergers and acquisitions processes and team members, but to begin with we needed generalists that we trusted to work across the business operations.

As a company scales, hiring the right people becomes crucial. When you start to hire people, you often start with a specialist in the field to bridge the missing gap in expertise. But as the team grows, these early employees often move from a technical role into a team leadership role, but without the necessary expertise and experience to mentor, coach and get the most out of a team. The constraint is not in hiring the right people, it is ensuring team members are well-equipped to lead.

Coaching and Leadership Development – learning to “Hand over your Lego!”

We definitely had phases at Canva where we had to ask: ok we’ve got a lot of good people, but are they structured in a way to drive the most impact? Start-ups especially celebrate a flat organisational structure – as it serves them very well at the beginning of their journeys for context sharing and decision making at speed. But as the company grows, the need for some structure becomes increasingly more apparent. This required us to really work with the whole team around balancing things that were important to them like flexibility and agility, with the introduction of new structures and processes that would also bring transparency, fairness and easier decision making.

What we quickly discovered is we needed more people to lead and develop others and that a lot of people who were in leadership roles didn’t know how to coach. Thus we had to figure out how to build a great scaling program focused on teaching people and giving them experiences to develop their human skills (soft skills) and apply them. This is not a small thing to achieve in a timely way. It takes a lot of planning, a great curriculum, diverse experiences and a lot of time to really build strong leaders and coaches. So most often we found as we scaled at Canva, that a lot of our scaling issues were focussed around building the teams we needed.

We started with an amazing generalist team, and then as the company grew we needed to bring in specialists, and thus encourage generalists to “hand over their Lego”! This is [a phrase from Molly Graham](#) that we referred to all the time at Canva, it’s a way of supporting team members on how they transfer their time and skills into new problem spaces as opposed staying focused on the task they were doing which now has new team members to deliver it.

Fast-paced change in a company has many impacts – for example, someone’s job description could change even between them accepting the position and starting in the role. So, we were faced with a continuous cycle of change, and we constantly had to think about how to enable our team to grow at the same rate as the product developed and the user base grew.



When scaling it is important to bring in the right specialists and encourage generalists to “hand over their Lego”! © Marcel Strauß



Balancing Reliability and Risk-Taking

Companies in a rapid growth phase need this kind of dynamic space that allows change, where everyone gets comfortable and then they must do something different. The next challenge is how to keep up motivation up in a continuously changing environment. One of the interesting things that happens in start-up world, which is different to the corporate world, is that founders are entrepreneurs, and they're often massive risk takers. That can be very beneficial for employees because people can actually see how to take risks and push beyond their limits. But it can also be very hard, because lots of people employed by the company aren't entrepreneurs and have a different way of working.

This can result in team members with desires that centre around structure, stability, and professional development, which is very different to the leaders who are seeking ambitious growth. And matching these two things is one of those beautiful tensions that happens in start-ups! One of the things that we're trying to bring across to the conservation work that we're doing now is a lot more risk taking. It is really powerful if you can balance reliability with entrepreneurial risk, this allows you to push into areas that other people may avoid, and tackle projects that you don't know a lot about or that other people don't want to do. That's something we encourage.

Another insight was that many early team members deliver more impact through individual contributions, such as innovation, rather than through coaching and leading a whole team. The great thing about a start-up is you get a lot of opportunities to test and try different roles, which leads to diverse experience. Being allowed to fail is critical. For great team leadership, you have to get the balance right - to have the wins and failures, and keep your team healthy and happy, and continuously learning so they grow and become better together.

Coaches are key to creating a learning culture and holding the space to let people win and fail, as well as share ideas. This is one of the hardest things, but also the most interesting and rewarding.

Create a Safe Space to Learn from Mistakes

When you're in a start-up, you're in a bubble, where everyone has equity. There's a huge willingness to share ideas and bring everyone together to test and learn. When you work across bigger organisations or in structures where everyone doesn't feel ownership it's a lot harder. How do you freely share ideas? How do you let people explore ideas? How do you do things that might not work?

Sometimes you can create structures inside larger ones that allow people to learn and explore more readily. Even though Canva has idea sharing and experimentation built into its start-up DNA, a good example is the way Canva encouraged its growth and experiments team to work.

Obviously when you are in a start-up and light on money and time, investing both in ideas that might not work is a huge opportunity cost. But the growth and experiments team needed be allowed to do this to find the ideas that truly delivered results. Sometimes these ideas can be counterintuitive to what everyone thinks will happen - so listening and encouraging contrarian voices is also very important. We often had ideas and projects that took time and money that totally failed to increase users or revenue but we would learn from them and incorporate those lessons back into the next idea. We also created structures and processes either in the code base or team that encouraged experimentation. And had retrospectives to share context and debate what went wrong and what went right.

To do all this we also found an ability to navigate human dynamics and emotional intelligence are so important to enable teams to work on things that might fail. Just like the findings of the "[Aristotle Project](#)" Google ran many years ago to capture what makes the most impactful, successful teams. And essentially, the most important element is psychological safety - individuals feeling safe to take risks around their team members.

Take Small Steps to Achieve Big Visions

At Wedgetail, we're looking for the people who are willing to take risks. The people who say - we're going to do the thing that everyone says we can't, because that is how systems change happens. For me it's a mindset: you really need to understand that most of the limits we have are in our own minds. We hold a lot of limiting beliefs around what we think can be done and our abilities to do it. For example, when Mel started Canva, she said, "I'm going to build one of the most valuable companies in the world". And to some it just sounded so unachievable. But being around her, you witness someone who authentically believes in their vision and takes a step towards it every day. There's just this constant pushing towards the goal.

When we look at projects in the conservation sector we look for a big vision, because the vision needs to be big for systems change. Then what we look for are the next steps, the action taken today to move towards that vision. We look for people who can sit in the high-tension space between small actions and big visions.

However, often what we see as investors and grant funders in conservation is the mismatch between the funding pitch and capacity to deliver at that scale immediately. The key is to take small risks first. It's then important to reflect and ask, what worked and what didn't. In the conservation sector, depending on where your funds are coming from, it can feel hard to take those risks. It really depends on the reporting and the decision structures of the boards and groups you are working with and their appetite to try something new and take small incremental risks.

Sometimes at Wedgetail we see a vision that's too small. For example, we have been pitched amazing ideas that have all the bells and whistles but fall in this middle space – big enough to require significant funding but not big enough to create systems change. Equally they often don't demonstrate they have the first piece of the model proved out or the Minimum Viable Product as we often call it in technology.

Projects need to take steps towards their goal and then see if it was successful. Regular check ins to investigate how the communities and stakeholders respond, including exploring if there were logistical issues, unidentified risks and unintended consequences. Then move toward scaling your idea with those learnings. At Wedgetail, that's how we think about supporting our partners in nature-based projects, and how we think about our investments.

Another example from Canva, was early on instead of starting a huge community platform to share projects we initially started with asking our community to use a hashtag, and looked for responses and increased engagement. When we got increased interaction, we started a dialogue inside Instagram using comments and likes for the community in that space. And then we reached the stage where we were like, okay, we've outgrown Instagram's ability to allow us to connect as a community and we don't want to rely on their platform. And so, we then started to think about the next step. We didn't invest a huge amount of capital on a community platform at the start when we didn't know what type of engagement people actually wanted.

As you become bigger and bigger, it's harder to be nimble. The amount of work increases and often the solution to a problem can be seen as a new hire or radically more expensive piece of software or infrastructure. You have to keep thinking about what's the first thing we need to do, what do we need to understand to make impact and then scale.



Aerial view of a farm in the Lamas landscape in San Martin, Peru © LandScale



An Ecosystem Approach to Scaling

At Canva we had to scale marketing, finance, legal, and engineering, all at once. Scaling multidisciplinary teams at the same rate can be challenging, but it's crucial to avoid becoming too siloed in your thinking. This is why the focus should be on the team as a whole – their collective capabilities and how they can work together to achieve the desired outcome.

I would describe this as an ecosystem approach to thinking about scale. As I said at the start, you have multidisciplinary teams who are trying to scale on all sides as much as possible at the same time. And this ecosystem is going to be affected by different things at different times, that means parts of the ecosystem need to scale at different rates which requires foreseeing the interdependencies.

Scaling down is particularly hard, even at a start-up where everyone's meant to be super pragmatic, even when a product hasn't gone well. It's a difficult process due to the emotional investment and egos involved. I have only seen things transition – taking a team who is focused on one thing and moving their skills and thinking to another. Scaling something down and cutting it off takes a really long time and it's very hard for everyone. But you do have to consider the opportunity cost of spreading yourself across too many projects and new things.

Encouraging innovation in the smallest of ways

Another important aspect of scaling is the willingness to innovate across all teams, not just the product team. Start-ups strive to be both different and the same – taking inspiration from existing ideas and structures, while still creating something new that is tailored to their specific needs.

The power of storytelling is really important here. At Canva, for example, traditional department labels such as “human resources” and “customer support” are replaced with the “people team,” and “customer happiness team” respectively. These names then not only live up to their labels but also help to foster a more positive and innovative work culture encouraging employees to think outside the box and challenge the status quo.

Amplified Insights

- *Embrace a learning culture:* Allow your team members to experiment, fail, and learn from their experiences. This enables growth and fosters innovation within your organisation.
- *Focus on team dynamics and psychological safety:* Create an environment where team members feel comfortable sharing their ideas and taking risks. This promotes collaboration and the development of new solutions.
- *Balance structure and reliability with flexibility:* While implementing structure is important for scaling, it's also crucial not to stifle creativity and innovation. Continuously evaluate whether new structures are driving progress or hindering it.
- *Develop leadership and coaching skills:* Great leadership is essential for effectively managing a growing team. Invest in developing the leadership and coaching skills of your team members, especially those in management positions.
- *Encourage innovation across all teams:* Innovation should not be limited to the product team. Encourage creativity and experimentation in every department, from finance to human resources.
- *Leverage the unique strengths of your team:* Identify and capitalise on the unique skills and expertise of your team members. This can help you scale more effectively.
- *Adopt an ecosystem approach to scaling:* Focus on scaling multiple aspects of your organisation simultaneously. This can help to ensure that all departments are growing at a sustainable rate and working cohesively towards shared goals.
- *Be open to change and adaptation:* In the beginning, scaling frequently involves making adjustments and pivoting strategies. Be prepared to change course when necessary and learn from the experience.
- *Start small and iterate:* When implementing new ideas or projects, set a vision that other people are excited by and to achieve that vision, start with small steps and learn from the results. This allows you to refine your approach and minimise risks before scaling up.
- *Use storytelling to share your vision:* Communicate your goals and vision through storytelling to create a sense of unity and purpose among team members. This can help drive motivation and dedication to achieving your mission, and empower teams to challenge the status quo.



Alto Mayo Awajun Communities Landscape project, Peru © Conservation International





**SCALING CASE STUDIES
& LESSONS LEARNED
FROM BHP FOUNDATION
PROJECTS**

3



CHAPTER OVERVIEW

Abstract:

This collection of case studies delves into the experiences of three organisations that have successfully scaled their initiatives, uncovering valuable lessons and insights for others aiming to expand their reach and amplify their impact.

- **Case Study 1:** UN Women's Second Chance Education Program provides learning and training opportunities to women affected by crisis. The program, which has been successfully piloted in six countries, focuses on scaling deep, scaling up, and scaling out. Scaling practices include addressing gender-based barriers and providing transformative life skills; engaging in advocacy and policy work, training trainers, promoting civic participation, and working with governments to secure support and policy reform. Expanding the program's reach and adapting it to various contexts involves partnering with organisations that share its values and commitment to transformative change.
- **Case Study 2:** The Great Barrier Reef Foundation (GBRF) experienced rapid growth after being awarded a \$443 million grant in 2018. GBRF shares their experiences and strategies as the organisation adapted to increased funding and scrutiny. By focusing on their core values and principles, building the right team, and adopting flexible strategies, the Foundation has been able to retain their identity while scaling up and delivering impact on a much larger scale.
- **Case Study 3:** The Open Contracting Partnership (OCP) works to transform public procurement by making it more transparent, efficient, and equitable in over 50 countries. They focus on legislative guidance, advocacy, capacity building, and technical data support, using an open government approach. OCP scales impact through multiplying beneficiaries via replication and amplifying impact through collaboration, and maintain a strong focus on measuring impact.



CASE STUDY 1: SECOND CHANCE EDUCATION



Sonali Hedditch – UN Women

Sonali joined UN Women’s Second Chance Education program in 2019 and is currently the Scaling and Innovation Manger. She has managed World Bank Group, Asian Development Bank and Indigenous Business Australia programs, projects and teams to reform the business enabling environment to foster private sector investment and entrepreneurship, with a focus on women’s economic empowerment. Sonali has worked globally, with deep experience in the Pacific Islands, East Asia and the Middle East.



Anna Parini – UN Women

Anna joined the UN Women’s Second Chance Education program in October 2021, directly from UN Women Ethiopia. A development professional experienced with UN agencies, NGOs, and the Italian Development Cooperation Agency, her areas of expertise include economic development, team leadership and project management, gender programming, humanitarian response and post-crisis recovery, as well as partnership management, and monitoring and evaluation.

Introduction

The Second Chance Education Project, a partnership between UN Women and BHP Foundation’s Education Equity Program since 2018, aims to provide women affected by crisis with learning and training opportunities that empower them. The program has been successfully piloted in six countries, and scaled across three dimensions—scaling deep, scaling up, and scaling out.

We have needed to scale at huge levels, because the problem we are trying to solve is huge. It’s a challenge around adult learning and education, reaching those who need it most. And for us, that’s women that are affected by crisis. They’re the people that are least likely to have education at any level, be it primary, high school or tertiary. And once they reach adulthood, pathways into education are extremely constrained and limited for a variety of reasons.

We’re working in multiple contexts in terms of women affected by crisis. We’re working with women that left school before completion due to poverty, due to discrimination and due to harmful social norms. We’re working with women in humanitarian crisis situations, including conflicts and disasters where schooling is disrupted regularly due to the crisis. And we also work with women that did finish school and perhaps even tertiary studies, but they’ve been internally displaced or forced to move countries due to conflict, persecution or some form of disaster. In their new home, as asylum seekers, refugees, migrants, they often need to begin again learning a new language, navigating a new life, a new country, and perhaps not having their qualifications and experience recognised.

So, Second Chance Education is essentially about providing a second chance to women to access learning and training opportunities and find pathways to empowerment. After five years of working in six countries, we are working across multiple levels to implement this program. We’re working through our global office in Geneva. We’re working, of course, through our UN Women offices at the country level. We always partner with women-led organisations, feminist organisations at the grassroots that have lived experience in their management in terms of the issues we’re addressing and have deep grassroots relationships with the communities that we’re working with.

Coming to this question of what is scalable, there are different parts of what we call the “signature features” of our program that are scalable.



Scaling Deep: Addressing Gender-Based Barriers and Transformative Life Skills

The program delves into the cultural roots of discrimination and social norms that constrain women's access to education. By addressing gender-based barriers such as access to childcare, safe spaces, cyber safety, and public transport, the program ensures that women can participate in educational opportunities.

The program also engages men and boys, encouraging positive masculinity and examining family dynamics as women pursue new pathways. We see this as a second chance for men and boys as well, around their identity and gender roles. Additionally, it provides gender transformative life skills training to challenge discriminatory norms within individuals, families, and communities.

We accomplish much of this scaling through social referrals, life skills training, and work through our hubs for gender-based violence.

Scaling Up: Advocacy and Policy Work

In addition to, of course, working with the individuals that are the beneficiaries of Second Chance Education, we also need to work at the institutional and the structural level as well, in terms of changing hearts and minds, and challenging discriminatory norms.

We do a lot of "training the trainer" work. So not only are we training the beneficiaries, but we're training other women to be trainers to deliver Second Chance Education. There's a big focus on civic participation. In a humanitarian crisis situation, the women are often motivated to be pursuing an income to get a job, or to engage in some sort of microenterprise. But we want these women to also feel empowered if they so desire to step up to the table and be involved in advocating for their needs - in a civic context, a political context, in a leadership role. There's a lot of work that we do around representation and relatability for women at the intersections.

Scaling up involves advocating for government support, policy reform, and financial frameworks that help expand the program's reach. Government relationships are really core to how UN programs have to work. By demonstrating success through evidence-based pilots, we can secure co-funding from governments and work on policy reform at all levels of government.

Scaling Out: Expanding the Program's Reach and Geographical Contexts

Scaling out involves increasing the program's reach, adapting it to different contexts (from country to country, or urban to remote, for example), and expanding to new countries. To achieve this, we are developing knowledge products like handbooks and guides, while also improving our systems to accommodate new partners and data.

Key factors in scaling out include clearly elaborating our unique value proposition, our ability to localize, and innovative funding approaches such as outcomes-based models. Choosing the right partners who are aligned to our values and ideas is equally important as finding those who understand our commitment to scaling deeply and scaling up.

CASE STUDY 2: GREAT BARRIER REEF FOUNDATION



Cedric Robillot – Great Barrier Reef Foundation

Cedric joined the [Great Barrier Reef Foundation](#) in 2014 and is the Executive Director of the Reef Restoration and Adaption Program. Bringing together Australia's leading experts, the Program is helping the Great Barrier Reef resist, adapt to, and recover from the impacts of climate change. Cedric has 20 years' experience in both the private and public sectors, delivering and managing large infrastructure and R&D programs. He is passionate about how the design and management of integrated-science and innovation programs can be used to tackle big challenges.

Introduction

The Great Barrier Reef Foundation's (GBRF) Resilience Reefs Initiative is funded by BHP Foundation's Environmental Resilience Program. GBRF experienced rapid growth after being awarded a \$443 million grant in 2018 called the Reef Trust Partnership. It was very much an all or nothing opportunity, and resulted in 12 months of intense scrutiny, negative media coverage and politicisation. This grant has increased the effort, funding and impact of the organisation by an order of magnitude and with such a rapid growth came some very specific challenges. We needed to focus on the organisation itself, looking inward, while also building external partnerships as the only realistic way to deliver the program at scale.

With this kind of rapid growth, there were some very specific challenges. Not only were we given one year to plan and start delivering, but we were also the first non-governmental organisation to be subjected to an audit from the National Audit Office in Australia, which was quite unusual and very challenging itself. (We passed it, I should mention here.)

Scaling Up and Down

As a six-year program with a defined end date, the GBRF had to consider not only how to rapidly scale up but also how to scale down once the funding ends. This has required us to think strategically about the balance between building in-house versus external capacity (within delivery providers and communities), the management of knowledge to support transitions and handovers, and how to design a program that leads to system change, builds a solid legacy and ensures long-term impact.

Retaining Core Values and Principles

One of our challenges has been existential. How do we stay true to our core identity through this transformation? We felt we were a small and very innovative group of passionate people, in a unique position which allowed us to take risks, try things out, and when needed create some disruption in the overall system. Suddenly we were faced with an operating environment that was completely different, including being now perceived as an arm of the government delivering a very major grant.

Our approach to keeping our identity was to go back to our core values, explicitly state our principles, and focus on building the right team and fostering strong partnerships. We knew that retaining an innovative spirit and continuing to show care and kindness was very important in our space. Displaying a sense of purpose and confidence was essential, but we continually strived to engage with humility and grace. Taking risk for the right reward, keeping a focus on the Great Barrier Reef as our anchor, and adopting a partnership approach were reflections of our core values. At the moment we have more than 500 partners delivering our programs across the GBR and Indo-Pacific.

Balancing Growth and Impact

Another challenge has been balancing internal growth and program delivery while managing the risk of becoming too inward-looking. It's been interesting to see how, as a larger organisation with incredibly ambitious goals and very tight timeframes, it has sometimes been more difficult for us to look up, and to look outside.



To maintain our focus on delivering impact at scale, we have had to be really creative and identify new ways to translate our core principles into delivery models, such as balancing accountability with flexibility. We could have chosen for example to go with a one size fits all procurement model which would have significantly simplified our internal processes, but we knew this would diminish our impact and transfer the administrative burden to our partners, particularly small community and Traditional Owner groups. So, for example, our procurement model was developed using a fit-for-purpose approach, with some initiatives requiring strategic partnerships (including joint ventures), while others could be delivered most effectively through a conventional tender or grant process, but with contracting templates, guidelines and reporting requirements modified to suit the risk and local context.

As a principle and strategic decision, we have relied heavily on transparent science-based evidence and prioritisation models, as well as peer-review and independent advice, to inform our planning and delivery, helping 'neutralise' the external pressure that comes with such large funding capacity.

Building Capacity for Change

We have had to be smart about balancing organic growth with step changes, understanding that processes and systems needed to evolve with the organisation. To be honest, surviving the transition has been hard, but the way we survived was by taking control and just getting on with the job – and that may seem obvious, but amidst all of the external pressure it wasn't always clear to us. What we mean by taking control is accepting that "we're doing it", as opposed to "it's being done to us".

We wanted to aim big, but we had to start small. Yet we also had to accept that growth was not simply a case of replicating our small-scale operations. I sometime use the analogy of product development in the pharmaceutical industry. Research chemists spend years designing and synthesising new drugs, testing those until a promising candidate drug emerges. Once a business decision is made to put this drug on the market, shifting to large scale production is a whole new ball game. The scientists that spent years developing this new drug, take all their data and hand those over to another group, literally in a different facility. This new group will start from scratch, because what they need to make is not a milligram of this product – but kilograms. And the way to do that is entirely different, in terms of raw material, technology and manufacturing safety etc. Of course they will consider the learnings from research and development, but they will go back to the drawing board to make sure that they design a fit-for-purpose process.

In our business, we've had to do that several times. We've had to accept that at some point it is no longer okay to grow organically, and a step change is required. With that come a whole lot of issues, including around staff and management, systems and governance. This extends to our partnerships, and we have been invested in creating the conditions for them to grow and when needed implement step changes so they can thrive after our funding ceases.



Challenging the Status Quo

We realised quite early on that we needed to pace ourselves and stay focused on the long game, we needed to think of this scaling as a marathon, not a sprint. One of our biggest scaling challenges was around our ability to challenge the status quo and establish a legacy.

When you have this scale of funding, you need be prepared to show courage and use it to challenge the system in a positive way, if you think the status quo is incompatible with the outcomes you seek to achieve. For example, the GBRF decided very early on to allocate 10% of the overall grant funding to Traditional Owner-led activities, even though this was not a design feature of the original grant agreement. We made a strong case to government who supported the approach, and this completely transformed the way we approach Traditional Owner governance, co-design and capacity building on the Great Barrier Reef.

Similarly, we decided to challenge the established monitoring and reporting system, demonstrating the benefits of applying innovative technologies and dashboards to report live data to the government, our partners and stakeholders. This freed us from some of the inefficiencies that can impact the delivery of programs, reducing the administrative burden and significantly increasing transparency and accountability.

Conclusions

Overall, our process of scaling has involved focusing on our core values and principles, building the right team, adopting flexible fit-for-purpose strategies and approaches and challenging the status quo, aiming to retain our identity as we grew to deliver impact on a much larger scale.

In practice, we have applied many different delivery and scaling strategies, reflecting the huge diversity of our programs. In some areas, it has been and still is about movement making and having the courage to influence the system to achieve the legacy we are seeking.



The Great Barrier Reef © Yanguang Lan



CASE STUDY 3: OPEN CONTRACTING PARTNERSHIP



Carey Kluttz – Open Contracting Partnership

Carey leads the [Open Contracting Partnership's](#) partnership and engagement strategy to support open contracting around the world while directly overseeing projects in Africa, the Middle East and France. Before joining the Open Contracting Partnership, Carey served as a Fulbright-Clinton Fellow with the national mining company Côte d'Ivoire, where she also supported the Open Government Partnership process, and was previously with the World Bank's Governance Global Practice.

Introduction

The Open Contracting Partnership (OCP), part of the BHP Foundation's Natural Resource Governance umbrella program, aims to change the status quo of public procurement. Governments spend \$13 trillion annually on public contracts with private companies for various public services, but the process is often opaque and outdated. Public procurement is the government's number one corruption risk globally. This is especially concerning in resource-rich countries, where public contracts are crucial to converting natural resources into goods, works, and services for citizens.

At OCP, we are working to make public contracting more fair, efficient, and better for people and the planet, ultimately creating shared prosperity. With a small team of 30 globally distributed members, we are active in over 50 countries, transforming public procurement with the help of local partners.

Thinking Differently

Scaling impact is a critical aspect of OCP's work, as we want to see global results. We provide technical support and implementation guidance for public procurement reforms, including working in a lot of different focus areas, using an "open government approach" to engage various stakeholder groups, and we work with partners to publish and use open data and advocate for normative changes. We track impact stories from a wide range of countries and contexts.

A key organisational focus is documenting, sharing and scaling that impact. Figure 5 shows a screenshot from our website where we track what we call our impact stories, which we have been able to do in a wide range of countries and contexts.

Impact is one of the most important organisational targets that we monitor quarterly. Tracked year-over-year, it illustrates the results that we're seeing and what can be described as the "gift that keeps giving," when a first open contracting reform continuously drives deeper and more sustainable reforms. These different targets help us to show how we're doing in terms of scaling in different ways.

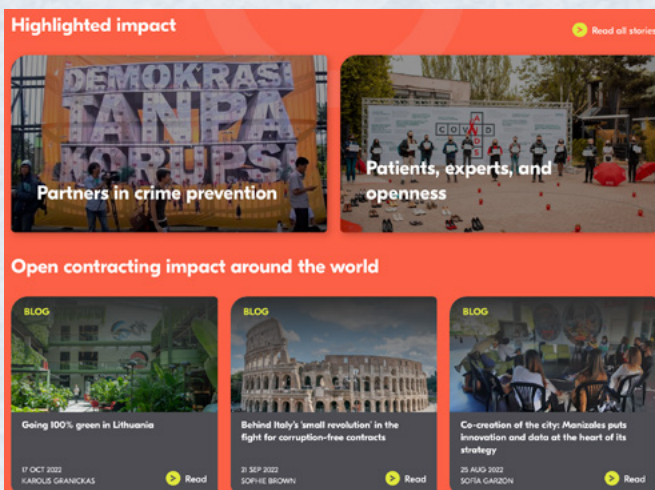


Figure 5: Screenshot from OCP's website showing impact stories

Scaling Out: Multiplying the Number of Beneficiaries through Replication

For us, scaling out is focused on multiplying the number of reforms and beneficiaries. We often think about it as snowballing, or independent replication of projects.

A recent example of this comes from the state of [Nuevo León](#) in Mexico, where we helped develop a digital open data platform to publish and track information on public works and infrastructure projects. This has improved competition and led to better quality infrastructure and better value for money. What's really interesting is that we've since seen similar projects being replicated in other states. A total of ten states have now adopted this approach in the infrastructure sector. We've seen similar replication or inspiration among local governments within countries in Colombia and Nigeria.

On a related note, our [Open Contracting Lift program](#) has been particularly good at spurring this sort of replication and inspiration. Lift is our impact accelerator that helps teams of bold procurement reformers around the world to go "further, faster" with their ideas and deliver plans for systemic change. It is an intensive 18 month-long program, where we work closely with each team to provide change management and technical open contracting support. Teams are selected through a competitive process, with new calls for applications offered annually. Currently we are working on social equity and inclusion, and our next generation will focus on anti-corruption, equity and inclusion, and environmental sustainability.

Scaling Up: Amplifying Impact through Inspiration

At OCP, we think about scaling up as amplifying progress or impact, including through inspiring other reforms that build on each other. Our organisational targets document progress and impact from our key countries, and writing up the stories as I mentioned earlier – the idea of "the gift that keeps on giving".

We have seen this effect in [Ukraine](#), [Paraguay](#) and [Colombia](#) where our open contracting reforms have improved integrity, anti-corruption, and service delivery at various levels of government and in a range of sectors – from health to defence to education.

In Colombia, for instance, we saw our first impact story in the capital city of Bogotá, where we documented an open contracting approach that helped the city to [bust a price-fixing scheme and improve the quality of school meals](#). We have since observed impact at the national level in terms of [increased competition, with more businesses competing for public contracts](#). These reforms have recently inspired further impact in gender-responsive procurement, increasing capacity and competition among women-owned businesses, and we have been able to see [exceptional improvement in parts of the country that have adopted an open contracting approach](#).

Scaling Wide: Changing Mindsets, Practices and Values

In terms of thinking about changing hearts and minds, we do that through looking at impact, and especially through our community engagement and empowerment strategies, and collaborating with partners. We have seen our community diversify over the years, which we measure in an annual survey. We look particularly at our community's own perceived capacity to carry on this work without OCP's direct support. Looking forward, boosting this empowerment score will be a key factor in scaling and sustaining the success of open contracting beyond OCP.

Scaling Challenges

OCP was spun out of the World Bank in 2015, and our original goal was to work ourselves out of a job by focusing on scaling the community of implementers that were doing open contracting on their own. During this time, we have really seen our community grow exponentially and become more diverse. And despite the growth and uptake of open contracting globally, we are seeing that partners still don't feel ready to carry out the work independently, which we've heard clearly through our last few annual partner surveys, as well as independent evaluations of our work.

Our current evaluation has reiterated some of the key challenges that we are facing. Firstly, our partners don't yet feel ready to do the work on their own. We're now working on adapting our service offerings to better prepare them. We measure that through organisational targets around partner capability, partner empowerment, and also whether they're securing funding independently of open contracting to do this work.

This is linked to a second challenge. Even though we're focused on helping partners get funding, identifying more sustainable core funding is a real issue. And a third challenge is political turnover or shifts in priorities that can pause or stall reform. We work with multi-stakeholder coalitions to try to build robust support around reforms so that they can weather transitions and navigate shifting political landscapes.



As mentioned previously, our main focus is showing impact from our work. At OCP, we set a high bar for what we consider impact, based on hard, openly available data. Especially for some of our partners with lower capacity, we know it can be difficult to calculate and we heard through our evaluation process that partners are sometimes frustrated that their good work doesn't "count". We're trying to be more mindful about taking what we call a "garden" approach: we plant the seeds for future impacts among a variety of projects and cultivate them over the years, and also celebrate the incremental steps along the way.

Where we are now, we have early adopters in most of the global regions. In Latin America in particular, where over half of the population lives in a country with open contracting data, we're further along and are at the early majority phase. So there's a lot of energy around open contracting and open contracting data, but we really want to see all of the regions, our entire community, move over this chasm to the early majority or beyond, when we will know that open contracting is really taking root.

We are continually adapting our service offerings and looking for ways to address the challenges. As OCP enters its next five-year strategy cycle, we are moving even further from looking at just transparency in terms of open contracting, to better and more purposeful contracting. Our focus will be on more equitable and more sustainable contracting, and moving that towards scale.



Medellin, Columbia © Open Contracting Partnership

Amplified insights

- *Build collaboration and local partnerships:* Working with local partners and stakeholders is crucial to understanding the specific context and needs of our target audiences. Engaging with local partners helps in adapting solutions to fit the local context, ensuring that the initiatives are more likely to be successful and sustainable.
- *Focus on capacity building:* Equipping partners with the necessary skills, knowledge, and resources is essential for scaling impact. Empowering local partners enables them to take ownership of the projects, increasing the likelihood of long-term success and replication.
- *Focus on sustainability:* Scaling impact requires a long-term perspective, ensuring that the projects can continue to deliver results even after the initial funding or support has ended. This involves securing sustainable funding sources, fostering local ownership, and building robust support systems.
- *Respond to change with adaptability and flexibility:* Successful scaling requires the ability to adapt and respond to changing contexts and challenges. This includes refining strategies and approaches, addressing new obstacles, and making adjustments as needed to ensure the initiatives continue to deliver results.
- *Challenge the status quo:* Accepting the status quo might limit the ability to deliver impact. Where appropriate, challenge the constraints of the status quo using an evidence-based approach to argue for change.
- *Work with others to address systemic barriers:* To scale effectively, it is essential to tackle underlying systemic issues, such as political turnover, funding challenges and cultural barriers. This requires working with multi-stakeholder coalitions, advocating for policy and legislative changes, and fostering an enabling environment for the initiatives to thrive.
- *Document and share impact:* Tracking and sharing impact stories and evidence of success is vital for scaling. This helps build credibility and social proof, demonstrates effectiveness, and encourages the adoption of successful approaches by other organisations or governments.
- *Leverage technology and share data:* Sharing data can improve transparency, efficiency, and accountability. Harnessing the power of technology and open data can help in monitoring progress, evaluating outcomes, and informing decision-making.
- *Learn from and iterate on successes and failures:* Scaling impact involves continuous learning and improvement. Organisations should be open to learning from both successes and failures, iterating on their approaches, and refining their strategies to enhance their impact.



SCALING RESOURCES

The Scaling Scan

The Scaling Scan is a user-friendly tool to explore what is required to scale an innovation in a specific context, the implications this has for project management and collaborations, and the potential trade-offs on the environment as well as social dynamics. It is based on ten scaling ingredients that represent the enabling environment for an innovation and have a significant impact on whether a scaling ambition can be realistically achieved.

- Web address: <https://scalingscan.org/>
- Article: Woltering, Fehlenberg, Gerard, Ubels and Cooley (2019). [Scaling – from “reaching many” to sustainable systems change at scale: A critical shift in mindset](#). *Agricultural Systems* vol 176, Nov 2019, 102652.

Global Community of Practice on Scaling Development Outcomes

The Scaling Community of Practice works to strengthen the development community’s ability to design and deliver sustainable solutions that match the scale of the need. It provides a platform for knowledge exchange among experts and practitioners on approaches to scaling up development interventions, for developing partnerships, and for championing the idea that scaling up development impact is critical for achieving global development aspirations, such as the Sustainable Development Goals.

- Web address: <https://www.scalingcommunityofpractice.com/>

‘Give Away Your Legos’ and Other Commandments for Scaling

In this article for *The Review*, Molly Graham explains why scaling companies and teams is, in her words “crazy hard,” and what you can do as an early employee or a start-up founder to make it easier on yourself and your team. She covers what rapid scaling actually feels like as an experience (something too few people talk about), the toughest phases of growth and how to survive them, and – most importantly – how you can anticipate the biggest challenges before they really hurt your momentum and your chances for long-term success.

- Web address: <https://review.firstround.com/give-away-your-legos-and-other-commandments-for-scaling-startups>

Project Aristotle from re:Work with Google

re:Work is organised around ways you can make an impact in your workplace. Each subject contains tools and insights for addressing specific challenges. One of these tools arose from an analysis of effective teams at Google. Code-named Project Aristotle – a tribute to Aristotle’s quote, “the whole is greater than the sum of its parts” (as the researchers believed employees can do more working together than alone) – the goal was to answer the question: “What makes a team effective at Google?”

- Web address: <https://rework.withgoogle.com/print/guides/5721312655835136/>

ABOUT US

Ampliseed

[Ampliseed](#) is a learning and leadership network that curates opportunities for conservation practitioners to connect, learn and amplify ideas for environmental resilience, globally. Designed for intentional reflection and dynamic connection, the initiative cross-pollinates ideas and connects practitioners for peer-to-peer knowledge exchange.

- Web address: <https://ampliseed.org/>

BHP Foundation

[The BHP Foundation](#) is a global philanthropy collaborating to catalyze new solutions to social and environmental challenges. The [Environmental Resilience Program](#) supports new ways of conserving and sustainably managing large-scale, globally significant natural environments for the benefit of future generations through taking a rights-based human centered approach.

- Web address: <https://www.bhp-foundation.org/>

Pollination Foundation

[Pollination](#) is a specialist climate change investment and advisory firm, accelerating the transition to a net-zero, nature positive future. [The Pollination Foundation](#) is a catalytic organisation that supports nature-based initiatives that put humanity at the heart of climate solutions by incubating ideas, nurturing growth and celebrating success.

- Web address: <https://pollinationgroup.com/foundation/>



Forest conservation in Manitoba's boreal, Canada © Nature United



OUR PROJECT PARTNERS

Indigenous Desert Alliance

The *Indigenous Desert Alliance* is an Indigenous controlled, member based organisation that plays a vital role in 'keeping the desert connected' and building resilience for desert ranger programs.

- Web address: <https://www.indigenousdesertalliance.com>

Nature United

The *Forest Conservation in the Boreal* Project works with First Nations in the Canadian boreal to help build a socially, economically and environmentally resilient future for Indigenous communities and for nature.

- Web address: <https://www.natureunited.ca/about-us/where-we-work/manitoba/>

Conservation International

The *Alto Mayo Project* is supporting Awajun indigenous communities and migrant farmers become effective stewards of the landscape's natural resources.

- Web address: <https://www.conservation.org/peru/iniciativas-actuales/awajun-indigenous-communities>

Great Barrier Reef Foundation

The *Resilient Reefs Initiative* is a global partnership bringing together local communities, Reef managers, and resilience experts to develop new solutions for adapting to the effects of climate change and local threats.

- Web address: <https://www.barrierreef.org/what-we-do/projects/resilient-reefs>

Fundación Tierra Austral

The *Chile Conservation Corridor* is demonstrating a new model for conservation in Chile by using Chile's new private lands protection tool, the *Derecho Real de Conservación* that will help achieve conservation goals within a corridor of Chile-Mediterranean habitat.

- Web address: <https://www.fundaciontierraaustral.cl/en/projects/>

Rainforest Alliance

LandScale is a global framework to generate trusted landscape-level insights that can align and incentivize local and global action to deliver sustainability at scale.

- Web address: <https://www.landscape.org/>

The Nature Conservancy

Valdivian Coastal Reserve is protecting one of the largest areas of temperate rainforest in Chile and is managed as a model for private conservation in Chile.

- Web address: <https://www.nature.org/en-us/about-us/where-we-work/latin-america/chile/valdivian-coastal-reserve/>





A learning and leadership network connecting practitioners with a rights-based, human-centred approach to building environmental resilience. Together we learn, share and amplify.

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