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**B** | Center for  
Universal Education  
at BROOKINGS

# Scaling impact in education for transformative change

Practical recommendations from  
the Real-Time Scaling Labs

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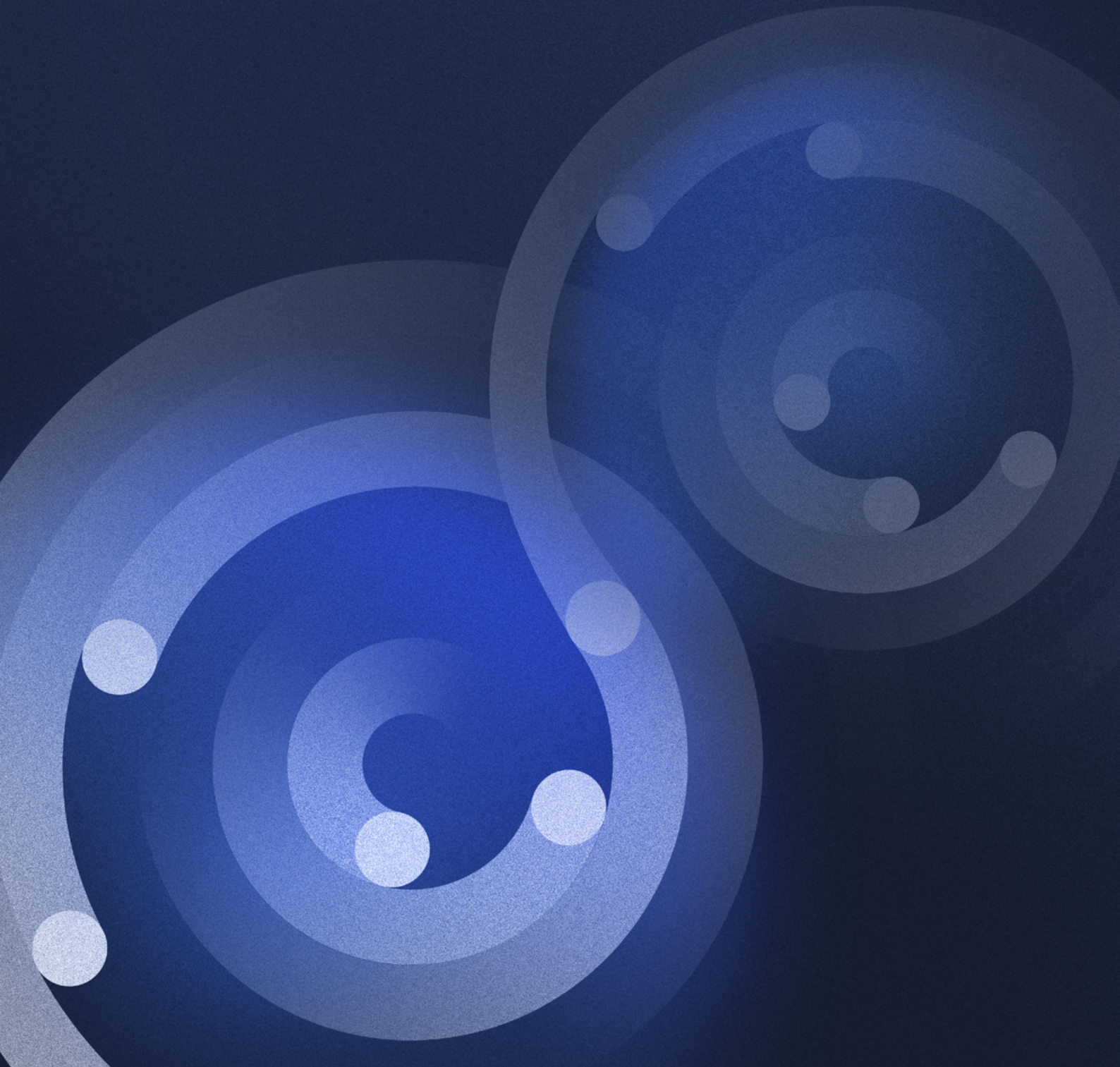
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# I

## Introduction



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Transforming education systems is a complex process that requires understanding the strengths and weaknesses of the educational ecosystem and exploring new approaches, ideas, and initiatives to improve quality learning opportunities for children and youth. However, research shows it is not enough to simply identify effective education initiatives and expand them to more people. It takes a combination of technical expertise, understanding of local contexts, political strategy, collaborative partnership, flexible adaptation, and shared vision to scale and sustain the impact of education initiatives. Scaling cannot occur through one actor alone; it requires concerted and collaborative action by multiple actors at all levels of the education system.<sup>1</sup>

Too often, the work of scaling is not captured by typical monitoring and evaluation or research studies and lessons learned are not systematically documented.<sup>2</sup> In response, in 2018 the [Center for Universal Education](#) (CUE) at [Brookings](#) launched a series of [Real-time Scaling Labs](#) (RTSL) to generate more evidence and provide practical recommendations on how to expand, deepen, and sustain the impact of education initiatives leading to transformative change in education systems, especially for the most disadvantaged children and youth.

The purpose of this report is to look across all six of the RTSL cases to analyze common themes, insights, and lessons learned about the process of scaling as well as interesting

divergences, and to offer considerations for others looking to learn from or build on this work (Table 1). This report is intended for governments, education implementers, donors, and researchers who are interested in collaborative approaches to scaling impact in education.

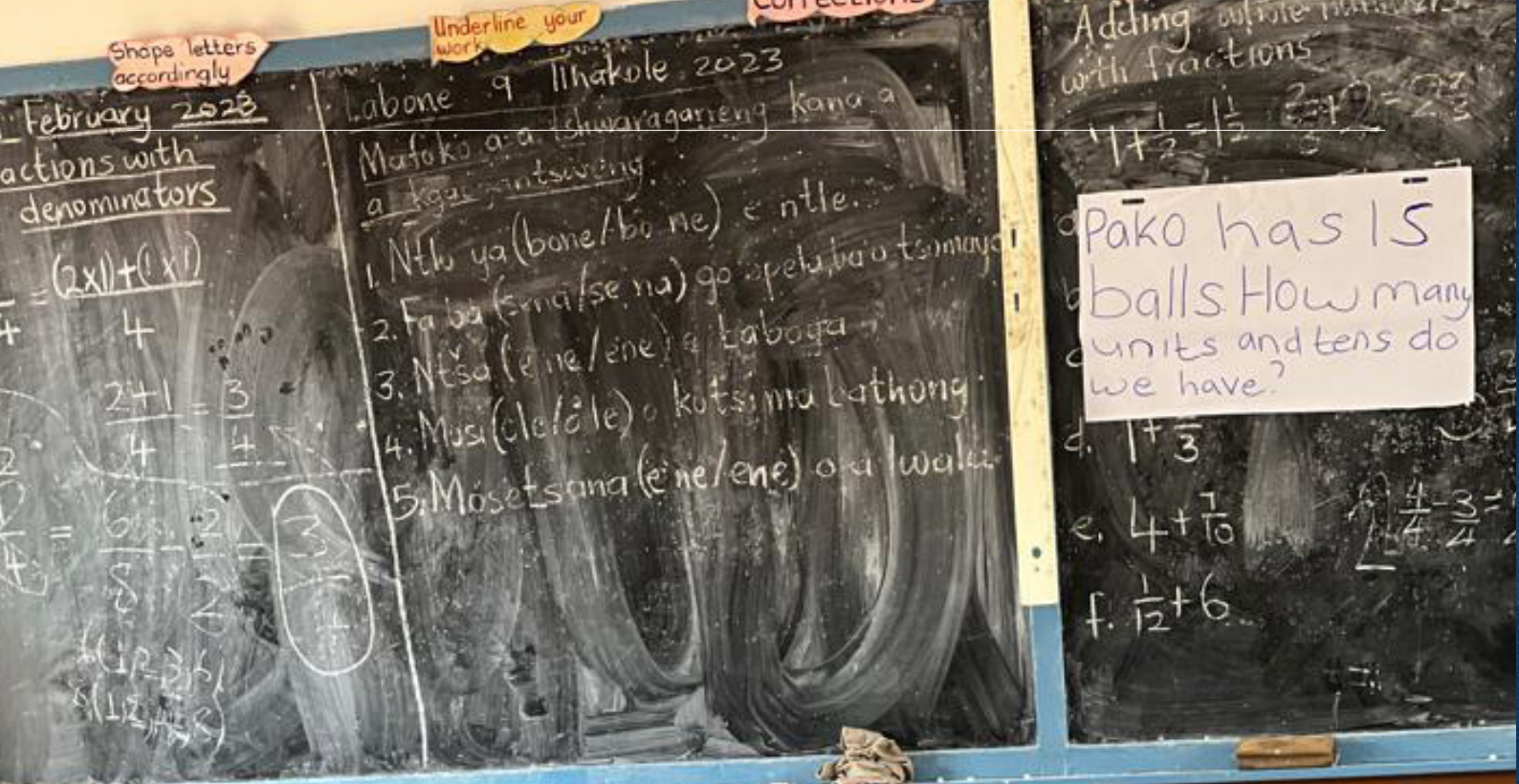
Section 1 examines key scaling lessons that emerged across all of the RTSL cases and analyzes scaling drivers (key levers, forces, or factors critical to making progress toward the scaling goal) at three different units of analysis to explore the way scaling happens at the **system, institution, and individual levels**. The second section analyzes how the RTSL model worked in practice, its strengths and challenges, and how it contributed to scaling. The report concludes with a set of core recommendations for governments, implementing organizations, donors, and researchers developed in consultation with the RTSL learning community. These recommendations are not intended to be exhaustive but to be concrete, actionable, and realistic. Unless otherwise cited, data throughout this report comes from firsthand documentation and analysis collected by RTSL scaling lab researchers and partners between 2018-2023. See Annex I for a full explanation of the RTSL methodology. More details on the RTSL approach and the paper's methodology can be found in Annex I and II. A synthesis of the findings and recommendations can also be found in accompanying short briefs targeted to specific actors.

## Scaling

Scaling represents a range of approaches—from deliberate replication to organic diffusion to integration into national systems—that expand and deepen impact leading to lasting improvements in people's lives.

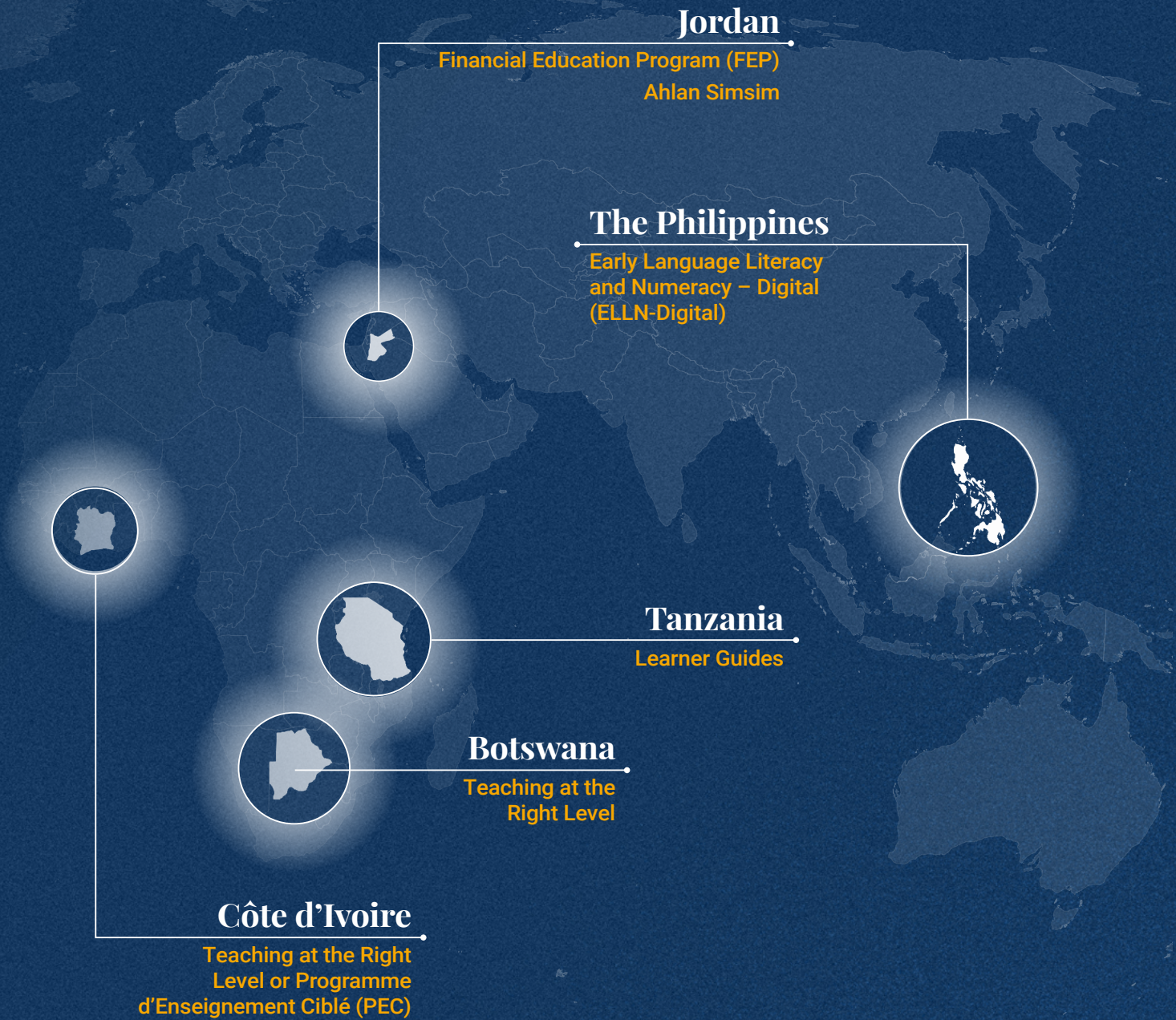
## Real-time Scaling Lab

A Real-time Scaling Lab is a participatory, action research approach that accompanies an education initiative in the process of scaling in order to learn from, document, and support scaling and sustaining its impact. The RTSL approach was co-created by CUE at Brookings with partner institutions around the world and tested in five countries between 2018 and 2023. The lab process combines ongoing documentation and analysis of the scaling journey with a series of in-person and virtual convenings that bring together a diverse group of key stakeholders to collectively plan for sustainable scale, discuss and reflect on challenges and opportunities faced, and develop and test adaptations and course corrections to scaling strategies through an iterative learning process.





**FIGURE 1. COHORT OF REAL-TIME SCALING LABS**



Source: Authors own analysis



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## EDUCATION INTERVENTION

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### BOTSWANA

**Teaching at the Right Level (TaRL)** - An approach for teaching foundational literacy and numeracy skills focused on frequent assessment and targeted instruction by children's actual level rather than grade. Adapted for the Botswana context.

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### CÔTE D'IVOIRE

**Teaching at the Right Level (PEC)** - An approach for teaching foundational literacy and numeracy skills focused on frequent assessment and targeted instruction by children's actual level rather than grade. Adapted for the Ivorian context and use in French.

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### JORDAN

**Ahlan Simsim** - A range of early childhood interventions covering all aspects of nurturing care provided to children in areas affected by the Syrian crisis. This report focuses on the inclusion of socio-emotional skills in the national school readiness program in Jordan.

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### JORDAN

**Financial Education Program (FEP)** - A national program for teaching core financial literacy concepts through interactive curriculum. Classes are part of the regular curriculum and take place weekly in grades 7-10 and as an option for students in grades 11-12.

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### PHILIPPINES

**Early Language, Literacy, & Numeracy Digital (ELLN Digital)** - A blended teacher professional development course for K-3 teachers combining multimedia self-study, classroom practice and independent reflection, and peer learning.

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### TANZANIA

**Learner Guide program** - An approach that focuses on delivering engaging life skills classes to secondary students through young female role models from the local community.

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### SCALING GOAL

Reach 100% of students in **grades 3-5** by 2025; infused into daily teaching practice in all primary schools by 2027.

Reach 100% of the nearly 3 million students in **grades 3-6** in 20,406 public schools, mobilizing 81,624 teachers, 20,206 school heads, and 2041 Primary and Pre-Primary Pedagogical Advisors.

Reach 1.5 million **children ages 0-8 and caregivers** through direct services, and an additional 8 million children and caregivers through mass media services by 2023 in Jordan, Iraq, Lebanon, and Syria. In Jordan, a specific subgoal was to integrate socio-emotional learning into teacher everyday practice for grades K-3.

Reach 100% of students in **grades 7-12** and transfer ownership of program implementation to government by 2022.

Reach 100% of primary schools & **K-3 teachers**; expand model to other grades & subjects.

Introduce Learner Guide program in **secondary schools** in 12 new districts in 2021 and lay groundwork for integration of some elements as a national government program.



### RTSL PARTNER

Youth Impact

Transforming Education in Cocoa Communities (TRECC)

International Rescue Committee (IRC)

INJAZ

Foundation for Information Technology Education and Development (FIT-ED)

CAMFED



### LOCAL SCALING PARTNERS

Ministry of Education and Skills Development; Ministry of Youth Empowerment, Sport and Culture Development

Ministry of National Education and Literacy, cocoa industry partners

Ministry of Education; Ministry of Health; National Council of Family Affairs; Sesame Workshop

Ministry of Education; Central Bank of Jordan; Association of Banks in Jordan; Shoman Foundation

Department of Education

Ministry of Education, Science, and Technology; The President's Office, Regional Administration and Local Government; Prime Minister's Office, Labor, Youth, Employment and People with Disabilities



**ROLE OF LOCAL  
RTSL PARTNER IN  
SCALING\***

**FINANCING  
MECHANISM\***

**SCALING  
STAGE\***

**BOTSWANA**

Direct delivery in some schools to test adaptations, support government delivery

External funding from foundations, bilaterals, multilaterals; government in-kind contributions

Transition to national scale

**CÔTE D'IVOIRE**

Support government delivery and M&E, financing for extension

PPP between foundations and cocoa companies; government in-kind

Expansion phase to study adaptation & institutionalization

**JORDAN**

Adaptation, M&E, and coordination of different scaling pathways

External funding from foundations

Identifying opportunities to embed into system

**JORDAN**

Support government delivery, ongoing research on adaptations and training approaches

Private sector funding of commercial bank profits channeled through Central Bank of Jordan

At scale, in process of handover to government

**PHILIPPINES**

Support government delivery

Government financed

National policy, scaling through phased rollout

**TANZANIA**

Direct delivery in schools, responsible for financing and M&E

External funding from foundations and bilaterals; government in-kind

Transition to national scale

\* During RTSL period



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### SCALING PATHWAY(S) PURSUED

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### PROGRESS TOWARD SCALING GOAL (AS OF MARCH 2023)

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Institutionalization, delivery by teachers & national youth service interns

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TaRL is implemented in 6 regions in Botswana with sensitization trainings done in 2 additional regions. Over 20% of primary schools are implementing TaRL.  
Both literacy and numeracy content are being implemented.  
Students have shown clear learning gains with 72% of students gaining numeracy skills after 30 hours of TaRL.

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Institutionalization; delivery by teachers

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PEC is implemented in 1,000 schools with preparations for expansion to approximately 2,000 additional schools.  
PEC continues to be gradually integrated into the education system and adaptations tested for further institutionalization.  
Heads of lower-secondary schools and regional Ministry of Education offices are requesting PEC implementation in order to raise the reading level of students in grades 7 and 8.

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Government and NGO delivery

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277,599 children reached through the readiness and remedial programs in 2021 and 2022.  
Classroom environment scorecard now includes social-emotional learning and learning through play metrics. These score cards are a requirement for teachers' in-service training and part of the promotion system.  
IRC and the ministry are integrating social-emotional learning and LtP in the teachers' guides for Kindergarten to grade 3.

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Institutionalization, delivery by teachers

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FEP delivered to all students in grades 7-10 and offered as an option for students on the literature track in grades 10-12.  
Full handover of all curricula, monitoring, and training processes to the ministry in 2022. FEP integrated into policies and processes.  
Ongoing research and adaptation of the curriculum through continued partnership between the ministry, INJAZ, and Central Bank of Jordan.

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Institutionalization, government delivery

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Following policy established in 2016, DepEd supports ELLN course delivery (face-to-face and the blended ELLN Digital model).

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Institutionalization, direct delivery, and government delivery

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12 districts implementing the Learner Guide program in Tanzania with plans to scale to additional 3 districts in 2024 and all schools in the same districts in 10 program regions  
Reaching 312,871 students in 466 schools.  
Inclusion of CAMFED life skills content into safe schools materials under government national SEQUIP program.  
Orientation of CAMFED life skills to 30 guidance and counseling teachers from Malinyi, Chamwino districts and Morogoro municipality.

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# 2

**What have we  
learned about  
scaling impact  
in education?**



This section looks across the RTSL cases to identify common lessons about how key drivers contributed to scaling, how constraints were addressed, and how different scaling choices and strategies were determined and pursued. The themes discussed and the accompanying examples are not a comprehensive list but aim to dive deeply into a few themes that provide interesting and actionable insights. The findings are clustered at the system, institution, and individual levels. It is important to note that the three levels are primarily used for organizational purposes; the distinction among system, institution, and individual is porous and context-specific, and many key drivers operate at and across multiple levels (for more details on how this paper defines these levels, see Annex II).

# Section 1

## System-level lessons



Throughout this section this icon indicates specific examples from the Real-time Scaling Lab cases.

### **Scaling implementers and scaling teams**

These terms designate the set of individuals and/or institutions leading the process of scaling. This could refer to an NGO, government actors, or a combination, depending on the case.

### **Initiative**

Initiative is used broadly to mean a program, policy, innovation, intervention, approach, idea, or practice.

### **RTSL case**

The term RTSL case refers to the initiative being scaled in that specific context.

## Operating in a system requires balancing tradeoffs, priorities, and opportunity costs

Scaling does not happen in a vacuum — all initiatives are influenced by the broader environment in which scaling takes place. Prevalent ideology, priorities, politics, resources, social and cultural practices, and power dynamics within local communities, regional departments, ministries of education, national governments, and the international arena all influence how an initiative scales.<sup>3</sup> In turn, the process of scaling an initiative impacts the broader system.<sup>4</sup> Across cases, scaling teams had to continually negotiate a delicate balance among pursuing their intended scaling strategy, meeting local needs, and aligning with the broader policy environment. Additionally, given that time and effort are limited commodities, each team had to make tough choices about what elements of scaling to prioritize (and deprioritize) and what tradeoffs to accept.

### **Aligning with the local policy environment**

Across cases, implementers attempted to demonstrate how their initiative responded

to local needs and contributed to key policy priorities. Prior research makes clear that these are important strategies for building momentum and buy-in at different levels of the education system.<sup>5</sup>

These two examples demonstrate that linking the initiative to a key policy priority can help ensure the initiative is connected and framed as a solution to an existing problem that is already front and center for policymakers. Policymakers are faced with multiple, simultaneous pressing challenges that require attention. Not all problems are of equal priority or can receive the same amount of attention. As such, it is important to align scaling efforts to current policy priorities and national or regional strategies. This will ensure

that the initiative is seen not as a standalone or parallel effort but as an innovative contribution to solving a priority problem. Clear alignment to existing policies will also help identify opportunities for integrating the initiative into existing budgets and sector plans.



In the Philippines, the development and scaling of a teacher professional development (TPD) initiative was a direct response to a priority policy of the Department of Education. In order to strengthen its reading program, in 2015, DepEd developed the Early Language Literacy and Numeracy Program from kindergarten to grade 3 (K-3), whose TPD component utilized the face-to-face train-the-trainer cascade model for delivery. The following year, DepEd mandated the practice of “School-based Learning Action Cells” (S-LACs) to encourage professional learning communities to serve as the channel for school-based TPD. However, DepEd found it challenging to provide early language literacy and numeracy training efficiently for over 250,000 K-3 teachers while maintaining quality, as well as to efficiently and effectively assess the impact of training on teacher competencies and practice and to mobilize the S-LACs as intended. As a result, the Department of Education asked local NGO FIT-ED to co-develop and test a blended model of TPD delivery utilizing the original course content of early language literacy and numeracy and leverage the S-LACs. The adapted model—ELLN Digital—has teachers first study independently using multimedia courseware, apply concepts and strategies learned in practice, and support learning and practice through independent reflection and regular peer exchange in the S-LACs. The pilot delivered the course successfully to over 4,000 teachers in 11 of the 17 national regions, and as a result, the Department of Education mandated national scale-up beginning in the school year 2019-2020.<sup>6</sup>

In Jordan, the IRC began scaling efforts by first collaborating with the ministries and communities to identify priority needs and align these needs with existing national policies. With this shared understanding, IRC then collaboratively identified the core components of the Ahlan Simsim program that could help address these priorities. All partners engaged identified that as a first step, Ahlan Simsim’s social and emotional learning (SEL) and Learning through Play (LtP) approaches could be incorporated into the existing national School Readiness Program and reach marginalized children who did not attend preschool to help equip them to thrive in primary school. As a second step, partners agreed to identify opportunities to integrate SEL and LtP more broadly across different education services aimed at equipping teachers with the skills and tools to apply them in the classroom.



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## Balancing tradeoffs

Ideally local needs and national priorities are aligned, but in reality, they can and do diverge. Given the constant paucity of time as a resource, many scaling teams could not put equal focus and energy on every component of the education system at once and so they often had to decide where to prioritize their efforts. While all cases sought to address local needs and align with national priorities, in some cases the strategy was to start with grassroots-level priorities and work out and up, while in other cases, the first step was to emphasize issues that national or regional policymakers prioritized. Although these choices were necessary and often unavoidable, they often contributed to implementation

challenges, imbalances, or blind spots that later had to be corrected.

The RTSL examples make clear that adoption of an initiative at the policy level does not necessarily result in change at the classroom level. Conversely, success in the classroom does not automatically lead to prioritization at the national level. To achieve sustainable change, scaling strategies need to cultivate engagement, emphasize alignment, and support behavior and policy change at multiple levels of the education system. Regardless of the scaling pathway and starting point, including locally driven approaches for scaling at different levels of the education system is important to ensure impact spreads across the system and is not concentrated at just one level.



In Jordan, the national government and the financial sector both identified strong need for greater financial literacy and inclusion among the population and youth in particular. This interest was reinforced by an international movement in favor of financial inclusion and resulted in the adoption of a Jordanian National Financial Inclusion Strategy. However, while initially there was robust support at the national level for scaling a Financial Education Program (FEP) in schools, there was less interest from some teachers and students and a belief, especially in the early years, that the program was “extra” rather than a core subject of the curriculum. In other words, the demand was stronger at the national level than at the local school level, which led to some challenges with the quality of FEP delivery initially. Recognizing the need to rebalance the demand and establish greater support at the classroom level, the RTSL focused on identifying activities to strengthen teacher training and ultimately increase student and teacher engagement. This highlights that one constituency’s priority should not be mistaken for support across all constituencies and that interest and capacity must be deliberately built at multiple levels of the education system.

The opposite occurred in Tanzania, where communities highly valued the Learner Guide program and its direct response to local challenges around opportunities and empowerment for adolescent girls. There was strong attention to a grassroots scaling approach, but initially less emphasis on cultivating buy-in at the higher levels of the education system and on articulating how the Learner Guide approach would fit into national policies and priorities. As a result, some national-level policymakers initially had limited understanding of the importance of the Learner Guide program for addressing locally identified problems, which constrained potential scalability and sustainability of the program. The RTSL supported CAMFED to introduce the program to a broader set of national policymakers and to find ways to align the program with existing policies for youth empowerment.

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Similarly, cases faced other tradeoffs. Immediate needs often took precedence over long-term plans. It could be challenging for scaling implementers to dedicate sufficient time and expertise to future planning around issues such as costing, training, or longitudinal research when there were pressing daily needs related to implementation. Implementers working outside government sometimes felt it was too early in the scaling trajectory and potentially presumptuous to raise issues such as long-term financing or cost analysis with government. But this approach ran the risk of lapsing into a short-term project mindset in which direct implementation was prioritized over scaling for long-term impact.

In many cases, scaling teams were aware that prioritizing some areas might mean sacrificing progress in others, and when it became apparent that excessive amounts of time, energy, or staff were spent in one area,

they would work to reprioritize. This meant cutting back on certain partnerships when the moment was not right for collaboration, pivoting to new research approaches like proof-of-concept studies before large-scale pilots, searching for ways to streamline and simplify implementation, or moving away from certain activities. To do this, teams needed to create intentional space to regularly pause, reflect on tradeoffs, and shift attention and action.

While it is certainly challenging, scaling requires routinely taking a step back from immediate needs to reflect on the whole picture. Planning for and protecting time to stop, reflect, and adjust is important for ensuring a balance between immediate needs and the long-term scaling vision. When tough decisions have to be made about how to prioritize limited time and capacity, it is essential to interrogate the tradeoffs that result and actively work to counterbalance them.

## REMAINING QUESTIONS AND GAPS: TRADEOFFS AROUND PURSUING MULTIPLE PATHWAYS TO SCALING

While the RTSL tried in each case to develop and pursue a balanced scaling strategy, across cases, demand for the specific initiative varied across the different levels of the education system. This illustrated a number of questions about what it means to be problem-driven. Which problems get significant attention in a world of many needs and finite resources? Are local priorities defined by decisionmakers at the national level, the regional level, by grassroots communities, by researchers, or by funders?

Some cases raised the question of what happens when the data show a clear need, but the government or local communities have different priorities.

The literature on scaling emphasizes government buy-in and community support as fundamental to success<sup>7</sup> — without this, should scaling an impactful initiative be abandoned as a waste of time and resources? Or should external actors spend their resources advocating to government to prioritize the issue?



## Prioritizing costing and securing financing is challenging

In every case and among nearly every actor, there was a strong awareness about the need for cost data to inform scaling decisions and the necessity of planning for sustainable medium- and long-term financing. Yet despite clear understandings of the importance of these issues, this was an area with some of the greatest constraints and challenges when it came to operationalization. Nonetheless, across cases, creative approaches to analyzing costs and leveraging financing opportunities were employed.

### Challenges collecting and using cost data

Scaling teams agreed that cost data and cost analyses are critical for informing the scaling process. However, actually doing this work proved difficult. Cost data are distinct from a project budget in that they go beyond the direct delivery costs to include all of the resources required for implementation.<sup>8</sup> Cost data can be used not only for accountability purposes, but also to make the case to government and funders for investment, to identify ways to use resources more effectively, and to answer

questions about implementing, adapting, scaling, and sustaining an initiative in a specific context. These could include: What might this initiative cost when implemented in a different context or at a larger scale? Is the initiative as designed affordable at scale? What adaptations could increase cost effectiveness? What scope and timing for a scaling process is optimal from a budget perspective? How might the costs of this initiative be integrated into existing government budget lines?

If it is clearly important, why was it so difficult to carry out cost analysis for scaling? Across cases, a primary obstacle was lack of data. In many instances, the detailed and disaggregated data necessary to conduct a robust analysis of the costs of implementing and scaling the initiative within the existing education system had not been collected—either because stakeholders did not know how, did not have the capacity to collect such detailed data, did not understand what type of information the government would want, or did not prioritize it. Tying back to the issue of tradeoffs, scaling teams expressed that it could be hard to prioritize collecting, disaggregating, and analyzing in-depth cost data when such information was not requested by their funders or by their government partners. Further data limitations occurred when the type of population data necessary to conduct scaling scenario planning (such as how many students there would be in 5, 10, and 20 years) did not already exist in government data systems and had to be generated. Finally, some in-kind costs, government contributions, and volunteer opportunity costs could be challenging to compute, especially when the government data was not accessible to external actors. Another barrier was capacity limitations from both government and non-government stakeholders in terms of how to conduct cost analysis to inform scaling decisions. Finally, more hesitancy to share cost data externally or with key partners was observed than with other types of data.



In Botswana, the team did an internal cost analysis to inform adaptations to the training model for significant cost savings, as well as to help Youth Impact understand what level of government contribution could be expected when expanding to a new region.

In Côte d'Ivoire, the RTSL hired an external costing expert to gather data on the costs of delivering the initiative and to build projections for several scaling scenarios. Comparing the costs of these scenarios helped lab members identify what scaling scope and timeline would be most feasible given available financial and human resources. Once an optimal scenario was selected, its costs were compared to existing Ministry of Education expenditures, and the analysis informed the decision to identify adaptations to test for reducing costs of the training model. In Tanzania, the RTSL also hired an external expert to support cost analysis. Since the Learner Guide program had different goals for its cost analysis, the work focused not on projected costs for delivering at scale, but instead on understanding in detail the costs of running the existing program, where there might be cost efficiencies to explore, and how the costs could be integrated into existing government budget lines.

Nonetheless, the RTSLs found ways to address these challenges and move forward with cost data collection and analysis in some form. These strategies included working closely with partners to reach agreements about sharing and using cost data; tracking financial and non-financial contributions from the government and making educated guesses where data were not available; and bringing in outside expertise.

These examples make clear that there is not a one-size-fits all approach to cost analysis for scaling, and the purpose of the analysis and the questions it seeks to answer must be clear from the outset. They also offer some lessons about the process. First, cost analysis for scaling is more than a budgeting exercise. It is important to assess what implementation would cost at scale within existing government systems. Second, even though it may slow the process, there are benefits to bringing together diverse stakeholders (especially government representatives) to inform what questions get answered and what assumptions are made in the analysis. Third, limited resources and expertise often mean collecting disaggregated cost data gets deprioritized, despite the fact that collecting it in real time is easier than collecting it retrospectively. Donors have an important role to play in incentivizing cost data collection and providing support to

undertake this work at each stage. Finally, there are often sensitivities about sharing cost information outside of internal teams. This may be due to the pressures of competing in the “marketplace” of innovations, with implementers worrying that their initiative would quickly be dismissed as too expensive.

It can be worthwhile to openly acknowledge and discuss these sensitivities across stakeholder groups in order to find avenues that feel comfortable but also lead to the information necessary to inform scaling decisions. When cost data is framed only as an accountability exercise, it remains hard to discuss externally. Understanding cost data as sources of information to guide adaptation and decisions about scaling strategies is an important shift to make across all stakeholder groups.

## **Innovative approaches to medium-term financing**

The fact that sustainable financing is both critical for scaling and difficult to secure is no revelation. Unsurprisingly, across cases, similar challenges arose in planning for and securing long-term funding. Given the relatively short timeframe of CUE's documentation (two to four years, compared to the 10-15 years it often takes to scale),<sup>9</sup> significant progress made in securing long-term financing was not expected.

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Nonetheless, the cases do offer rich examples of innovative strategies to secure middle-term financing and leverage existing resources in the system, as well as highlight some common challenges in transitioning toward long-term financing.

The examples below demonstrate that innovative partnerships can help support initiatives through the middle phase of scaling. The partnerships in these cases removed pressures from short-term funding cycles and provided independent resources to support ongoing research and adaptation, while working to align the incentives of disparate actors. These partnerships were not intended to be long-term financing models but rather to support progress in the middle phase

toward the goal of sustainable government delivery and financing. Contributions from private sector actors such as the cocoa or banking industry may best be leveraged to support initial testing and adaptation (when there is more risk), as well as the process of expansion and capacity strengthening as a means to government handover, rather than a long-term solution. Similarly, alternative funding sources, such as Learner Guide program alumni donations in Tanzania, are useful financing supports in the middle term, but do not offer dependable funding at scale. Innovative approaches that combine financial and in-kind resources from government, private sector, and civil society actors can support a scaling journey, particularly during the middle phase of scaling.



In Jordan, implementing, adapting, and scaling the FEP was financed by the Central Bank of Jordan and the commercial banks (as well key philanthropic partners) who agreed to contribute a portion of their local annual profits. The intention was not that this private sector funding continue in perpetuity, but that it would offer a dependable source of financing during the seven-year period when the program was expanding to all schools and transitioning over to the ministry. This guarantee of stable, domestic financing was a critical advantage for FEP, as time and energy did not need to be spent on fundraising or reacting to shifts in donor priorities.

In Côte d'Ivoire, Transforming Education in Cocoa Communities (TRECC) also brought resources from the private sector in support of implementation, adaptation, and scaling. The five-year TRECC project was collaboratively financed by three philanthropic organizations and the cocoa industry to target challenges related to child labor and education quality in cocoa-growing communities. The philanthropic organizations leading TRECC supported the majority of costs of piloting a suite of innovations and secured agreements from cocoa and chocolate companies to pay the remainder, alongside making commitments to increase financing if the government moved any of the pilots to a scaling phase (which it ultimately did with PEC). The Ministry of National Education also provided in-kind resources by delivering the initiative in public schools through existing teachers. TRECC's grant-matching model was intended to "incentivize industry participation and reduce risk, as continued investment was conditional to the success of the pilot phase as confirmed by the independent evaluator."<sup>10</sup>

In Botswana, Youth Impact identified ways to leverage existing but underutilized resources already present in the system—namely a cadre of youth participants in the National Service Program, whose work in schools was already supported by the Ministry of Youth budget—to deliver TaRL in public schools without any additional resources initially required from the Ministry of Education. Similarly, in the Philippines, the Department of Education and FIT-ED made use of the existing S-LAC structure in public schools to support the scalability of ELLN Digital. Likewise, in Jordan, IRC and partners leveraged existing training programs to integrate SEL and LtP content into TPD for K-3 teachers.

This does not negate the need to identify long-term, sustainable sources of financing, though many questions remain about how to use these innovative models as steppingstones to transition to long-term financing. Several scaling teams felt they did not fully understand government budgetary processes and timelines or know how and when to align with or integrate into these processes to mobilize long-term resources. As such, it was evident that “clear and practicable information about budgetary processes and timelines that is widely available would be valuable to education stakeholders.”<sup>11</sup>

An additional challenge to securing long-term financing is the reality of constrained government education budgets, especially after COVID-19. Across multiple cases,

scaling teams reflected that sustainable institutionalization might not be realistic unless the initiative could be integrated into existing systems in a way that was cost neutral (or even potentially cost saving).<sup>12</sup> Understanding how to leverage existing budgets and resources to support scaling and how to maintain quality and avoid overloading teachers when pursuing cost-neutral approaches are clear areas where more research and learning are needed. It is important that cost discussions happen early and involve not just the Ministry of Education but also the Ministry of Finance and other governing bodies responsible for determining education budgets. Having detailed and disaggregated data about current and projected costs (both in-kind and financial) is important for these conversations to be meaningful and actionable.



Photo Credit: Youth Impact - Chisala Mipata

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## Section 2

# Institution-level lessons

## Assessing who takes an initiative to scale

Across cases, the long-term aim was for the initiative to ultimately be fully integrated into government systems and processes or “institutionalized.” However, the path to institutionalization looked different in each situation. In some cases, the initiative had been implemented outside government for years and the scaling effort was focused on persuading and supporting government take-up. In other cases, the government was involved in delivery from the start, and the scaling process was about maintaining support from external organizations and facilitating a gradual handover of responsibilities and financing to government.



Regardless, the process of institutionalization required roles to evolve over time. These changes needed proactive consideration and joint planning, as both sides could be hesitant to cede control over specific elements of the process to the other. Further, these cases demonstrate the salience and centrality of capacity limitations of stakeholders (financial, in-kind, and human resources) in the scaling processes. Capacity can be a tricky issue to discuss across stakeholder groups, and insufficient human resources and expertise can be a challenging limitation to admit. But without honest assessment of these constraints and joint problem-solving to address them, capacity often became a stumbling block for quality implementation and scaling.

## Anticipating evolving roles in the scaling process



The scaling literature highlights partnerships among different constituencies as a necessary component of scaling.<sup>13</sup> Collaboration can bring together the complementary strengths, perspectives, and resources of a range of actors to institutionalize an initiative in a way that sustains impact across an education system. The RTSL cases highlight some roles nongovernmental partners can play that government perhaps cannot—including getting diverse people who do not normally work together in a room, bringing new resources, and being nimble, adaptive, and experimental.<sup>14</sup> For example, new approaches for teacher training and support were tested in Jordan by INJAZ as part of the FEP rollout, and then shared with the government to consider uptake. However, the cases also showed that there are limitations and

concerns about what the government views as an acceptable role for outside actors in public schools.

Infusing an initiative throughout the education system requires more than just involving government in scaling or setting a deadline for “handover.” It entails planning for and gradually transitioning aspects of the initiative to government ownership at all levels of the system and carefully thinking through how each aspect (including monitoring, evaluation, and learning) can be incorporated into existing processes while maintaining quality. This requires deliberately planning for the role of the institution that originated the initiative to change in ways that maximize its particular value, while also supporting greater ownership by government actors.<sup>15</sup>

The RTSL cases showed that it is beneficial for all scaling partners to have a clear, shared understanding of how the process of scaling includes progressive changes in roles and responsibilities and to plan for these changes proactively and concretely from the beginning. Neglecting this aspect of scaling runs the risk of teams staying too long in roles that government should take on or inadvertently inhabiting new roles they cannot sustain or are not best suited for. Though it is not always easy, planning proactively and realistically for how and when roles will change is an important part of a scaling strategy. That is not to say that changing roles or balancing multiple types of roles is easy for an implementing organization to navigate, only that it is essential.



Over the period of RTSL documentation, the cases highlighted how the role of the originating organization evolved. For example, in Jordan and Botswana, as the government has taken on more delivery of the initiative, INJAZ and Youth Impact have transitioned toward a capacity strengthening and research support role for improving M&E and teacher training and enhancing program content. In The Philippines, FIT-ED has had to balance different roles as implementer, government partner, and researcher. All of these experiences highlight the challenge of trying to both implement a project and maintain a critical researcher perspective at the same time. The role of the lab in creating spaces for reflection aimed to help teams draw from improvement science to navigate this balance.



## Incentives matter and ownership is flexible

John List argued that “Motivating people in the service of a common goal hinges on one thing only: You have to get the incentives right.”<sup>16</sup> Across cases, scaling teams found value in partnerships for scaling. However, the cases also underscored complexities around aligning incentives and maintaining alignment between partners in service of a common scaling goal. Challenges with scaling incentives occurred for a range of reasons. In some cases, pursuing the long-term scaling goal meant potentially working against the long-term, financial health of the originating organization. Fully integrating the initiative into the educational system entailed losing the initiative’s branding and

links to the external organization, thereby risking future funding and visibility when the originating organization is no longer associated with the initiative. Similarly, the realities of project-based funding and donor deliverables at times discouraged collaboration between two actors working on similar issues in a single context. It was also clear that policymakers at times had more political incentives for short-term, visible wins over long-term, sustainable impact.<sup>17</sup> Nonetheless, participants across cases reflected that even though it might go against the incentives of individual institutions, scaling sustainable impact requires focusing on the best way to achieve the long-term goal and consequently letting go of ego or the need for full attribution of success.



In Jordan, the IRC and Sesame Workshop shifted from promoting specific social and-emotional learning (SEL) materials developed by their organizations to acting as partners supporting government actors to adopt SEL practices into teacher training approaches more generally. This meant relinquishing some of the name recognition and branding for the project to enable wider take-up and acceptance by the Ministry of Education and hopefully broader impact. They decided to make this shift in order to reach a much greater number of students than they could with their own individual programs, and to ensure that core SEL concepts were embedded in the education and early childhood development systems in a way that would continue even after the project ended. These can be difficult decisions when they go against the competing incentive structures that surround the work but are easier when all participants are focused on the ultimate goal: improving children’s education and healthy development. Scaling teams must be prepared to give up attribution and visibility to achieve progress toward a shared goal.

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## Limited capacity is difficult to talk about

While there is no single pathway to scale, these cases demonstrate that for sustainable scaling of education initiatives, the preferred scaling pathway and ultimate scaling goal is often institutionalization. Whether this is pursued through transitioning ownership of an external education initiative to government or supporting government actors to deliver, adapt, and scale a new policy within the existing system, it can be tempting to assume that, if they have the will and the financing, a government will always have the capacity to deliver and sustain an initiative at scale. However, scaling research has consistently shown that this is not the case. Even when an education ministry truly wants to adopt an initiative at large scale, capacity constraints related to time, human and financial resources, and skillsets are a common obstacle and are compounded by the complexities of a large bureaucratic system. This issue was especially salient around data collection and analysis, as well as teacher training.

Across cases, the capacity limitations and constraints of the government were frequently underestimated. Examples of this include misunderstandings or insufficient information related to how often teacher training took place, class sizes, how teachers were assigned to academic subjects, how curriculum was implemented, frequency of supervision visits to classrooms, availability of materials, and prevalence of contract teachers.<sup>18</sup> These challenges were exacerbated by the fact that capacity issues were rarely discussed openly in a multi-stakeholder setting. Many external organizations partnering with government seemed reluctant to raise the issue of capacity limitations and the resulting constraints on implementation quality openly with government counterparts.

Similarly, government actors could be hesitant to acknowledge or unaware of critical capacity gaps in the education system that might impact scaling, especially around resources, monitoring and supervision practices, and teacher retention. Absent the spaces and a shared ethos to openly discuss capacity needs, it was challenging to have honest conversations about what activities or scaling strategies were truly feasible and what steps could be taken at the outset to address limitations, including how roles might strategically shift.

It is crucial to acknowledge that ministries of education operate under much greater demands and complexities than most nongovernmental actors, with complicated bureaucracies and regulations to navigate, larger constituencies to represent and serve, and broader mandates with more (and potentially competing) goals to pursue. Without these constraints, nongovernmental actors can operate more nimbly, focus on specific initiatives, and be more selective in the priorities they pursue. These realities make them more suited for smaller scale implementation, and they may not necessarily have the expertise to navigate the larger, more complex opportunities and challenges of scaling the initiative into the educational system. For a successful scaling process, it is crucial for both the external organization and the government to openly discuss the overall capacity, time, and resource limitations that they both face.

It is important to make realistic assessments about what is feasible for the educational system and each scaling partner to take on and to plan for how this informs the evolution of stakeholder roles. Frank conversations between partners should be held early and often. Scaling teams should explore innovative ways of addressing capacity limitations, including by leveraging the distinctive

strengths and competencies of partners, delineating roles based on scaling stage and making concrete plans for those roles to shift over time, and exploring feasible methods for gradually strengthening capacity for the institutionalization of key components. This necessitates building trusting relationships between different stakeholders. Equally important is having

patience and perspective about the role of the initiative in the wider education system. Changes may not always happen as quickly as implementing organizations desire or expect. It is essential to remember that scaling is a multi-year process and to understand that partners have many competing responsibilities, with scaling the initiative just one of them.

## REMAINING QUESTIONS AND GAPS: SCALING THE INITIATIVE OR STRENGTHENING THE SYSTEM?

The pervasive challenge of limited capacity leads to the question of what to tackle first: Do scaling teams first focus on scaling the initiative, knowing that the weaker elements of the system will be a challenge that could impact quality and potentially derail scaling, or do they first focus on broader systems strengthening and capacity building, knowing this is a difficult and long-term effort? It can be tempting to think of scaling and systems transformation as a binary,<sup>19</sup> but these cases suggest that a “both/and” approach may be more strategic.<sup>20</sup> Nonetheless, key questions remain, including: Does knowing where the system fails help scaling teams make more realistic decisions? Can full institutionalization only happen after systems transformation? How can actors push for transformative changes in the education system while being realistic about what can feasibly change in the timeframe in which scaling is taking place? How is systems transformation measured?

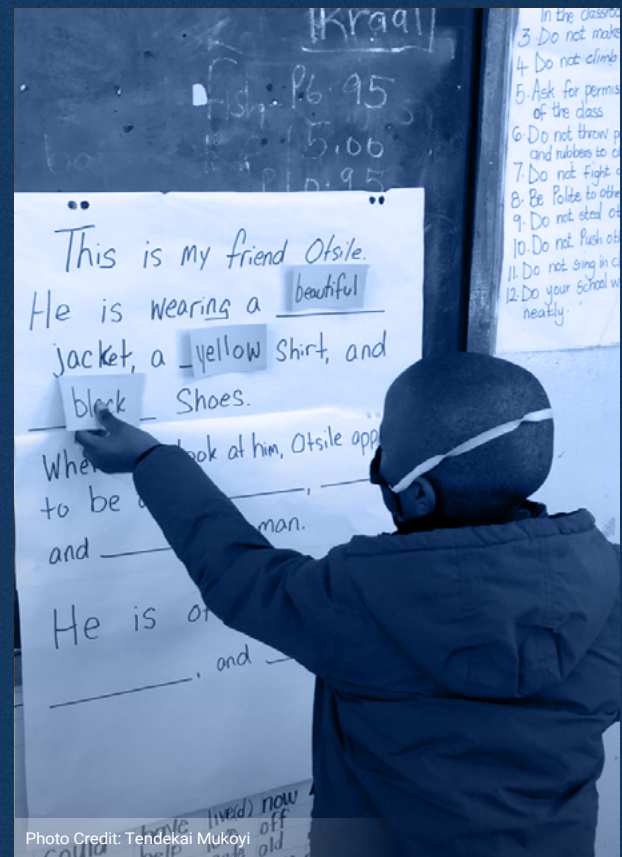


Photo Credit: Tendekai Mukoyi

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## Recognizing when the plan needs to change: Planning and acting non-linearly

Taking an iterative, adaptive approach to scaling has become axiomatic, but how to operationalize this principle is rarely clear.<sup>21</sup> These cases highlight that adaptation is rarely conducted once and checked off the list—rather, it is a continuous cycle

of iteration and improvement that often requires returning to the same activities repeatedly. This can be challenging in a project-based system where teams are incentivized to complete circumscribed activities, in a world where logic is typically constructed as linear and forward-moving, and in contexts where repetition and course correction can be mistaken for failure or wasted resources. Building space for candid reflection and continual refinement can facilitate adaptation. Inflexible financing, heavy demands on time and capacity, and organizational cultures that discourage sharing mistakes can hinder the process.



Several teams found ways to build in time, space, and resources for adaptation cycles. One key facilitating factor to adaptation was including it in plans and expectations from the start, instead of only adapting in reaction to specific events. In Jordan, rather than developing all the content for the FEP at once, INJAZ and the ministry created a cyclical approach involving three rounds of review and adaptation for each grade's curriculum content. Each year, a new grade would enter the cycle, the content would be implemented and tested in classrooms, and then it would be refined based on feedback from students, teachers, parents, school directors, and ministry staff. The next year, the revised curriculum would be tested and revised again, while a new grade would also be implemented, allowing for a phased rollout that supported continuous learning and improvement. The fact that this adaptation was planned from the beginning created a "clear and shared understanding between the stakeholders involved that they would not get the curriculum content completely right on the first try, that changes and adaptations were not only expected but an intrinsic part of the process, and that ultimately this iteration would strengthen the final product."<sup>22</sup> This meant there were not just time and resources for adaptation but also a supportive culture and incentives to provide honest input.

In the Philippines, FIT-ED built flexible adaptation into both the innovation and scaling plan, recognizing that a key challenge would be the high degree of variation in contexts and needs across the country. The blended learning model was designed to allow teachers to take the course in situ, and at their own pace. To ensure that the core elements of the model are maintained while allowing for adaptation, all the regions and divisions were equipped with the implementation package: courseware materials, explanations on how the blended learning model works, how to prepare and plan for implementation, and the tools and process for improvement. FIT-ED also incorporated "Readiness Assessment" and "Plan-Do-Study-Act" (PDSA) improvement cycles to the national scale-up.

Assessing readiness allowed schools to improve their potential for successful implementation, and the intention of PDSA cycles was to enable continuous documentation and reflection on challenges faced in delivery and encourage schools (e.g., school heads, teachers, information and communications technology coordinators) to rapidly test and learn from potential solutions to the problems that emerged. Examples of problems documented by the PDSA were teachers lacking computer time to finish self-study lessons; some S-LAC facilitators who were unprepared to conduct a LAC session; and some school heads unable to observe classes and give teacher feedback. Planned solutions to these problems were tested within the two-week lesson cycle and then assessed in the next PDSA cycle.

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## Adaptation during crisis: Focusing on impact over model

The COVID-19 pandemic was what is considered a “focusing event” in policy adoption.<sup>23</sup> These events can facilitate and accelerate adoption and adaptation of initiatives and new policies, but they cannot be planned for, so scaling teams must be ready to respond to these windows of opportunity when they arise. Across cases, COVID-19 made possible significant changes that were previously unthinkable in terms of what the government prioritized and was open to try, what funders were willing to support, and who could be reached by programs. In many cases, funders became much more open to flexibility in how budgets were spent, enabling scaling teams to reallocate monies to support testing and adaptation in ways they formerly may not have had the leeway to do. Speed became a top priority, and so where government bureaucracy might previously have been slow to approve adaptations, decisions were made rapidly. The closure of schools forced

experimentation with alternative delivery mechanisms—such as radio, television, and mobile phones—which might not otherwise have been considered and which at times enabled reaching a broader group of children. At the same time, the pressure to react quickly and the use of technologies such as radio made gathering data about the reach and effectiveness of adaptations challenging, so it could be hard to assess their utility and impact.

In many cases, teams found their close links to communities and ability to innovate and adapt quickly made them valuable partners when schools closed. All of the scaling teams based outside of government chose to continue to work with government partners to support the larger goal of keeping children learning, even if it meant letting go of their own specific initiative or scaling plans for a while. For many teams, in addition to supporting the ongoing education and well-being of children, this decision paid off by allowing them to quickly test adaptations they had not previously considered and building trust with government partners and local communities.



Photo Credit: Eliza Powell



In Tanzania, because the Learner Guides were from the local communities in which they worked and had strong networks and deep contextual knowledge, they could adapt quickly to school closures. Learner Guides shifted from working with students in classrooms to holding smaller sessions outside, conducting home visits, providing soap and masks to families alongside mentoring activities, and using local radio to share messages from the curriculum.

In Jordan, prior to COVID-19, partners wanted to pursue digitalization of the FEP, but did not have the funding, political will, or capacity to move forward. When the pandemic struck, government priorities shifted to rapid digitalization of learning materials and experiences, opening a window of opportunity for a new scaling avenue. In response, INJAZ worked with the government to adapt FEP content into short, recorded lessons that were uploaded onto the ministry's online learning platform, as well as shown on television. While this was not originally how INJAZ had envisioned digitizing FEP, this approach helped them respond to an immediate need and illustrate to the government the importance of using more interactive digital approaches in the future.

In Botswana, when news of imminent school closures was made public, Youth Impact's close links to schools enabled them to quickly collect contact information for thousands of students and their caregivers. After the government approached Youth Impact to help support learning continuity at home, the team designed and tested a low-tech approach to foundational numeracy based on TaRL that made use of SMS and weekly phone calls to provide virtual targeted math instruction to primary-aged students.<sup>24</sup> Likewise with Ahlan Simsim in Jordan, the use of SMS and phone calls helped early childhood providers stay in touch with families during the pandemic and offer ideas for at-home activities for young children, as well as parenting support during lockdowns.

Planning for cycles of adaptation helps ensure that there is time, space, and a culture of change embedded into the scaling process. But this is not enough on its own—there needs to be resources, access to data, and an organizational culture that incentivizes adaptation and does not punish mistakes. At the same time, unexpected events can open windows of opportunity for adaptation and scaling that could not be planned for, but which institutions must be prepared to identify and act on when the moment comes. Scaling usually happens in a series of significant, often

unanticipated, steps rather than through small, gradual changes. This process is different from project implementation, which often occurs incrementally based on an approved plan. Scaling compared to project implementation is much more dependent on leveraging windows of opportunity to make progress. As such, it is important to have evidence of impact, data about cost projections at scale, clear identification of policy alignment, and strong relationships with key stakeholders ready to be prepared to seize a scaling opportunity when it suddenly arises.

## REMAINING QUESTIONS AND GAPS: TRADEOFFS AROUND PURSUING MULTIPLE PATHWAYS TO SCALING

In multiple cases, several scaling strategies were pursued simultaneously in an attempt to balance tradeoffs and address challenges. In Botswana, TaRL is delivered in different schools by Youth Impact, teachers, and participants in the national youth service program as a step to the long-term goal of delivery by teachers in all schools. These distinct delivery mechanisms have enabled Youth Impact to balance short-term capacity limitations and gradually build long-term institutional capacity. It has also facilitated ongoing adaptation, as the direct delivery schools provide a venue for experimentation. In Jordan, Ahlan Simsim explored multiple scaling pathways to improving access to Early Childhood Development for children in refugee and host communities. These pathways enabled the program to focus on scaling different aspects of ECD services for different age groups in partnership with distinct ministries and stakeholders, rather than try to scale a single, complex package of services across multiple sectors. These distinct pathways also helped balance scaling tradeoffs, with the idea that scaling with government could enable large-scale reach and sustainability, while simultaneously scaling services outside government with national NGOs could enable reaching the most vulnerable. This multi-pronged strategy acknowledged the fact that some services were not yet provided by the government due to budget availability and worked to address some of the inequities in the system. Adaptive and flexible funding played a key role in facilitating this approach.

At the same time, multiple scaling pathways add complication to a scaling effort, while a single pathway to scale is often easier to understand and communicate and thus simpler to move forward. More pathways mean more champions to cultivate, more partners to collaborate with, and more elements to keep track of, which can open additional opportunities but also tax already-stretched capacity. If multiple pathways are an interim step to the long-term goal, it is not always clear how the transition will happen. It is important to examine whether this increased complexity is worth its challenges, and to plan ways to counterbalance it.



Photo Credit: Tendekai Mukoyi

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## Section 3

# Individual-level lessons

### Scaling champions: Many hands make light(er) work

The scaling literature highlights the essential role of champions in driving the scaling process.<sup>25</sup> In each case, champions at various levels of the system played a critical function advocating for an initiative, supporting implementers to navigate the education system, and helping drive scaling processes forward.

#### Scaling is a collective endeavor: Strengths and limitations of champions

The importance of scaling champions was demonstrated across cases, but the methods for identifying, cultivating, and sustaining champions and engaging them in scaling processes differed. Some cases focused more heavily on cultivating high-level government champions, while others put greater emphasis on grassroots or regional champions, and others sought to make connections between the two. New champions were identified in numerous ways, including by their strategic role in the education system, commitment to the problem addressed, knowledge of the initiative in other contexts, and through leaning on the existing networks, connections, and reputations of implementers and early champions. Though none of the cases explicitly selected champions based on their personality traits, the charisma and gravitas of an individual champion could be a significant factor in his or her effectiveness.

Stakeholders advocating for scaling the initiative worked to foster champions using diverse types of data—including quantitative information on improved learning outcomes (both local and from other contexts), qualitative stories and testimonials, and

#### Scaling champions

Scaling champions can include local and international policymakers, prominent individuals, and NGO leaders who believe in an initiative and want it to be adopted within an education system. These are knowledgeable, credible, determined, and connected individuals with the vision and the skills to motivate others, foster commitment, and secure resources to move from a concept to adoption within an education system.



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in-person observation of results. They also demonstrated links to existing practices and values in the education system, built on international support and momentum, and engaged existing champions to advocate to others. The cases showed the role of champions recruiting new champions could happen in multiple directions: Vocal support

and sensitization efforts from key leaders at the national level could generate buy-in at the community level, while enthusiasm and demand from grassroots champions could push regional or national actors to prioritize the initiative. Champions could also be effective advocates to their more hesitant peers.



In Botswana, Youth Impact pursued a champion-centric scaling strategy they dubbed “follow the leader,” in which the locations for regional expansion were determined by the presence of a strong champion eager to bring the initiative to their region. This approach “attached TaRL to effective leaders more closely and leveraged their skills, resources, and networks for scaling. It also helped maintain a close relationship between Youth Impact and the champions they had succeeded at cultivating, since these individual leaders could directly see the fruits of their efforts in their own communities.”<sup>26</sup> Youth Impact also engaged these regional leaders in subsequent expansion to new regions, soliciting their input on where to go next and relying on them to help make the case for scaling TaRL to other regional leaders. Youth Impact focused on selecting champions not simply by their strategic location in the government bureaucracy, but by their individual commitment to excellence and impact, wagering that dedicated and determined champions would be more useful than individuals who might be in a more strategic role but less excited about TaRL. Champions were sustained through ongoing communication and relationship management from Youth Impact, who emphasized frequently sharing data, engaging champions in joint decisionmaking, and building strong professional relationships that transcended TaRL.

Nonetheless, challenges with cultivating and maintaining champions were seen across cases. The issue of turnover was common and is a well-known challenge in the scaling literature.<sup>27</sup> Often, those leading the scaling process were required to begin renewed efforts to advocate for an initiative and cultivate key champions each time a primary champion changed positions, retired, or was replaced. Multiple strategies to mitigate the setbacks of turnover were tested, including by cultivating champions at more technical levels of ministries and organizations; convening multi-stakeholder groups who could serve as advocates for an initiative; diversifying support across multiple ministries; utilizing relationships in the system to gain access to new leaders after a champion turned over; and creating Memoranda of Understanding with the ministry to provide institutional support for scaling that might outlast an individual or political party. An additional challenge

confronted was how to progress from engaging a handful of key champions in the system to systematizing and institutionalizing support and accountability at all levels of the system, including at the classroom level.

Across the cases, it became clear that scaling requires building and maintaining a diverse team of champions across the system. Multistakeholder reflection meetings, regular data sharing, site visits demonstrating visible results, and engagement in scaling decisionmaking proved effective strategies for cultivating champions and maintaining their engagement. The cases underscore that key champions should be identified at different levels of the system (not just the top or grassroots) and included in the scaling process in an ongoing way. However, it is important to remember that champions are only one component of a scaling strategy and should not be relied on alone for scaling progress.

## Educators: Moving from top-down control to collaboration<sup>28</sup>

Educators are central figures in children’s educational experiences, and research consistently finds that teacher quality is one of the biggest factors impacting student learning outcomes.<sup>29</sup> Across cases, the initiative being scaled aimed to increase educator knowledge and/or change educator behavior by adding new content to the curriculum, offering new ways to manage classrooms and provide instruction, and shifting how educators were trained and supported. As such, educator engagement, understanding, buy-in, and participation were central features of quality delivery, even for initiatives supported by additional actors in order to reduce teachers’ burden. However, across cases, educators were often seen primarily as implementers who needed to be trained, rather than as innovation partners who could contribute to the process of adaptation and scaling.

### Educators as owners and adapters, not just implementers

Research on teacher practices shows that educators are not merely implementers of an approach, but creators and adapters, who improve student outcomes through maximizing their own knowledge and pedagogical approaches, and who adapt the initiative to suit their classroom environment

#### **Educator**

An educator encompasses any individual involved in facilitating student learning—teachers, volunteers, mentors, and trainers.

and beliefs about learning and teaching.<sup>30</sup> Yet too often it was assumed that if policies were in place, impact was demonstrated, and educators trained, then scaling success would follow. However, if a new idea or practice is imposed on educators without taking time to understand their existing beliefs, constraints, and practices, and proactively fostering buy-in and gathering input, it may be ignored or adapted in a way that no longer meets the initiative’s goals or undermines scaling.<sup>31</sup> In some cases, assumptions about educators’ interests, abilities, and incentives to take on new initiatives led to deprioritizing direct engagement with teachers in the scaling process. Several of these assumptions are detailed below, along with ways that the scaling teams worked to correct these assumptions and address the constraints.

The first assumption was around teacher buy-in flowing directly from a new policy or the urgency of a problem. Scaling teams sometimes assumed educators would immediately understand the value of the initiative and the benefits of building it into their own practice. But educators need to be convinced of the value and feasibility of a new idea as much as policymakers do—especially given the significant burdens already on their shoulders. Several teams realized they could foster buy-in by having teachers first observe others delivering the initiative and thereby come to their own conclusions about its impact and how to adopt it.



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Relatedly, the additional time and effort required from educators to implement a new program was often underestimated. More attention needed to be paid to incentivizing educators to implement the initiative with quality and sustained commitment, especially when doing so requires significant effort. It is risky to assume that educators will take up an innovation just because it is “their job.” Finding ways to frame the new approach as a means to relieve workload or support educators to better undertake their current roles was a useful strategy.

Addressing educator incentives is not enough if other elements in the environment constrain uptake of an initiative. In some cases, insufficient emphasis was placed on understanding how the broader school, community, and education system environment would impact educators’ buy-in and uptake of an initiative. While many teachers agreed that the new approaches were valuable, they often struggled to find ways to implement them due to challenges with school leadership support and the education ecosystem. These constraints included overcrowded classes, lack of resources, and pressure to focus on material

to help students pass exams rather than emphasize new content. In some cases, while the long-term benefits of a new approach were emphasized, the short-term challenges of adding this to an already full school-day were downplayed or not sufficiently understood. Several teams tested strategies to engage school leaders to address this challenge. For example, in Botswana, Youth Impact hosted sensitization sessions for principal education officers and school heads prior to TaRL training for teachers, so that school leaders understood its purpose and how to better support their staff.

Finally, there also seemed to have been the assumption that once trained, educators would automatically be equipped to translate that learning to the classroom. However, adult learning and behavior change is an ongoing process.<sup>32</sup> More consideration was needed on the types of support teachers required in adopting new approaches, including hearing teacher feedback on what is feasible for them.<sup>33</sup> To support teachers with continuous learning, two cases developed mentorship models and two cases tested peer learning communities. In Jordan, teacher learning circles were developed to create learning



In Botswana, the strategy of youth national service participants delivering TaRL was intended to allow teachers to become familiar with the program without immediately having to take on a new approach themselves. In some cases, after several terms serving as mentors to youth volunteers, teachers requested to become trained to deliver TaRL themselves.

In Tanzania, the My Better World program is led by Learner Guides—young women who have been through the program and can serve as mentors to other young people—supported by teachers as mentors. This approach has meant that Learner Guides are not competing with teachers, but construed as taking work off their plates and freeing teachers’ time, which has helped organically engender teacher support. And it is not just teachers that need incentives to take on new tasks—mid-level supervisors, trainers, learning facilitators, and others in the education system also need sustainable incentives that work in the local context. Monetary compensation, professional development opportunities, rebalanced workloads, evidence of student success, and institutional promotion are just a few areas ripe for experimentation. CAMFED also tested multiple extrinsic and intrinsic incentives for Learner Guides, including access to interest-free loans, an international certification, and increased stature in the local community. However, finding ways to maintain incentives for teachers or other education facilitators at scale and transition them to government ownership remains a challenge.

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communities and provide fora for continuous learning, building upon teachers' actual experiences and expertise.

While it can be difficult to engage teachers and school leaders in the scaling process because of the many constraints on their time and reform fatigue, it is vital that they are included as active partners from the beginning. Consulting teachers from diverse settings is important for understanding what it would take to implement the initiative successfully in their context and for learning about how they might adapt it. Engaging school leaders through sensitization meetings and inviting them to participate in trainings alongside teachers can help foster the buy-in needed to ensure teachers can adopt the initiative. Throughout

the scaling process, deliberate time and attention must be paid to fostering buy-in from educators; ensuring the incentives are aligned to support the initiative's uptake and quality implementation; and analyzing and working to address elements of the broader school, community, and education system environment that might constrain implementation. Finding ways to show how the new approach can lighten the workload or support educators to better undertake their current roles can be a useful strategy but may be most effective when done by fellow teachers. It is important not to underestimate the amount of work required to learn the new approach or misrepresent how it will support teachers, as this may cause more harm than good to the long-term goal of sustainable scaling.

## REMAINING QUESTIONS AND GAPS: SCALING QUALITY TPD IS A PERSISTENT CHALLENGE

Across the labs, and in the field at large, implementing quality training that creates lasting behavior change and leads to improved student outcomes is a huge challenge at large scale. Preparing and supporting teachers to deliver the initiatives with impact to diverse groups of students raised challenges across cases, including related to capacity, affordability, and sustainability. Scaling teams experimented with different approaches to delivering training and strengthening TPD within broader

scaling efforts. This included exploring virtual methods of delivering training, testing peer learning approaches, and considering avenues to integrate training content into existing pre-service modules. Many of these approaches also presented professional development and support models that could be applied in the education system more broadly. There is much more to be learned about how quality teacher training, professional development, and support can be implemented and sustained at large scale.

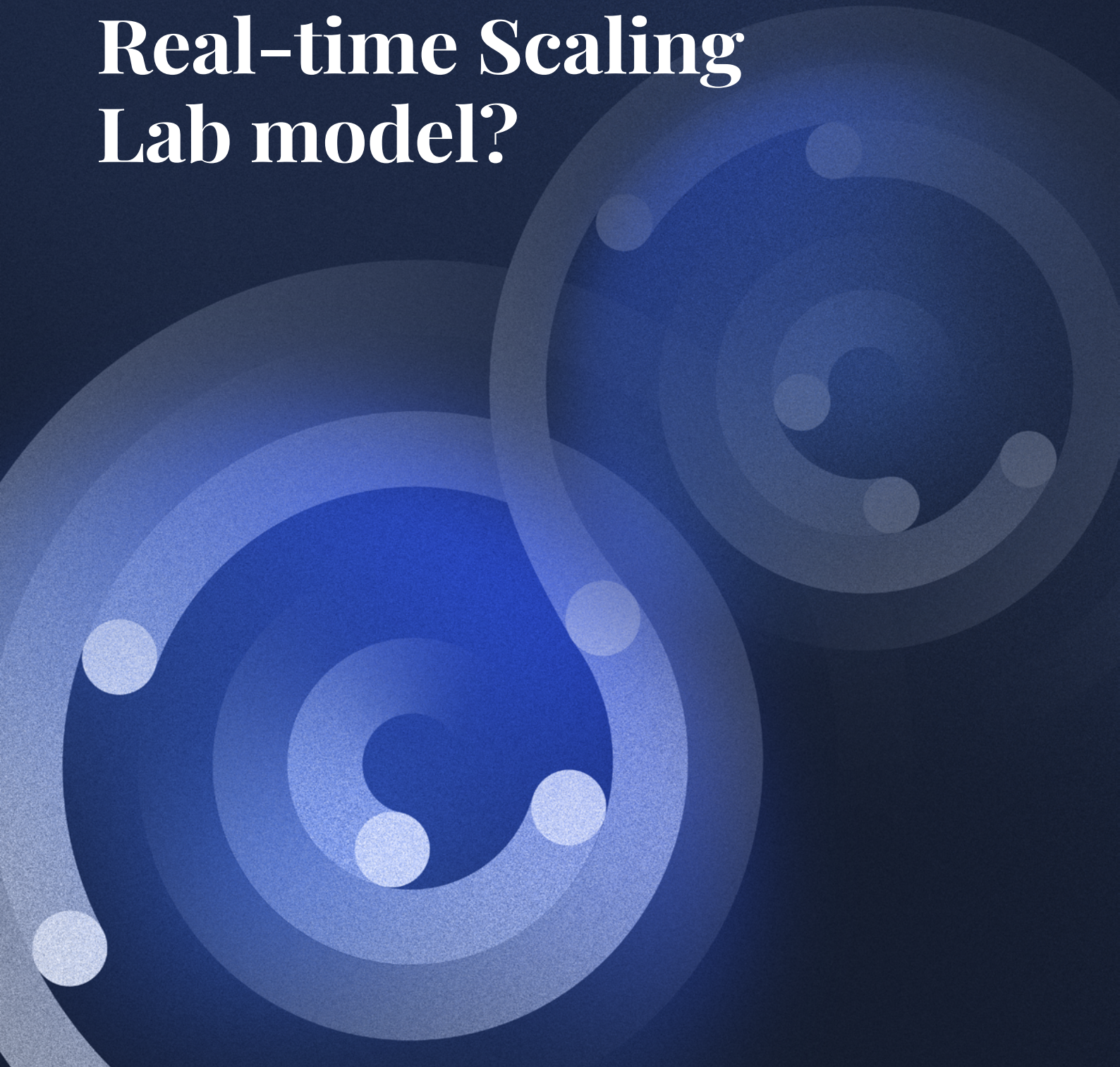


Photo Credit: Anna Sawaki

Scaling impact in education for transformative change

# 3

**What have we  
learned about the  
Real-time Scaling  
Lab model?**



The following section offers insights about the benefits and uses of an RTSL approach to support ongoing scaling, drawing from documentation and analysis of the lab planning, process, and adaptations, as well as reflections from more than 20 lab partners. These insights are organized around five core questions:

**When** is the right time for an RTSL?

**Who** should be involved?

**Where** should it be hosted?

**What** activities should a lab focus on?

**How** do the principles of adaptive capacity and collaborative research work in practice?

There is variance in the experiences across labs, so these points are illustrative, not exhaustive. The intention is for these lessons to be informative for other efforts looking to design and implement a collaborative learning approach in support of scaling quality learning.

# When is the right time for an RTSL?

## What did we plan?

- ▶ CUE conceptualized the RTSL approach as an experiment to examine potential approaches for putting scaling principles into practice, for strengthening adaptive capacity, and for learning from ongoing scaling efforts in real-time. As such, CUE intended to use the cases to understand if and when an RTSL might be useful. The criteria for selecting labs included:
  - Strong interest from a local partner with aligned interests and capacity to engage;
  - Strategic timing, where there was a reform process underway or other catalyst to leverage, as well as political will and buy-in from government partners;
  - Problem-centered, where the initiative in the process of scaling addressed a critical issue in education facing many countries and had evidence of its effectiveness;
  - Diversity, including in terms of geographic location, type of education initiative, scaling pathway, and role of government and nongovernment stakeholders.

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## What happened?

After four years of implementing a cohort of labs—and a number of potential labs that were explored but did not come to fruition—CUE developed a clearer understanding of when an RTSL process might be most useful and what pre-conditions contribute to its likelihood of success.

## What did we learn?

- ▶ Scaling is a long-term and staged process<sup>34</sup>, and an RTSL is not likely to be useful at every stage. An RTSL is not a good fit for a situation where stakeholders are exploring “what” to scale—searching for innovations or piloting initiatives—or for efforts that do not yet have a clear vision to scale. An RTSL is most useful once scaling is underway for examining questions about how to advance the process and address challenges and constraints as they arise.
- In cases where the RTSL model did not come to fruition, the process often got stuck when there was not a clear initiative of focus or idea about what scale would look like. A lab was premature at this stage, as it was difficult to convene diverse stakeholders repeatedly without a clear idea of what they were working on and why.
- ▶ Each of the labs focused on scaling a specific initiative, which was useful for providing a concrete focus to the process and enabling participants to apply abstract scaling principles to a clear program or policy. In the future, if looking to use a lab process to support scaling multiple initiatives, it would be important to consider whether it is strategic to have labs for each initiative or a cross-cutting lab focused on a shared theme or goal.
- The RTSL in Côte d’Ivoire got closest to establishing a lab around a cross-cutting theme. While it focused on the PEC initiative, the scaling goal centered on improving numeracy and literacy outcomes in primary schools more generally. Lab membership included representatives from other organizations implementing related initiatives and the RTSL explored ways to combine elements and learning from across these projects into a broader national program. Additionally, lab leadership emphasized that the RTSL process used PEC as a case study with the intention of building scaling capacity and expertise more broadly.
- ▶ Support from key government stakeholders for a lab approach was essential for advancing the process, convening other government representatives, and making the case for participation to other nongovernmental stakeholders.
- ▶ Timing also impacted whether a lab got off the ground. In contexts where there were significant shifts happening in the education ecosystem or notable political turmoil, the context was too uncertain for launching a lab.
- ▶ Experiences confirmed that clear alignment between CUE and the RTSL partner organization on the purpose of the lab, its value add, and each party’s roles was crucial to making the process work. Not every lab moved through the full process. Some labs that did not move forward were interested in collaborating but had no clear focus for the RTSL. In other labs, scaling needs changed over time and the lab model was no longer the best approach for addressing those needs. Understanding when the lab was working and when it was not the right fit was something that had to be continuously assessed and revised by all partners.



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# Who should be involved in an RTSL?

## Scaling lab managers and researchers

### What did we plan?

- ▶ In each lab, CUE planned for two local individuals to serve as key figures in the RTSL, with the salary costs shared between CUE and the local partner.
  - The scaling lab manager (SLM) would shepherd the process forward, including planning and facilitating the multistakeholder lab convenings.
  - The scaling lab researcher (SLR) would document the scaling process and collect additional data.
  - Both would contribute to data analysis and identifying actions to take forward.

### What happened?

In reality, the exact roles, division of labor, expertise, and capacity differed in each lab. In some cases, the SLM and SLR were consultants based outside the implementing organization, in some they were government officials involved in the scaling process, and in others they were research or project staff in the partner organization. For example, in Botswana, two researchers from Youth Impact split the SLR role, and the co-founder of Youth Impact and the deputy director of the Ministry of Education and Skills Development split the SLM role. In Côte d'Ivoire, an independent research consultant filled the researcher role, while the general inspector for Administration and School Life from the Ministry of Education took on the manager role. Some SLRs had significant prior research experience, while others came from other disciplines entirely.

## What did we learn?

- ▶ Across labs, SLMs and SLRs provided strong leadership. Over time, many became “scaling champions” within their own organizations and among their peers. A strong working relationship between the lab manager and researcher was critical. While the manager was typically a more senior individual, the collaboration worked best where there was strong mutual respect and the researcher felt free to speak his or her mind and push back when needed. The division of roles often evolved over time, with researchers taking on convening activities and managers pushing forward the research agenda.
- ▶ A deep understanding of the local context and a strong network across the education ecosystem were essential prerequisites for the SLM. Placement within or strong ties to government was also particularly valuable. There were notable advantages of an SLM based in government, including their authority and relationships in the system.
- ▶ SLRs came from different professional backgrounds and with diverse skillsets. Incorporating RTSL activities into the researcher’s job description helped ensure they had the autonomy and time to carry out this work.
  - There were tradeoffs to having the SLR situated inside or outside the partner organization. An SLR who was also a staff member often had better access to information and pre-existing relationships. However, in this situation, an SLR also had many competing responsibilities and could feel overburdened with tasks not related to the RTSL. Additionally, an internal SLR’s documentation may be less neutral. External researchers typically had more independence and control over their workload. However,

the tradeoff was that they sometimes struggled to access the information and meetings needed for thorough documentation and data collection. Sharing the roles between two individuals in different positions (such as one with strong research expertise and another focused on external relationships) was an effective approach to help balance these tradeoffs.

- ▶ Financial resources were essential to support the significant time and capacity these roles demanded.



Photo Credit: Eliza Powell

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## Diverse groups of education stakeholders

### What did we plan?

The RTSL process aimed to regularly convene stakeholders from a diversity of roles and perspectives who were already involved or would need to be involved in the scaling process. The premise was that “Drawing perspectives from a diversity of viewpoints would result in stronger problem analysis, avoid relying on unilateral assumptions and preconceptions, and build horizontal engagement for scaling.”<sup>35</sup> The intention was to include both high-level and technical-level policymakers and implementers and for the same individuals to participate in the entire process.

### What happened?

Lab membership was decided based on criteria developed by each partner institution, the SLM, and SLR, with input from CUE. Member institutions typically remained stable, but often individual members changed.

### What did we learn?

- ▶ Offering a structured space to regularly bring together diverse perspectives, especially those who do not typically work together or have a seat at the table, was consistently one of the most significant value-adds of the lab process according to participants. This inclusivity of voices and experiences helped scaling teams to consider elements of scaling earlier in the process and to make connections with others doing similar work.
  - For example, in Tanzania, the lab convened representatives from

ministries that do not generally work closely together—the Ministry of Education, Science, and Technology; the President’s Office, Regional Administration and Local Government; and the prime minister’s Office, Labour, Youth, Employment and Persons with Disability—due to the cross-sectoral nature of the Learner Guide program. The lab also brought in members from the Teacher’s Service Commission, the Tanzania Institute of Education, local district councils, education networks, and school heads.

- It is important to note, however, that convening a diverse group of high-level stakeholders is not always an easy or straightforward process and requires actors with the credibility and convening authority to launch the process and maintain momentum. In the case of the labs, the SLMs were critical, leveraging their networks and relationships in the local context to get the right individuals in the room and engaged in the process. Similarly, the standing and relationships of leadership in the local partner organization played an essential role. CUE’s position as an external, intermediary actor also helped it to convene a wide cross-section of actors. In addition, the access to international audiences and large platform to share research through the Brookings Institution also played a role in bringing stakeholders together, especially at the start when the lab concept was a new idea.
  - ▶ While the diversity of lab members was generally valued, identifying the right individuals to engage could be a challenge. Turnover and shifts in the policy environment meant significant time and effort was spent in some labs revising member lists before each convening.

- CUE and partners attempted to identify participants of sufficient seniority with the decisionmaking power to act on the learning generated through the RTSL. However, at times this meant inviting high-level officials because of their influence, despite the fact that they were not in a position to continuously and actively engage in lab activities. In hindsight, identifying mid-level officials who could regularly attend and report back to high-level leaders would have been a better approach to address this challenge.
- It was often difficult to find ways to meaningfully engage teachers, school leaders, community members, and learners throughout the RTSL process. Several labs prioritized bringing head teachers, mentors, and even students to initial convenings, which provided the opportunity to hear valuable insights about how the initiatives were working at the classroom level. However, their participation waned over time, raising questions about whether lab convenings were the best way to involve them in

scaling decisions. Another challenge was related to identifying how many teachers and students to include. Labs struggled with the balance between avoiding tokenism and fostering inclusivity while keeping the group to a size that enabled meaningful relationships and discussion. Some labs found that convenings were not the right format for these actors but used other ways to get student and teacher perspectives, including focus groups, interviews, and site visits.

- ▶ The political economy of each context influenced and sometimes limited discussion. Politics, power dynamics, hierarchies, and norms could hamper open conversation and in-depth exploration of challenges in the broader environment. This was especially true with highly sensitive topics such as teacher union strikes, refugee policies, finances, or election cycles. In many labs, this challenge lessened over time, as members got to know one another better, trust was developed, and SLMs experimented with different approaches to inclusive facilitation.

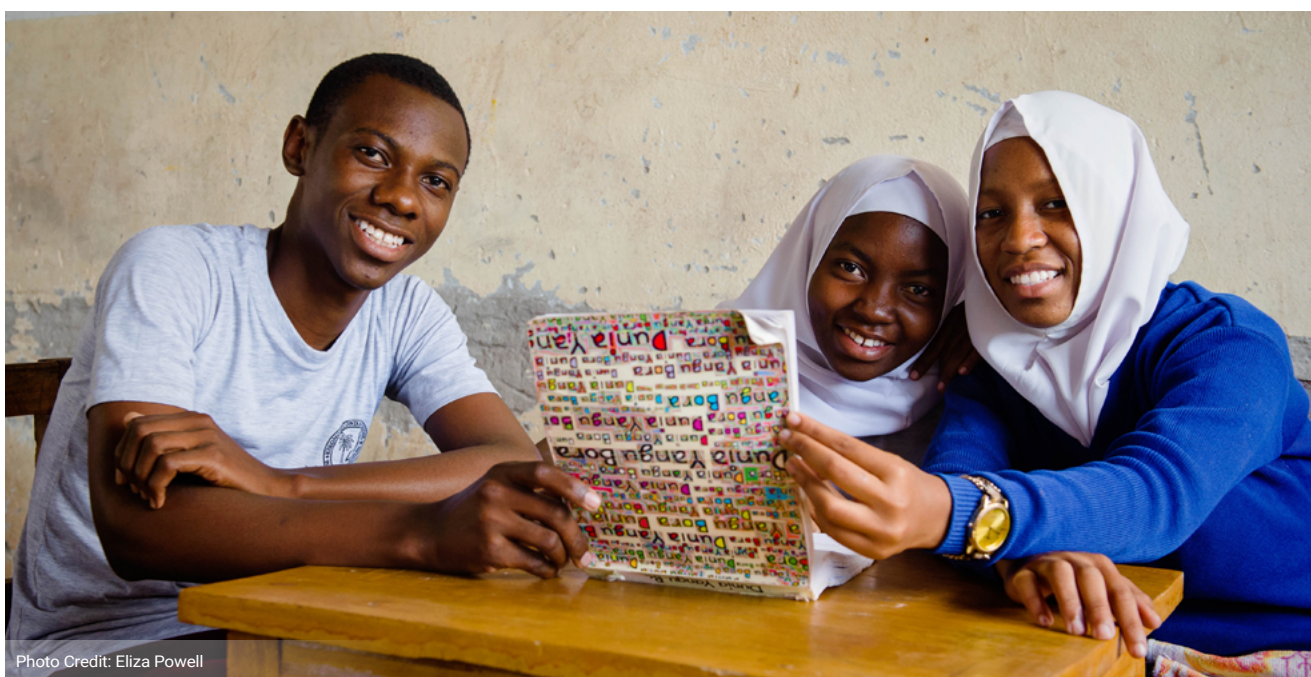


Photo Credit: Eliza Powell



## The role of a scaling intermediary

A third party or “intermediary organization” often plays a critical role in supporting scaling, taking on essential tasks that can be more challenging for the institution(s) leading the scaling process to accomplish. These roles can include assessing institutional capacity, supporting partnership development, and “convening and coordinating stakeholders, change management, organizational development, process management, and systems strengthening.”<sup>36</sup>

One intention of the RTSL was to learn more about the role that an intermediary organization might play in support of continuous learning about scaling. CUE’s position as part of a globally recognized think tank helped with convening diverse stakeholders (including high-level individuals) and CUE’s role as an outside actor helped facilitate more honest reflection and strategic planning about scaling. Additional value-adds from the intermediary role included facilitating access and sharing lessons from scaling research, as well as undertaking additional research, making connections with global actors and institutions, and documenting and disseminating lessons. Funding for these activities can often be hard to find or earmark in existing project budgets, so CUE’s existing funding to undertake these activities was critical.

At the same time, Brookings’ organizational character as a research institution (and not a technical assistance provider, advocacy organization, or implementer) and its location in Washington, D.C. limited some of its contributions as an intermediary. CUE’s role might have been more effective if it had partnered with a local research institution to complement and support some of these functions.

### **Beneficial roles that an external, third-party organization like CUE can play to support scaling:**

- Conducting demand-driven research and making connections to existing expertise and evidence.
- Advancing a process to convene diverse stakeholders.
- Helping carve out regular space and time for reflection within scaling efforts.
- Serving as a sounding board and facilitator during reflection sessions; using its external position to ask probing questions and help partners interrogate their assumptions
- Leveraging its own convening power, networks, and reputation to help connect and collect information, resources, and people in support of scaling.
- Providing a platform facilitated by a reputable research and policy organization for sharing lessons and highlighting local scaling efforts with a global audience.
- Bringing additional human and financial resources to support scaling.

### **Issues to consider:**

- Intermediary organizations can operate at different levels of a system and bring diverse strengths and limitations, so it may be best to bring together a coalition of complementary institutions with clearly defined roles at the local and global levels rather than delegating the intermediary role to one single organization.
- In addition to scope of work, the geographic location and linguistic capabilities of the intermediary organizations are important to consider, as they impact how and who the organization can work with.

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# Where should the lab be hosted?

## What did we plan?

In the beginning, CUE was agnostic about where the RTSL would be housed, recognizing advantages and disadvantages to hosting it either within existing structures or working groups (governmental or nongovernmental) or as a standalone body. The priority was ensuring that the activities would not be duplicative of existing efforts and could include stakeholders with diverse roles and perspectives.

## What happened?

As a result, each RTSL looked different based on the local context and preferences of partners. In Botswana, the lab was co-led by the Ministry of Basic Education and Youth Impact but hosted outside of the government. In Côte d'Ivoire, the RTSL was hosted by the General Inspectorate within the Ministry of National Education and Literacy as a standalone group, but as the ecosystem evolved and new national structures were created, lab activities were integrated into them. In Jordan, the RTSL was convened as a standalone body within INJAZ. Similarly, in Tanzania CAMFED hosted the lab. In the Philippines and Jordan, adapted versions of the labs were situated within the NGO partner organizations, FIT-ED and IRC, respectively.

## What did we learn?

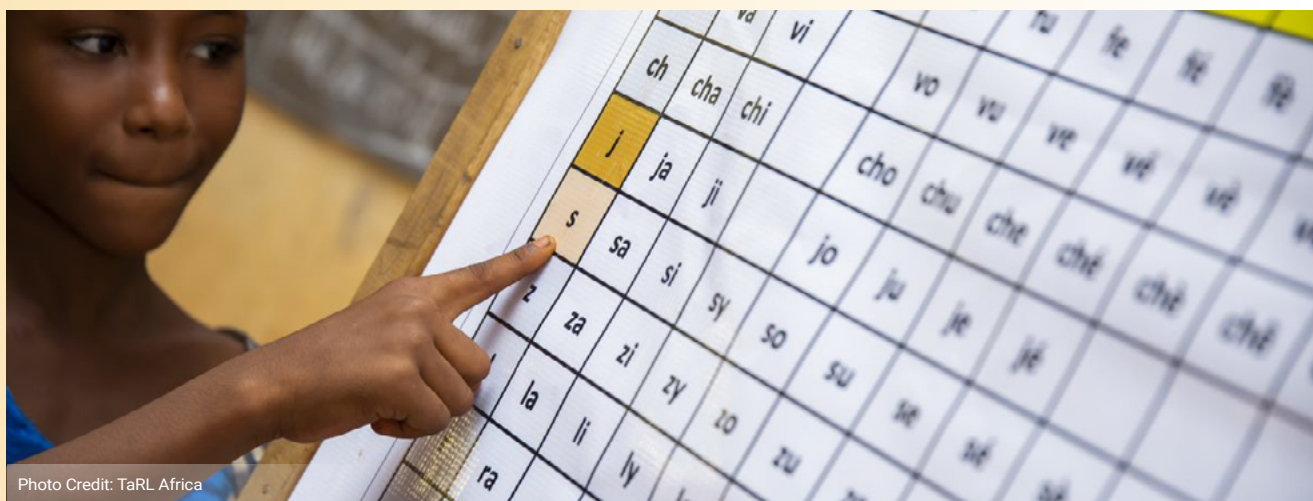
- ▶ As anticipated, there were tradeoffs to the RTSL being housed within or outside of government. Hosting the RTSL within the government facilitated stronger buy-in for the process from other stakeholders and helped bring key government actors into the ongoing scaling conversations earlier than might be typical. At the same time, operating the lab within the government brought challenges of existing hierarchies, bureaucracy, and last-minute decisions.

- ▶ Lab partners concluded that whether the RTSL was hosted within or outside government, it should be a distinct group and not embedded into existing groups. This was important to retain the lab’s independence, its ability to convene a wide cross section of actors and set its own agenda.



## What’s in a name? Defining and translating the “lab” concept

The term “Real-time Scaling Lab” was created to illustrate that the process was different from usual ways of working and was focused on real-time learning about ongoing scaling efforts. However, there was some confusion over the terminology, particularly when the name was translated into other languages. The term “lab” meant different things to different people— from a space to experiment, to an approach to scaling, to a group of diverse stakeholders. In many cases, the term lab generated excitement, but its ambiguity also caused confusion. This underscored the importance of clarity around terminology and the need to invest time upfront to develop shared understanding. It also raised questions about what terms might be clearer and more appropriate, especially in other languages.



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# What activities should the lab focus on?

## Multistakeholder convening and reflection

### What did we plan?

The original plan for the RTSL was a three-year process, launched with a first convening focused on identifying scaling goals for the initiative, discussing current challenges, and articulating a scaling plan. This was to be followed by clearly structured “iteration periods” for testing adaptations to the scaling strategy and gathering data, with regular reflection convenings every six months.

### What happened?

In reality, the process moved more slowly and took more time than anticipated. Convenings did not take place on a fixed schedule but happened when it was feasible to bring partners together and there was something concrete to work on. There was variance in the number, size, and frequency of convenings. Across cases, convening diverse stakeholders regularly was important for gathering input from multiple viewpoints, problem-solving collaboratively, and generating buy-in for potential adaptations. Overall, flexibility was needed to respond to new questions, priorities, and changes.

### What did we learn?

- ▶ Launching the RTSL in each location required a much longer preparatory period than anticipated. More time was needed to identify and onboard the SLM and SLR; incorporate partners’ feedback into the lab design; hold individual- and small-group meetings with key stakeholders to build buy-in before launching the process; and determine structural questions such as where the lab would be housed.



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- ▶ It was critical to focus the first lab convening on the concept of scaling to help reach a common understanding around terminology and principles, and to hold off on discussing the initiative and its particular scaling goals and strategy until subsequent convenings.
    - Key questions discussed in the first convening included: What does the scaling terminology mean? Why is scaling and sustaining an initiative a challenging endeavor? What are the key principles of scaling and the common pitfalls?
  - ▶ Especially in the early days, participation was inconsistent, and a proportion of invitees did not come or sent someone in their stead. This was especially true for individuals more removed from implementing the initiative who did not clearly see the value of the RTSL. Over time, some of these challenges were overcome through identifying a more tailored list of members and through individual outreach from the SLM.
  - ▶ Maintaining momentum between formal convenings was often a challenge, with lab members across cases expressing the desire to have more meetings, more frequent communication, and more actionable ways of engaging. However, this was difficult due to the voluntary nature of the lab, scheduling conflicts, and the already heavy workload of SLRs and SLMs. Planning and executing convenings took significant effort and scheduling was difficult, particularly during COVID-19.
    - Several labs created sub-groups of members who could convene more frequently and undertake more substantial activities. In Tanzania,

thematic sub-groups were created based on key scaling priorities. Each group had the ownership to determine research and advocacy activities needed to make progress and brought the results of this work back to full lab. In Côte d'Ivoire, a core group of lab members was identified, whose daily work was closer to the implementation of the initiative. They met with a greater frequency to focus on discrete areas of work that were then presented back to the full lab group for discussion and refinement.

## Information for scaling

### What did we plan?

The original plan for the RTSL was to clearly articulate a scaling goal and develop a scaling strategy for achieving it, and then to routinely collect data on the scaling process and share this back with lab members to enable real-time reflection and decisions. Each data collection cycle was intended to take place over six months, and the SLR was responsible for collecting data on the scaling strategy and conducting supplementary research on key topics identified by the lab group. The RTSL was also intended as a forum to bring external research, expertise, and tools to support the scaling process.

### What happened?

In all labs, developing and refining a scaling strategy was a central activity. Data was collected and used to inform decisions. However, data collection did not follow clear cycles, and often varied in the type, quantity, and frequency.

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## What did we learn?

### I. Defining and using data

On reflection, CUE did not begin the RTSL process with a sufficiently detailed understanding of what kind of data were needed and how much would be feasible for one SLR to collect, often overestimating what a single person with competing demands on their time could accomplish.

- ▶ A key strength of the lab was the information generated about the scaling process by the SLR, who documented meetings, conversations, site visits, and key decision points in the scaling journey and in turn, shared summaries and emerging findings with lab members as well with the global education community through blogs, briefs, and other communications products.
- ▶ However, it was hard for one person to secure the permissions, access, and time to collect additional data on the adaptations identified in the lab. Accessing existing data from partner organizations and government also revealed sensitivities and questions around privacy and ownership.
- ▶ Data that were collected in the RTSL process was not always used in a timely and actionable way. In some cases, the situation was changing rapidly, and so by the time analysis was completed and shared, it was no longer relevant. In other instances, data collection was sporadic and uneven due to capacity limitations on the part of CUE, the partner organization, and the SLR, as well as challenges with research knowledge and access to information. This limited the ability to regularly assess how the scaling journey was playing out and share it with lab members in a timely fashion.
- ▶ Finally, some stakeholders misunderstood the lab purpose as being focused on

impact evaluation, assessment of student learning, or tracking fidelity of implementation rather than the process of scaling. In hindsight, clarifying this from the beginning would have been helpful for avoiding confusion about the level, quantity, and types of data it was feasible for the SLR to collect. In cases where lab members identified questions related to these other issues that the scaling teams could not answer, bringing in local research institutions or partnering with government research departments more closely may have been beneficial.

### II. Providing space for sharing evidence and expertise

- ▶ The RTSL also served as a space to bring research and expertise together from different sources to support the scaling process. This included CUE contributing its own scaling research, expertise, and tools, as well as bringing in external evidence and additional support from expert consultants on specific issues. For example, in both the Côte d'Ivoire and Tanzania labs, the RTSL hired external costing experts to support lab members to conduct cost analyses and projections for scaling.
- ▶ Importantly, the RTSL also afforded a platform to learn and benefit from lab members' expertise and deep context knowledge in areas such as financing, curriculum development, and policy innovation. Lab partners reflected that having a variety of stakeholders in the room together—jointly analyzing problems and collaboratively exploring solutions—both saved time and increased buy-in, as stakeholders developed the ideas themselves in response to a commonly held-view of the challenge. For example, in Jordan and the Philippines, an understanding of the challenges around

quality TPD led lab members to focus on the idea to test teacher learning circles.

### III. Scaling tools and resources with facilitation

- ▶ The development, refinement, and iteration on a scaling strategy formed a central activity across all labs. The intention of these scaling strategies was to both serve as a “north star” guiding scaling efforts and a set of living documents continuously being revised through the scaling process. Across cases, the deliberate and structured process of articulating a long-term scaling goal; assessing an initiative’s scalability and comparative advantage in the context; examining enabling conditions, human, financial, and institutional resources, and partnerships; and considering sustainability was a beneficial and constructive process. For many stakeholders, elements of these strategies already “lived” in their heads but had not previously been discussed out loud in their entirety or refined collaboratively.

Lab partners valued discussing scaling with key stakeholders before every aspect of the initiative was finalized, in order to better understand what would be feasible and where they could align with policies and goals in the broader education ecosystem.

- In addition, a “driver diagram” was useful in almost every lab as a focusing exercise. It offered a visual representation of the scaling goal and the top-line strategy for achieving it,<sup>37</sup> drawing from the experience and expertise of local stakeholders, as well as the broader research. The use of the driver diagram often led the way to specific research activities for the RTSL.
- ▶ Based on activities undertaken and challenges identified across the labs, CUE and partners developed a suite of scaling resources, including guiding questions for a scaling strategy.<sup>38</sup> The value of these tools was highest when CUE served as a facilitator, guiding lab members through the process of applying the tool and acting as a “critical friend” who could prompt additional reflection.



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## Peer learning and global platform

### What did we plan?

The intention of launching a cohort of RTSLs simultaneously was to enable ongoing peer learning, sharing, and problem-solving across labs through in-person and virtual exchanges and workshops.

### What happened?

In practice, the RTSLs engaged in a learning community throughout the project, including meeting twice in person, as well as multiple times virtually. Beyond the circle of RTSLs, CUE also shared insights and lessons with the broader global education audience in several ways, including writing blogs and reports, hosting webinars and podcasts, presenting at events, and identifying opportunities to feature the voices and experiences of lab partners and key stakeholders in these fora.

### What did we learn and what was changed?

- ▶ It was clear that cross-lab learning was valuable to partners, despite their different contexts and areas of focus. Partners felt that in-person workshops were particularly useful, not only for exchanging ideas, but also for forging connections, strengthening community, and leveraging others' expertise. These in-person events were expensive, but they made subsequent virtual discussions better.
- ▶ Nonetheless, the cross-lab learning community did not reach its full potential, and there were challenges

with meaningful and sustained interactions. This was largely because of CUE's own capacity constraints, as well as COVID-19—when travel was indefinitely postponed, the community became fully virtual, and teams were dealing with Zoom fatigue and urgent response efforts.

- ▶ A clear lesson was that peer learning does not happen automatically once the space is created. It requires significant, intentional, and ongoing planning, coordination, facilitation, and resources. It is helpful to have both an overarching learning agenda with clear objectives, as well as the scaffolding for organic, demand-driven exchanges to take place when new learning needs arise. More co-construction and co-leadership in the learning community would have been beneficial.



Photo Credit: TaRL – Chisala Mipate

## REMAINING QUESTIONS AND GAPS: HOW TO FACILITATE CO-CREATION AND PEER LEARNING WHEN WORKING IN MULTIPLE DIFFERENT LANGUAGES?

The RTSL process and learning community underscored the importance of investing in translation and interpretation to ensure inclusive participation and engagement from all members. While inclusive language practices were enhanced over the course of the project, there are opportunities to improve beyond this and toward creating truly multilingual spaces. Key questions arise around how to maintain

consistency and coherence around scaling terms when writing in multiple languages, how to create spaces where speakers of different languages can interact directly and not just in common language groups,<sup>39</sup> how to develop authentic co-written products when authors speak different languages, how to adequately plan for the costs of quality interpretation and translation, and how to ensure that language inclusion means all languages.



Photo Credit: TaRL Africa

# How did the principles of adaptive capacity and collaborative research work in practice?

## **Adaptive capacity**

Adaptive capacity refers to the capacity of systems, institutions, organizations, or individuals to adjust in response to unanticipated changes, issues, and opportunities that arise. It not only requires relevant data to inform decisions and a mindset open to an adaptive approach, but also an “authorizing environment” that supports experimentation and rewards.

## Scaling mindset and adaptive capacity

### What did we plan?

The RTSL was designed to be an adaptive process that could be tailored to each context and adapted in real time. Iteration cycles were built into the timeline to help coordinate this process. The aim of the RTSL was to develop greater knowledge about scaling, as well as the adaptive capacity necessary to respond to and act on this knowledge. Over time, this mix of knowledge, skills, and practice was referred to as a “scaling mindset.”

### What happened?

- ▶ In reality, even when adaptation is expected, it is hard to plan for the unexpected and react in real time. Adaptations most often took place in response to new changes, questions, and shifts in the environment rather than on six-month cycles. Some labs extended beyond three years, while others ended after one year.
- ▶ Across cases, the development of a scaling mindset was one of the most important aspects of the RTSL process. It was clear that lab members’ scaling mindsets evolved, but it was not clear that these changed mindsets could lead to greater capacity for adaptation.

### What did we learn?

- ▶ A key strength of the labs was the ability to adjust their format, structure, and approach to suit each individual context and initiative of focus.
- ▶ Having a structured but flexible plan for moments to pause and reflect on

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the scaling process was an important contribution of the RTSL approach. Often, those in the process of implementing felt the daily demands of their work did not allow space for this reflection and assessment and that the RTSL served as a sort of “forcing function” to make time to do so.

- ▶ A neutral third party such as CUE could play an important role of external questioner—asking questions, prodding for alternative explanations, seeking contextual explanations, and encouraging partners to articulate implicit assumptions underlying their scaling efforts.
- ▶ A changed mindset and new conceptualization of scaling was noted by many lab participants as a primary contribution of the RTSL and many reported that they were bringing these ideas into their other work. This mindset included a focus on the long-term and phased nature of scaling; the recognition that there are different pathways to achieve scaling goals; consideration of factors in the education ecosystem that may affect scaling and shift strategies; a focus on scaling “impact” rather than growing or specific projects; and an awareness that mistakes, iteration, and adaptation are not to be considered as a failure but as a critical and necessary learning step.
- The RTSL process did seem to foster a strong appreciation for the need to adapt throughout a scaling process and the importance of data to support these adaptations. For example, in Jordan, data about the availability of ECD-services in rural communities informed testing pilots around strengthening community-based ECD centers. Several individuals noted that this

conceptualization of adaptation as core to the process felt revelatory and shifted their thinking about all of their work.

- ▶ However, it is less clear whether this mindset shift will persist over time or lead individuals to do things differently in a concrete way. Gaining an understanding of the importance of an adaptive mindset is the first step. To make this operational at the individual level, the understanding needs to be accompanied by changes in attitudes that translate to changes in behavior. At the institutional level, there need to be shifts in culture, as well as a supportive enabling environment.

## Balancing co-creation with direct guidance

### What did we plan?

In each location, the aim was to co-design the RTSL process with the local partner institution and RTSL members. CUE brought a framework for the approach with the goal of tailoring it to the specific context and initiative. From the beginning, the idea was not to “sell” the RTSL idea or impose CUE’s approach on local stakeholders, but to engage in co-creation and collaborative exploration, with all parties involved learning from each other and contributing their own expertise and experience.

### What happened?

In each case, the RTSL structure and approach did indeed differ, based on the preferences and needs of the partner and key stakeholders. However, co-creation was less straightforward than anticipated.

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## What did we learn?

- ▶ The partnership approach worked well at both the individual and organizational level across all labs. In particular, participants shared that they valued the dynamic of creating a learning partnership where everybody came together to learn alongside each other.
- ▶ However, striking a balance between co-creation and providing guidance could be challenging, particularly at the beginning. Members of the labs often requested more direct guidance and expertise from CUE when setting up an RTSL, sharing that if knowledge of scaling and participatory approaches were a value-add to their efforts, they wanted CUE to express opinions more strongly. For CUE, considering itself learners and supporters of the process, providing direction rather than collaboratively coming to a consensus felt uncomfortable. Over time, co-creation and ownership became a valued part of the lab process, with many lab members requesting more involvement and engagement in the development of sessions and the direction of the RTSL.
- ▶ In some cases, lab partners felt CUE should have leaned more heavily on partners' context expertise. At times partners wished for a more active role in the development of final research products and for the contributions of all lab members to be made clearer in reports. CUE sought input and feedback on analysis and research products from lab members, but their extremely busy schedules, as well as different levels of English fluency, could make it challenging for members to engage in-depth.
  - In response to partner feedback, CUE revised approaches to co-authorship as the project progressed and tried to find new ways for lab members to feed into final research products.

For example, in Jordan a workshop was hosted to discuss and prioritize the recommendations from the final case study before it was published. In the future, CUE reflects that it will be important to have conversations from the start about expectations and processes for co-authorship (informed by an equity lens) and find ways to develop research products that are collaborative while also respecting the time commitments of everyone involved.

- ▶ This report certainly does not have clear answers about how to approach co-creation and collaboration between a Washington D.C.-based research organization and local implementing partners. However, it does seem clear that essential to making this type of partnership work is humility and honesty—being clear that one institution does not have all of the answers but will deliberately offer a forum to discuss and consider them together.

## Sustaining the labs

### What did we plan?

From the start, CUE's role in the RTSL process was designed as a time-bound undertaking. The intention was that if RTSL partners found elements of the approach useful, they would take those forward beyond CUE's direct involvement and adapt them as needed. Similarly, CUE never intended to launch new RTSL cohorts in perpetuity but rather to use this project to understand if and how an approach like the RTSL might support scaling, and how elements of it could be undertaken by others.

### What happened?

- ▶ This plan largely played out as envisioned. While the RTSL timeline



was extended in several instances, by 2023 the lab process with CUE as an active partner had been completed in each location. Much as each lab varied in focus, approach, and design, the ways that partners have maintained and adapted elements of the RTSL approach have also varied in each context.

- ▶ In Botswana, elements of the lab approach have been incorporated into a new MoU between the Ministry of Education and Skills Development and Youth Impact to continue to support scaling TaRL to all students in grades 3-5. As part of this MoU, a multistakeholder body—building on the work of the RTSL—will be convened to assess, learn from, and make decisions on scaling TaRL, but this body will now be chaired and sit within the ministry.
- ▶ In Côte d’Ivoire, learnings from the RTSL have informed the development of an

EdLab within the Ministry of National Education that will provide a space for analysis, reflection, and evidence-informed decisionmaking on a wide variety of education initiatives and decisions beyond PEC.

- ▶ In Jordan, analysis and findings from the lab helped inform a new phase of research on the impact of FEP. Building on recommendations from the RTSL case study, INJAZ, the Central Bank of Jordan, and the Ministry of Education plan to carry out additional research to assess and monitor the quality of FEP implementation as the ministry implements the program at national scale.
- ▶ In Tanzania, CAMFED decided to take the RTSL approach forward themselves in their work scaling the Learner Guide program in the country, as well in Zambia and Zimbabwe. Lessons about scaling and the lab approach were incorporated



Photo Credit: Kumi Media

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into a new phase of research as part of GPE's Knowledge and Innovation Exchange (KIX).

- ▶ While full-scale RTSLs were not implemented in the Philippines and Jordan, the same key principles and mindsets have been taken forward and scaling has continued to be a significant issue of focus. In the Philippines, FIT-ED and the TPD@Scale Coalition have expanded their work scaling technology-mediated TPD to include additional efforts in Honduras, Ghana, and Uzbekistan. These efforts are also part of the GPE KIX Research on Scaling Innovations in Education Initiative. Some labs used a modified lab process but still focused on fostering a scaling mindset. For example, though a full-RTSL was not pursued, Ahlan Simsim has used scaling principles to inform how to sustainably integrate elements of their approach into existing government systems, with the goal of influencing systems change around early childhood development.

## What did we learn?

- ▶ A typical concern for this type of research partnership with co-creation and direct guidance is that it will be extractive and end abruptly when the funding is spent. CUE has endeavored through planning and close collaboration to avoid these pitfalls but has not always succeeded at striking the right balance in the final

years between focusing on research plans and supporting partners' efforts to transition the lab to its next phase. While these new iterations of the lab or some version of collaborative research for scaling are moving forward in each case, it did become clear that more time and attention to support transitioning each lab to its next phase would have been highly beneficial. This requires including time and budget in the initial workplan for these activities.

- ▶ Perhaps the best metaphor for the intention of the RTSL process would be scaffolding—that CUE and partners aimed to build a supporting structure that would help to establish something that would last (though not look exactly the same) after the scaffolding was removed. Although the labs in their original conception were designed for a finite amount of time, CUE hopes that they have served as a catalyst for partners and the stakeholders involved to continue a forum to engage with each other and collaboratively reflect and make evidence-informed decisions about scaling. The principles, mindsets, and structures of the RTSL have moved forward in different ways and to different extents by the individuals who engaged in them. While it is not yet possible to ascertain whether they have made an enduring difference, the hope is that they have contributed to advancing the field's knowledge of scaling and efforts to ensure all children have access to quality education.



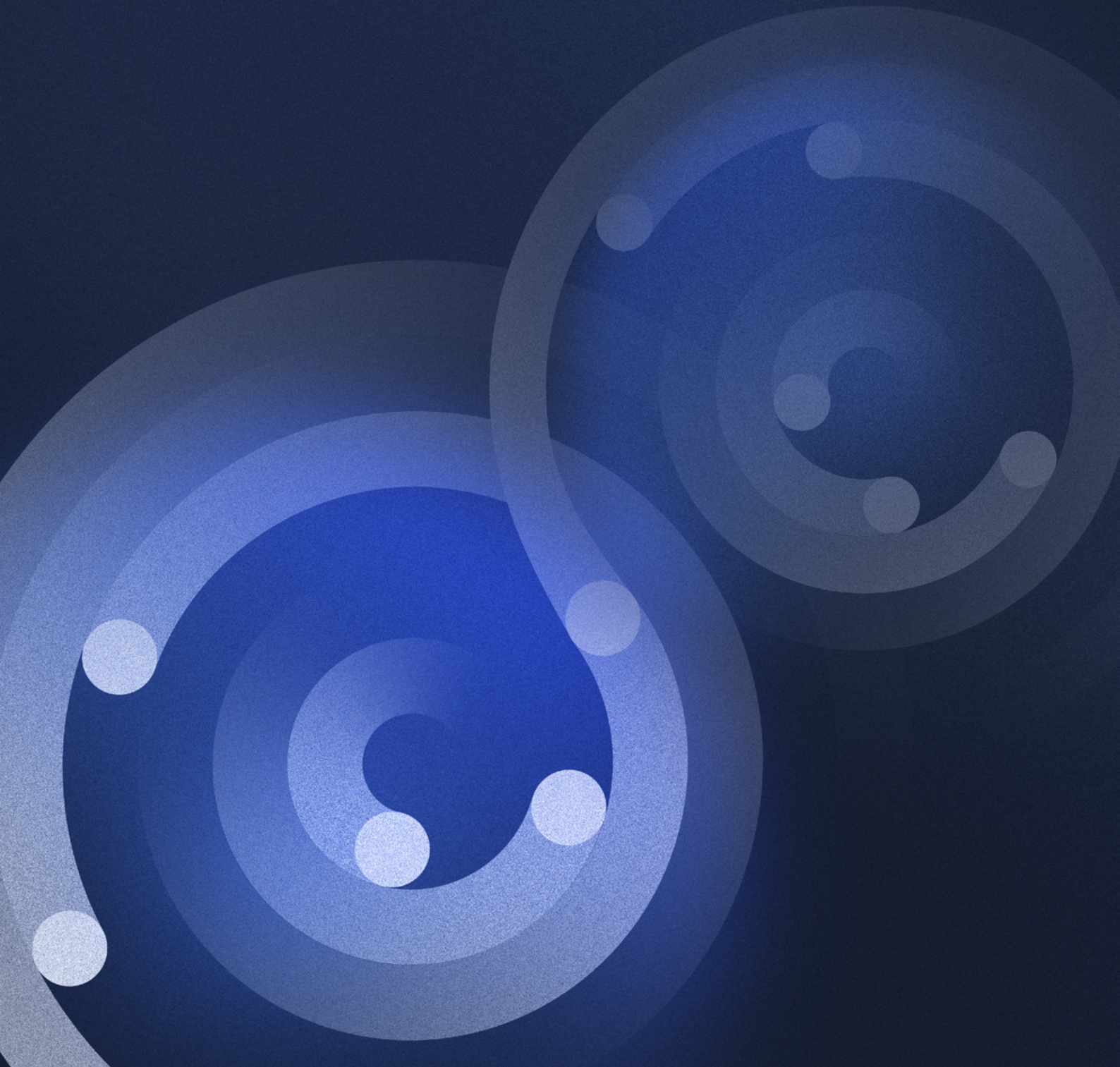
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Photo Credit: Tendekai Mukoyi

# 4

## Recommendations



The following recommendations synthesize the key findings and action items identified in the previous sections of the report. They are grouped by key scaling principle and then are further broken down by type of stakeholder. The recommendations are not intended to be an exhaustive list, but to be concrete, actionable, and realistic. While the recommendations are targeted to specific stakeholder categories, these distinctions are less clear-cut in real life, where different actors play multiple and overlapping roles. We encourage readers to consider all of the recommendations regardless of stakeholder type and see them as complementary approaches to pursuing a shared scaling principle. More detailed versions of these recommendations can be found in separate briefs tailored to specific stakeholder groups.



## ENGAGE WITH DIVERSE STAKEHOLDERS

Actively involving actors from various roles and viewpoints strengthens the scaling process.

### Government policymakers

*Include diverse perspectives from inside and outside government in the process of scaling and institutionalizing a new policy or program. Bring stakeholders together regularly and at key moments to plan and reflect in order to foster alignment, trust, and shared understanding and to ensure new information and changes in the environment are considered. Establish coordinating structures with systems-wide lens (such as the RTSL or other approaches) to make decisions, harmonize efforts, and ensure the work advances.*

*Engage teachers, school heads, supervisors, and trainers in the development and scaling of any new teaching and learning practice, not just its implementation. Solicit their input on the design, consider how the broader education ecosystem and working conditions might support or hinder their ability to take up the initiative, and provide ongoing support to translate training into practice. Teachers and implementers can play an integral role in designing and adapting the initiative and should be viewed as scaling thought partners, not just providers.*

### Implementers

*Engage diverse stakeholders in scaling planning and reflection early and often, including government representatives (especially at the middle or regional tiers), civil society, donors, researchers, teachers, and other education personnel. Cultivate and engage a diverse set of champions through participation in multistakeholder reflection meetings, sharing data regularly and in accessible formats, hosting site visits to demonstrate visible results,*

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and soliciting genuine input in scaling decisionmaking. Leverage existing champions' networks and standing to secure new champions, particularly among their peer group.

## Donors

*Fund intermediary scaling activities* — such as convening diverse actors (and the related expenses of reserving space, interpretation and translation, catering, and supporting travel to the location), conducting ongoing and tailored research and documentation, and providing external scaling expertise and technical assistance—that play an important role in advancing scaling but can be difficult to secure financing for otherwise.

*Invest in peer learning and exchange around scaling*, which goes beyond webinars and attendance at annual conferences and requires significant, intentional, and ongoing planning, coordination, facilitation, and resources. This should be supported as an integral part of the work.

## Researchers

*Engage with all actors impacted by the initiative of focus in documentation and research activities.* Where possible, include teachers, students, supervisors, school heads, teachers' unions, finance department staff, and those who oppose the initiative in data you gather about the scaling process. Incorporate questions about scaling into ongoing implementation activities such as training workshops, as well as focus groups and surveys. This can provide invaluable insights about how the initiative is working at different levels and what scaling challenges and innovations are emerging.



## BUILD TRUST

Foster collaboration and ownership through aligning incentives, developing shared agendas, making time for regular discussion, honestly sharing limitations, and engaging in collaborative decisionmaking.

### Government policymakers

*Hold frank conversations internally and with nongovernmental partners about capacity and resource limitations and challenges with quality and equity. Invite honest and open discussion with diverse stakeholders about constraints in the education system that impact scaling. Explore innovative ways of addressing the capacity limitations identified, including by leveraging the distinctive strengths of different partners, delineating roles based on scaling stage and making concrete plans for those roles to shift over time, and exploring feasible methods for strengthening capacity gradually.*

### Implementers

*Make realistic assessments about what is feasible for each scaling partner (and the broader ecosystem) in terms of time, capacity, and resources. Use this information to make collaborative decisions about the evolution of stakeholder roles in the scaling process. If your scaling goal is institutionalization, be prepared to progressively cede individual and organizational attribution and visibility to achieve progress.*

*Align scaling efforts to policies and strategies that are prioritized by government stakeholders and local communities. This will help engender support and ensure that the initiative is seen not as a standalone effort but as an innovative contribution to a problem that is already a priority for local stakeholders. Clear alignment to existing policies will also help identify opportunities for integrating the initiative into budgets and sector plans.*

### Donors

*Incentivize reporting not just how money was spent but what was learned and what did not work as planned. In addition to questions about progress and deliverables, ask questions in grantee reporting templates about mistakes made and pivots needed. Foster a culture of open sharing and learning from mistakes with grantees and ensure there are not negative repercussions for groups that share openly.*

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## Researchers

*Be open about the limitations of research, as well as how data will be used.* It is critical to share the findings of the data and any policy impact the research might have with participants so they can see the results of their contributions. Data ownership and authorship can be challenging issues when working on collaborative, process-focused research; it is important to have conversations early and often about how all those who contributed will be recognized and who owns the data and analysis generated. Present research findings in an accessible way for all audiences. This might mean breaking up the research report into smaller more digestible pieces, using simple language, translating the research into multiple languages, and being transparent about what questions the research does and does not answer.



## USE DIVERSE DATA

Timely, relevant, and actionable data are essential for informing scaling decisions.

## Government policymakers

*Make clear and practical information about budget processes and timelines widely available to external partners* to support the staged process of institutionalizing new policies or programs into existing government systems sustainably.

## Implementers

*Don't limit data collected on scaling to reach or impact measures;* include qualitative and quantitative data on scaling processes, costs, indicators of buy-in and capacity, and implementation evidence from educators. Build process indicators into monitoring, evaluation, and learning plans, including measures related to pivots, adaptations, and decisions to scale down. Participatory, action research processes like the RTSL are one avenue for documenting the scaling process in rich detail.



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## Donors

*Incentivize cost data and prioritize outcomes.* Incentivize and support grantees to collect detailed cost data at every stage and conduct cost analyses to inform scaling decisions, including through providing financial resources and expertise. Focus on key milestones and outcomes, not just outputs, and be flexible in how they are achieved — allow for adaptations in scaling plans based on data and learning.



## Researchers

*Document the scaling process using diverse types of data.* Recording key meetings, illustrative achievements, the change ideas tested, reflections, and measures of scaling progress affords invaluable information for understanding the scaling journey, identifying windows of opportunity, and adapting the scaling strategy in real time. Simultaneously, it is important to ensure data and documentation are responsive to the local setting and cause the least burden on participants.



## BE FLEXIBLE

Scaling is not a static process; the approach, strategy, roles, and areas of focus necessarily change over time. Adaptations, shifts, and mistakes are expected and essential.



## Government policymakers

*Actively plan the process of infusing each aspect of a program or policy into existing government processes and systems.* This includes tracking and planning progress related to leadership within government; alignment with policies, plans, curricula, and standards; human and financial resources including training, supervision, and support; materials development and procurement; monitoring, evaluation, and learning; community buy-in; and equity.<sup>40</sup> It is important for all scaling partners to have a shared understanding of how roles and responsibilities will change and plan for this proactively from the beginning.

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## Implementers

*Adapt based on new insights and be willing to share what is not working* with government partners, donors, implementers, and peer organizations. Learning communities and multistakeholder groups such as the RTSL can provide useful avenues for exchange and collaborative problem-solving.

*Seize windows of opportunity for scaling when they arise.* Though these moments often cannot be anticipated, they can be prepared for. This includes having evidence of impact and cost data ready, fostering strong relationships with key stakeholders, and tracking the enabling environment to identify areas of potential or existing policy alignment.



## Donors

*Incentivize iterative learning and data-driven adaptation.* Support grantees to dedicate space, time, and resources for iterative learning and reflection activities, including providing funds for testing adaptations and for convening multistakeholder efforts such as the RTSL. Support grantees if needed to adapt scaling targets and pre-determined activities during moments of crisis.



## Researchers

*Find opportunities to leverage existing MEL structures to gather scaling data.* Given that undertaking new research activities to answer scaling questions can take significant time and often requires lengthy approvals, it can be valuable to find ways to use existing data and integrate measures into existing MEL structures. This approach also helps identify ways the initiative may be continuously monitored and improved when it is operating at scale.



## HAVE PATIENCE

Scaling is a long, complex, and nonlinear journey. A phased approach combined with deliberate moments for collaborative reflection and learning is important to break the process into steps, navigate changes in the broader landscape, and respond to emerging insights.

### Government policymakers

*Don't rush the scaling process or expect immediate results.* While the urgent nature of the learning crisis naturally demands swift action, scaling can take 15-20 years<sup>41</sup> and requires a systematic approach to ensure quality, equity, and sustainability are maintained throughout the process. Consider undertaking a phased approach to scaling that includes actors at multiple levels of the system.

### Implementers

*Don't sacrifice long-term planning for scale and time for reflection in service of short-term demands.* Include periodic moments for reflection on the scaling process in your regular workplan. Use this time to assess tradeoffs confronted, mistakes made, and adjustments needed to balance scaling goals at different levels of the system. Consider equity as a core component of scaling quality education, not a tradeoff to manage, and be aware of how scaling within the existing system might inadvertently replicate existing inequities.

### Donors

*Recognize the long-term nature of scaling and build internal structures and processes accordingly.* Provide longer-term and more flexible financing to grantees, focused on outcomes with discretion as to how they are achieved. Instead of funding a series of short-term projects, use each project cycle to finance subsequent phases in the scaling process of a specific initiative. Explore avenues to combine your funding with financial and in-kind resources from government, the private sector, and civil society actors to support grantees' scaling journeys, particularly during the middle-phase of scaling.



## Researchers

*Find ways to communicate ongoing scaling learnings while highlighting that it may take years to see the outcomes of scaling.* Research can play an important role in illustrating progress toward scale, as well as identifying challenges and setbacks to address. This is particularly important given that scaling is a long-term process, so providing more real-time insights, analysis, and information both enables continuous learning and adaptation and maintains interest and buy-in.



Photo Credit: TaRL - Hannah Blair



Photo Credit: Kumi Media

## RECOMMENDATIONS FOR REPLICATING AN RTSL APPROACH TO SUPPORT SCALING IMPACT IN EDUCATION

### When?

When the problem is clear, the initiative has been identified and shown impact in the local context, and there is interest from multiple key stakeholders in a participatory approach to scaling.

### Who?

**Leadership.** Identify individuals early on who can lead and manage the approach and document the learning. Consider sharing these roles between individuals in different positions in the system. Provide support and training around inclusive facilitation, research, and scaling principles.

**Membership.** Engage diverse stakeholders – including government representatives at multiple levels, civil society, community and school leaders, donors, and researchers – who offer important perspectives and expertise. Be intentional about institutions involved but flexible about individuals. Translating reflection into action is essential.

- ▶ Consider creating subgroups of lab members who can meet more frequently than the full group and move specific elements of the scaling strategy forward.
- ▶ Have open conversations with members about what level of effort is feasible, practical, and useful and return to these conversations regularly. Consider whether all members need to participate in the same ways or if there can be different types of engagement.

- ▶ Provide resources for those not located in urban centers to participate in meaningful ways.
- ▶ Look at who is missing from the group and consider why and how to include them.

**Intermediaries.** Create a partnership of international and local research organizations that can act as an independent third party, conducting scaling research, convening actors, and disseminating research findings.

### Where?

Identify an institutional home that takes advantage of existing capacity to support ongoing research, stakeholder buy-in, and sustainability.

### What and how?

**Convenings.** Begin with one-on-one and small group meetings with diverse stakeholders who are key to the scaling process to build interest and understanding. Next, hold an introductory scaling workshop to create shared understanding of the objectives and approach, as well as key scaling principles and terms. Collectively articulate a scaling goal, develop a scaling strategy, and identify a few key elements to focus efforts on. Revisit this strategy regularly, reflecting on adaptations or pivots needed based on data collected, lessons learned, and changes in the broader environment. Honestly examine power

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dynamics, hierarchies, and cultural factors that might inhibit honest conversation about scaling challenges and work to foster a trusting, collaborative environment where all opinions are welcomed, and each voice is equal. Set aside time and budget for field visits, teacher consultations, and travel to convenings for nonlocal stakeholders.

**Scaling expertise and resources.** Utilize convenings as a forum to bring expertise, external research, and resources in support of scaling questions. Workshops can be a particularly useful time to engage in facilitated use of scaling tools. If possible, allocate resources for bringing in external expertise (particularly local experts) as required, particularly regarding cost analyses and budget forecasting. It is essential to think not only about how the lab process can foster a scaling mindset among participants, but also to consider what supports are needed to help move from knowledge to action.

**Data.** Collaboratively identify the types of data required to inform decisions about scaling strategies and adaptations, the methods and frequency of collection and analysis, and the available capacity and expertise. Simplify data collection to gather data that are

actionable and that can be shared back with members regularly. Ensure there is clarity and accurate expectations about what information gathering is possible, what resources are needed, and what each partner can contribute to the process, as well as around data access and co-authorship among partners. If possible, set aside time and budget for field visits, teacher consultations, and travel to convenings for non-local stakeholders.

**Peer learning.** Allocate time, capacity, and resources for engaging in a learning community (either with other local stakeholders or across contexts), with an intentional, tailored, and demand driven approach. Build in opportunities for experiential learning and cross-case exchanges, allowing for small groups to visit one others' initiative and reflect on relevant lessons and takeaways.

**Timeline and iteration.** Plan for long time frames with flexible iteration cycles and sufficient time to develop the process and transition to its next phase. Learn from mistakes, continuously reflect on how the approach is working and what needs to change and adapt the approach accordingly. The principles of flexible adaptation apply not just to scaling but also to collaborative research.

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# Annex I

## Real-time Scaling Lab overview

The RTSL approach<sup>42</sup> was designed to respond to and build on findings identified in a [previous phase of research](#) conducted by CUE as well as themes in the broader scaling literature<sup>43</sup>, collective impact, innovation hubs, adaptive learning mechanisms, and a wide range of related methodologies and frameworks such as improvement science, systems thinking, and change management.

For more information, see “Real-time Scaling Lab Guidelines: Implementing a participatory, adaptive learning approach to scaling.”<sup>44</sup>

The labs aimed to explore approaches to addressing common scaling constraints and opportunities, test hypotheses through application in real-time case studies, and learn more about the practical contours of scaling impact.

**Specifically, the RTSL approach was an attempt to move beyond what principles are important in scaling the impact of education initiatives to understanding how scaling happens—or not—in particular contexts.**

The stated objectives of the RTSLs were to:

1. Strengthen scaling efforts through a forum for peer-to-peer learning in which lab participants discussed lessons learned and developed strategies to address challenges and opportunities faced.
2. Provide ongoing guidance drawn from the scaling evidence base to lab participants on how to identify, adapt, and expand effective approaches to achieve large-scale improvements in education.
3. Document participants’ scaling experiences in real time to feed back into a rapid and iterative learning cycle, as well as into the development of global public goods for scaling in education.
4. Study modes of communication and collaboration among lab participants as a potential model for reflective learning and knowledge sharing generally, connecting those innovating in education delivery with those designing and implementing policies and programs.
5. Identify gaps in the scaling evidence base and areas for further research.

The RTSL approach was grounded in core principles drawn from the scaling literature, which include being problem-driven; multistakeholder participation; an adaptive orientation and using data for learning; taking a systems approach to scaling; considering political, economic, social, and cultural factors; and fostering peer learning and exchange.<sup>45</sup> In each location, CUE collaborated with a local partner organization in the process of implementing or supporting the scaling of



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a specific education intervention. Each RTSL sought to convene policymakers, practitioners, and a diversity of other stakeholders in a series of meetings and workshops to:

- ▶ Identify a shared priority issue that the initiative could help to address if scaled
- ▶ Articulate a vision for impact at scale and identify intermediate goals and drivers
- ▶ Develop and iterate on a scaling strategy to accelerate progress toward the goal
- ▶ Periodically reflect on progress made, constraints faced, ideas tested, and adaptations needed
- ▶ Undertake supplementary research and data collection to answer questions in the scaling process and document scaling.

Each of the cases offer a snapshot of efforts to scale and sustain the impact of an education initiative in a middle phase of the scaling process—after the decision to scale the initiative was made, but before it was delivered sustainably at scale. Diversity was purposefully sought, not only in terms of geographic location and initiative of focus, but also in scaling approach and the role of state and nonstate actors. In some cases (TaRL in Botswana and Côte d’Ivoire, and the Learner Guide program in Tanzania), the initiative had been identified and piloted at small scale either outside or in partnership with government, and the focus turned to identifying the best ways to deliver the initiative at large scale and effectively embed

its components into the national education system. In the case of Ahlan Simsim in Jordan, the desired impact had been identified but the pathway to get there was being explored in collaboration with government. In other cases (ELLN Digital in the Philippines and FEP in Jordan), the initiative had been developed by or at the request of government and the focus was on how to implement it with quality at scale within the national educational system. Just as each program had a different path to scale, each lab had a different scaling focus and sequence of activities based on lab member priorities. In addition to supporting individual initiatives, the RTSLs also offered opportunities for peer learning and exchange between labs.

## Methods

Through a case study approach, CUE aimed to distill common themes and transferable lessons about scaling. In each lab, CUE, the local partner institution, and local researcher(s) documented the process of implementing, adapting, and scaling the selected initiative via quantitative and qualitative methods, analyzing the data on an ongoing basis to

identify lessons learned and challenges confronted, and recommending course corrections. Across labs, CUE sought to deepen its understanding of the 14 key scaling drivers or “core ingredients” identified through previous research; further investigate how these drivers contributed to scaling; and examine the strategies pursued in their absence.

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The information in this report comes from analysis of more than three years of collaborative research and documentation.

**Over 436 pieces of data and documentation** were collected by RTSL researchers. Data sources include but are not limited to meeting summaries; documentation of scaling processes; quarterly lab reflection reports; research briefs on key scaling topics; scaling strategy documents; stakeholder mappings and landscape analyses; research prepared for RTSL convenings; surveys with teachers, supervisors, and lab members; and interviews and focus groups with RTSL managers, researchers, and key stakeholders. This data was compiled, coded, and analyzed by CUE according to the framework of the 14 core ingredients for scaling and the foundational research questions for the RTSL project:

1. How do key drivers contribute to the scaling process and how are key constraints mitigated or overcome? More specifically, what works and does not work, for whom, under what conditions, in what contexts, why, and how?

2. How can the link between gathering evidence around scaling and putting this knowledge into practice be strengthened?

Findings from this analysis were used for the development of four individual case study reports on the RTSLs in [Botswana](#), [Côte d'Ivoire](#), [Jordan](#), and [Tanzania](#), as well as this final report.

There are limitations to a case study-based approach, including the inability to demonstrate causation or make broad generalizations and the risks of subjectivity of informants. Selection bias might also exist whereby the selection criteria employed may have resulted in a sample of cases more likely to successfully scale than the average education initiative, which may limit the transferability of conclusions. Further, CUE recognizes that playing an active role as an intermediary in supporting scaling in each case has the potential to introduce bias into the analysis. By outlining these limitations, CUE aims to ensure transparency with the reader. In addition, CUE has employed strategies to reduce subjectivity and biases.<sup>46</sup>

# Annex II

## FIGURE 2. DEFINITION OF LEVELS OF ANALYSIS FOR THE SCALING LESSONS SECTION

### SYSTEM



Refers to the education structures and networks that encompass all forms of learning in a particular context. It includes institutions, policies, and practices that provide learning experiences both within formal and non-formal institutions.

### INSTITUTION



Refers to organizations involved in scaling and delivery at scale, which can include government, NGOs, civil society groups, private sector actors, and other partners. Scaling typically involves an originating organization that develops and pilots the model and an adopting organization that implements and sustains it at scale.

These can be the same or different institutions. Many scaling processes also involve intermediary organizations—neutral, third-party institutions that support scaling activities.

### INDIVIDUAL



Refers to specific actors involved in the scaling process, including members of government, the private sector, civil society, educators, supervisors, researchers, students, and local community members who champion, implement, engage with, or oppose the initiative.

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# Annex III

## Full list of Millions Learning International Advisory Group members (2017–2019 and 2019–2021)

**Chair (2017-2019):** **Hon. Julia Gillard**, 27th Prime Minister of Australia, former Chair of the Board, Global Partnership for Education, and Distinguished Fellow, Center for Universal Education, The Brookings Institution

**Chair (2019-2021):** **Jaime Saavedra**, Global Director, Education Global Practice, World Bank, Former Minister of Education, Government of Peru

**Modupe Adefeso-Olateju**, Managing Director, The Education Partnership Centre (TEP Centre)

**Manos Antoninis**, Director, Global Education Monitoring Report

**Luis Benveniste**, Human Development Regional Director, Latin America and Caribbean, World Bank

**Theresa Betancourt**, Salem Professor in Global Practice, Boston College School of Social Work, Director, Research Program on Children and Adversity

**Larry Cooley**, Senior Advisor and President Emeritus, Management Systems International, Nonresident Senior Fellow, Brookings Institution

**Claudia Costin**, Director, Center for Excellence and Innovation in Education Policies (CEIPE), Getulio Vargas Foundation

**Luis Crouch**, Senior Economist, International Development Group, RTI International

**John Floretta**, Global Deputy Executive Director, Director of Policy and Communications, The Abdul Latif Jameel Poverty Action Lab (J-PAL)

**Laura Ghiron**, Vice President, Partners in Expanding Health Quality and Access

**Yaneth Giha Tovar**, Executive President, Association of Pharmaceutical Laboratories for Research and Development (AFIDRO); Former Minister of Education, Government of Colombia

**Javier Gonzalez**, Director, SUMMA, Affiliate Professor, Center of Development Studies, University of Cambridge

**Sanni Grahn-Laasonen**, Member of Parliament, Former Minister of Education, Finland

**Afzal Habib**, Cofounder and Chief Imagination Officer, Kidogo

**Rachel Hinton**, Senior Education Advisor, UK Foreign Commonwealth and Development Office

**Maysa Jalbout**, Founding CEO, Abdulla Al Ghurair Foundation for Education, Nonresident Fellow, Brookings Institution

**Cassandra Kelly**, Founder and Senior Advisor, Pottinger; Founder, C-Change

**Shiv Khemka**, Vice Chairman, SUN Group; Chairman, The Global Education and Leadership Foundation (tGELF)

**Homi Kharas**, Senior Fellow, Global Economy and Development, Brookings Institution

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**Lord Jim Knight**, Director, Suklaa Education  
**Wendy Kopp**, Chief Executive Officer and Co-Founder, Teach For All  
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