

CONSIDERATIONS FOR **RESEARCHERS** FOCUSED ON SCALING IMPACT IN EDUCATION

This brief provides a targeted synthesis of recommendations for conducting collaborative research on scaling and sustaining impact in education, as well as remaining questions and gaps in the scaling evidence base that require further investigation and research, from the report "Scaling impact in education for transformative change: Practical recommendations from the Real-time Scaling Labs." It is intended for researchers interested in real-time research on the issue of scaling impact in education.

These findings emerged from the Real-time Scaling Labs project, co-created by the Center for Universal Education at the Brookings Institution with partner institutions around the world, which included four years of participatory, qualitative research on the process of scaling in

five countries. In each location, the scaling lab process combined ongoing documentation and analysis of the scaling journey with a series of in-person and virtual convenings that brought together a diverse group of key stakeholders to collectively plan for sustainable scale, discuss and reflect on challenges and opportunities faced, and develop and test adaptations and course corrections to scaling strategies through an iterative learning process. Data from each lab was collected, analyzed, and used in real-time to inform the scaling decisions for each initiative, and to develop individual case studies detailing the scaling journey during the period of the project. Process data and evidence were also analyzed across cases to identify common trends about how key drivers support the scaling process.

Recommendations for collaborative research on scaling and sustaining impact in education



Pursue equitable and authentic collaboration with local researchers and implementers and more locally driven research.

Why? Context is a huge factor in scaling processes—all initiatives are influenced by the broader environment in which scaling takes place. Research on scaling will be most useful and actionable when the needs, priorities, and questions of local actors are prioritized over the agendas of external researchers.

How?

- Ensure research is determined by local agendas, is based on a firm understanding of the context, prioritizes answering relevant questions for national and local decisionmakers, and causes the least burden on participants.
- Have conversations early and often about the roles and expectations of each partner, how all those who contributed will be recognized, and who owns the data and analysis generated.
- Be open about the limitations of research as well as how data will be used.
- Share the findings of the data and any policy impact the research might have with participants so that they can see the results of their contributions.
- Present research findings in an accessible way for all audiences. This might mean:
 - Breaking up a research report into smaller, more digestible pieces
 - Using simple terminology, not jargon
 - Translating the research into multiple languages
 - Being transparent about what questions the research does and does not answer.



Engage diverse stakeholders in research on scaling.

Why? Actively involving actors from various roles and viewpoints strengthens the process of scaling research, bringing in new perspectives and complementary insights.

How?

- Engage with all actors impacted by the initiative of focus in documentation and research activities. Where possible, include teachers, students, supervisors, school heads, teachers' unions, finance department staff, and those who oppose the initiative in data gathered about the scaling process.



Ensure research designs are flexible and can pivot as needs and circumstances shift.

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

How?

- Build data collection about course corrections, pivots, and adaptation cycles into research plans to ensure there is time, capacity, and support for these activities.
- Since scaling is an iterative, adaptive process, incorporate flexibility into research plans to enable changes as new questions and needs arise.
- Find opportunities to leverage existing MEL structures to gather scaling data, given that undertaking new research activities to answer scaling questions can take significant time and often requires lengthy approvals.
- Incorporate specific questions about scaling into ongoing implementation activities like training workshops as well as focus groups and surveys to capture insights from different actors.



Find ways to communicate ongoing scaling learnings while highlighting that it may take years to see the outcomes of scaling.

Why? Scaling is a long, complex, non-linear journey that can take up to 15-20 years. It requires a systematic approach to ensure quality, equity, and sustainability are maintained through expansion.

How?

- Share findings and implementation evidence early and often so they can be used to inform timely decisionmaking in scaling processes.
- Don't wait until the end of a scaling journey to share learnings. Given that scaling is a long-term process, providing more real-time insights, analysis, and information supports continuous learning and helps maintain interest and buy-in.



Accompany scaling and systems change tools and resources with facilitation and support.

Why? A tool is a learning support, not an activity on its own. The value of scaling resources is often highest when accompanied by a facilitator who can guide participants through the process of applying the tool and acting as a "critical friend" who can prompt additional reflection.

How?

- Accompany publishing tools with workshops and facilitation so they can be used as intended to meet larger learning goals.
- Dedicate time and space in research activities to defining key scaling terms. In instances where multiple languages are being used in the research, invest in finding translations for key terms that are both accurate and widely understood.



Undertake more in-depth, action-oriented research on the process of scaling impact in education.

Why? The work of scaling is not captured by typical monitoring and evaluation or research studies, and lessons learned are not systematically documented. The scaling process requires different types of data, methodological approaches, and tools than monitoring a pilot or an initiative at smaller scale.

How?

- Document the scaling process using diverse types of data. Record key meetings, illustrative achievements, change ideas tested, reflections, and measures of scaling progress. This information helps illustrate what is happening at different levels of the system, ensures the scaling strategy is up to date, and can provide early indications of potential windows of opportunity.
- Examine persistent gaps in the scaling evidence base, including but not limited to:
 - Scaling and sustaining quality teacher professional development and support
 - Securing long-term government financing
 - Developing relevant measures to continuously assess reach, depth, quality, and equity of scaling
 - The interplay between scaling and systems transformation

Questions and critical assumptions worth interrogating further

Who determines "local needs"?

While the scaling literature makes clear the importance of being "problem-driven" and emphasizes government buy-in and community support as fundamental to success,ⁱ this approach is less straightforward when applied practically. Questions remain around who determines local

needs and what should be done in the absence of local prioritization.

- Who should decide which problems get significant attention in a world of many needs and finite resources? Are local priorities defined by decision makers at the national level, the regional level, by grassroot communities, by researchers, or by funders?

- What happens when the data show a clear need, but the government or local communities have different priorities? Should external actors spend their resources advocating to government to prioritize the issue, or focus on scaling outside of government services in the hope that demonstrating impact will convince governments over time?

How to undertake genuine collaborative research and facilitate co-creation and peer learning when working in multiple languages and contexts?

The Real-time Scaling Lab (RTSL) project underscored the importance of close collaboration between researchers based in the Global North like Brookings and researchers, implementers, and policymakers working in the context where an initiative is being scaled. However, it also highlighted challenges with genuine co-creation, including: how to ensure inclusive participation and engagement from all participants in an action research project and learning community when different languages are spoken; how to gather input and feedback on analysis and research products from partners with extremely busy schedules and different levels of English fluency; how to think about co-authorship in a participatory, action research project; and how to strike the right balance between co-creation and providing guidance.

There is still much to learn about how to move beyond simply providing language options to creating truly multilingual spaces and engagement. Key questions arise around:

- What are the best ways to maintain consistency and coherence around scaling terms when writing in multiple languages?
- How can you create spaces where speakers of different languages can interact directly and not just in common language groups?
- What are the best approaches for developing authentic co-written products when authors speak different languages?
- How can you adequately plan for the costs of quality interpretation and translation?
- What are the best approaches to ensure that language inclusion means all languages and not just the most commonly spoken UN languages?

Scaling the initiative or strengthening the system?

The pervasive challenge of limited capacity leads to the question of what to tackle first: do scaling teams (within or outside government) first focus on scaling the initiative, knowing that the weaker elements of the system will be a challenge that could impact quality and potentially derail scaling, or do they first focus on broader systems strengthening and capacity building, knowing this is a difficult and long-term effort? It can be tempting to think of scaling and [systems transformation](#) as a binary, but a "both/and" approach may be more strategic. Rather than see systems transformation and scaling initiatives as conflicting approaches or sequenced steps, experience and evidence suggest they be considered complementary processes that sit on a continuum of large-scale change.ⁱⁱ Nonetheless, key questions about their intersection remain, including:

- Does knowing where the system fails help scaling teams make more realistic decisions?
- Can full institutionalization only happen after systems transformation?
- How can actors push for transformative changes in the education system while being realistic about what can feasibly change in the timeframe in which scaling is taking place?
- How is systems transformation measured?

How to scale and sustain quality teacher professional development (TPD)?

Scaling quality training and support that creates lasting behavior change and leads to improved outcomes for diverse groups of students is a well-known challenge in education. Many issues arise related to capacity, affordability, and sustainability. Research shows that the training and support strategies proven to be most effectiveⁱⁱⁱ are difficult to implement at large-scale, especially due to cost and equity tradeoffs. In many of the RTSL cases, teacher training was an area where the scaling journey stalled when it came up against both existing systemic structures related to teacher training and retention and people's beliefs and daily practices. While scaling teams experimented with different approaches to delivering training and strengthening TPD within broader scaling efforts, there is much more to be learned about how quality teacher preparation, training, professional

development, and support can be implemented and sustained at large-scale and systems transformed.

- Which TPD components and approaches that work at small-scale can be scaled effectively?
- Are there inventive TPD opportunities at large-scale that are unavailable to smaller TPD programs and approaches?
- How can teachers and school leaders be actively engaged in the design, delivery, and evaluation of TPD, and not viewed only as recipients?
- How can TPD simultaneously take advantage of economies of scale and be sensitive to local needs?

- How do efforts to scale and sustain TPD balance tradeoffs around affordability, quality, and equity?
- How is adaptive capacity for high-quality teacher support fostered among key decisionmakers and institution

Where can I find more information?

Scaling impact in education for transformative change: Practical recommendations from the Real-time Scaling Labs¹

Country Case Studies:

- [Adapting, innovating, and scaling foundational learning: Four lessons from scaling Teaching at the Right Level in Botswana](#)
- [Improving children's reading and math at large scale in Côte d'Ivoire: The story of scaling PEC](#)
- [Improving financial literacy skills for young people: Scaling the financial education program in Jordan](#)
- [Improving learning and life skills for marginalized children: Scaling the Learner Guide Program in Tanzania](#)

Scaling Tools and Resources:

- [Institutionalization Tracker](#)
- [Scaling Strategy Worksheet](#)
- [Adaptation Tracker](#)
- [Real-time Scaling Lab Guidelines](#)
- [Education Scalability Checklist](#)

Project Website: <https://www.brookings.edu/project/millions-learning/>

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¹ Hartmann and Linn, "Scaling Up"; Linn and Kohl, "Scaling Principles," 11; Worsham, Langsam, and Martin, Leveraging Government Partnerships for Scaled Impact.

ⁱⁱ Johannes Linn and Richard Kohl, "Scaling Principles" (paper prepared for the Scaling Community of Practice, 12 December 2021), <https://www.scalingcommunityofpractice.com/wp-content/uploads/bp-attachments/8991/Scaling-Principles-Paper-final-13-Dec-21.pdf>

ⁱⁱⁱ Anna Popova, David K Evans, Mary E Breeding, Violeta Arancibia, Teacher Professional Development around the World: The Gap between Evidence and Practice, The World Bank Research Observer (i) 37, no.1 (2022) [107-136] <https://doi.org/10.1093/wbro/lkab006>