ARTICULATING YOUR THEORY OF ACTION

<table>
<thead>
<tr>
<th><strong>HIGH IMPACT PRACTICE:</strong></th>
<th>____________________________</th>
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<table>
<thead>
<tr>
<th><strong>WHY?</strong></th>
<th><strong>HOW?</strong></th>
</tr>
</thead>
<tbody>
<tr>
<td>Why should this project be scaled?</td>
<td>How (through which methods) will the project be scaled?</td>
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</table>

<table>
<thead>
<tr>
<th><strong>WHO?</strong></th>
<th><strong>WHERE?</strong></th>
</tr>
</thead>
<tbody>
<tr>
<td>Who are the key stakeholders that should be involved?</td>
<td>Where will the scaling up take place?</td>
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## SCALING UP READINESS ASSESSMENT

<table>
<thead>
<tr>
<th>Readiness Criteria</th>
<th>Questions to Consider</th>
<th>Not in Place</th>
<th>Challenges Present</th>
<th>Gaining Traction</th>
<th>Established</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Stakeholder Management</strong></td>
<td>Do key stakeholders understand what you’re trying to accomplish? Do they feel motivated to help?</td>
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| **Theory of Action**               | ▪ 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? |              |                    |                  |             |
| **Leadership Commitment**          | ▪ Has leadership made a commitment to support and drive the strategy? |              |                    |                  |             |
| **Stakeholder Assessment**         | ▪ 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?     |              |                    |                  |             |
| **Cultural Alignment**             | ▪ Is the current organizational culture conducive to implement the strategy?  
▪ Have the necessary cultural shifts been identified and communicated to impacted organization staff? |              |                    |                  |             |
| **Practices and Procedures**       | ▪ Have the required everyday practices been identified and set in place (e.g. policy changes, removal of organizational barriers)? |              |                    |                  |             |
| **Infrastructure/Capacity Building** | ▪ 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? |              |                    |                  |             |
| **Team**                           | ▪ Is there a team in place to coordinate the implementation of the strategy? |              |                    |                  |             |
| **Funding**                        | ▪ Has adequate funding been allocated to support the implementation and management of the strategy? |              |                    |                  |             |
| **Data/Routines**                  | ▪ 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? |              |                    |                  |             |
| **Plan**                           | ▪ Has an actionable implementation plan, which includes measurable outcomes, timelines, and communication strategies been developed? |              |                    |                  |             |
## PLANNING TO SCALE

<table>
<thead>
<tr>
<th>People</th>
<th>Lead</th>
<th>Who will lead the implementation of the strategy?</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Key Actors</td>
<td>Who else needs to be involved in the implementation effort? What are their roles?</td>
</tr>
<tr>
<td>Actions</td>
<td>Key Actions</td>
<td>What are the key actions that need to take place in order to scale the practice?</td>
</tr>
<tr>
<td>Barriers</td>
<td>Barriers</td>
<td>What are some organizational barriers to take into account when planning?</td>
</tr>
<tr>
<td>Stakeholder</td>
<td>Purpose</td>
<td>Flow</td>
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<td>-------------</td>
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<tr>
<td>Who are the critical stakeholders we need to engage?</td>
<td>What do we need from this stakeholder group (e.g. buy-in, feedback, etc.)?</td>
<td>What direction(s) should communication flow (e.g. receive or provide info)?</td>
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