

ARTICULATING YOUR THEORY OF ACTION

HIGH IMPACT PRACTICE: _____

WHY?

Why should this project be scaled?

HOW?

How (through which methods) will the project be scaled?

WHO?

Who are the key stakeholders that should be involved?

WHERE?

Where will the scaling up take place?

SCALING UP READINESS ASSESSMENT

Readiness Criteria	Questions to Consider	Readiness Level			
		Not in Place	Challenges Present	Gaining Traction	Established
Stakeholder Management	Do key stakeholders understand what you're trying to accomplish? Do they feel motivated to help?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<i>Theory of Action</i>	<ul style="list-style-type: none"> ▪ Is the strategy aligned with the organization's aspiration? ▪ Has the strategy been assessed to determine projected impact? ▪ Has a clear theory of action been articulated and shared? 	Rationale:			
<i>Leadership Commitment</i>	<ul style="list-style-type: none"> ▪ Has leadership made a commitment to support and drive the strategy? 				
<i>Stakeholder Assessment</i>	<ul style="list-style-type: none"> ▪ Have all potential stakeholders been identified? Has potential impact on them been assessed? 				
Change Management	Has the organization created an implementation environment conducive to the change?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<i>Cultural Alignment</i>	<ul style="list-style-type: none"> ▪ Is the current organizational culture conducive to implement the strategy? ▪ Have the necessary cultural shifts been identified and communicated to impacted organization staff? 	Rationale:			
<i>Practices and Procedures</i>	<ul style="list-style-type: none"> ▪ Have the required everyday practices been identified and set in place (e.g. policy changes, removal of organizational barriers)? 				
<i>Infrastructure/Capacity Building</i>	<ul style="list-style-type: none"> ▪ Have necessary structural changes been identified and implemented (re-allocation of roles and responsibilities, new positions established)? ▪ Are the mechanisms in place to support organization staff with the appropriate tools, training, and/or additional support needed? 				
Implementation Management	Are project and program management tools in place to plan, execute, and monitor the strategy's implementation?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<i>Team</i>	<ul style="list-style-type: none"> ▪ Is there a team in place to coordinate the implementation of the strategy? 	Rationale:			
<i>Funding</i>	<ul style="list-style-type: none"> ▪ Has adequate funding been allocated to support the implementation and management of the strategy? 				
<i>Data/Routines</i>	<ul style="list-style-type: none"> ▪ Is the data needed to monitor progress and evaluate the efficacy of the strategy available and accessible by the appropriate people? ▪ Are processes in place to provide feedback to leadership and the implementation team on implementation progress? ▪ Have routines been established to inform leadership of progress and to identify and address challenges? 				
<i>Plan</i>	<ul style="list-style-type: none"> ▪ Has an actionable implementation plan, which includes measurable outcomes, timelines, and communication strategies been developed? 				

PLANNING TO SCALE

People	<p>LEAD Who will lead the implementation of the strategy?</p>		
	<p>KEY ACTORS Who else needs to be involved in the implementation effort? What are their roles?</p>	<u>ACTOR</u>	<u>ROLE</u>
Actions	<p>KEY ACTIONS What are the key actions that need to take place in order to scale the practice?</p>		
Barriers	<p>BARRIERS What are some organizational barriers to take into account when planning?</p>		

STAKEHOLDER ENGAGEMENT AND COMMUNICATION

Stakeholder <i>Who are the critical stakeholders we need to engage?</i>	Purpose <i>What do we need from this stakeholder group (e.g. buy-in, feedback, etc.)?</i>	Flow <i>What direction(s) should communication flow (e.g. receive or provide info)?</i>	Method <i>What is the best way to communicate with and engage this group?</i>	Messages <i>What core messages need to be communicated?</i>