Guiding questions for adapting and refining a scaling strategy

Once an initial scaling strategy has been developed, it can be tempting to consider it "done" and to turn focus and energy to implementing the strategy. However, scaling is an iterative process that requires ongoing adaptation, refinement, and course corrections based on data collected, lessons learned, and changes in the broader education environment, such as new policies or leadership changes.

These guiding questions are designed to complement the development of a strategy for expanding and deepening the impact of an education initiative or innovation.[1] They are intended to support individuals and institutions in the process of scaling to regularly and collaboratively reflect on issues and opportunities arising related to the scaling strategy, to PLAN and TEST adaptations, and to periodically REFLECT and REFINE based on these changes. The ultimate goal is to support and strengthen the process of scaling impact in education.

Step 1: Plan

Remind yourself: What is the overarching scaling goal?

The scaling goal should be specific, measurable, and time bound. This goal should come directly from the scaling strategy you have already created.

Identify the problem or opportunity

- Is there a key problem or challenge faced in the scaling process you want to address or a new opportunity you want to seize?

- Why is the problem or opportunity happening? *Try asking yourselves "why?" several times to get below the surface and understand the root cause of the problem or opportunity.[2]*

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1. If you have not yet developed a clear scaling goal and strategy for achieving it, we recommend starting with the "Scaling strategy guidelines" worksheet, which offers guidance for articulating a clear, measurable, and timebound scaling goal and high-level strategy, serving as both a "north star" to guide scaling efforts and as a dynamic planning document to periodically revisit and update based on new insights, data, and changes in the environment.
2. The Lean Enterprise Institute has created a helpful explainer video for this simple technique for identifying root causes of problems (and many other resources exist online): https://youtu.be/SrlYkx41wEE

Brainstorm

Is there an adaptation, change, or refinement you could make to address this problem or seize this opportunity?

Plan how you will implement and test this change or adaptation

- What are the major tasks to enact this adaptation?

- When will the testing occur? For how long?

- Where will the test occur? How many sites?

- Are there any contextual considerations? Equity concerns?

Consider measurement and costs

- How will you assess whether this adaptation works? What changes are you hoping the adaptation will lead to? What data will you need? Who will collect and analyze the data? How frequently?

- What resources will be needed and where will they come from?

- It can be hard to see immediate change or progress in long-term strategies. Are there early indicators you can look for to see if the adaptation is having an impact (positive or negative)?

Step 2: Test & Measure

In many cases, each adaptation or refinement to a scaling strategy will go through multiple cycles of tests and adjustments. The duration of these cycles is not fixed and will depend on the adaptations tested, the measures collected, and the stage of the process. For instance, early testing of an idea might be quicker than later refinements. However, it is important that the cycles be short enough that the data collected remains timely, relevant, and useful to inform quick learning and decision-making.

Specify the timing

- For this cycle, when do you anticipate seeing any effects or changes?

- When should this cycle of testing end?

Step 3: Reflect & Revise

Reflect on what happened

- Remind yourself of the scaling goal and why you are prioritizing this adaptation.

- What are the results of testing the adaptation? What worked and did not work?

- Were any spontaneous or unplanned adaptations made to the original plan?

- How did the results compare to the predictions? Were there any unanticipated consequences?

Plan what comes next

What will you do based on this learning and reflection? Do you plan to incorporate this adaptation fully into your scaling strategy? Do you need to keep testing this adaptation? Do you want to abandon it to try something else? Regardless of your next step, identify a few key lessons you learned about this process that can inform your broader scaling approach.

Step 4: Begin again

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