Chapter 6

Scaling Up and Beit Issie Shapiro's Theory of Change

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Introduction

Beit Issie Shapiro shares the innovations it develops for its direct clients with other organizations and local and governmental authorities, so as to increase the number of people who benefit from such services. This dissemination takes place only after the innovation has been tested and researched within the organization. Beit Issie Shapiro also collaborates with other organizations to influence national policy and to advance the rights and well-being of children and adults with disabilities. In the 21st century, the importance of "theory of change" has gained significant global attention, emphasizing the dissemination of innovative working models to bring about widespread social change. Such a theory was developed and implemented at Beit Issie Shapiro with the goal of disseminating successful local programs to broaden their positive impact on as many lives as possible. The literature reviewed in this chapter reveals that this process is complex, and the frustration and challenges involved in disseminating local programs have led to research and a reconceptualization of the "scaling up" strategy.

Scaling up means increasing scale, expanding numbers and dissemination. The result of this expansion is a change in policy, and successful programs and projects being adopted in other locations, to benefit as many people as possible. The researchers and professionals introduced in this chapter have defined the concept and explained what is required to successfully implement this strategy.

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The first part of the chapter will begin with an overview of scaling up in the world of global development, where the concept is especially relevant. Following this, we will provide definitions of the term and its associated objectives. We will examine the conditions required for scaling up, and the methods commonly used for its implementation. We will also review the barriers to scaling up and insights from experience and research on scaling up around the world.

The second part of the chapter will be dedicated to the theory of change developed at Beit Issie Shapiro, analyzed based on the sources presented in the first part. We will present the vision and values that led the organization to adopt the scaling up approach. We will then outline the conditions that promote and encourage scaling up at Beit Issie Shapiro, and the limitations and challenges that hinder its broader implementation. Finally, we will discuss lessons learned from Beit Issie Shapiro's experience that may help other organizations to adopt a similar strategy for their own innovations, or to adopt innovations from others. In this section, we will analyze three of Beit Issie Shapiro's initiatives: the Rehabilitative Day Care Centers Law, the development of the multi-sensory Snoezelen therapy approach, and the establishment of Friendship Park – an accessible and inclusive playground. We recommend reading about these three initiatives in Chapter 7, which discusses each of them in detail.

Part A

Scaling Up

Although scaling up was written about prior to 2000 (e.g., Uvin, 1995), the majority of the literature on the topic is related to the creation of the United Nations' Millennium Development Goals (MDGs) – global development goals aimed at eradicating poverty – and to the need to develop effective solutions to issues related to poverty, nutrition, health, employment, education and equality from a global perspective.

The UN Sustainable Global Development Goals

Millennium Development Goals (MDGs) – In 2000, world leaders gathered at the United Nations to discuss eliminating extreme poverty and hunger worldwide by 2015. They decided to promote eight goals: eradicating poverty; promoting education; promoting gender equality and women's empowerment; improving child and maternal health; ensuring environmental sustainability; combating AIDS and other infectious diseases; and building a global development partnership (The Millennium Development Goals Report, 2015).

Sustainable Development Goals (SDGs) – The 2015 UN Millennium Development Goals Report (Take Action, n.d.) and articles written leading up to 2015 acknowledged that the UN's 2000 goals had not been fully achieved, and that continued effort would be required to make significant progress (GDN - Global Development Network, 2013; Greenhill & Prizzon, 2012). Therefore, in 2013, a decision was made to extend the project until 2030 under a new name: Sustainable Development Goals (SDGs) (Take Action, n.d.). The goals remained the same, but a critical lesson learned from the first fifteen years was that there

is synergy in achieving these various goals, and that sustainability, climate improvement and achieving peace are also closely related to poverty eradication.

The most direct strategy is to ensure that successful programs in each field reach as many needy people as possible in additional locations. To this end, at the start of the MDG project, Edwards et al. (1999) identified four challenges faced by international development organizations:

1. How to engage a genuinely inclusive civil society at every level of the global system.

2. How to ensure that institutions are held accountable and respond to social and environmental needs.

3. How to develop governance at the international level that is both effectively implemented and serves the poorest people and nations.

4. How to ensure that global achievements translate into concrete benefits on the ground.

To address these challenges, civil society organizations were required to develop new capabilities: learning to listen and collaborate with others, both locally and globally, including outside of their sector; developing a strategic understanding of how global issues impact their organizational agenda; learning how to adapt to meet new needs and demands; developing work methods that prioritize alliance-building, partnerships, and shared responsibilities over self-promotion; being open to new ideas and deeply committed to learning; meeting demands for high-level research, data collection and analysis, while maintaining practical knowledge and the ability to advocate against injustice.

According to Edwards et al. (1999), the strength of third-sector organizations lies in their values: cooperation, nonviolence, respect for human rights and democratic processes. Therefore, they should strengthen this power by joining forces to promote a global moral order that does not tolerate poverty or violence; they should exemplify the society they aspire to create; and they must work hard to ensure that civic values are reflected in political, economic, environmental and social policy decisions.

Since 2015, it has become evident that the social and cultural context and the processes by which programs are integrated into the community are particularly important. Developers found that the process of implementing and embedding a new program is complex, iterative and slow (Coburn, 2003; Uvin et al., 2000). In light of these new insights, interest in "best practices" has grown. This requires learning from the successful scaling up experiences of grassroots organizations on the ground (Westley et al., 2014).

Reflecting on the lessons drawn from the MDG implementation, Vandemoortele (2014) suggested that international development bodies should focus on goals and principles, not on methods. He specifically criticized the attempt to address deep social issues through technical or standardized methods:

"[T]he MDGs are not about techno-fixes, but about fundamental transformation in society so that the disadvantaged…receive priority in national policy-making and resource allocation. Such transformations will never result from the application of standard recipes that often engendered such discriminations in the first place. Those who claim that the MDGs should spell out the strategy

for reaching the targets often want to impose their own policy framework onto others."
(Vandemoortele, 2014, p.225)

According to Vandemoortele, by 2030 – the target date for achieving the Sustainable Development Goals (SDGs) – it is essential to propose a theory of change, i.e. general principles that can guide equitable and sustainable development in a flexible manner. As he states, "global targets are good servants but bad masters" (p. 225). A global agenda should serve the people it is intended for, rather than dominate them. He warned against turning guiding principles into formulaic targets that could impose themselves on local processes and hinder the development of sustainable solutions.

Scaling Up – Conceptualization and Definitions

Uvin (1995) proposed four types of scaling up:

1. **Quantitative scaling up** – Expanding a program geographically or to a larger scale to reach more people and communities. This type of expansion, also known as "horizontal scaling up" or "scaling out," means that the program reaches a greater number of beneficiaries.

2. **Functional scaling up** – Broadening the type of activities and services offered by the organization, rather than expanding the scope of a single program. For example, an organization involved in agricultural development might expand its work to include nutrition and health programs.

3. **Political scaling up** – Expanding activities by influencing the political process, and working with groups of influential people, elected officials and political parties so that the state ultimately takes over the distribution of the program. (Uvin later revised this definition, labeling it as "indirect" scaling up in 2000, though others continue to use this category as originally defined.)

4. **Organizational or institutional scaling up** – Expanding the organization implementing the intervention, increasing the involvement of other existing institutions, or creating a new organization. This expansion can be horizontal or vertical. Horizontal expansion involves creating identical organizations, while vertical expansion is hierarchical – from a community organization to a city-wide, regional, national, or global organization.

According to Uvin et al. (2000), the goal of scaling up is to expand the program's impact, not necessarily to grow the organization itself. An organization does not need to become larger to achieve a broader impact. The organization's goal should be to spread innovation so as to avoid being an "island of excellence" in a wider economic or organizational wasteland. They further clarified the concepts and identified several possible methods of scaling up:

1. **Increasing the number of beneficiaries** – The simplest approach to scaling up is to expand, thereby increasing the number of people benefiting from the program (see Kim & Bradach, 2012, for data and examples from Teaching for America).

2. **Increasing the number of activities** – Generally in response to increasing demand, an organization may increase its program range by increasing the number and variety of activities (horizontal integration), or it may add new activities "above" or "below," that are aligned with the original program (vertical integration). An example of horizontal integration would be adding hydrotherapy facilities to an existing therapy center; vertical integration might involve creating a school for children to continue their education after they leave the early childhood rehabilitative day care center.

3. **Expanding indirect influence** – Direct influence refers to the services provided to the service recipients. Indirect influence occurs when an organization seeks to affect the behavior of other "players" who work with or have an impact on the service recipients' lives. In this way, the organization also indirectly impacts the service recipients' welfare. This indirect impact is achieved through training, advocacy, knowledge creation or consulting. Targets for indirect influence may include other organizations, local authorities, or the state, so that they may alter their behavior, advance the organization's goals and benefit the service recipients.

4. **Strengthening organizational sustainability** – Transitioning from the entrepreneurial stage of the organization to a stable institutional presence with established programs.

Coburn (2003) defined scaling up in the field of education as: expanding a program that has been successfully developed and tested in one school (or a small number of schools) to many more schools. In the expansion process, the question arises whether the program should be replicated or whether emphasis should be placed on a process of mutual adaptation, where the new program is modified to meet the needs of local schools. In either case, the goal is the quantitative expansion ("spread") of the program, so that there are many similar programs.

The questions that arise are: Did those who implemented scaling up also consider the depth of adaptation? What changed as a result of the scaling up? Was sustainability considered? Namely, to what extent is the program actually suitable and likely to endure in the new location? Was there consideration of a shift in reform ownership for the program? To what extent was the new program truly adapted to the new location? How much of an impact did it have on local professionals who learned new skills, and did new things – learning how to manage and implement it – and ultimately took ownership of it? Has the program changed the values of the professionals in the new location, so that it is no longer an imported solution but one that is integrated and part of the service that adopted it?

Coburn noted that there is a tension between deep adaptation (depth) and quantitative expansion (spread). Additionally, there is a tension between reform ownership and product fidelity. This tension raises the following question: When another organization takes ownership of a project that we developed, can we ensure that, after all the changes and adaptations made to the project, it will maintain the same service and maintenance standards that we established as being necessary for the program's proper implementation?

Dees et al. (2004) defined scaling up as three mechanisms that may operate in sequence, each requiring substantial central coordination (integration) and funding. To determine which mechanism to use, social entrepreneurs need to define their innovation and find the most suitable dissemination strategy:

1. **Dissemination** – Active dissemination of the innovation through providing information and/or technical assistance to others interested in implementing the innovation in their community.

2. **Affiliation** – A formal relationship defined by an agreement that sets out the nature of the relationship between parties, as part of an identifiable network. A network of affiliates might be a loose coalition of organizations with shared goals, or a more tightly coordinated structure that operates similar to a franchise. The agreement specifies guidelines for affiliates on using the common brand name, program content, funding responsibilities and reporting requirements.

3. **Branching** – Establishing local branches that are subordinate to one large organization, similar to company-owned stores in the business world.

Hartmann and Linn (2008) adopted the World Bank's 2005 definition: "Scaling up means expanding, adapting and sustaining successful policies, programs or projects in different places and over time to reach a greater number of people" (p. 8). They criticized the International Institute of Rural Reconstruction's (IIRR) 2000 definition, which included equity as uniformity in implementation, and speed as factors of scaling up. They argued that while equity is a concern to the organizations, it is not always critical, and that speed of implementation is generally unhelpful in this process, as experience shows that it can take years. After discussing various definitions, including Uvin's 1995 definition, they defined scaling up as a multidimensional process of change and adaptation of programs and projects.

Hartmann and Linn (2008) discuss different pathways to scaling up (pp. 13-15)

1. **Expansion** – The organization that developed the program expands and disseminates the service on its own. This requires a managerial decision to alter the nature of the organization and is not always suitable or feasible.

2. **Replication** – Dissemination by others, not by the organization that developed the original program, without hierarchical authority.

3. **Spontaneous diffusion** – This is sometimes referred to as being like an explosion. Gladwell discusses this kind of diffusion in *The Tipping Point* (2006). Information spreads to the point where additional stakeholders adopt the innovation independently. Hartmann and Linn (2008) note that this is rare in development work, as adopters typically need information and most interested parties lack organizational infrastructure.

Beattie-Huggan et al. (2012) adopted the definition developed in 2009 by the World Health Organization's professional network, WHO ExpandNet (https://did.li/jPOx5): "Deliberate efforts to increase the impact of health service innovations successfully tested in pilot or experimental projects so as to benefit more people and to foster policy and program development on a lasting basis" (p. 1).

Berelowitz et al. (2013) examined the effectiveness of a method of scaling up that they termed "social franchising": a successful social organization enables at least one independent franchisee to deliver its proven model under license. They explain that social franchising is a subset of social replication, which

they defined as replicating a social purpose organization or project in a new geographical location. Bradach (2003) argues that, just like in the business sector, franchising also benefits the third sector, as the franchisees do not only replicate the program technically, but also disseminate the underlying theory of change that guided the central program. New practices move from place to place, and sometimes the entire organizational culture is replicated. The great advantage of franchising is that it starts with a program whose value has been proven in one place, and the new location's ability to implement the knowledge developed by others can accelerate the implementation of the program and increase the likelihood of achieving desired results. He notes that the central program may also benefit from the additional knowledge and changes contributed by the various franchisees.

Westley et al. (2014) differentiated between "scaling out" (disseminating services to more users) and "scaling up." They argue that most of the literature uses "scaling up" to describe efforts by an organization to replicate and spread its programs, products, ideas or innovative approach. They call this "scaling out" – the organization attempts to reach more people and to cover a wider geographical area. They reserve the term "scaling up" for situations where the organization seeks to affect everybody who is in need of the proposed social innovation, or to address the institutional roots of a social problem. According to them, legislative and policy change constitute true "scaling up."

Hartmann and Linn (2008) found that scaling up was challenging for nonprofits, which first emerged in the 1980s and were typically small and innovative. This made the question of how to spread successful models crucial, especially at the level of community-based and collaborative projects in smaller localities.

To summarize the concept of scaling up according to Hartmann and Linn: Since 2000, scaling up has been used to discuss the expansion, replication and transfer of successful policies, programs and projects to reach more beneficiaries, with or without donor support.

After reviewing the definition of scaling up from a developmental perspective, the next step is to examine the best way to implement it.

Conditions for Implementing a Scaling Up Strategy

What contributes to a successful scaling up intervention? What is needed to move from an idea developed in a particular place to large-scale dissemination?

According to Edwards et al. (1999), organizations must develop new learning capabilities to address the challenges that scaling up presents. They must learn to listen, to work with others both locally and globally, as well as outside of their sector. They need to develop a more strategic understanding of how global issues impact their organizational agenda, and they must learn to adapt in order to respond to new demands. They should also develop work practices that are focused less on advancing their own profile, and more on building alliances, working with others, and sharing roles and responsibilities collaboratively.

The researchers emphasized that organizations interested in scaling up must efficiently handle the demand for high levels of research, data collection and analysis without losing touch with their knowledge of what

is happening at the grassroots level (local civil society organizations) and their ability to protest against social injustices.

Bradach (2003), examining the scaling up situation in American society, explained that most civil society organizations are small, with programs limited to a specific neighborhood or city. As a result, some programs reinvent the wheel, while others, with proven successes, are not disseminated. He identified a number of obstacles to scaling up programs. The first is the negative attitude of funders towards innovative ideas. The second is the concern that scaling up could lead to bureaucracy and to management being taken over by the entity taking over central control. The third obstacle is the nature of social entrepreneurs, for whom autonomy is an important psychological value, and who do not want to implement another's vision. Simmons and Shiffman (2007) argued that certain characteristics of the program team and particular conditions of the organizations adopting the program impact scaling up success. Similar to Hartmann and Linn (2008), they suggested the following conditions that a disseminating organization should possess for optimal dissemination of its program:

1. Effective, motivated leaders with authority and credibility within the organization.

2. A unifying vision.

3. An assessment of the adopting organization's capabilities and limitations.

4. An understanding of the political, social, and cultural environments in which the scaling up will occur.

5. The ability to secure financial and technical resources.

6. Relevant technical skills, training ability and management expertise.

For organizations adopting the program, they noted the following required attributes: an understanding of the need for the program; suitable implementation abilities; favorable timing and circumstances for the adoption of the program; effective leadership that can advocate for the program; and either physical proximity to the disseminating organization or similar characteristics to it.

Hartmann and Linn (2008, pp. 16-18) outlined six drivers motivating organizations to implement scaling up: ideas for innovation or for an alternative implementation; a vision for dissemination and expansion; leadership that believes in and knows how to lead the change, and how to raise resources for it; external catalysts, such as a natural disaster or economic crisis that can accelerate change in this direction; incentives and accountability.

Westley et al. (2014) studied five organizations in Canada that implemented scaling up. They identify three types of skills required to lead change beyond the boundaries of the organization, such that the lives of all individuals in society are impacted, not just the service recipients. These skills are:

1. Cultural and social skills, including knowledge management.

2. Political skills, such as networking, advocacy, lobbying and coalition building.

3. Resource mobilization skills of all kinds: financial, social, intellectual and political capital.

Scaling Up Methods and Practices

Most of the literature on scaling up practices originates from researchers, major organizations and foundations that assess progress towards achieving the MDGs. This body of work examines scaling up methods from a "top-down" perspective (Hartmann & Linn, 2008; Chamberlain et al., 2012; Gillespie, 2004; Beattie-Huggan et al., 2012). Some researchers focused on programs designed specifically for national-level dissemination (Chamberlain et al., 2012). A few articles (Uvin, 2000; McLeod Grant & Crutchfield, 2007; Westley et al., 2014) examined scaling up from the viewpoint of local organizations. In this section, we will also present a conceptual article written by members of an organization that implemented scaling up in India (Fernandez & D'Souza, 2017). Uvin et al. (2000) studied dissemination strategies in five organizations in India, and concluded that an organization can achieve large-scale impact without drastic growth. The title of their article – "Think Large and Act Small" – reflects this idea. They identified several types of political influence that promote scaling up. Only a few organizations engaged in policy or legislative change, while more were part of advocacy networks. The organizations used additional strategies to make an impact beyond advocacy and lobbying. These strategies included: integration – the government or institutional bodies adopted the organization's program and implemented it on a larger scale; joint venturing – the organization started to operate a project in partnership with the state or another large entity, after which the program continued independently; organizations made an impact by providing training and knowledge – they learned within the organization and then went on to teach others.

Fernandez and D'Souza (2017) described three scaling up strategies employed by an organization promoting hygiene and nutrition for pregnant women and infants in poverty and high-risk environments in Mumbai:

1. **Research** – Publishing data and research on the plight of pregnant women and infants in severe poverty generated public interest and attracted new donors.

2. **Partnership with government** – In a city of 18 million residents, the Mumbai government and public health department utilized the organization's knowledge and models to reach more women and infants.

3. **Model dissemination** – The organization shared its models with other organizations across India, who then replicated them and thereby continued to disseminate the organization's theory of change.

Budosan et al. (2020) presented a study of four mental health service organizations for victims of natural disasters. These services had to expand their operations to address the overwhelming needs in the field. However, from an organizational and professional standpoint, they were not adequately prepared for such demands. They relied primarily on on-the-job training, the training of paraprofessional staff, and financial assistance from aid organizations. The authors emphasized that this approach was implemented for only a few months, and was insufficient to significantly improve the condition of clients who required more prolonged treatment. Their conclusions, along with those of other researchers (Fagan et al., 2019; Rubin &

Diallo, 2019), are that to expand the reach of services to additional clients urgently in need, collaboration with policymakers, professionals, researchers and philanthropists is essential. However, such collaborations can pose challenges for organizations that are not well-established in their respective fields, as explained below.

Uvin et al. (2000) argues that there is a synergy between political activity and efforts to influence policy change. They argue that an organization that is confident in its direct impact on clients is also more confident in its ability to disseminate its knowledge. However, they also believe that there is a conflict between direct client impact and political activity, particularly when the political activity puts the organization at odds with the state funding its direct operations. Nevertheless, in the Indian democracy, it was possible to operate simultaneously, as it provided a civic space for autonomous action, a free press, and laws that more or less protected the organization's freedom to act as an advocate. They found that an organization could protect itself from conflict with the state by establishing a separate department dedicated to advocacy and research, distinct from its direct operations. This was especially important when some donors supporting policy change efforts might have opposed the organization's advocacy and lobbying activities.

Scaling Up through Decentralization

Uvin et al. (2000) found that four out of the five organizations they studied in India adopted decentralization as part of their scaling up strategy. These organizations discovered that decentralization was the best approach to create a structured process of organizational growth that ensured quality and sustainability: local communities gained easier access – both geographically and socially – to the organization's services; decentralization facilitated the establishment of local institutions; it encouraged the hiring of local employees, and promoted institutional and intellectual diversity.

The term "decentralization" describes three possible processes: simple deconcentration; the creation of independent units, known as "spin-offs"; the delegation of authorities to self-help groups. Each process represents a strategic choice that impacts the organization's future trajectory and the challenges it will face.

Deconcentration involves the delegation of tasks to lower-level units within the same organization. Uvin et al. observed variations among organizations in terms of the importance of the delegated tasks, the number and size of the units to which the tasks were delegated, as well as the degree of oversight and involvement retained by the central office. Three of the organizations managed the majority of their projects in this manner, granting substantial autonomy to project managers. The central office's role typically included facilitating shared learning and policy coordination, handling public relations and image building, developing and implementing staff accountability standards, and providing social capital and emotional support.

In cases where spin-offs were created, these units assumed new tasks and were legally separate, meaning that there were no longer hierarchical authority relationships between them and the central organization. One organization encouraged its staff to establish new organizations, though not for running its projects. Another organization was in the process of undergoing radical decentralization, which resulted in the creation of ten new organizations. Each of these new entities managed projects previously handled by the

original organization and undertook additional new activities. Two of the organizations established separate entities – a weavers' cooperative and a dairy cooperative – for their projects that could function on their own. In these cases, the role of headquarters evolved primarily around the building of capabilities in the new organizations, promoting shared learning and providing social capital, and fostering a sense of belonging to a family.

The organizations consciously chose to increase their impact without becoming larger. All decentralization methods were implemented to increase the sustainability of benefits to the service users, and to increase the likelihood of successfully influencing other actors in society.

Scaling Up Using Social Franchising

According to Bradach (2003), disseminating a program using the social franchising method depends on an organization's ability to articulate and standardize its theory of change. This is essential because the more complex the theory of change underlying a program is, the harder it is for other organizations to replicate it.

Bradach proposed a method for developing a project's theory of change: First, the foundational activities of the project should be specified, and then reduced to the minimal set of components necessary for the project to achieve the desired outcome. A strong theory of change is one that is as simple as possible: it includes as few elements as possible, and only those that are the most vital. It is systematic – it shows cause-and-effect relationships among the components of the operational model, and predicts how changes in one component will affect others. The theory itself and the activities required to produce results can be articulated clearly and concretely. Bradach views social franchising as a planned evolutionary process that might begin with a limited number of sites from which to learn and expand. The whole point is to understand what is going according to plan and what is not. At the beginning of this process, the organization develops a strategy that addresses three key questions: Where and how should the organization grow? What kind of network should be built? What role should the central organization play?.

Where and how should the organization grow? – The major challenge in launching the scaling up program is identifying the potential demand for the program and determining where the elements of success lie. For example, Bradach describes how the STRIVE program, which focuses on professional training, analyzed fifty major cities in the United States to find those with the highest concentration of unemployed individuals, a lack of alternative job-training providers, and local donors that would be interested in such a program. Based on this analysis, they increased efforts in several cities where they were already operating, and where unmet demand was identified. They also prioritized several new markets where potential funders were identified, and where there was a shortage of job training services.

Once the organization knows where it wants to expand, it must find local champions who are enthusiastic about the project and will act as local entrepreneurs. Following in-depth media coverage of the program, these enthusiastic individuals may volunteer themselves, expressing interest in developing such a program in their city. There have been cases in the United States where a program expanded after being adopted by a well-known public figure (e.g. President Clinton and President Carter).

What kind of network should be built? – A franchise network can be tight or loose, with the connection between the franchisees and the central organization being either strong or weak. The more standardized the operating model, the looser the network can be, as the program is easy to implement, and the central organization can easily identify deviations. However, when organizational culture is a crucial part of the program's operating model, a tighter network is required.

What is the role of the central organization? – The organization that initiated the scaling up program must address three key challenges: ensuring program quality and protecting the brand; facilitating learning within the franchise network; providing centralized services in locations when they are difficult to access.

These challenges will be explored further in this chapter.

Berelowitz et al. (2013) suggested five stages of social franchising:

1. Prove/Promote – Prove the success of the program and promote it so as to interest funders and adopters.

2. Design – Design the appropriate replication model once there is demand for the model.

3. Systemize – Establish and systemize the processes, and produce manuals for every stage of operation.

4. Pilot – Conduct a pilot of the replicated model.

5. Scale – Distribute the model to other franchisees.

They proposed setting up a fund to finance the franchisees, as the banks would not fund such programs. They also suggested online marketing of franchise opportunities, to publicize the model.

Identifying Readiness for Scaling Up

Dees et al. (2004) detailed what an organization needs to know before it decides to scale up:

1. **Readiness** – The organization must address the following questions: Is the innovation ready to be disseminated? Does the organization have measurable evidence of the success of the program? This evidence should be research-based, and not dependent on unique leadership or special circumstances. Is the program defined in a way that it can be replicated in other locations? Will the core components of the program be equally effective and acceptable in the new location?

2. **Receptivity** – The organization must ask: Will the innovation be well-received in the new location? If the innovation is complex and represents a radical departure from accepted practice, threatens influential local parties, or clashes with the community's dominant values or ideologies, it will be met with resistance. People might object to adopting innovations if they involve yielding ownership or control, or giving credit to outsiders. Are there reasons to anticipate resistance? Do the adopters demonstrate willingness to invest time, money and energy to achieve the impact that the innovation aims to create?

The local demand will increase when the community identifies an unmet need, and will perceive the innovation as important to it.

3. **Resources** – Which financial and other resources are required in order to adopt the program? Assessment of readiness and receptivity is the starting point for thinking about resources. In any scaling up project, additional resources are required, and therefore it is important to ask: What is needed to implement the program? Will it save resources while maintaining effectiveness? Where will the funding come from? Will it be self-funded by the users or will the program rely on donors?

4. **Risks** – What are the risks? How likely is it that the program will be implemented incorrectly, or will fail to bring about the result that it originally achieved? What are the potential negative effects on the clients and communities being served? What will be the consequences of failure for the organization doing the scaling up?

5. **Returns** – What will the benefits be? Impact is not just about serving more people, but also about providing a better service. For this reason, it is important to ask: What will people in the community gain?

Once these questions have been resolved, we must return to the question of readiness: The disseminating organization must examine whether, under the existing conditions and using the chosen dissemination strategy, it is interested in going forward with the scaling up process.

The Importance of Participation and Collaboration in Scaling Up Processes

Gillespie (2004) focused on the question of how to spread successful community initiatives of poor communities. He published his paper in a document produced by the Washington-based International Food Policy Research Institute. The goal was to ensure that excellent projects could be implemented on a national scale, benefiting a larger population. Gillespie asked what should be disseminated (not only how to disseminate), highlighting four key points:

1. **Participation** – The principle of community participation and empowerment should be disseminated, including: transferring authority and resources; setting a budget framework and participating in financing together with the community; planning all stages of the project with local stakeholders; and ensuring the availability of technical and administrative support from external entities.

2. **Accountability** – The dissemination of the initiative must be accompanied by full reporting to ensure that not only the funders but also the clients receive reports on the project's progress.

3. **High technical standards** – The dissemination should be context-specific, enabling those adopting the project to plan and manage it independently. Organizations adopting the project should have access to high-quality manuals for planning, implementation and maintenance of the project. Technical advisors should also be available to support the adopted project.

4. **Sustainability** – The financial, environmental and social sustainability of the project should be ensured.

McLeod Grant & Crutchfield (2007) studied twelve organizations in the United States that achieved high impact and continue to thrive. They found that these organizations did not conform to conventional ideas of what makes an organization successful: They were not managed perfectly. They did not particularly focus on branding. They did not always have new or exciting ideas. They were more focused on living their mission than fine-tuning it. There was no correlation between their size and their impact. However, there were some practices that all of these organizations employed (not always at the same time). These practices created momentum that would fuel further successes and expand their impact. The practices included:

1. **Services and advocacy** – The organizations provided excellent services and programs, but they understood that in order to achieve social change they had to undertake advocacy to change policy so that the government would add resources and change legislation.

2. **The market can work for the organization** – They learned to be in contact with the market and the economy, and not to rely on pure altruism. Economic powers and businesses were perceived by them as partners in social change.

3. **Supporters who believe in the organization's goals** – They built strong communities of supporters and "evangelists" who helped them achieve their larger goals. They expressed appreciation for volunteers, donors and advisors, not only for their time, money and guidance, but also for their faith in the organization's mission. These supporters believed in the organization's goals, thereby helping to create change themselves. The supporters were not just means, but ends in themselves.

4. **Nurturing networks of voluntary organizations** – Unlike most organizations that just pay lip service to collaboration, and see other organizations as competitors for scarce resources, these organizations helped others in their network to succeed, built networks of allies, and dedicated time and energy to advancing their fields. They freely shared money, expertise, know-how and power, not only for altruistic reasons but also because it was in their own interests to do so.

5. **The art of adaptation** – These organizations were endowed with an exceptional ability to adapt. They combined creativity with rational management over time to evaluate, execute and adapt themselves to new ideas.

6. **Share leadership** – The leaders of all twelve organizations exhibited charisma, but did not have huge egos. They understood that they needed to share power in order to bring about the change that they sought. They distributed the leadership within their organizations, as well as within their external networks. They nurtured strong deputy CEOs, built enduring executive teams and developed large and powerful boards.

A Vision of Social Change

McLeod Grant & Crutchfield (2007), similar to

Westley et al. (2014) and other authors, found that all the influential organizations that they studied had a big vision: they wanted to change the root causes of the toughest social problems – hunger, poverty, poor

education, climate change. But they combined the great vision and idealism with pragmatism. To achieve results they were prepared to collaborate with multiple and varied forces.

Simmons & Shiffman (2007) proposed a scaling up strategy for programs in the health field. The program must be **credible** – it must be based on sound evidence or promoted by respected persons or institutions. The program must be **observable** to ensure that potential users can see the results. It must be **relevant** and address needs that are keenly felt. It should have a **relative advantage** over existing programs. It should be **easy** to set up and understand. The program should also be **compatible** with the values, norms and facilities of the potential users. The program should be **testable** without committing the potential user to adopting it from the outset on the basis of reputation only.

Simmons & Shiffman, as well as Gilson & Schneider (2010) identified the features of a successful scaling up strategy. A successful scaling up strategy must include the following: clear messages that show the advantages of the program; personal contact and informal communication; early involvement of the organizations adopting the program; adaptation of the program to the local context; participatory approaches; technical assistance and a supportive approach; time allocation should be sufficient for the implementation of the new approach; strong diffusion channels; support via training and coaching to ensure skills transfer; systematic use of evidence on the effectiveness of the program and the results of the scaling up; and an ongoing focus on sustainability.

Barriers and Challenges to Scaling Up

Hartmann & Linn (2008) identified a number of challenges that may cause scaling up to fail:

1. **The financial challenge** – The first challenge is funding: How should the scaling up be funded? Bradach (2003) also argues that a project's costs and revenues must be transparent, and that the cost of an operating unit (e.g., the cost per child served, the cost of ongoing maintenance of one accessible park) should be known upfront. Funding sources should also be transparent so that the program adopters know what to expect. Bradach believes that programs for which it is difficult to find funding are not suitable for replication. Even when funding sources are secured to launch new programs, the primary challenge in the social sector remains securing long-term funding, since, in the nonprofit sector, success does not lead to increased financial investment, which causes significant frustration among organizations. Unlike in the business sector, in the nonprofit sector it is precisely when a program is highly successful that donors begin to withdraw. They lose interest in the issue that they were initially enthusiastic about and believe in distributing funding equally. As a result, they prefer to support other entrepreneurial organizations and initiatives. The state is usually the only entity willing to invest in the dissemination of successful services, which is why nonprofit organizations in the United States tend to rely heavily on government funding. According to Bradach, an additional financial challenge of the franchise model is funding the central office. The central office incurs expenses that are not directly tied to the program, and hence donors are unwilling to finance them and the franchisees end up allocating part of their budget to fund the central office. In such a situation there is a risk of underinvestment, which undermines the ability of excellent services, which would have been able to

provide proven solutions to critical problems for a larger population, had they received more support and management. Small, short-term grants focused on specific projects do not allow for the development of strong organizations. Therefore, a change in the funding model is necessary to enable the delivery of more successful services in the social sector, similar to the business world.

2. **The political challenge** – This barrier may be linked to funding, as political leadership can allocate the resources needed to disseminate the project. According to this perspective, any innovation intended for implementation in the public sphere requires political approval. Gilson and Schneider (2010) agreed that political consensus is required, but argued that in cases where political actors oppose the initiative, the obstacle can be overcome by activating advocacy groups to act as pressure groups, and by building alliances and recruiting lobbyists in the centers of political power.

3. **The policy challenge** – An existing policy may restrict the dissemination of a project by way of regulations or a legal framework that does not support the new direction.

4. **The organizational-management challenge** – An organization's lack of readiness or inability to execute scaling up can undermine such developmental efforts. One significant obstacle is the shortage of qualified professionals to disseminate the program effectively. Insufficiently skilled strategic management can become a barrier to the success of scaling up. This is because scaling up is not merely a rational management process that is vital for the planning stages. To ensure the sustainability of the change, flexibility and a sophisticated strategic approach are essential to adapt the innovation to the local reality (Gilson & Schneider, 2010).

   When the program is disseminated via a network of franchisees, central management faces three additional managerial challenges. The first challenge is ensuring the quality of the program. Although the program is delivered by different organizations, it carries the same name (brand) and therefore shares a public identity. To ensure quality, a data collection system must be established to provide evidence that each local program is reliable and effective.

   The second challenge for the central organization is facilitating learning among franchisees. One of the network's advantages is the ability to learn from others implementing the same program. However, tensions between franchisees and the central organization are inevitable, as the unique characteristics of each location do not allow for the perfect implementation of a uniform model. The challenge lies in ensuring that conflicts promote learning, rather than being destructive.

   The third challenge is providing centralized services, such as access to experts, centralized purchasing of equipment, or research and development. As the network grows and stabilizes, it becomes increasingly difficult for the central organization to remain relevant and essential to the franchisees. This presents an ongoing challenge for this management model (Bradach, 2003).

5. **The cultural challenge** – The project may not align with the worldviews and beliefs of the people in the new location. Bradach (2003) suggests that it is preferable from the outset to select adopting organizations with values and worldviews similar to those of the original project. Additionally, it is

crucial to clearly define the target audience to ensure that the new programs serve the same population that benefited from the original program.

6. **The learning challenge** – According to Hartmann and Linn (2008), scaling up requires a culture of "learning by doing," with an emphasis on adaptation, flexibility and openness to change. The process is not linear; it may take years and proceeds through unexpected channels. Part of the required learning is adapting and refining the process through regular monitoring and evaluation, feedback from users, communities and the implementation team, and training for the policymakers, managers and wider public. Bradach (2003) believes that many components of the social sector are non-formulaic, making it difficult to precisely articulate and detail the theory of change underlying a project, which makes it difficult to learn. For example, when training and advising form the foundation of a project, it is essential to identify who the appropriate candidates are for the work, how to choose the most suitable candidates, and how to train them and provide socialization for the position and the project.

Key Lessons

In this chapter, we have so far reviewed the "what" and "how" of scaling up based on the relevant literature on the subject. This section will focus on the lessons and insights drawn by these researchers regarding refining scaling up processes and implementing them optimally.

Uvin et al. (2000) suggested that organizations change their approach by "moving from development as delivery to development as leverage" (p. 1418), i.e., moving from developing the organization as a service provider (to serve more clients), to developing it as a lever for social change. The organization's impact is not dependent on its size – it can remain small. The impact can be expressed in the number of programs and projects developed within the organization and adopted by others, and the extent to which this organization has contributed to the social and intellectual diversity of civil society.

According to Westley et al. (2014), **organizations that "scale out"** (i.e., provide their programs themselves in other locations) **may reach a point of diminishing returns**. This point can be perceived as a "threshold" or a "ceiling." Some organizations view the point at which the marginal return is decreasing as a kind of "threshold." They perceive the impact that they have achieved on their own as a platform, and they continue to innovate so as to launch into a larger sphere of activity, and to systematically address the problems themselves. In contrast, organizations that have reached the point of diminishing returns and are satisfied with their existing activities and outcomes will view this point as a "ceiling," and will not expand into different types of interventions and roles offered by scaling up. Their conclusion is that organizations that want to make a systemic change first need to build a platform from which they will be able to disseminate their programs and ideas. **Without a foundation of experience, in-depth knowledge of the field, and established reputation it is not possible to make an impact on a larger scale.**

Gillespie (2004) summarized the key lessons from the community development initiatives that he studied:

1. A lesson that relates to governments and donors is that they need to think about the process beyond the project, the transformation that it creates and the transition to something new, rather than delineating

the period of support and setting the date to exit the project. **Donors and government should encourage development**, and not simply consider how to exit development programs in the hope that they will be financially self-sustaining. They should avoid concepts from the world of marketing, such as "supply-driven development" or "demand-driven development." Community-driven development works with citizens, not with clients. People do not "consume" community – the community is their home, and they are citizens who participate in its governance.

2. Capacity does not only relate to financial resources – it also includes motivation and commitment. **Developing capacity is an essential investment** that necessitates incentives at all levels, and requires time and resources. The development of the capacity of local leaders and facilitators is of particular importance.

3. **It is important to build a library of well-documented, context-specific experiences**, through monitoring, evaluation and research. This library will serve as a source of knowledge of advocacy processes aimed at improvements that need to be made in certain environmental contexts.

The International Centre for Social Franchising (ICSF), in its 2016 guide *Scaling Social Impact in the UK*, set out its insights for organizations that want to spread their impact:

1. It is important to invest time to **evaluate the disseminating organization's readiness and the evidence for the impact** that the organization intends to spread.

2. The **core components of the program** that the organization seeks to spread should be understood.

3. Significant thought should be given to **finding the right partners**, and to building a profile of the important characteristics of these partners, prior to making contact with their organizations.

4. **The disseminating organization must be prepared for change**. Often this change involves an organization that provides services becoming an organization that assist others to provide services. The organization must ask itself: Is the organization ready for such a change? Does the organization have a suitable staff for this change?

McCleod Grant & Crutchfield (2007) emphasized that "Even if nonprofits master and use all six practices, they still won't be able to solve the world's largest problems. Other sectors must also follow suit. For real change to occur, government and for-profit business leaders must learn from high-impact nonprofits and the six practices that they follow. Government leaders can begin to see nonprofits not just as a convenient place to outsource social services, but also as a valuable source of social innovation and policy ideas. Business leaders can partner with leading nonprofits to devise innovative systems that harness market forces for the greater good. And individual donors and volunteers can increase the social return on their investments by supporting those nonprofits that have the most impact, rather than those that adhere to conventional, and misguided, ideas of efficiency." (p.41)

Pandey et al. (2017) studied twenty organizations in India that have successfully implemented scaling up. They focused on the social-geopolitical context, focusing their insights on this aspect. Of India's 1.33 billion

people, 250 million live on an income of less than two dollars a day. India has 150 languages, around 2,000 ethnic groups, and all major religions are represented there. The Indian government spends only 1.4% of its GDP on healthcare – less than China and Brazil – and national spending on education is significantly lower than that of other developing countries. Any organization aiming to contribute to lifting people out of poverty in such a context must grapple with the dual challenge of scale and scarcity of resources. This means that any program must reach at least several million people. For this reason, the researchers concluded that India serves as an excellent laboratory for understanding the challenges faced by social organizations seeking to expand their influence while operating with very limited resources.

They argue that **methods and strategies are less important than the mindset** of the individuals in the nonprofit sector in India. They identified five dimensions of this mindset:

1. **The denominator mindset** – If one thinks of a specific social change as a fraction of the total need, the denominator represents the size of the need, while the numerator represents the organization's current achievements. Social innovators in India emphasize the total need. In a country where 25 million children suffer from acute malnutrition and 750 million people lack access to basic sanitation, these innovators believe that addressing even one part of the problem on a large scale, reaching many beneficiaries, is far more valuable than using the same resources to provide a more sophisticated solution that serves only a few.

2. **The dignity mindset** – When serving large numbers of people, there is a risk of reducing the human experience to mere data points in a table. Social organizations in India address this challenge by organizing their efforts around the individual participant, placing significant emphasis on the dignity of each service recipient. For example, the Aravind Eye Care System organization performs 300,000 cataract and other eye surgeries annually. They maintain the dignity of every patient by treating each one as a patient with choices. For instance, patients unable to pay can choose the "zero price" option. Another example of an organization that maintains human dignity is one that distributes clothes to those in need but decided to give used clothing as pay for essential work performed by the recipients for their community. For example, recipients built a bridge over a dangerous river in their area, turning the act of receiving aid into compensation rather than "charity."

3. **The radical frugality mindset** – Resource constraints compel organizations in India to focus on reducing costs to the point of using extreme frugality as a method of scaling up. They minimize operational expenses by innovating internal systems, and they use existing infrastructure to reduce costs. Education organizations collaborate with government schools, and healthcare organizations partner with state-owned rural health centers. These organizations employ three main strategies for achieving this economic efficiency:

   a. **Optimization of capital expenditures** – For example, in 2000, the Akshaya Patra organization provided meals for 1,500 children in five schools. After standardizing the process, and using smart technologies, they increased the output of one central kitchen to 100,000 meals. The cost of the kitchen was $3 million. Because their goal was to feed more children per day, they devised a model

where one kitchen would be the hub, which would work with four satellites. Instead of building two kitchens at a total cost of $6 million, they reduced the cost by 30% and doubled the quantity of meals prepared, ultimately feeding 200,000 children at a cost of $4.2 million.

b. **Continuous improvement around the goal** – For example, all Akshaya Patra employees know the critical number: one cent. For every cent that is knocked off the cost of a meal, they can feed 300,000 more children per year. The employees are organized around this one metric, and continuously work to reduce costs. For instance, each month a central kitchen uses approximately 2,500 kg of potatoes. The price of potatoes can rise suddenly by up to 50% due to shortages or speculation. The organization started to purchase large quantities and keep them in cold storage to use when needed.

c. **Investment to build capabilities and stretch resources** – All the organizations learned that radical frugality may lead to a tendency to cut the wrong things. They focused on reducing unit costs, and avoided, at all costs, any cut that might harm innovation and thereby dilute their overall impact. For instance, Akshaya Patra recruited managers from the business sector, and invested in techniques that substantially reduced waste and defects in the kitchen, in inventory management software and other logistical activities. The return on all these investments led to the organization serving its two billionth meal in 2016.

4. **The innovative hiring mindset** – One of the major obstacles to scaling up is the inability to recruit individuals with the right skills for certain roles. To address this challenge, various organizations have developed creative approaches. For example, Aravind requires female nurses, and recruits them from rural villages, specifically finding women with skills suitable for work as day laborers. The organization trains these women as ophthalmic assistants with a fixed salary and other benefits. These women do all the work in the hospital except diagnose and operate, and they are the reason that the organization became India's main provider of eye care. The organizations sought out people with the right attitude and willingness to work hard. The women that were recruited were empathic with patients and happy to serve others. SEWA is a trade union of women workers. The organization seeks to promote women as leaders in a patriarchal society that generally does not value them. It recruits women without any formal training. They have learned that with good training, people with values and a mindset that fits with the organization's culture can excel. At SEWA, the ratio of professionalism to motivation is 80/20: 80% of the women are recruited from the field, while 20% are professional women who support them and train them to work in the organization. SEWA has 14 cooperatives in India, with 1.5 million members.

5. **The collaborative mindset** – The majority of organizations in India seek partnerships with the establishment. They do not aim to serve as an alternative to institutional services, but view the government as the most powerful entity through which they can expand their impact. They believe that the government can provide critical funding, infrastructure and support that is needed to overcome even the most challenging obstacles to growth. However, partnering with the government involves trade-offs (weighing the benefits against the costs). Organizations must take into account that collaboration with

government entities often entails slow decision-making processes and navigating through extensive and cumbersome bureaucracy. As highlighted in this chapter, organizations recognize the need to develop unique strategies for working with the government. For example, in 2005, the Indian government decided to launch a large-scale program to address the healthcare needs of the country's 253 million adolescents. The Mamta public health organization seized this opportunity and developed a training module for adolescent girls on sexually transmitted diseases. This training module became part of the governmental program, and enabled the organization to leverage this success and provide an advanced training unit for medical personnel in other states where the organization operates.

To remain partners with the government, organizations must remain politically neutral, even while collaborating with policymakers.

Often, organizations that work closely with the government ensure that the roles and functions within their organizations map closely to those in the government. They argue that the more similar they are in structure to the government, the easier it will be for them to build collaborative partnerships with it.

The greatest risk in partnering with the government is that it often leads to corruption. Leaders of several organizations have stated that the most effective way to handle bribery is to never submit to it. The decision to never pay even a single cent caused these organizations to endure hardships and disruptions in supply. However, over time, once it became clear that they would not pay, they were left alone. An organization must decide not only what it will do but also what it will not do.

This section highlights that the literature on scaling up focuses on the question of how to disseminate local innovations and programs that have succeeded in a particular community to additional communities on a global scale. The literature has been examined from various perspectives, both to define what scaling up entails, and to explore how to successfully disseminate new programs to other locations where people can benefit from them. The literature shows that there are no simple solutions or foolproof techniques that can be relied upon in this field.

Part B

Beit Issie Shapiro's Theory of Change – Scaling Up

In this section, we aim to connect the definitions and models presented in the literature review with the scaling-up working model of Beit Issie Shapiro, as an organization that views broad social change aimed at improving the quality of life for individuals with disabilities and their families as a central goal in its social action. The purpose of this section is to learn from Beit Issie Shapiro's experience about the options available to a local organization for disseminating its innovations; to discuss the organizational conditions necessary for disseminating innovations; to review the methods and strategies that Beit Issie Shapiro employs to implement scaling up; and to examine the challenges that scaling up poses for the organization.

In 2008, Hartmann & Linn noted that they had not yet found a comprehensive evaluation of any single organization in terms of its capacity and functioning for scaling up. They saw this as a significant gap in the existing knowledge. Since then, we have found only one article that reports on scaling up from within an organization (Fernandez & D'Souza, 2017). Thus, in this chapter we will discuss the process, circumstances, conditions and methods involved in the dissemination of new programs developed by Beit Issie Shapiro. As noted at the start of the chapter, the discussion draws primarily on three social change initiatives led by Beit Issie Shapiro: the enactment of the Rehabilitative Day Care Centers Law, the development of an approach to treating sensory imbalance in Snoezelen rooms, and the establishment of Friendship Park – an accessible and inclusive playground (see Chapter 7).

Scaling Up or Scaling Out – to grow or to disseminate a work model

Westley et al. (2014) distinguished between scaling out (growing) and scaling up (disseminating a replicable work model). Their observation that organizations often transition from scaling out to scaling up during a process of redefining their core activities aligns with the development of Beit Issie Shapiro. Educational and therapeutic frameworks were the first services established by the organization. Subsequently, additional needs that emerged led the organization to develop new solutions and innovative treatment methods.

Beit Issie Shapiro's first attempts at developing innovative services led to requests from clients and local authorities to expand the services to additional target audiences. Beit Issie Shapiro management had to decide whether to open branches in other locations in Israel or to embark on a scaling up strategy, and ultimately chose the scaling up route. The initial plan was to help other organizations learn and implement the innovative models developed at Beit Issie Shapiro by themselves. The organization understood that physical expansion would impose an excessively heavy burden on fundraising, potentially jeopardizing its own sustainability. Mainly, it was evident that organizational expansion could shift the focus of its development away from innovation and policy change to dealing with lateral management and altering how the organization operates day-to-day. Therefore, it was decided not to expand physically or organizationally, and not to open additional branches through franchising or decentralization (Bradach, 2003; Berelowitz et al., 2013; Uvin et al., 2000). Despite the decision, and with special approval from the board of directors, a single branch of Beit Issie Shapiro was established in 2001 in the city of Qalansawe. This exception to the

policy was made so as to adapt our knowledge regarding operating services for infants and young children with disabilities and their families in the Arab sector.

Beit Issie Shapiro management decided that it would be an organization that impacts society as a whole, and works to improve the situation of people with disabilities. Therefore, it was decided to expand the organization's impact in the field (Westley et al., 2014; Uvin et al., 2000) such that it would be able to reach more service recipients by making information about new services available to other organizations (such as the distribution of the working model for using Snoezelen rooms to treat multi-sensory stimulation, and the pioneering dental clinic that makes dental treatment accessible to people with disabilities), and to work to change policy so as to improve the lives of people with disabilities and their families. When the organization was involved in large-scale social change, such as the legislation process for the Rehabilitative Day Care Centers Law, which sought to enable every toddler with disabilities in Israel to receive rehabilitative day care services funded by the state, it raised the funds to establish a coalition of organizations and parents, and promoted change in partnership with all the organizations in the coalition (Kaminsky et al., 2006). This was also the case with the establishment of the first accessible and inclusive park in Israel for children with disabilities and their families, which Beit Issie Shapiro initiated and developed. The organization assisted local authorities across the country to build accessible and inclusive playground complexes using the format that it developed. Subsequently, to ensure that the accessibility of the parks would not diminish over time, Beit Issie Shapiro was involved in the process of enacting mandatory regulations for the establishment of accessible parks in Israel. The organization thereby contributed to improving the quality of life of children with disabilities and developmental delays, and their families, as well as ensuring that the right to use adapted public facilities throughout the country remains protected (see details of these examples in Chapter 7).

The concept of "direct and indirect political influence" (Uvin et al., 2000) is indeed applicable to the policy change processes led by Beit Issie Shapiro over the years. The organization itself has not grown, but it has expanded its impact via research, training, advocacy and lobbying for policy change, to increase the circles of influence aimed at helping to improve the lives of people with disabilities.

Vision

Uvin et al., (2000) noted the vision of organizations moving from an outlook of development as delivery of services to an outlook of development as leverage for social change. Similarly, McLeod Grant & Crutchfield (2007) found that organizations that successfully made a major impact had a vision of changing the world, and employed policy influencing practices.

Those who wrote about the proper conditions for scaling up (Hartmann & Linn, 2008; Gillespie, 2004; Simmons & Shiffman, 2007) noted that an organization needs a vision of dissemination of services and of policy change in order to identify opportunities for their distribution and implementation. Beit Issie Shapiro was founded in this spirit, and formulated such a vision in 2006. In 2010, the vision was amended as follows: "To work towards a society that assures the rights of children and adults with different disabilities to maximum opportunities for growth and participation in communal life." The organization was set up in a

way that enables this vision to be realized, and includes three core areas: innovative, high-quality services, as models for replication; influencing policy and changing attitudes in the community; development and distribution of knowledge via research, knowledge management and training.

The critical factors for success were also defined: financial infrastructure, human capital, and partnerships in Israel and overseas.

Currently, multiple diverse organizations operate facilities and services that were originally developed by Beit Issie Shapiro. They do so independently and without any contact with the organization. Various local authorities have built accessible and inclusive playground complexes. The State of Israel enacted the Rehabilitative Day Care Centers Law, 2000, which grants every child with significant developmental delays aged six months to three years the right to rehabilitative day care services. Beit Issie Shapiro initiated, raised funds for and coordinated the activities of a coalition of organizations that served as a platform for lobbying and advocacy on matters related to improving the quality of life of children with disabilities and their families.

The vision makes clear that Beit Issie Shapiro develops services for its clients. However, since the majority of people with disabilities do not receive services from Beit Issie Shapiro, the organization sees every innovation as having potential for dissemination via several different methods, such as developing study materials for training, participation in conferences, documentation of models and production of guides – as a platform for changing attitudes towards people with disabilities among community members. In addition, the organization views changing overall policy as a way to realize the rights of people with disabilities to live as equal citizens in the country.

The implementation of Beit Issie Shapiro's vision for dissemination aligns with Gillespie's (2004) proposal: a vision of community-based development. According to this approach, every organization that chooses to adopt an innovation is trained on how to independently manage, fund, plan, adapt and maintain it. This strategy requires the ability to embrace changes that are beyond the organization's control, and to accept that there will be competition for service recipients, who may turn to the new organizations that have adopted the model. While this approach may result in Beit Issie Shapiro losing exclusivity, it benefits from the fact that it is leading broad social change.

Values

Beit Issie Shapiro's vision and mission are founded on several core values:

Respect for the person as a person – Equal treatment for every person regardless of disability, gender, religion etc.

Equal rights – People with disabilities are entitled to the same civil, financial, social, legal and political rights as every other citizen.

Empowerment of people with disabilities – Increasing their involvement in decisions about their lives: "Nothing about us without us."

Inclusion and participation – The right to be part of communal life without social exclusion.

Entrepreneurship, innovation and creativity – The organization is a social entrepreneur that develops innovative and ground-breaking programs and services.

Excellence – Developing services that are based on research and evaluation to the highest standards, setting a benchmark for excellence for best practice.

Professional Leadership

Beit Issie Shapiro's leadership team drives the organization's scaling up vision and works to implement it. As Hartmann and Linn (2008) found, leadership plays a central role in leading action, beyond the day-to-day running of the organization. The leadership have to encourage innovation and give support for original ideas, cultivate worthwhile initiatives proposed by employees at all levels, and support employees. Beit Issie Shapiro's leadership believes in each and every innovation that has been disseminated by the organization. Once it determines that an initiative is vital and effective, it leads the dissemination process, raises funds, and views the dissemination as a realization of the organization's vision and mission. Beit Issie Shapiro's leadership has raised funds specifically for the dissemination of initiatives or for advocacy to influence policy, and has allocated appropriate professionals within the organization to promote this process.

Motivation and Drivers

At this point it is clear that the organization's motivation is based on its vision and values, and is strengthened by its leadership. Beyond these drivers, it is important to the organization to preserve and maintain the professional identity and standards that it has cultivated over the years – excellence in the provision of services and a pro-social outlook. Every innovative development of Beit Issie Shapiro that has been distributed to other organizations and places serves to promote Beit Issie Shapiro and position it as an organization with broad social influence. The organization is incentivized to enhance the situation of its service recipients in a consistent and measurable way, as it thereby achieves its mission and goals and improves its public image, enhancing its ability to raise additional funds from foundations and donors.

The motivation for scaling up is also part of Beit Issie Shapiro's definition of professionalism, which is rooted in the foundations of the methodology and tradition of communal work. Communal work is always the scaling up of individual experience, which becomes a group task, followed by its expansion by activists into the community, and from there to the city and the state.

Skills and Resources

To succeed in scaling up, not only are vision, values, and leadership essential, but also skills that can turn good intentions into effective action. Therefore, we will present the steps the organization has taken to refine the skills and develop the resources necessary for successful scaling up. Westley et al. (2014) identified the following skills:

1. **Cultural and social skills** – Beit Issie Shapiro has a well-established professional program research and evaluation department. In addition, in the last decade, Beit Issie Shapiro has operated a knowledge management department, which gathers the existing knowledge in the organization. With this information, the department constructs replicable models and reviews the situation globally in the organization's areas of interest, and considers what the organization can do to contribute from its experience to organizations and people with disabilities around the world. Beit Issie Shapiro's Trump Institute converts knowledge into training materials and tools that can be given to parents, organizations, public services and decision-makers.

   Beit Issie Shapiro hosts an international conference every four years on the subject of developmental disabilities, attended by participants from around the globe who come to learn about innovations, trends, and new perspectives on people with disabilities. These skills help the organization formulate, document and disseminate evidence-based practices to anyone interested, through various channels.

2. **Political skills** – Beit Issie Shapiro has proven expertise in coalition-building and influencing policy. The organization is deeply connected among civil society organizations, and participates in think tanks and advocacy groups, and assists in developing issues raised by other organizations. Beit Issie Shapiro is committed to promoting the rights of people with disabilities, and seizes every opportunity to influence decision-makers towards this goal.

3. **Resource mobilization skills** – As an organization mainly focused on developing services, Beit Issie Shapiro raises funds in Israel and abroad to ensure that its vision becomes reality, and to secure its continued existence. The organization mobilizes intellectual and social capital, and contributes to the development of this capital through the departments mentioned in paragraph 1 above, and through the professionals operating in its various services. While the organization defines itself as apolitical, it has skills in the political field, as noted in paragraph 2 above, and mobilizes political capital that helps to advance its goals, and strengthens its position as an organization with proven skills in providing services to people with disabilities, and promoting the status and quality of life of these people in Israeli society and across the globe. (Beit Issie Shapiro has been a special consultant to the United Nations on the subject of people with disabilities since 2012.)

Hartmann & Linn (2008) noted that capability encompasses not only skills, but also motivation and commitment. These exist at Beit Issie Shapiro and are a driving force in its social mission. The organization's ability to recruit other entities to adopt its innovations is grounded in an understanding that not all organizations possess these characteristics or the skills required for successful implementation. To address this, Beit Issie Shapiro ensures that adopting organizations receive the necessary knowledge through guidance, training and briefings. This approach significantly increases the likelihood of success in implementing the innovation within these organizations.

The organization has developed several scaling up infrastructures:

1. **The International Trump Institute for Continuing Education in Developmental Disabilities – research, knowledge management**. Via the Trump Institute and the Research and Evaluation and

Knowledge Management departments mentioned above, Beit Issie Shapiro examines innovations developed within the organization, learns how to refine them, documents and designs the models, and distributes the research findings that illustrate the effectiveness of the innovation, by way of training programs and additional distribution channels. Beit Issie Shapiro also provides ongoing or one-time consulting to organizations that are keen to adopt innovations it has developed and implemented. Alongside the consulting and training, Beit Issie Shapiro produces briefings and training aids to make the learning process and implementation easier.

2. **The Community Development and Social Change Unit** – Beit Issie Shapiro has a department for community-based work, which manages policy-change processes, and develops strategies to ensure their success. Through these efforts, Beit Issie Shapiro influences legislation to benefit individuals with disabilities, and organizes parents and civil society organizations to join partnerships advocating for their rights. The broad coalition of organizations (approximately 50 organizations and entities), which was mentioned above, was established and operated to advocate for the enactment of the Rehabilitative Day Care (Early Intervention) Law. This coalition continued to function as a lobbying and advocacy group for secondary legislation (regulations and interim provisions), and continues to act as a national partnership in the field of children with disabilities, which has brought about further policy changes, such as regulating transportation for young children to rehabilitative day care centers. The organization develops additional innovative initiatives in collaboration with other entities, such as a self-advocacy project for individuals with disabilities.

3. **The Global Professional Development Department** – Beit Issie Shapiro has an international department that expands its international scaling up capacity. When Beit Issie Shapiro joined the United Nations Economic and Social Council (ECOSOC) in 2012, it enabled the organization to establish an international network to showcase its innovations and share them with organizations and governmental institutions seeking to implement them. This activity aligns with the Sustainable Development Goals (SDGs) and fosters learning among organizations worldwide.

As noted by Uvin et al. (2000), it is essential to establish synergy between an organization's direct activities and its indirect activities through political influence. This synergy exists at Beit Issie Shapiro. The organization has a proven reputation for success in the field of services for people with disabilities, with a particular expertise in developing solutions for children with disabilities and their families. Furthermore, Beit Issie Shapiro is recognized for its expertise in employing community-based work methods as a tool for social change. This solid foundation enables the organization to confidently engage in policy change activities within its areas of activity. This is because Beit Issie Shapiro is perceived by peer organizations and institutions, such as the National Insurance Institute and the Ministries of Welfare and Health, as a credible organization and an expert in its field, and its proposals of partnerships for policy change are well received. While an organization does not necessarily need to grow in size to exert influence, impactful organizations cannot be very small (Uvin et al., 2000). Indeed, Beit Issie Shapiro's size is a function of the visibility of its influence in the public sphere, its extensive community work, its disability-focused research, and its many long-standing partnerships. All of these have made it easier for government officials to trust

the programs and policies that Beit Issie Shapiro promotes. The Trump Institute for Continuing Education in Developmental Disabilities also enjoys wide professional recognition for the training programs that it runs. Its relative advantage lies in the fact that the students study in the same place that the changes and innovations are taking place. Alongside theoretical learning, participants engage in practical observation. During their training, students can see how the hydrotherapy program works, the dental clinic and its specialized treatments, the Snoezelen rooms with their unique intervention approach, and the accessible and inclusive park in Ra'anana, where the organization is located. According to Uvin et al. (2000), when people can directly observe an innovation, there is a higher chance that they will be persuaded to adopt it.

The Conditions for Scaling Up at Beit Issie Shapiro

Over more than four decades of social change initiatives at Beit Issie Shapiro, the organization has gained valuable insights regarding the conditions necessary for a local organization that sees social value in executing optimal scaling up processes. We believe that attention must be given to the following five dimensions:

Funding – Since every effort to influence policy or disseminate innovations is dependent on Beit Issie Shapiro's ability to raise resources for the initiative, the organization is constrained in its ability to act freely and according to its needs. This capability relies on its success in convincing donors and government authorities to fund the activities. This is difficult since, as Gillespie (2004) noted, most donors specify that their support is for a particular, limited period and expect to see tangible results at the end of that period. It is more challenging to secure funding for process-oriented projects that may take a long time, even if the outcomes of such processes, including interim results, are highly impressive. While Beit Issie Shapiro has succeeded in securing funding for policy influence initiatives due to the trust donors have in its expertise in this area, the organization lacks stable and ongoing resources for such tasks. Generally, it is harder to raise funds for projects aimed at societal impact, such as legislation or changing attitudes among children in kindergartens, compared to obtaining donations focused on improving direct services for the organization's immediate beneficiaries, such as building a new school facility.

Politics – Anchoring rights requires the support of politicians for change. When it comes to legislation, without the support of politicians, change will not happen. Parliamentary legislation enshrines human rights and obligates the entities responsible for implementing the law to allocate resources for its application. Implementing an innovation in the public sphere necessitates the agreement of politicians on both the national level, as seen in the case of the Rehabilitative Day Care Centers Law, and the local level, such as the accessible parks initiative (Hartman & Linn, 2008). Without the assistance of the mayor of Ra'anana and his understanding of the needs of families with children with disabilities, it would not have been possible to implement the program in the city. Once the accessible and inclusive park facility was operating successfully, mayors of other cities learned from its example, and today there is interest in similar initiatives across many locations in Israel. In such cases, the goodwill of local policymakers is crucial, as they must not only agree to the project's existence but also continue to fund its operations in their cities. The involvement of political figures facilitates dissemination through various channels, including professional recognition, resource allocation or policy changes.

Existing Policy – Existing policy that is enshrined in law in the area in which Beit Issie Shapiro operates can either restrict or enable the organization's activities as a whole, not just its scaling up. When Beit Issie Shapiro was founded, there was no legislated policy addressing the state's responsibility to provide services (such as day care services) for children aged zero to three, and in particular there was no policy relating to rehabilitative day care services for toddlers with significant developmental delays. Beit Issie Shapiro stepped in to fill the gap created by the lack of societal recognition of the needs of these children, providing services to them and their families. The necessity to cover all treatment costs for these children and their families led to a situation where parents contributed part of the expenses, and Beit Issie Shapiro had to raise substantial funds abroad to cover a significant portion of the operational costs.

The efforts of the coalition of organizations, led by Beit Issie Shapiro, to improve the situation for children with significant developmental delays and their families resulted in legislation that recognized their right to rehabilitative day care services. This legislation transformed the entire funding system for these children. It obligated the government to allocate resources for the realization of these rights, led to the opening of additional rehabilitative day care centers across the country, and alleviated the financial burden on parents who cannot afford the wide range of treatments that their children need.

Organizational limitations – While organizational limitations in developing scaling up initiatives are tied to funding constraints, they can also be attributed to policy restrictions. Beit Issie Shapiro's values, vision and mission drive it to pursue scaling up, but it does so only in conjunction with a specific innovation and after creating and implementing a prototype that has been proven as an evidence-based practice. Over time, Beit Issie Shapiro has developed organizational capabilities and supporting infrastructures for scaling up, including a methodology for scaling up. Today, the organization possesses both the ability and the motivation to disseminate this methodology to other organizations, despite the fact that Israeli policy generally does not encourage such dissemination and may not even be aware of this possibility.

Another challenge is the shortage of suitable professionals to engage in scaling-up and in dissemination marketing in a continuous and consistent manner. This is an organizational limitation, but it is a funding constraint as well as a policy constraint, since high-quality human resources are not evenly distributed across organizations, companies and locations that require professionals with such expertise. Through its training institute, Beit Issie Shapiro offers training and guidance to professionals who wish to implement an innovation in their own settings. For each new initiative, Beit Issie Shapiro develops manuals documenting its work model and operational methods, to ensure that professional standards are maintained.

Mindset - Mindset refers to the understanding that an organization's social, economic and cultural context is important and influences its decision-making processes in the field of scaling-up (Pandey et al., 2017). Beit Issie Shapiro operates in the State of Israel, a country whose size and complexity are incomparable to that of a vast and diverse nation like India. Nevertheless, the literature on the mindset of organizations in India provides valuable insights into the mindset of Beit Issie Shapiro's management and staff, and explains why the organization is highly conscious of the need to widely disseminate the innovations it develops.

The first mindset at Beit Issie Shapiro that also exists in India (Pandey et al., 2017), is the relative size of the solution compared with the absolute need. For many years, Beit Issie Shapiro was one of the few organizations in Israel addressing the needs of toddlers with severe physical disabilities. In its early years, the organization provided rehabilitative day care services to 25 toddlers. Today, at the peak of its activity, it directly serves approximately 130 children. Following a policy shift driven by Beit Issie Shapiro and the coalition of organizations, by 2021, about 140 rehabilitative day care centers were operating across Israel. There is no precise estimate of the number of children in Israel requiring these services, but a significant shortage remains, particularly for children with autism (Special Committee for the Rights of the Child, 2021). Meanwhile, the state is obligated to provide appropriate services for every child in need.

Beit Issie Shapiro's second mindset is the readiness to rely on the state and local authorities as a foundation for providing sustainable services. The reason for this in Israel, unlike in India, is that partnership with the state, to a large extent, guarantees an organization's sustainability. For an organization to disseminate its innovations and create societal impact, it must know that its future is secure. A fixed budget from the state means that a portion of the organization's resources are guaranteed annually. Similar to India, the State of Israel has an advantage as a provider of logistical and financial infrastructures, and organizations operating in the field of supplemental education typically prefer to engage with schools through the Ministry of Education. However, for Beit Issie Shapiro, whose special education school is classified as "recognized but unofficial," the state serves as a critical partner primarily in terms of funding and legitimacy infrastructure, rather than logistical support.

Conclusion

This chapter aimed to connect the literature review – which was intended to deepen the body of knowledge in the field of scaling up through learning from global practices – with insights accumulated at Beit Issie Shapiro that can assist organizations and research institutions to work towards scaling up.

This chapter, drawing on the literature in the field, sought to discuss how Beit Issie Shapiro disseminates the innovations developed within the organization, and to explore the similarities and differences between it and other organizations worldwide. We saw that the organization consciously generates new knowledge in order to disseminate it, and to turn it into part of the mainstream within a society that looks after its citizens. We learned that the driving force behind the organization is a social vision that is reflected in its organizational culture, rather than economic feasibility. Beit Issie Shapiro is more interested in policy change for the benefit of people with disabilities, and less interested in providing services on a large scale directly to them. The organization consciously upholds values critical to the future of the world, such as respect for human rights, democratic processes and collaboration (see Edwards et al., 1999, and Uvin et al., 2000).

Beit Issie Shapiro's experience in scaling up demonstrates that if grassroots organizations are keen to extend their influence beyond their immediate locale and the services they provide, they would benefit from adopting some of the qualities that have enabled Beit Issie Shapiro to become an active player in shaping

policy in its service domain. Achieving this requires developing a social vision and cultivating an organizational culture and strategy. In addition, training the organization's leadership and staff in community work is key to its ability to fulfil a role as an agent of social change, as well as fostering strategic and contextual thinking. Furthermore, planning via structured work methodologies combined with maintaining a strong connection to the place and culture are critical. Think big and create a major impact, while continuing to operate as a local organization.

To promote scaling up processes, it is important that the practices that the organization seeks to disseminate are evidence-based. For this reason, Beit Issie Shapiro prioritizes research and evaluation to enhance its scaling up capabilities, focusing on influencing policy and disseminating innovations for the benefit of people with disabilities in Israel and worldwide. Beit Issie Shapiro is committed to sharing its accumulated experience and knowledge with other organizations globally that aim to transition from being solely service providers to becoming organizations capable of leveraging their expertise to learn how to scale up.

Rondinelli (2013, p.1418) stated that "projects are more experiments in policy than solutions to problems," as a single local project, no matter how successful, is unlikely to independently bring about social change. Therefore, local organizations must aim to transcend their concrete innovations at the grassroots level and join forces with others to make an impact on the eradication of poverty, prejudice, violence, and the exclusion of weak populations, including people with disabilities. Organizing around the adoption of innovations presents organizations with an opportunity to change the realities of exclusionary economies, discriminatory politics and elitist perceptions of knowledge and ideas. This is the meaning of the transition from development as delivery of services to development as impact.

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