METHODOLOGY TO EXTEND IMPACT

SPRING IMPACT

JEWISH TEEN Education & Engagement FUNDER COLLABORATIVE
Powered by The Jewish Federations of North America

INTRODUCTION

One of the most famous statements in the entire canon of rabbinic literature is the teaching from the Babylonian Talmud that reads, “Whoever saves a single life is considered to have saved the entire world” (Talmud Bavli, Messechet Sanhedrin 37a). This text is often understood as conveying the unique value that Judaism places on each and every life; in other words, each individual person is themselves an entire world. Taken somewhat more literally, this teaching could also be interpreted as claiming the power of exponential impact. Were we to save one single life, the prospective effects and influences of that life and of all future generations emanating from that life, could have an unimaginable impact. The scale of our initial good deed could be incalculably enormous. Translated to the world of Jewish communal or organizational innovations like new programming, educational resources and trainings, engagement tactics, networks, or other interventions, we can see how exponential impact applies to our initial efforts. Imagine then what could happen were we to strategically plan for and *methodically* implement a series of techniques and approaches that would empower our ventures to spread. We may indeed “save” an entire world!

While scaling our innovations to other communities is a captivating idea, actually doing so requires a great deal of hard work and attention to operational detail. Too often, organizations jump into scaling impact without carefully thinking through the up-front decisions necessary to effectively carry out their ambitions. In partnership with **Spring Impact**—a nonprofit that focuses purely on scaling social innovations—we have developed this methodological approach that helps Jewish innovators effectively and sustainably extend their impact.

HOW TO USE THIS METHODOLOGY

1 **Theory and Practice:**
You’ll notice that the methodology is broken down into four main sections, each containing explanations, examples, and exercises to help you internalize the concepts presented and understand them through the specific lens of the venture you are seeking to scale.

2 **Read, Rinse, REPEAT:**
While the methodology is meant to be progressed through sequentially, you’ll find that exercises you complete in one section may cause you to revisit thinking in previous sections. This is exactly right! As you learn more and develop your thinking further, you’ll want to revisit and iterate previous exercises. Consider revisiting your completed work and content from previous sections after your initial pass to see what else you may have uncovered or discovered about what might work best. You may wish to include other key stakeholders from your organization as you re-examine certain exercises. Their perspective may offer important insights and considerations not taken into account on your first encounter.

3 **Additional Support:**
You may choose to work through the methodology on your own or with your organization; however, this workbook is typically supplemented by our cohort-based Masterclass in Scale, 1:1 coaching, or other educational offerings. The Masterclass in particular provides dedicated time and space to learn and work through the methodology alongside a cohort of supportive professional peers. We also offer 1:1 coaching and continued learning opportunities for alumni. For information visit **Jewish Teen Education & Engagement Funder Collaborative** or contact **Rabbi Dena Shaffer**, Director of Learning and Engagement to learn more.

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4

Remember the Context:
Finally, most sections of the methodology are paired with teachings from Jewish traditional wisdom. It is true that our ancestors certainly never discussed scaling the way we do today, and in fact nearly all acquired wisdom on this subject lies in secular sources. Still, our tradition offers much that might elevate your study and application of scaling practices or contextualize it in spiritually significant ways. It has been said that Torah is the blueprint of the world (Radak on Genesis 1:31), and if we turn it over and over again, everything can be found within it (Pirkei Avot 5:22). We encourage you to explore these "From the Sources" sections for Jewish inspiration and contextualization.

IS SCALING THE RIGHT NEXT STEP FOR ME?

We say that when it comes to scale, there really is no "too early or too late." Jewish innovators begin their scaling journey from all different entry points (from designing new interventions to be scale-ready, to revamping tried and true models to make them more easily adaptable to new communities, and everywhere in between). That said, this methodology is really not designed for brand new programs or innovations that are yet unsure of proof of concept (see our note below on page 15 about the link between scale and innovation). It is also primarily useful for organizations seeking to achieve scale through adaptation (replication), meaning scale by breadth rather than depth (see pages 10-14 for an in-depth explanation of this distinction).

THIS METHODOLOGY IS FOR YOU IF:

- You are a Jewish organization or program that has been running for at least 12 months
- You thoroughly understand the "problem" that your program or venture is seeking to solve or the opportunity it is seeking to fill
- You have promising evidence of positive impact (proof of concept) that you are able to track and articulate
- You are motivated by the vision of your venture, program, or principles positively impacting other communities
- You have evidence of demand for your methodology, program, or principles
- You have at least one team member who can dedicate time and capacity to leading efforts to extend impact to new communities

PRO TIP

See pages 18-21 and take our Readiness Assessment to help determine if your venture is scale-ready

It's Important to note: If you are scaling your venture through advocacy or other forms that are not adaptation (replication), most of the tools in this toolkit will not be applicable to you. As you work through this methodology, you and your organization will be able to spread your program or venture and increase your ability to influence the Jewish communal landscape via adaptation (see pages 10-14 for more detail).

FROM THE SOURCES: SCALING FOR GOOD

Pirkei Avot 4:2

(2) **Ben Azzai said: Be as quick in performing a minor commandment as in the case of a major one, and flee from transgression; **For one commandment leads to another commandment,** and transgression leads to another transgression; For the reward for performing a commandment is another commandment and the reward for committing a transgression is a transgression.

משנה אבות ד׳:ב׳

(ב) בֶּן עַזַּאי אוֹמֵר, הֱוֵי רָץ לְמִצְוָה קַלָּה
כְבַחֲמוּרָה, וּבוֹרֵחַ מִן הָעֲבֵרָה. שֶׁמִּצְוָה
גוֹרֶרֶת מִצְוָה, וַעֲבֵרָה גוֹרֶרֶת עֲבֵרָה. שֶׁשְּׂכַר
מִצְוָה, מִצְוָה. וּשְׂכַר עֲבֵרָה, עֲבֵרָה:

***Shimon Ben Azzai, or just Ben Azzai was an early second-century sage. Though he was not well known in his day, he enjoyed tremendous posthumous fame. He is cited twice in Pirkei Avot (Ethics of the Fathers), a well known and often quoted section of the Mishna.*

QUESTION FOR CONSIDERATION:

1. Ben Azzai suggests that the good acts we perform (both small and large) have the potential to generate more good acts.
2. How might this teaching change your understanding of impact and how might you connect it to the concept of scale?

This teaching, from the sage Ben Azzai, is profound even if perhaps a tad trite after having been made into a popular Jewish camp tune. It offers a helpful lens through which to understand the positive potential of successful scaling. Ben Azzai acknowledges what we hope to be true about our work, that it won't exist in a vacuum, but rather, will have a way of inspiring others in good deeds of their own. Through intentional and methodological scaling, we embark on a path not of incremental growth but of *exponential* growth, a sort of virtuous upwards spiral. The great programs and ideas we originate will spread and influence others, producing similar outcomes elsewhere, to ultimately generate more impact than the originator could have done independently.

ABOUT THE JEWISH TEEN EDUCATION & ENGAGEMENT FUNDER COLLABORATIVE POWERED BY JEWISH FEDERATIONS

The Jewish Teen Education & Engagement Funder Collaborative powered by Jewish Federations of North America is an innovative philanthropic experiment. In an unprecedented collaboration, national and local funders work together to develop, nurture, and scale new approaches to teen engagement. Informed by up-to-the-minute research and data, and drawing on the collective strength of local organizations, multifaceted initiatives in ten communities across the country aim to reverse the trend of teens opting out of Jewish life in their high school years.

ABOUT SPRING IMPACT

Spring Impact is a nonprofit that focuses purely on scaling social innovations. Spring Impact was born out of the frustration of seeing social organizations constantly reinventing the wheel and wasting scarce resources. Using a combination of successful and tested commercial and social principles, while drawing on extensive practical expertise, Spring Impact helps organizations identify, design, and implement the right strategy and business model for scale.

OVERVIEW

This document is intended to be used as a tool for learning about and applying scaling strategies to spread impactful solutions across the Jewish community. It is broken into four core sections:

- First, to **DISCOVER** key concepts and frameworks for understanding scale
- Second, to **ASSESS** your existing innovation in the context of scale
- Third, to **PREPARE** your strategy for achieving scale by discovering and choosing a pathway that best suits your innovation
- Fourth, to **DESIGN** the necessary elements for sustainable and effective scaling

1 DISCOVER KEY CONCEPTS

This section will introduce you to new concepts and frameworks to better understand what scaling is (and what it isn't)

- 1.1 GLOSSARY OF TERMS
- 1.2 GROWTH VS. SCALE
- 1.3 DIRECT AND INDIRECT SCALE STRATEGIES
- 1.4 THE ADAPTATION STRATEGY

2 ASSESS YOUR VENTURE

This section will help you see your innovation through the lens of scale and determine your scale readiness.

- 2.1 PROBLEM DEFINITION, MISSION, AND VISION
- 2.2 READINESS ASSESSMENT

3 PREPARE YOUR STRATEGY

This section will empower you to see how far you can take your innovation and the different pathways to get there.

- 3.1 SETTING YOUR IMPACT GOAL
- 3.2 CAPTURING YOUR CORE
- 3.3 EXPLORE DIFFERENT PATHWAYS
- 3.4 SPECIFYING YOUR PATHWAY AND ROLE

4 DESIGN YOUR MODEL

This section will enable you to make your scaling dream a reality and create all the components of a successful adaptation strategy.

- 4.1 DETERMINING ROLES AND RESPONSIBILITIES
- 4.2 DEFINING YOUR ADAPTER PROFILE
- 4.3 DETERMINING STARTUP AND ONGOING SUPPORTS
- 4.4 ESTIMATING COSTS AND FUNDING STRUCTURE
- 4.5 IDENTIFYING YOUR VALUE PROPOSITION AND HONING PITCH
- 4.6 DEFINING DATA NEEDS
- 4.7 DETAILING YOUR MODEL
- 4.8 CREATING YOUR TOOLKIT
- 4.9 IDENTIFYING AND TESTING YOUR RISKIEST ASSUMPTIONS

DISCOVER KEY CONCEPTS

Scale is a hot topic in the nonprofit sector, yet scaling in a way that preserves quality and sustainability can be difficult. Too often, organizations and funders jump into scaling impact without carefully thinking through the upfront decisions necessary to effectively carry out their ambitions.

GLOSSARY OF TERMS

It's useful to define a few key terms upfront when talking about adaptation strategies that enable others to take on a program in their own Jewish communal organizations. This toolkit will use the following definitions:

1. **Adaptation Pathway:** This is the specific path or strategy that an originator will choose. We teach nine different models of adaptation. Originators will consider a variety of factors—such as complexity of their innovation, desired impact, timeline, or desired relationship with adapters—when choosing an adaptation model.
2. **Adaptation/Replication:** Due to cultural specificity and preference, we refer to the process by which programs and concepts are scaled in the Jewish organizational world as adaptation rather than replication. Partners will rarely replicate an innovation exactly; rather, they will adapt it to suit their own needs and unique features.
3. **Adapter:** A person or organization that takes on a program, concept, or product, and makes it their own. The relationship between originator and adapter varies greatly in closeness and intensity.
4. **Adapter Profile:** These are the minimum requirements that other individuals or organizations need to meet in order to successfully take on your program or concept.
5. **Core:** The leanest or most essential elements of your program or concept that make it successful or generate impact and therefore should be included in every adaptation.
6. **Growth:** Adding resources (capital, people, technology, effort, etc.) so that impact increases. Growth is a linear process that can sometimes compromise the (delivery of) original innovation.
7. **Impact Goal:** A concise statement expressing an originator's desired impact over time. An individualized vision of success. The impact goal is audacious and aspirational. It combines a target population, specific location(s), time frame, and metric.
8. **Methodology:** Recognizing that the Jewish organizational landscape has unique needs and perspectives, the Funder Collaborative modified existing teachings from the social impact sector to develop this methodology (which you're reading right now) that speaks directly to Jewish innovators.
9. **Originator:** The person or organization that innovates a new program, concept, or product and, after achieving proof of concept, seeks to scale that program, concept, or product.

10. **Readiness Assessment:** A self-scored assessment that examines a variety of domains such as funder and market appetites, organizational capacity and resources, degree of codification, and promising proof of impact, to help determine whether an innovation is scale ready.
11. **Scale:** Expanding impact without substantially adding resources or compromising the original innovation. Scale is an exponential process (i.e., sending an email to one person or 10 million people—same effort, substantially different impact).
12. **Toolkit:** This is a method for both codifying your innovation as well as disseminating it. Originators can use our toolkit template to capture everything a prospective adapter would need to know to successfully implement your innovation. Toolkits are also extremely valuable for pitching prospective adapters.

FROM THE SOURCES: SHIFTING MINDSET TO EMBRACE SCALE

****A Chelm Parable**

The town of Chelm was a magical, mythical place where the people were known for their piety—but also for their foolishness. Once, in the middle of the very busy town square, two citizens who were dear friends found themself in an argument about how people grow. One friend was convinced that people grow from the ground up, while the other was just as sure that they grow from the head down.

Each had evidence to support their opinion. The first friend, the one who believed that people grow from the ground up, said, “Look at the army as they march by here. You can tell from them that I’m right. None of the soldier’s heads are on the same level, yet all their feet are on the ground! That proves that people grow from the ground up.”

But the other friend argued back. “No no!” he said, “Look at the members of the marching band as they march through here and you’ll see that I am right! Their pants all end at different lengths. Some reach to the tops of their shoes, while others are a little long or too short. Surely that indicates that people grow from the head down!”

Finally, unable to resolve their debate, the two friends paid a visit to the local rabbi. Each explained to the rabbi about the method by which human beings grow. The rabbi listened intently to each friend, carefully considering the evidence they had brought to substantiate their case. After a long time, the rabbi looked up and took each friend in her gaze. “My fair gentlemen,” the rabbi said, “It is not that humans grow from the top down or from the bottom up. Human beings only grow from the inside out.”

**Chelm is a real town in Southeast Poland but has taken on an outlandish, mythical characteristic in Jewish folklore where it is understood to be an imaginary town full of people who think themselves to be wise but are actually foolish. Most Chelm stories however do contain some moral wisdom or lessons that offer truth and insight into our own lives.

QUESTIONS FOR CONSIDERATION:

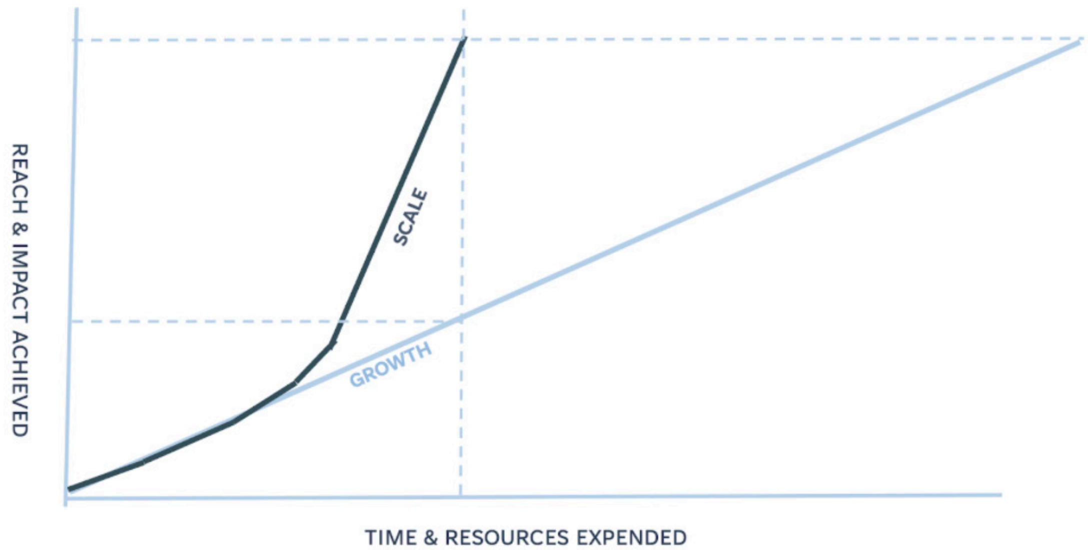
1. What mindset shifts are necessary for successful scaling? And what mental models may not serve you, your team, your organization, or your adapters?
2. How else might “internal growth” be a factor in successfully scaling a venture?

GROWTH VS. SCALE

"Growth" and "scale" are two commonly used terms that are often conflated. Understanding the difference between the two is important to appreciating why scale is so powerful and widely sought.

Growth is often linear—that is, adding inputs (e.g., resources, time) at the same rate has a predictable corresponding change in outputs (e.g., revenue, reach, impact). In this construct, if it takes $1000 to deliver a program to one individual, with twice as much investment ($2000) the program can reach twice as many participants (two individuals).

Scale by contrast is exponential—that is, adding inputs (e.g., resources, time) incrementally results in an outsized positive change in outputs (e.g., revenue, reach, impact). In this construct, with twice as much investment the same program could reach perhaps four, six, or eight times as many individuals or more. This is commonly referred to as "J-Curve" or "Hockey Stick" growth, in reference to its graphical representation in contrast to the straight line of linear growth:



You can see that—by unlocking scale—you can have a significantly greater impact in a shorter amount of time while making the best use of limited resources. This is why the aim of achieving scale is so compelling to organizations and funders alike.

To expand the the definition of scale further for organizations trying to scale social good, consider the following definitions:

- Increasing positive impact exponentially while adding resources incrementally
- Taking something that is making a positive difference somewhere, and spreading it everywhere
- Expanding the impact of an innovation or program to better reach the size of the problem it seeks to address, or closing the gap between the size of the problem and the reach of an impactful solution

Notice that there is a difference between scaling a program or organization and scaling impact, and you should be thoughtful about your intention. Consider, for example, the differences between two well-known organizations in the field of substance abuse, addiction, and recovery.

REMEMBER D.A.R.E.?

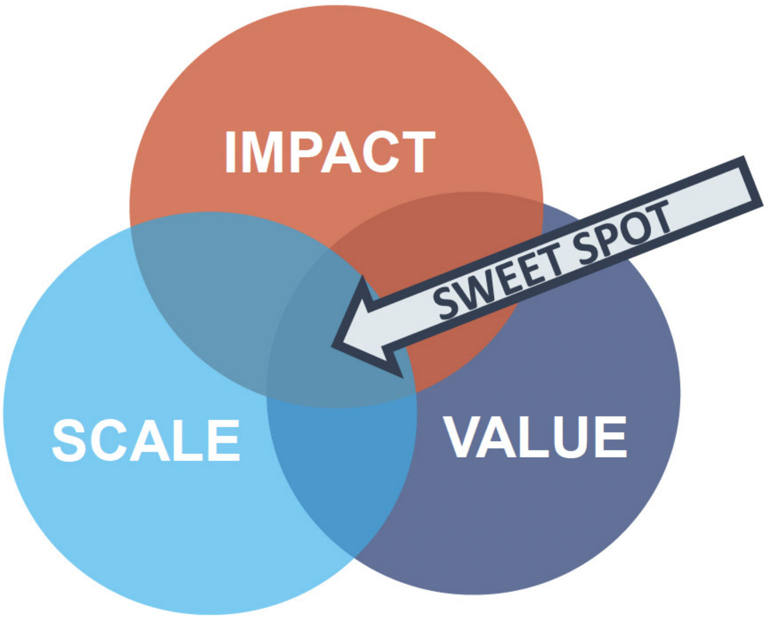
In the 1980s the LAPD and LA Unified School District worked together to reduce drug use and violence among young people and launched Drug Abuse Resistance Education, or D.A.R.E. Largely due to high profile political support and significant federal funding, D.A.R.E rapidly scaled nationwide. At the program's height, 75 percent of American school districts were implementing the program. However, scientific studies cast doubt on program effectiveness, with many concluding that D.A.R.E. did nothing to reduce illicit drug use. One study found that students who had been through the program were actually more likely to use drugs. The D.A.R.E program scaled without paying attention to whether its intended outcome was actually being achieved. As a result, immense time and resources were wasted on a program that not only didn't work, but in some cases actively caused harm.

FRIENDS OF BILL W.

In contrast, Alcoholics Anonymous (AA) began in 1935 when two men in Akron, Ohio, were searching for a way to stay sober. They found it by forming a support group. It took four years to produce about 100 sober alcoholics in three founding groups as AA refined its philosophy and methods. In 1939, AA published its Twelve Steps and the case histories of 30 recovered members to demonstrate its efficacy over time. AA has since spread around the globe, and now reports more than two million members in 180 nations and more than 118,000 groups. In recent years, independent studies have validated that AA is the most effective path to alcohol abstinence. It performs better than other common treatments in helping people get sober, stay sober, drink less, and suffer fewer negative consequences of drinking, all while keeping health care costs down. Because the model is simple, open to all, and free, it can reach a greater number of people without the constraints of programmatic or organizational barriers. AA took the time early on to ensure its model was able to demonstrate positive impact, and has successfully delivered that impact at scale for roughly over 85 years.

THIS METHODOLOGY'S ULTIMATE AIM IS TO SUPPORT THE SCALE OF POSITIVE *IMPACT*

It's worth recognizing that there are a wide range of indirect and direct ways to scale impact. Indirect methods of scaling impact increase impact by influencing others, such as influencing public policy around an issue or building a social movement. Direct methods of scaling increase impact by providing a service or a product ("solution") directly to the end user ("constituent"), such as increasing the number of those served or increasing the quality of a provided service, in order to reach more people with better solutions in more places. These strategies are detailed further below.



Interplay Between Innovation, Scale & Impact
You want to scale something proven (impactful) but also need it to be scalable and highly valuable. Sometimes you must innovate / tweak to get to the sweet spot, but ideally you've already proven impact.

DIRECT AND INDIRECT SCALE STRATEGIES

INDIRECT SCALE STRATEGIES

Indirect scale strategies increase impact by influencing others:

- **Influence public policy:** Advocating for changes in public policy and legislation to address or reduce a social need
- **Create or change markets:** Creating solutions that completely alter a space and change behavior
- **Establish a social movement:** Bringing people together to create demand/change for something from the bottom up through grassroots, community-led action

PRO TIP

A common way of indirectly scaling in the Jewish community is through field building. Similar to the strategy of establishing a social movement described above, field building is when an organization works independently or in collaboration with other similar-minded organizations to create social change for the Jewish community. "Building the field" generally involves creating a collective identity across a visible membership base that pursues a shared common cause or desired change to the status quo. It also typically involves collective actions and activities for the membership base.

DIRECT SCALE STRATEGIES

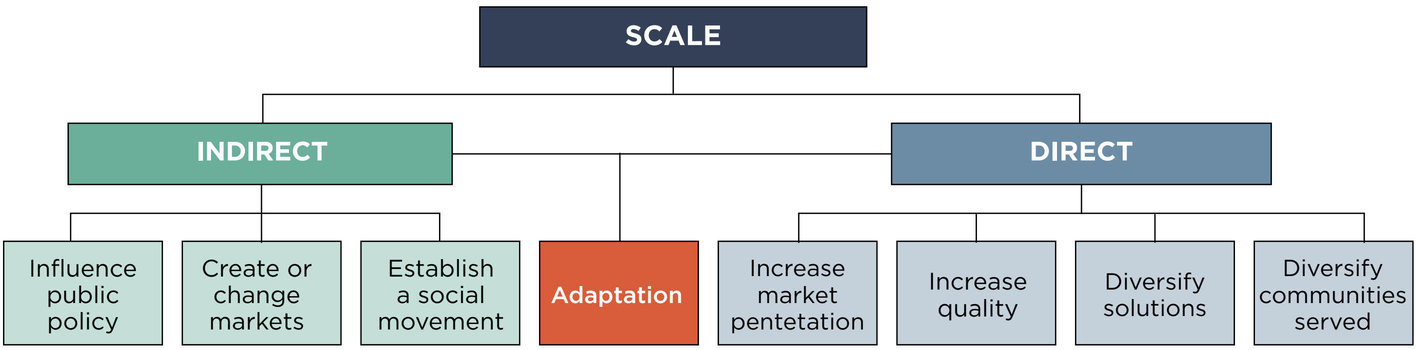
Direct scale strategies increase impact by providing a direct-to-constituent solution (e.g., a service or product):

- **Increase market penetration:** Having greater impact through increased numbers of your same target constituency, such as adding new distribution channels
- **Increase quality:** Improve the quality of the solution to have greater impact
- **Diversify solutions:** Providing additional, supplemental, or complementary solutions that address different challenges affecting the target constituents
- **Diversify communities served:** Offering existing solutions to new constituents to serve additional demographics

THE ADAPTATION (OR REPLICATION) SCALE STRATEGY

This toolkit focuses on the specific method of scale called "replication." Replication is defined as taking your organization, program or a set of core principles to other geographic areas or organizational homes, or empowering others to do so. Within the context of Jewish community organizations, this is best articulated as enabling others to take on and ***adapt*** a program, concept, or principles in their own community, rather than replicate it verbatim. Each Jewish community and organization is unique and is likely to customize your innovation to suit their own local needs. Throughout this toolkit, we will frequently use the term "adaptation" in place of "replication."

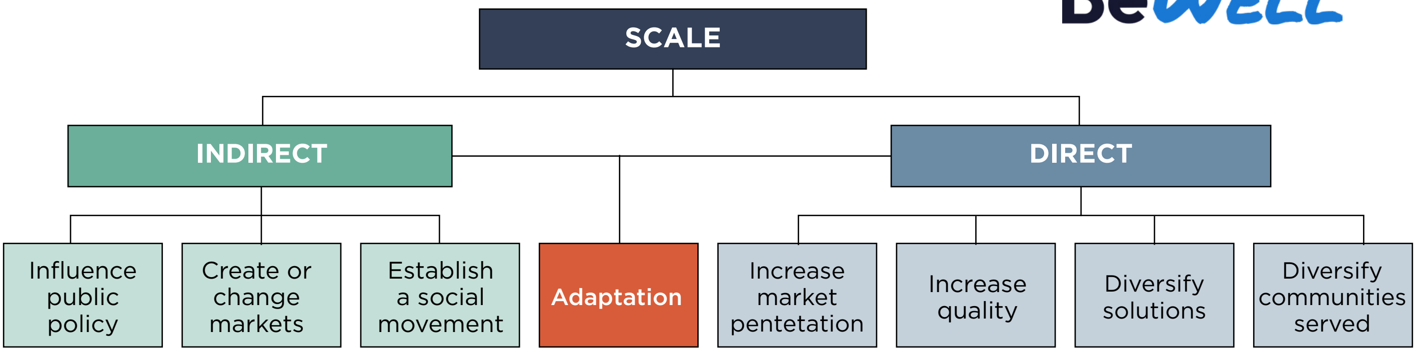
Adaptation can be classified as either an indirect or direct scale strategy depending on what pathway you employ. You can scale directly by delivering the solution to the constituents yourself in new places, or leverage others by sharing your solution with others to take on and deliver.



Scaling strategies are not mutually exclusive; in fact, many organizations will take on multiple routes simultaneously that often affect and support one another. To illustrate this and highlight the strategies in action, consider the Jewish Federations of North America's BeWell Initiative as a practical example.

BeWell is a wellbeing initiative aimed at helping teens and young adults thrive by strengthening the Jewish community's ability to build resilience and offer support and care to those who need it. BeWell deploys a number of interrelated strategies to deliver and scale the impact of its work across the North American ecosystem.

BeWell

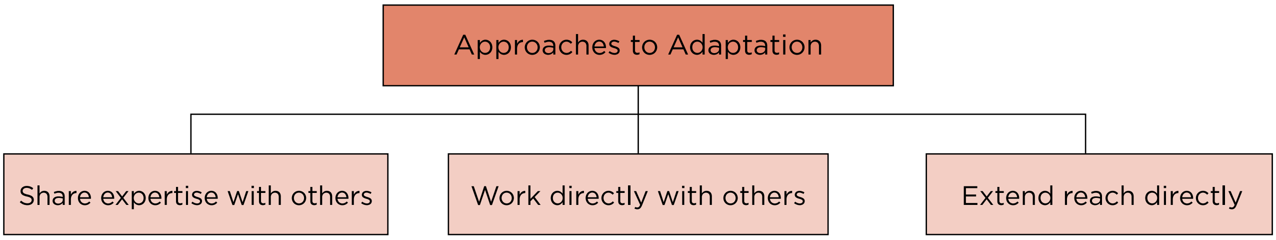


- **Influence public policy:** The BeWell partnership employs national lobbyists to influence policy and legislation impacting youth mental health and wellbeing and to access public dollars to fund related programs and interventions. BeWell is also undertaking a national research project to collect data specific to the Jewish community to inform future strategies and interventions.
- **Create or change markets:** BeWell has created a market for local and national resiliency roundtables as a networked response.
- **Establish a social movement:** Resiliency roundtables, national convenings and various Communities of Practice connect and galvanize participants, disseminate shared frameworks and messaging, explore opportunities for collective action, and increase and strengthen relationships and prospective collaborations.
- **Adaptation:** New communities are able to take advantage of and customize open source tools and resources, as well as trainings (such as YMHFA first aid). Communities can also apply for funding and are offered a toolkit and network for launching their own local resilience roundtable.
- **Increase market penetration:** BeWell works with a wide variety of community organizations such as Jewish Federations, Jewish human service agencies, independent organizations, synagogues, summer camps and day schools.
- **Increase quality:** Through ongoing evaluation and research, local communities can make data-informed improvements to programming. The integration of the Jewish lens and unique traditional wisdom enhances programs and trainings for BeWell's specific Jewish audience. Cross-organizational collaboration/coordination and strategic partnerships enable participants to learn from one another's best practices.
- **Diversify solutions:** Over time, BeWell has built a robust menu of offerings to meet needs and demands. What started with a Youth Mental Health First Aid training led by a single facilitator has evolved into dozens of offerings including both episodic and short-duration curricula, courses, full-day trainings, high- and low-cost interventions, and a variety of networks for connected trainers, stakeholders, clinicians, and other participants, with a menu of solutions ripe for local adaptation curricula.
- **Diversify communities served:** BeWell's focus is on young people ages 12-26, but also encompass the variety of demographics that populate the ecosystem in which young people reside, including teens and young adults, youth-serving professionals, clinicians, parents, and organizational leadership.

THE ADAPTATION STRATEGY TO SCALE

As mentioned, this methodology focuses on the adaptation strategy to scale—adapting your solution into other communities, or empowering others to do so.

Within the adaptation strategy, there are three high-level directions you might choose to pursue in order to enable other communities to take on and adapt your program, concept, or principles. The direction you choose depends on several factors, for example the level of control you wish to have, or the speed by which you hope to reach new communities. There are advantages and disadvantages to each approach, which will be explored in greater detail in section 3.3 below.



SHARE EXPERTISE WITH OTHERS

In models where expertise is shared with others, originators create resources (toolkits, manuals, etc.) that enable adapters to take on and adapt a program or initiative in new locations. Sharing expertise may involve little interaction between the originator and the adapter. In some cases, a fee can be charged for materials and advice, but there is usually no ongoing financial or legal relationship between originators and adapters.

This approach is generally most appropriate when a project, or elements of it (such as a curriculum, tool, or approach), can be quickly and easily copied or adapted. This is less effective when your program is likely to be misused, and should not be pursued when there is potential for a program to lead to harm if delivered incorrectly. For example, a mental health program may have a specific protocol to care for the wellbeing of suicidal participants, and any community that takes on the mental health program would need a protocol of comparable quality to avoid causing harm. The program may not be well suited for models of sharing expertise with others, because the originator may have a hard time ensuring the quality of the program once adapted elsewhere.

ADVANTAGES	DISADVANTAGES
• Easiest means of quickly reaching new communities • Low ongoing support and monitoring requirements • Often requires less financial investment and time to prepare	• No guarantee the program, methodology, or principles will be implemented well • Difficult to monitor impact or gather learnings from other communities • Income generation likely to be small and less secure • Less likely to capture benefits such as economies of scale and brand awareness

WORK DIRECTLY WITH OTHERS

In models of working directly with others, originators create relationships and networks with other organizations or individuals in order to support spreading their impact to new communities. This approach features an official ongoing relationship between the originator and adapter. Typically, there is some level of legal and financial arrangement between both parties.

These scale models are especially effective when a program should be customized for the local context, but the adapter will require some ongoing support to make sure the program is implemented well.

ADVANTAGES	DISADVANTAGES
• Can balance the priorities of a more rapid expansion with a focus on quality implementation • Do not have to manage day-to-day operations in the same way as with direct scale models • Option to share the financial burden • Ability to harness local resources, knowledge, and ownership • Data on a large scale for impact assessment and advocacy purposes	• No guarantee the program, methodology, or principles will be implemented well • Difficult to monitor impact or gather learnings from other communities • Income generation likely to be small and less secure • Less likely to capture benefits such as economies of scale and brand awareness

EXTEND REACH DIRECTLY

In models where reach is extended directly, originators replicate impact by carrying out delivery in new locations; for example, through setting up local or regional offices. The greatest benefit is a high degree of control since the person delivering the project is employed by the central organization, so follows rules and standards provided by them.

This type of adaptation may be appropriate for complex programs that would require a large amount of knowledge transfer for others to adapt, or where the risks of others incorrectly delivering a program are very high.

ADVANTAGES	DISADVANTAGES
• Can oversee implementation and ensure fidelity to original program • Less risk to brand • Decisions can be made centrally, often with less consultation required • Consistent management and reporting	• More difficult to achieve local sense of ownership • Likely to be less flexible and may fail to make necessary adaptations to new contexts • More expensive • Slower way to scale

FROM THE SOURCES: ON DIRECT VS. INDIRECT PATHS TO SCALE (WHY PURSUE ADAPTATION?)

****“Gizeira Shava” גזירה שוה**

Gizeira Shava (“similar laws, similar verdicts”) is one of several recognized hermeneutical devices employed by the rabbis of the Talmud for purposes of textual interpretation and legal exegesis. Gizeira Shava is essentially a comparison of similar expressions. It suggests that if the same word occurs in two separate passages of Torah, its application, implications and meaning can be scaled from one expression (where these things are known) to the other (where they may not be) in order to achieve a more unified legal principle (even when the nuances of each context are varied).

***Gizeira Shava is part of what is known as **Talmudical hermeneutics** (מידות שהתורה נדרשת בהן) which define the rules and methods for investigation and exact determination of meaning in the Hebrew Bible, within the framework of Rabbinic Judaism. These rules often relate to elements such as grammar and exegesis, interpreting superfluousness and/or missing words and letters, the addition of crowns, dots, or other scribal techniques, letters and their numerical equivalents (known as gematria), and more.*

QUESTION FOR CONSIDERATION:

1. How might we apply the idea of “similar laws, similar verdicts” to the pursuit of adaptation as a means of scale?
2. Later on we’ll discuss the role of customization and flexibility in successful scaling. What are some of the ways that an idea like Gizeira Shava creates a false reality that could inhibit our ability to scale successfully?

Gizeira Shava is a powerful concept to consider when it comes to scaling successful Jewish programming or interventions. We often believe that our communal circumstances are so unique, or our perspective so exceptional, that we feel pressure to innovate our own solution rather than adapting an already proven idea. While not a perfect analogy (Gizeirah Shava has many rules for its application to prevent abuse of this method of interpretation), this invention of the rabbis does offer inspiration for us to consider scaling as a path to greater impact and adaptation as a path to maximize success without compromising capacity. In suggesting that what worked “there” might (with proper flexibility) also work “here,” we capitalize on the general features that our communities share while still accounting for important differences.

A WORD ABOUT INNOVATION IN A SCALING CONTEXT

Adaptation is about stopping reinvention of the wheel. Rather than constantly innovating new solutions to address the same old problems, taking something proven to have positive impact and adapting it to new contexts can unlock impact on an exponential scale by reducing the time and resources needed to build and grow something from scratch (that may or may not actually achieve the intended result). Innovation does have a place in contextualizing the solution to new situations and geographies, and ensuring that the solution is not only impactful but also valuable to its constituents, as well as scalable and sustainable at scale. See section 4.9 (Identifying and Testing Your Riskiest Assumptions) for more information on lean innovation and validation processes.

ASSESS YOUR VENTURE

Before diving straight into your scale journey, it's useful to frame what you're intending to do in the context of your organizational identity. Rooting yourself in your purpose will ensure you develop a scale approach that stays true to what your organization exists to do.

PRO TIP

Most for-purpose organizations have a set of statements that communicate their values and direction. You can use these statements as written where they exist, or draft your own as needed. This exercise is not intended to guide you through officially redrafting these statements for organization-wide use or external communication, but rather to gather and center the organization's ethos as the foundational starting point of your scale journey.

Three valuable facets of the organizational identity are:

Problem Definition - the problem you're trying to solve or address, what gets your team out of bed in the morning

- Think about the root causes, the problem itself, who it affects, and the consequences of the problem
- Make sure to focus on the problem itself, not on how it's solved

Vision - what the world you hope for looks like, an aspirational future-focused statement

- Think about what the world looks like on the day the problem is solved or adequately addressed; what's the headline on the front page?
- Don't reference your organization in this statement - this is about how the world looks

Mission - what you do to achieve that vision, an action-based statement that describes your purpose

- Think about what you do now, for whom, and how you do it
- Avoid detailing the minutiae of your programming; ideally your mission is evergreen and adaptable to changing or adding programs while still aiming for the same goals

EXAMPLE

Caring Connections is an organization that aims to tackle the societal problem of domestic violence.

- A summarized version of their Problem Definition is: Up to 1 in 4 women and 1 in 6 men will experience emotional or physical abuse within a relationship, in part due to a lack of ability by both victim and perpetrator to recognize the signs of a healthy relationship and the red flags of a toxic one
- Caring Connections' vision is: a world without domestic violence
- Caring Connections' mission is: to end domestic violence

EXERCISE:

Summarize succinctly the following aspects of your organizational identity:

Organizational Identity Component	Question to answer	Write out your succinct statement:
Problem Definition	What problem does your organization exist to solve?	
Vision	What does the world your organization hopes for look like? *"A world where..."*	
Mission	What does your organization do to address the problem you've identified, toward the vision you have? *"Our mission is to ..."*	

Keeping these statements in mind as you move through the methodology will help you focus on your organizational purpose and consider new ways to achieve your goals.

READINESS ASSESSMENT

Now that you have a strong sense of your organizational identity and your scaling venture in context, it's important to take a step back and consider the feasibility of reaching scale with your venture in its current state. Assessing community demand, funder appetite, Jewish pedagogy, and the other criteria below will help you determine whether it is worth embarking on what can be a resource-intensive undertaking, and what elements of your innovation might require some additional refining prior to the pursuit of scale.

PRO TIP
Each question is worth considering in depth and in consultation with other stakeholders and members of your professional team (at all levels). It's important to be honest in this exercise.

Community Demand		
Q1: Does your program generate interest among participants or promoters (i.e., teens and their parents)? Are your program's offerings regularly filled either to capacity or with critical mass?		
1: Programs are not well attended.	**2:** Program attracts a limited number of repeat, highly engaged participants; marketing is primarily staff led.	**3:** Program is well attended, and periodically sold out; marketing is increasingly word-of-mouth.
Q2: Is there at least one unique selling point (USP) about the program that differentiates it from others? Is there evidence that your USP is an improvement compared to other programs?		
1: Have developed some theory behind the USPs but no evidence.	**2:** Have defined the USPs with some evidence of improvement compared to other programs.	**3:** Have well-defined USPs and evidence of significant improvements compared to other programs.
Q3: Do your program's goals align with those of other Jewish communities?		
1: Success of the program is very specific to the local community.	**2:** Some evidence that the factors of success for the program would be present in other communities.	**3:** Strong evidence that the factors of success for the program would be present in other communities.
Q4: Are organizational leaders from other communities interested in or asking for the program?		
1: No other communities have yet shown demand for or interest in the program.	**2:** There has been moderate demand or interest from other communities.	**3:** Numerous other communities are expressing interest in or asking to adapt this program.

↓ cont.

Funder Appetite		
Q5: Does your organization have the potential to attract funding to prepare for scaling to new communities (i.e., create resources and provide support)?		
1: Little evidence that there is interest in funding plans to extend impact into new communities.	**2:** Little evidence that there is interest in funding plans to extend impact into new communities.	**3:** There is at least one funding partner that has expressed interest in funding strategy and plans to extend impact into new communities.
Q6: Does your program have the potential to attract and sustain funding in a new location?		
1: Little evidence that funders are interested in funding the program in another community.	**2:** Moderate evidence that funders are interested in funding the program in another community.	**3:** Other funders have already approached the program offering to fund in another community.

Scalable Program		
Q7: Have the program's outcomes been proven and evaluated? Is there a theory of change or similar framework, and before and after data in place?		
1: Internal evaluation process has shown a reasonable level of evidence of the program's impact.	**2:** Internal evaluation process has shown high level of evidence of significant programmatic impact.	**3:** At least one rigorous external evaluation process has been conducted on the program and shows significant impact.
Q8: Are the core elements of the program and what is being scaled clear?		
1: It's not clear whether it is a program, set of values, approach, methodology, or other aspect that should and can be replicated.	**2:** Some clarity on what should or can be replicated, but more analysis needed.	**3:** Clear understanding of what should be replicated.
Q9: Has the program been replicated 1+ times in local community, or has it serviced multiple groups (i.e., multiple rounds of teen innovation awards)?		
1: Program only operating in one location or has only served one group.	**2:** Program is operating in 2-3 locations or has had served two groups.	**3:** Program is operating in 3+ locations and has served more than two groups.
Q10: Are the necessary processes and systems well defined and developed to ensure quality?		
1: Few or no processes and systems exist or they are fragmented and/or difficult to find.	**2:** Most processes and documentation for delivery and replication are in place but with some gaps.	**3:** Accurate documentation is in place for process, systems, training, legal agreements, procedures, and ensuring quality.

↓ *cont.*

Q11: Does the program have a clear sustainability plan for the next 3-5 years (multiple funders, diversified revenue)?		
1: There is little evidence that the program will be sustained locally.	**2:** There is evidence demonstrating the program's sustainability, including a track record of securing sufficient income and rationale for this to continue.	**3:** There is detailed evidence around sustainability including documentation around income sources, profit levels, reserve amounts, income ratios, etc.
Q12: Has the program evaluated cost efficacy and ensured the cost of the program is scalable?		
1: The program cost has not yet been evaluated or is in need of improvement to make it more cost effective.	**2:** The program has evaluated cost efficacy and is beginning to take steps toward improving cost efficacy.	**3:** The program has been evaluated and is determined to be cost effective.

Organizational Capacity

Q13: Is there resistance on the part of local funders and program team to scaling the program into new geographic locations?		
1: Stakeholders are hostile toward adaptation and/or there has been no consultation at all.	**2:** Stakeholders are neutral toward adaptation and/or there has been limited consultation.	**3:** Stakeholders fully support adaptation and have been consulted.
Q14: Do the local funders and/or program team have deep programmatic knowledge and the capacity to work with Spring Impact and the Funder Collaborative to develop and implement the adaptation model (i.e., participate in a Scaling Masterclass or individual coaching)?		
1: There is no capacity among knowledgeable members of the local community to work toward scaling.	**2:** There is sufficient capacity among members of the local community to work toward scaling.	**3:** There is significant capacity and buy-in among members of the local community to work toward scaling.
Q15: Is there is a clear project owner to lead scaling efforts?		
1: There is no one within the local community that has the capacity to lead scaling efforts.	**2:** There is a clear project owner with a relevant skill set who can lead scaling efforts.	**3:** There is a clear project owner with previous experience in scaling who is trusted by stakeholders.

↓ *cont.*

Jewish Education		
Q16: Is your program grounded in Jewish wisdom, language, or values? Are these well integrated?		
1: Jewish wisdom, language, and/or values are not an explicit priority. The Jewish context is implied by the identities of our participants.	**2:** Jewish wisdom, language, and/or values are present in this program, but not well integrated or explicit.	**3:** Jewish wisdom, language, and/or values are explicitly taught in this program. They are a consistent priority and well integrated in program delivery.
Q17: Is the program designed around specific outcomes for Jewish impact (such as the Flourishing Framework—14 Outcomes that Positively Impact the Lives of Jewish Teens) https://bit.ly/3YSCKX4		
1: Jewish impact is not an explicit priority of this program. Jewish outcomes are not part of our program design.	**2:** We integrate Jewish content and meaning-making, but the program is not designed around specific Jewish outcomes.	**3:** We have identified specific outcomes for Jewish impact, and these drive our program design.
Q18: Has the program evaluated Jewish identity growth or educational impact? For a suggested evaluation instrument, see "Teen Survey" http://bit.ly/3YQ96S1		
1: The Jewish impact has not been evaluated or is in need of improvement to reach our goals for participants.	**2:** The program is evaluated for Jewish impact, and we are beginning to see evidence of identity growth and strengthening in our participants.	**3:** The program is evaluated for Jewish impact, and there is strong evidence of its positive effect on the Jewish identities of our participants..

STOP AND THINK

Take a moment to self-assess your program using the workbook below. Often, it's helpful to ask someone else who knows the program well, such as a team member or collaborator, to assess the program for a second perspective.

Part 1: Use the table below to score your program on a scale of 1-3 for the following questions related to community and funder demand.

Self-Assessment Questions	Score (1-3)
Community Demand	
Q1: Does your program generate interest among participants or promoters (i.e., teens and their parents)? Are your program's offerings regularly filled either to capacity or with critical mass?	
Q2: Is there at least one unique selling point (USP) about the program that differentiates it from others? Is there evidence that your USP is an improvement compared to other programs?	
Q3: Do your program's goals align with those of other Jewish communities?	
Q4: Are organizational leaders from other communities interested in or asking for the program?	
Funder Appetite	
Q5: Does your organization have the potential to attract funding to prepare for scaling to new communities (i.e., create resources and provide support)?	
Q6: Does your program have the potential to attract and sustain funding in a new location?	
Scalable Program	
Q7: Have the program's outcomes been proven and evaluated? Is there a theory of change or similar framework, and before and after data in place?	
Q8: Are the core elements of the program and what is being scaled clear?	
Q9: Has the program been replicated 1+ times in local community, or serviced multiple groups (i.e., multiple rounds of teen innovation awards)?	
Q10: Are the necessary processes and systems well defined and developed to ensure quality?	
Q11: Does the program have a clear sustainability plan for the next 3-5 years (multiple funders, diversified revenue)?	
Q12: Has the program evaluated cost efficacy and ensured the cost of the program is scalable?	

↓ *cont.*

Organizational Capacity	
Q13: Is there resistance on the part of local funders or program team to scaling the program into new geographic locations?	
Q14: Do the local funders and/or program team have deep programmatic knowledge and the capacity to work with Spring Impact and the Funder Collaborative to develop and implement the adaptation model (i.e., participate in a Scaling Masterclass or individual coaching)?	
Q15: Is there is a clear project owner to lead scaling efforts?	
Jewish Education	
Q16: Is your program grounded in Jewish wisdom, language, or values? Are these well integrated?	
Q17: Is the program designed around specific outcomes for Jewish impact (such as the Flourishing Framework—14 Outcomes that Positively Impact the Lives of Jewish Teens) **https://bit.ly/3YSCKX4**	
Q18: Has the program evaluated Jewish identity growth or educational impact? For suggested evaluation instrument see "Teen Survey" **http://bit.ly/3YQ96S1**	

Part 2: Step back and look at your scores.

Have you scored a 1 in any of the questions? If so, consider pausing plans to extend impact into new communities, and focus on strengthening that aspect of your program or gathering more information.

If you scored a 3 against the majority of questions, it's a good sign that you are ready to effectively and sustainably extend your impact to new communities. Areas where you self-scored a 2 should be your focus for improvement as you plan and implement your model.

FROM THE SOURCES: ASSESSING READINESS

Numbers 13:1-2

(1) The Eternal One spoke to Moses, saying, (2) “Send agents to scout the land of Canaan, which I am giving to the Israelite people; send one participant from each of their ancestral tribes, each one a chieftain among them.”

במדבר י״ג:א׳-ב׳

(א) וַיְדַבֵּר יְהֹוָה אֶל־מֹשֶׁה לֵּאמֹר: (ב) שְׁלַח־לְךָ אֲנָשִׁים וְיָתֻרוּ אֶת־אֶרֶץ כְּנַעַן אֲשֶׁר־אֲנִי נֹתֵן לִבְנֵי יִשְׂרָאֵל אִישׁ אֶחָד אִישׁ אֶחָד לְמַטֵּה אֲבֹתָיו תִּשְׁלָחוּ כֹּל נָשִׂיא בָהֶם:

במדבר י״ג:כ״ה- י״ד:א׳-ד׳

(כה) וַיָּשֻׁבוּ מִתּוּר הָאָרֶץ מִקֵּץ אַרְבָּעִים יוֹם: (כו) וַיֵּלְכוּ וַיָּבֹאוּ אֶל־מֹשֶׁה וְאֶל־אַהֲרֹן וְאֶל־כָּל־עֲדַת בְּנֵי־יִשְׂרָאֵל אֶל־מִדְבַּר פָּארָן קָדֵשָׁה וַיָּשִׁיבוּ אֹתָם דָּבָר וְאֶת־כָּל־הָעֵדָה וַיַּרְאוּם אֶת־פְּרִי הָאָרֶץ: (כז) וַיְסַפְּרוּ־לוֹ וַיֹּאמְרוּ בָּאנוּ אֶל־הָאָרֶץ אֲשֶׁר שְׁלַחְתָּנוּ וְגַם זָבַת חָלָב וּדְבַשׁ הִוא וְזֶה־פִּרְיָהּ: (כח) אֶפֶס כִּי־עַז הָעָם הַיֹּשֵׁב בָּאָרֶץ וְהֶעָרִים בְּצֻרוֹת גְּדֹלֹת מְאֹד וְגַם־יְלִדֵי הָעֲנָק רָאִינוּ שָׁם: (כט) עֲמָלֵק יוֹשֵׁב בְּאֶרֶץ הַנֶּגֶב וְהַחִתִּי וְהַיְבוּסִי וְהָאֱמֹרִי יוֹשֵׁב בָּהָר וְהַכְּנַעֲנִי יֹשֵׁב עַל־הַיָּם וְעַל יַד הַיַּרְדֵּן: (ל) וַיַּהַס כָּלֵב אֶת־הָעָם אֶל־מֹשֶׁה וַיֹּאמֶר עָלֹה נַעֲלֶה וְיָרַשְׁנוּ אֹתָהּ כִּי־יָכוֹל נוּכַל לָהּ: (לא) וְהָאֲנָשִׁים אֲשֶׁר־עָלוּ עִמּוֹ אָמְרוּ לֹא נוּכַל לַעֲלוֹת אֶל־הָעָם כִּי־חָזָק הוּא מִמֶּנּוּ: (לב) וַיֹּצִיאוּ דִּבַּת הָאָרֶץ אֲשֶׁר תָּרוּ אֹתָהּ אֶל־בְּנֵי יִשְׂרָאֵל לֵאמֹר הָאָרֶץ אֲשֶׁר עָבַרְנוּ בָהּ לָתוּר אֹתָהּ אֶרֶץ אֹכֶלֶת יוֹשְׁבֶיהָ הִוא וְכָל־הָעָם אֲשֶׁר־רָאִינוּ בְתוֹכָהּ אַנְשֵׁי מִדּוֹת: (לג) וְשָׁם רָאִינוּ אֶת־הַנְּפִילִים בְּנֵי עֲנָק מִן־הַנְּפִלִים וַנְּהִי בְעֵינֵינוּ כַּחֲגָבִים וְכֵן הָיִינוּ בְּעֵינֵיהֶם: (א) וַתִּשָּׂא כָּל־הָעֵדָה וַיִּתְּנוּ אֶת־קוֹלָם וַיִּבְכּוּ הָעָם בַּלַּיְלָה הַהוּא: (ב) וַיִּלֹּנוּ עַל־מֹשֶׁה וְעַל־אַהֲרֹן כֹּל בְּנֵי יִשְׂרָאֵל וַיֹּאמְרוּ אֲלֵהֶם כָּל־הָעֵדָה לוּ־מַתְנוּ בְּאֶרֶץ מִצְרַיִם אוֹ בַּמִּדְבָּר הַזֶּה לוּ־מָתְנוּ: (ג) וְלָמָה יְהֹוָה מֵבִיא אֹתָנוּ אֶל־הָאָרֶץ הַזֹּאת לִנְפֹּל בַּחֶרֶב נָשֵׁינוּ וְטַפֵּנוּ יִהְיוּ לָבַז הֲלוֹא טוֹב לָנוּ שׁוּב מִצְרָיְמָה: (ד) וַיֹּאמְרוּ אִישׁ אֶל־אָחִיו נִתְּנָה רֹאשׁ וְנָשׁוּבָה מִצְרָיְמָה:

Numbers 13:25 - 14:4

(25) At the end of forty days they returned from scouting the land. (26) They went straight to Moses and Aaron and the whole Israelite community...and they made their report to them. (27) This is what they told him: “We came to the land you sent us to; it does indeed flow with milk and honey, and this is its fruit. (28) However, the people who inhabit the country are powerful, and the cities are fortified and very large; moreover, we saw the Anakites [and others] there. (30) Caleb hushed the people before Moses and said, “Let us by all means go up, and we shall gain possession of it, for we shall surely overcome it.” (31) But the other men who had gone up with him said, “We cannot attack that people, for it is stronger than we.” (32) Thus they spread falsehoods among the Israelites about the land they had scouted, saying, “The country is one that devours its settlers. The people who dwell there are giants and we looked like grasshoppers to ourselves, and so we must have looked to them.” (1) The whole community broke into loud cries, and the people wept that night. (2) All the Israelites railed against Moses and Aaron. “If only we had died in the land of Egypt,” the whole community shouted at them, “or if only we might die in this wilderness!” (3) “Why is יהוה taking us to that land to fall by the sword?” “Our wives and children will be carried off!” “It would be better for us to go back to Egypt!” (4) And they said to one another, “Let us head back for Egypt.”

Numbers 14:28-34

(28) Say to them: ‘As I live,’ says יהוה, ‘I will do to you just as you have urged Me. (29) In this very wilderness shall your carcasses drop. Of all of you who were recorded in your various lists from the age of twenty years up [AKA adults] who have muttered against Me, (30) not one [of you] shall enter the land in which I swore to settle you—save Caleb and Joshua. (31) Your children who, you said, would be carried off—I will allow them to enter, they shall know the land that you have rejected.

במדבר י״ד:כ״ח-ל״ד

(כח) אֱמֹר אֲלֵהֶם חַי־אָנִי נְאֻם־יְהֹוָה אִם־לֹא
כַּאֲשֶׁר דִּבַּרְתֶּם בְּאָזְנָי כֵּן אֶעֱשֶׂה לָכֶם: (כט)
בַּמִּדְבָּר הַזֶּה יִפְּלוּ פִגְרֵיכֶם וְכׇל־פְּקֻדֵיכֶם
לְכׇל־מִסְפַּרְכֶם מִבֶּן עֶשְׂרִים שָׁנָה וָמָעְלָה
אֲשֶׁר הֲלִינֹתֶם עָלָי: (ל) אִם־אַתֶּם תָּבֹאוּ אֶל־
הָאָרֶץ אֲשֶׁר נָשָׂאתִי אֶת־יָדִי לְשַׁכֵּן אֶתְכֶם
בָּהּ כִּי אִם־כָּלֵב בֶּן־יְפֻנֶּה וִיהוֹשֻׁעַ בִּן־נוּן: (לא)
וְטַפְּכֶם אֲשֶׁר אֲמַרְתֶּם לָבַז יִהְיֶה וְהֵבֵיאתִי
אֹתָם וְיָדְעוּ אֶת־הָאָרֶץ אֲשֶׁר מְאַסְתֶּם בָּהּ:

QUESTION FOR CONSIDERATION:

1. How does Caleb’s (and later Joshua’s) testimony differ from that of their colleagues? What does this tell us about their perspective/attitude?
2. Who do the people choose to believe and how do they react? What does this tell us about the people themselves and their perspectives/attitudes?
3. Leaving aside the harsh decree that “your carcasses shall drop in the wilderness” for just a second, why might God have thought it best that the older generation not enter the Promised Land? How is this generation different from those who either were children when they left Egypt or were born in the desert?
4. Why might additional time in the wilderness benefit the Israelites in the long run? Is this truly a punishment, or preparation for future success?
5. How might you apply this story to your own sense of scale readiness? In your organization, who might be a Caleb/Joshua and who might be more of an Israelite as you set out on this journey? Rather than thinking of any low scores on the Readiness Assessment as “punishment,” or “failure,” what might you do with some more time in the wilderness, and with whom would you do it in order to feel confident taking next steps toward scale and ensuring organizational alignment along the way?

PREPARE YOUR STRATEGY

SETTING YOUR IMPACT GOAL

An impact goal is a single statement that defines the impact you wish to achieve with measurable and realistic targets. It is different from, but should complement, your organization's mission and vision. While you have likely invested a great deal of time in refining your mission and vision to date, the impact goal should be new and unique to your aspirations for scale, and should define a nearer-term impact milestone you wish to achieve on your journey to fulfilling your mission.

Being clear and ambitious about the impact you want to achieve is foundational to your scale plan. Used strategically, an impact goal will help guide your organization to work in new ways—rather than the same old way—to achieve greater impact faster and more efficiently. Your impact goal should be ambitious. Rather than looking at the next one to two years, an impact goal helps you consider what impact you want your program or organization to have 10 to 20 years out.

In many cases, an organization will not be able to achieve its impact goal on its own. The impact goal may highlight where it will be important to share expertise with others, or establish relationships and networks, in order to reach and engage more communities. Defining your impact goal helps select between different models of scaling impact.

Impact goals have four elements: the target population, location, timeframe, and metric.

PRO TIP: BUILDING STRONG METRICS

1. Organizations are often trying to balance ambition and practicality. If you tend to "plan forward" by thinking about what is achievable next year or the year after with the resources you already have, consider pushing yourself to be more aspirational in your goal setting without worrying yet about how it will happen (don't worry, that will be covered in subsequent sections).
2. While it can be helpful to plan using absolute numbers (e.g., "we want to reach 500 students" or "we want to double participation"), consider going deeper with your intended impact and unlocking greater scale by setting metrics that speak to a percentage of the total population or constituency you could reach. For example, consider the difference between a goal that seeks to reach—instead of 500 students—5 percent of all Jewish students!

Impact Goal Aspect	Prompt	Example
Target Population	Who will directly and indirectly engage with your program or service?	Jewish high school students
Location	Who do you aim for the program to reach?	All largest Jewish metropolitan areas on the U.S. East Coast
Timeframe	By when do you aim to reach them?	10 years
Metric	What information or data will demonstrate that the program was successful? What is your target that is achievable and ambitious?	**Reach:** 20 percent of Jewish high school student population **Outcomes:** 90 percent of students engaged in the program have a stronger sense of self, host at least two peer events within their communities

Combine the four components together to create the impact goal.

For example: "In the next ten years, the program will reach 20 percent of Jewish high school students in the largest Jewish metropolitan areas on the East Coast. As a result, 80 percent of these students will have developed a stronger sense of self, and have regularly engaged peers."

STOP AND THINK

Practice crafting your impact goal based on the guidance above, using the workbook below.

Part 1: Use the table below to create the four components of your impact goal.

Impact Goal Aspect	
Target Population	
Location	
Timeframe	
Metric	

Part 2: Combine the four components you drafted above together to create your impact goal.

Once you draft your ambitious impact goal with your team, you can ground it by outlining how you will reach your goal and estimating the impact, site by site, year by year. If you've defined your impact goal using percentages, you may need to gather more data on the size of the total population as an input to this exercise.

The following is a sample roadmap based on the impact goal from the recent example. For the purposes of this example, we'll use 100,000 as the total number of East Coast Jewish high school students, meaning a 20 percent target reach of 20,000 students over 10 years.

The table below plots a high level scale trajectory over the 10 years stated in the impact goal. At this stage, getting a starting point on paper is more important than knowing exactly how to practically achieve these numbers. The path to your target goal will likely mimic the "J Curve," starting slow as the organization invests in start-up activities and expanding more rapidly as it ramps up from more linear growth to scale.

Year	Total number of students	% of total goal (20,000 students)
1	50	0%
2	200	1%
3	300	1.5%
4	400	2%
5	1200	6%
6	1600	8%
7	2200	11%
8	3200	16%
9	4400	22%
10	6400	32%
TOTAL	20,000	100%

Note the total number of students reached by year 10 meets the 20,000 student goal (equivalent to 20 percent of all students in the available population).

Next, it's often helpful to drill down further to look at how these target numbers break out geographically. This roadmap focuses on the first five years of the plan. Also note that this roadmap example allows for some unknowns in terms of future sites beyond its first few locations.

Impact Goal Roadmap Example					
	Year 1	**Year 2**	**Year 3**	**Year 4**	**Year 5**
Site 1: Brooklyn	50 students	100 students	150 students	200 students	300 students
Site 2: Queens		50 students	100 students	125 students	150 students
Site 3: Long Island		50 students	100 students	125 students	150 students
Site 4: Boston				50 students	100 students
Remaining sites TBD				50 students	600 students (across multiple sites)
Total per year	50 students	200 students	350 students	550 students	1300 students

Use the following roadmap exercises to understand how you will achieve your goal.

PRO TIP
Remember, if your impact goal is expressed as a percentage, your first step may require some light research to find the overall size of your target population.

Exercise 1: 10-Year High Level Roadmap Template

Year	Total number reached	% of total goal
1		
2		
3		
4		
5		
6		
7		
8		
9		
10		
TOTAL		

Your Impact Goal Roadmap Template					
	Year 1	Year 2	Year 3	Year 4	Year 5
Site 1					
Site 2					
Site 3					
Etc.					

Next steps to finalizing and using your impact goal:

- Review how current activities contribute toward your goal
- Share your impact goal with key stakeholders (e.g., board, funders, advisers) and gather feedback
- Use it to maintain focus, determine where you want to scale, and decide how to allocate resources
- Continuously track progress
- Share your impact goal to inspire your team and your supporters!

CAPTURING YOUR CORE

WHY DO I NEED TO THINK ABOUT CORE ELEMENTS?

It is important to reflect on the aspects of your programming that drive impact in your community and set you apart from other Jewish organizations. This helps to isolate what is absolutely critical for other communities to take on, what must be adapted for local context, and what is less important for impact.

To begin, you should first identify what drives your model's impact where it already exists. Is it:

- The principles and approach that underpin what you're doing?
- A program structured in the specific way it exists?

When thinking about core elements, it's useful to ask yourself:

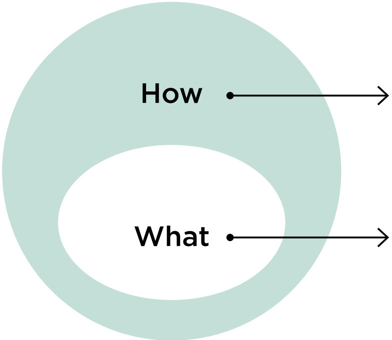
- Which elements of what we do are vital to achieving our mission and impact?
- Is this backed up by evidence?
- What aspects of what we do would others benefit from?

GUIDELINES FOR DEFINING YOUR CORE ELEMENTS

Define your core by thinking about the elements or "ingredients" needed to achieve your intended impact. Core elements need to be defined at two levels. Start by making a list of the key activities and aspects of the program (the "what"), as well as the different structures and systems that enable you to deliver it effectively (the "how").

Note: These guidelines are illustrative of a path in which you pursue bringing a program to new communities, but could be significantly cut down if it's determined you are focused on enabling others to apply a set of principles.

"What" - Program Activities and Aspects	"How" - Structure and Systems
These core elements pertain to the impact your program(s) deliver. Examples may include: • Methodology • Program components • Delivery platform	These core elements pertain to 'how' your programs are delivered or organization operates. Examples may include: • Staff functions • Training • Business systems and equipment • Partnerships • Site/facilities



Values, staff functions, office space, training, timing, business systems and equipment

Delivery of your program to the Jewish community

1. Once you have identified all of the elements, see if these can be broken down any further into sub-elements. For example, if you have several values that are core to your systems and structure, then list these out. If you have a specific methodology that needs to follow certain steps, outline the main steps as sub-elements.

2. For each sub-element, decide what is exact versus flexible for others who take on the program.
   - **Exact** - What elements are prescriptive (or should be replicated exactly) as opposed to recommended? For example, "Training must take place in a group of 15 people or less, and must follow a set structure in each session."
   - **Flexible** - What elements must be carried out but can be done in a flexible way based on the local context? For example, "There is a defined time period over which training must take place, but it's up to the local community to choose when."

See below for an example of what core might look like for a Jewish teen leaders fellowship:

Impact Delivery Core Elements	Structure and Systems Core Elements
Pre-program • Promotion and recruitment is teen-led (flexible) • Participants complete short online application process (flexible) **Monthly sessions** • Meetings with group size no larger than 15 teens (exact) • One meeting per month for the duration of the school year (exact) • Each meeting includes an external speaker followed by small group discussion (flexible) **Post sessions** • Participants reflect and complete creative exercise following each session (flexible)	**Values** • Teens as leaders, choosing the topics and leading the discussions (exact) **Staff Functions** • Part-time role to facilitate discussions and arrange speakers (flexible) **Partnerships** • Middle school staff to refer interested teens (optional) • Connections to local speakers (flexible) **Site/Facilities** • Private room for teens to meet in person (exact) • Group discussion takes place in a circle (optional)

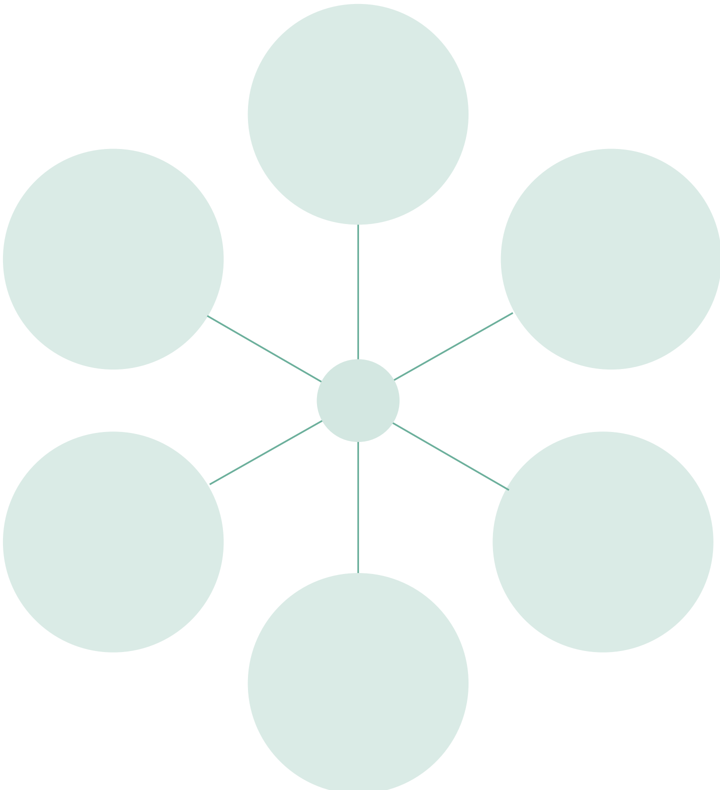
STOP AND THINK

Use the tables below to write out your core elements.

Part 1: Start by mapping out a list of the core elements of your program that lead to impact. Core elements include the “what”—program activities and aspects—as well as the “how”—different structures and systems that enable you to deliver you program effectively.

The “What”

You may find you don’t need to fill all the circles in the diagram below, or you may need to add extra circles.



The “How”

You may or may not have core elements to your structure and systems core elements for each area below.

Value	Staff Functions	Training	Business Systems & Equipment	Partnerships	Site & Facilities	Other

Part 2: Write each high-level element you identified in Part 1 into column A. Break down this element into its sub-components in column B.

Part 3: Indicate whether sub-elements are exact or flexible.

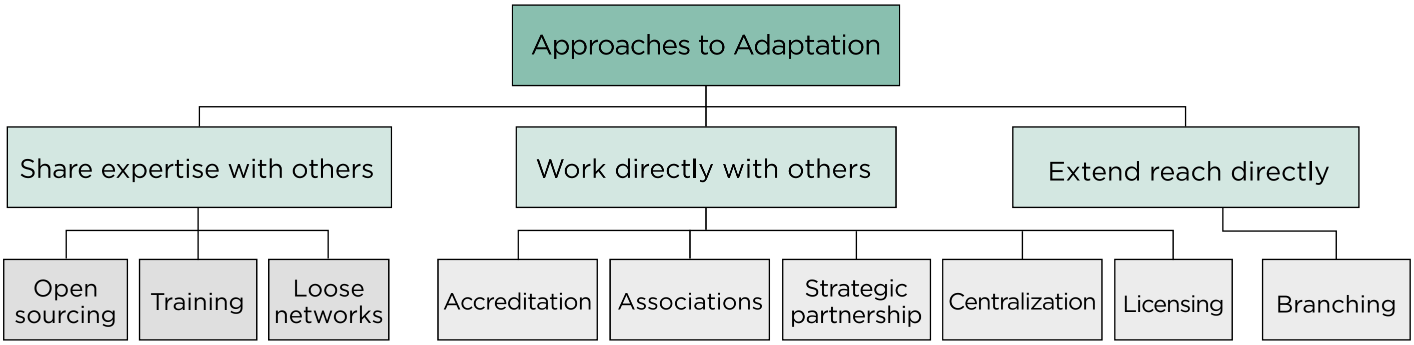
A: Core Element	B: Sub-Components	Exact Critical	Exact Flexible

Part 4: Once you have a first draft, go through every element and ask yourself, why is this element essential for impact? Is there anything that can be removed?

EXPLORE DIFFERENT PATHWAYS

Section 1.4 (The Adaptation Strategy) introduced you to three directions through which you can extend reach to other communities (1. Share Expertise with Others, 2. Work Directly with Others, 3. Extend Reach Directly). Within each of the three directions presented, there are specific pathways for scaling impact. The next section will introduce you to those pathways, and unpack their nuances in more detail so you can have a clearer sense of which direction your venture is well positioned to pursue.

There are nine main pathways best positioned to help Jewish community programs scale impact. It is worth noting the Spring Impact Social Replication Toolkit describes additional pathways beyond the nine below.



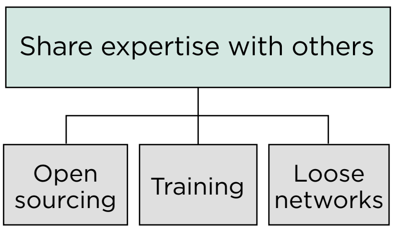
We will begin by exploring the potential scale strategies in which you share expertise with others.

SHARE EXPERTISE WITH OTHERS

There are nine main pathways to help Jewish community programs scale impact. It is worth noting the Spring Impact Social Replication Toolkit describes additional models beyond the nine below.

PRO TIP
As we explore these models, consider whether your current structure includes any of these approaches.

Three common pathways for sharing expertise with others are Open Sourcing, Training, and Loose Networks.



OPEN SOURCING

In open sourcing models, the originator creates resources advising others on how to create programs or interventions in their local area. Resources provided could include online videos, best practice booklets, and easy-to-use tools. This generally works best when a program is simple and the adapter who takes and uses the resources is capable of using them correctly. Channels for disseminating those resources include websites, conferences, and publications. Open sourcing is most effective where there is already a sense of the type of organization or adapter that would use the resource to take on a program in their community.

Open sourcing is often perceived as a simple way to share best practice, but the reality is that it usually needs a fairly proactive approach to be successful.

One of the most well-known examples of an open source model is Alcoholics Anonymous. The organization published a set of principles, the **Twelve Steps**, that local meeting groups apply autonomously. There is no central organization involved.

Another open source model is **Better Together in a Box**, a free, ready-to-use curriculum that includes teen learning sessions on Jewish values, and virtual intergenerational activities that allow teens to connect with elder "buddies." Better Together in a Box also offers a modest grant for Jewish organizations to fund their programming.

ADVANTAGES	DISADVANTAGES
• Can be the least costly form of bringing impact to new communities • Easiest means of rapidly expanding your geographical reach	• Little control over way resources are interpreted and used, which can impact quality

Key success factors:

- Easy-to-understand resource structure and content
- Supply of adapters capable of using resources successfully
- Proactive dissemination plan with targets and if relevant, small incentive grants

TRAINING

Originators can teach adapters to implement a model or aspects of it through courses, workshops, or seminars. Training works best when resources need explaining or some local adaptation initially, but can then be easily used independently.

One option is the train-the-trainer model that enables the originator to show less experienced instructors how to deliver the training themselves. Often, new instructors will attend a training event led by the originator to allow them to observe how a normal session is run. They will also generally receive guidance on how to deliver their own training events. This allows you to expand your reach more quickly and offers the originator some (but not significant) control over quality.

An additional example of a training model is the National Lawyers Guild's Legal Observer® Program, which prepares individuals to observe and record incidents and the activities of law enforcement in relation to demonstrators. National Lawyers Guild provides a Legal Observers training manual that is supplemented with in-person trainings held several times a year in various locations around the country.

Another example of a training model is Youth Mental Health First Aid, an 8-hour course through the National Council of Behavioral Health. This course, led by certified facilitators overseen by the Funder Collaborative, teaches participants about risk factors and warning signs for a variety of mental health challenges applicable to Jewish Youth settings. Unlike some other training models, Youth Mental Health First Aid is also paired with a certification.

ADVANTAGES	DISADVANTAGES
• Teach others the fundamentals of your program • Can be a source of limited income	• The individuals being trained may not implement lessons correctly

Key success factors:

- Easy-to-follow structure, resources, and expectations
- Clear learning objectives and milestones

LOOSE NETWORKS

Loose networks are networks of individuals or organizations that share the same social mission but with little coordination or control. The originator shares resources with the network, which often grows spontaneously through adapters rallying behind a popular cause. Network members may or may not share the same brand.

Loose networks are generally appropriate where adapters benefit from an ongoing association with the originator, where they need only limited support, and there is little risk to any shared brand. Technology can be used to improve communications across the network, creating a common sense of purpose and community. Adapters may be allowed to pick and choose elements of the program to apply. Other characteristics of a loose network often include:

- Relatively loose relationship between original and adapting organizations
- No formal agreement or contract
- Considerable room for local adaptation and innovation
- Relatively even distribution of power between network members
- Recruitment processes relatively or completely open

One example of a loose networks model is the Coalition on Human Needs, an alliance of civil rights, religious, labor, and professional organizations working together to promote public policies that address the needs of low-income and other vulnerable populations. The coalition publishes and sponsors educational seminars and facilitates forums for member organizations to share information and collaborate on public policy issues.

An example of the loose networks model in Jewish community is the Jewish Youth Climate Movement at Adamah. JYCM empowers teens to be on the front lines of climate change through its kevutzot (chapters). These grassroots, teen-led chapters operate independently to best adapt the program to the local youth culture. But educational resources are available to teen leaders through a portal and leaders are convened frequently for learning, sharing of best practices, retreats, and joint advocacy efforts.

ADVANTAGES	DISADVANTAGES
• Rapid expansion of reach • High degree of flexibility for adapters to innovate to meet local needs • Best if program, method, or principles can be adapted significantly	• Can be difficult to lead • Members often work in an incoherent way, often leading to unnecessary duplication of efforts • Often focused on a broad mission but not on specific impacts • Lack of coordination and control presents risks to the brand or program

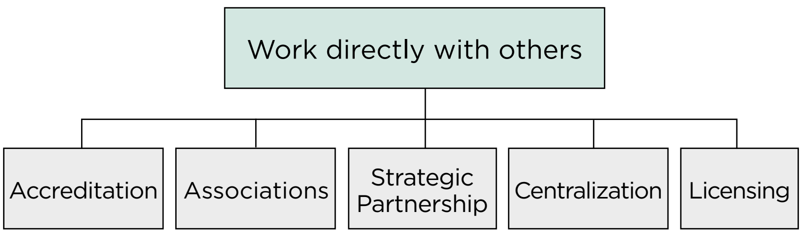
Key success factors:

- Finding a cause or rallying point that will generate enough interest to form a network
- Simple, easy-to-implement programs scale more quickly
- Being clear on who makes what decisions where, and when
- Buy-in from all parties

There are additional options for sharing knowledge with others that are typically less relevant to the Jewish Community. To explore these options, please access the Spring Impact Social Replication Toolkit here.

WORK DIRECTLY WITH OTHERS

Four common models for working directly with others are Accreditation, Associations, Centralization, and Strategic Partnerships.



ACCREDITATION

In this model the originator becomes the accreditor, providing formal third-party recognition by way of a recognized “mark” of competence for others to operate a program. Conditions attached to the accreditation will help ensure that the program is implemented with quality. When done effectively, this makes certified organizations or individuals stand out from other similar providers by extending value through shared or recognizable branding. Periodic fees can be charged to help boost income, though it often proves challenging to raise enough funding this way to sustain central operations.

A well-known example of the accreditation model is Fair Trade, which requires all food producers to provide fair wages and abide by standards for health and safety of working conditions. In exchange, producers are accredited as "Fair Trade producers," which helps them stand out in the market.

Another example of the accreditation model is the hechsher system that modern Jewish institutions employ to certify foods and other products as kosher. Like the Fair Trade example above, these symbols on packaging indicate to consumers that the product was brought to market under the observance of Jewish dietary laws and restrictions.

Organizations such as the Orthodox Union accredit these products and producers with their seal of approval, which helps observant customers feel confident in their purchase.

ADVANTAGES	DISADVANTAGES
• Can enforce standards without needing to create a large central support body • Can create a strong brand awareness with a well-marketed accreditation system.	• Requires significant effort and resources to generate awareness of accreditation mark • Can be time intensive to ensure appropriate use of the mark

Key success factors:

- Finding a compelling need for accreditation
- Generating accreditation mark awareness among beneficiaries

ASSOCIATIONS

Associations involve individuals or organizations entering into an agreement to achieve a common purpose. In an association, members operate and raise funding in communication with peer organizations. However, there is central organization and coordination of activities. As in loose networks, members may be able to choose which aspects of a program to implement or not.

The originator often takes on a role to coordinate the network and/or fulfill certain functions as the network's center. However, the originator may be held accountable by a governance structure in which all members of the network are considered equals.

One example of association models is Feeding America, the nation's largest domestic hunger-relief organization. Feeding America is a central entity that secures donations from national food and grocery manufacturers and matches excess food with the food banks that most need it. A network of food banks receive, store, and distribute donated food and grocery products. Feeding America's central entity also promotes public education about food insecurity, and supports food banks with training or equipment.

An example of association from the Jewish community is the Jewish Community Center Association. JCCA provides centralized leadership, a sense of galvanized network, and common purpose to more than 170 Jewish Community Centers and Jewish Community Camps across North America. Individual JCCs are considered members, pay dues as such, and in turn receive support, professional development opportunities, learning and training vis a vis conferences, benchmarking and evaluation support, national and international experiences for individuals, participation in joint programming efforts, and assistance in policy formation and enforcement (i.e., security).

ADVANTAGES	DISADVANTAGES
• Works well when a number of similar potential adapters already exist and your program(s) would add incrementally to their work • Relationship between parties leads to greater accountability • Allows for sharing of experiences and best practice across network members • Can reap economies of scale through sharing certain functions	• Likely to involve duplication of efforts • Can be challenging to lead toward a common purpose • Can be challenging to define a level of centralization that works for everyone

Key success factors:

- Strong emphasis on representation: understand your members and then act as a spokesperson for their concerns
- Being clear on the roles and responsibilities of the center (if applicable) and network members

STRATEGIC PARTNERSHIPS

In strategic partnerships, an originator enters into an agreement to collaborate with one or more partners to address common goals and opportunities. Any partner you choose needs to be well placed to help your organization adapt your program(s) in a new community. Unlike short-duration partnerships formed in order to secure funding, such agreements should generally emphasize a long-term relationship and financial sustainability.

Strategic partnerships could be with a range of similar-sized or smaller organizations who might have similar capabilities to your own, or they could be with larger organizations whose existing infrastructure could enable rapid scale up. When pursuing strategic partnerships, it is important to set expectations early on, think carefully about whether you want to work with and can trust the partner, and formalize your expectations in a written agreement.

One of the best-known examples of a strategic partnership model is the matchup between Starbuck and Barnes & Noble. Almost every Barnes & Noble bookstore has an in-house Starbucks coffee shop—Starbucks bringing customers into the bookstore in the morning when people usually do not shop for books, and Starbucks generating sales when customers pause for a break in shopping. The companies also collaborated to develop Barnes & Noble cafes that license the Starbucks brand and serve coffee.

An example of a strategic partnership model is the collaboration between Bamidbar Wilderness Therapy and the Boston Jewish Teen Initiative. In late 2021, the Boston Jewish Teen Initiative was seeking new ways to diversify opportunities for Jewish teens to lead their peers in Jewish engagement and social change efforts. Simultaneously, Bamidbar desired to expand its reach in community education that included training teens in skills related to peer-to-peer support in wellness and wellbeing. The Peer Leadership Fellows Peer Wellness track offers young people in grades 10-12 high level training in awareness, advocacy, relational engagement, and leadership development as teens work to remove stigmas surrounding mental health and wellness. The partnership is supported with shared funding, a memorandum of understanding, and frequent communication to develop programming and share learning. This strategic partnership has also been adapted by the Los Angeles Jewish community.

ADVANTAGES	DISADVANTAGES
• Make use of others' technologies, skills, capabilities, and competencies that would otherwise be difficult or take a long time to develop • Partnering with large organizations can lead to a rapid scale up	• If there are many (potential) partners, negotiation may become time-consuming and costly • Large organizations may risk turning into a glorified subcontracting arrangement

Key success factors:

- Developing shared vision and value statements
- Ensuring that each partner's resources are appropriately valued
- Accountability for all involved, with clearly defined decision-making processes, objectives, performance standards, and assessments
- Having a formal written agreement that is clear on IP use

There are additional options for working with others that are typically less relevant to the Jewish Community. To explore these options, see here.

CENTRALIZATION

Centralization brings together an existing set of programming or group of organizations under one umbrella. Centralization models are similar to associations but with a greater level of coordination as members work toward a shared goal. They include principles and stipulations regarding how those involved work together, backed up by oversight mechanisms and formal agreements.

Typically, an existing organization with the necessary infrastructure and network is established as the center. This organization coordinates with other member organizations and works to scale programs across geographies. Member organizations are most likely to weigh in at the local level when it comes to adapting programming to fit specific regional contexts.

Centralization models are likely to share a common brand and often use a governance structure in which the central support organization oversees the rest of the network.

An example of the centralization model is The International Planned Parenthood Federation. It is a global NGO with the broad aims of promoting sexual and reproductive health and advocating the right of individuals to make their own choices in family planning. The Federation has 118 member associations in 129 countries, with six regional offices that oversee, promote, and distribute core funds to member associations and a central board of directors. Due to the importance of the local political and cultural climates in their work, not all members share the same name or exact operations.

An example of the centralization model in the Jewish community is the Jewish Teen Educational and Engagement Funder Collaborative (the authors of this Methodology). The Funder Collaborative is an innovative philanthropic experiment, uniting national and local funders and practitioners to create, nurture, sustain, and scale contemporary approaches to Jewish teen education and growth. Participating communities exert the most influence on the local level, adapting designated outcomes to fit communal needs. Communities are united through shared language and framework, measures of success, evaluation and aggregated data collection, virtual and in-person convenings for sharing learning, building relationships, and honing best practices, supported by informal oversight.

ADVANTAGES	DISADVANTAGES
• Enable sharing of experiences and best practice across network members • Central organizations tend to be well established, leading to a stronger brand and deeper impact for scaled programming and/or solutions • Can reap economies of scale through consolidation of certain functions	• Program originators may lose control over how their programming is implemented elsewhere • It can be challenging to define the right level of responsibility between the central and member organizations

Key success factors:

- Running an efficient process to create consensus between members regarding the role the Center should fulfill
- Being clear on the roles and responsibilities of the Center and local members
- Ensuring local members understand and look at the Center as the main decision making body for the network

LICENSING

Licensing is a contractual agreement between two parties, where the originator (licensor) leases its program or product to adapters (licensees) under specific conditions. The licensor owns the intellectual property (IP) and can set the terms for geographical use, length of time, and use of the product or program. Licensors typically collect licensing fees from licensees on a 1-3 year basis. The licensee, in turn, is granted access to the IP, and other benefits that licensors offer their licensee network.

An example of the licensing model is Recovery Cafe Network, a nonprofit committed to serving people suffering from homelessness, addiction, and other mental health challenges. Individuals or organizations interested in bringing a Recovery Cafe to their community will apply to become a licensee. If approved, they start as an Emerging Member, and receive training, resources, and rights to the brand for two years. They are then evaluated on how they have implemented the model to become a full member, and if approved, granted a full license that will be evaluated every three years.

An example of the licensing model in the Jewish community is **Student to Student**. It is the signature program of the national organization Be the Narrative. Be the Narrative develops interactive educational programs to connect Jewish and non-Jewish peers, and inspire the latter to learn more about Judaism in order to dispel stereotypes and create positive perceptions of Jews and Judaism across the United States. Local Jewish organizations (typically a Federation or Jewish Community Relations Council) license the program from Be the Narrative, which offers initial and ongoing support and training. Licenses are regularly evaluated and licensees agree to several terms including fidelity to the curriculum, regular data collection (standardized evaluation), and reporting on impact.

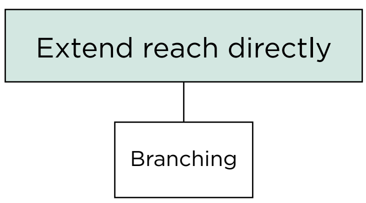
ADVANTAGES	DISADVANTAGES
• Effective way of rapidly distributing more complex products or programs • Financial costs are already built into the business model • Allows for greater control over how an originator's IP is used by adapters	• There are limitations to the quality control, as the originator has no control over the business operations of the licensee • Licenses usually require protecting IP, which can be expensive and initially time-consuming

Key success factors:

- Setting up the terms of the license clearly, including fees, terms of use, support that will be provided
- Put a brand strategy into place, to market the program or product license

EXTEND REACH DIRECTLY

Extending reach directly is also known as branching.



BRANCHING

Branches are wholly owned organizational units that are managed and controlled by the central organization, with local staff operating the branch but reporting directly to the central office. Local branches may have their own advisory boards, but the governance responsibility lies primarily with the central board of directors.

Well managed branches give the central organization a level of control that helps to protect its brand and reputation. Coordinating overall strategy and operations also allows for greater consistency. Where organizations expand using multiple strategies, branches serve as models, testing grounds for new ideas, and a means of keeping the central office in tune with actual delivery of service.

One of the largest and longest standing examples of a branching model within the social sector is Teach For America. The organization trains college graduates to become teachers in some of the most underserved schools in America. With 50 branches across the country, the central office will share a portion of its funding and has a main board of directors, but each branch has a local advisory board and its own share of funding responsibilities. The standards for teacher recruitment and training are consistent across all branches, which was important for the program's impact and reputation in the education sector.

An example of branching in the Jewish organizational world may be "movement-based" summer camps. Camps that are affiliated with a Jewish denomination such as the Reform Movement's **URJ camping network** or the **Ramah camping movement** preserve local culture, flavor, traditions, emphasize local partnerships (such as food service), respect local policies or laws, etc., but year-round leadership is employed by a central agency (such as the URJ or USCJ), training for staff is unified, and some internal policies and rules are governed by a central agency.

ADVANTAGES	DISADVANTAGES
• Can provide a higher degree of control which can be desirable when the program being implemented is complex or relies heavily on knowledge that is hard to transfer to others • Can be suitable when an organization is in the early stages of growth and is interested in testing and refining its model in new locations, or the organization has less ambitious expansion plans	• Resource-intensive: originator has to invest heavily in its own readiness, the process by which it opens new branches, and in the new branches themselves • Requires high levels of ongoing support and monitoring • Maintaining a close-knit culture and recruiting the right leaders can be difficult • Usually grow at slower rates given the greater investment of resources by the central organization

Key success factors:

> Achieving the right level of centralization versus decentralization of certain activities: decentralization can lead to people duplicating efforts across different offices, centralization can lead to slow and bureaucratic decision-making and processes

STOP AND THINK

Do you already have a sense of the model, or a few models, that you imagine are the best fit for you? Are you employing any of these models now? Is there alignment between the impact you want to achieve (impact goal), the main activities (core), and the model that will help you achieve these goals? If not, what model(s) might better serve these aims?

Scaling Masterclass alumni pathways

It's understandable that diverse pathways of adaptation resonate differently with Jewish organizations and ventures. Graduates of the Scaling Masterclass are creatively applying nearly all the pathways presented, and many have combined strategies and tactics common to several different pathways. If you'd like to learn more about a particular organization and its chosen path, please contact Rabbi Dena Shaffer (dena.shaffer@jewishfederations.org) for more information.

SPECIFYING YOUR PATHWAY AND ROLE

In order to better choose and understand your pathway and role extending impact to other communities, it's helpful to define some key criteria or "design requirements" related to your program and priorities.

Start by thinking through the following questions for your own program.

Areas	Key Questions
Complexity and flexibility	• How complex is your program? • How much of the program must be done exactly the way it's done now and how much is flexible to be adapted by the local community?
Adapter profile	How open or strict is the profile of the adapter that is taking on your program? How selective do you want to be? (e.g., alignment of values or ideology, existing resourcing, etc.)
Impact goal	How quickly are you hoping to see the program adapted by new communities, and how many communities are you aiming to reach?
Support	Will adapters who take on the program in their own community require ongoing support to run the program effectively? Is this a light level of support (e.g., answering questions in a phone call) or more intensive support (e.g., helping plan launch events)?
Evidence	Will you need adapters to share back data or evidence from their program? If so, what level of data or evidence?
Interactions among adapters	How important is it that adapters can interact with each other (share knowledge, ask questions) across communities?
Financial relationship with adapter	What is the financial flow between the originator and the adapter? Are there any shared funding responsibilities?

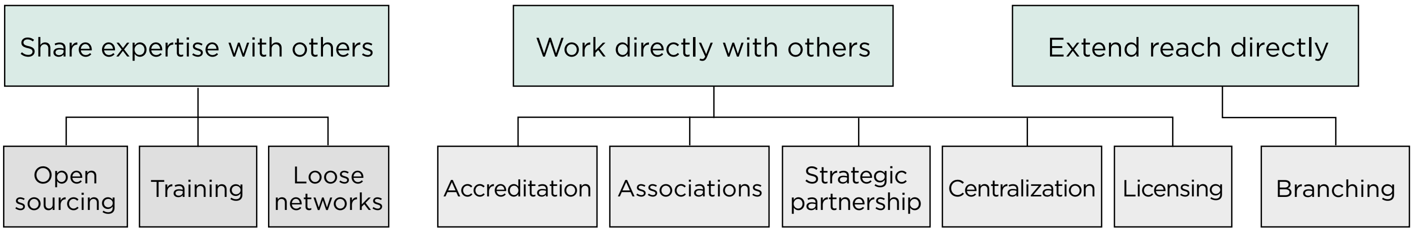
STOP AND THINK

Try writing out your answers to the above questions using the table below.

Do you feel clear on your answers to the questions? This can be a good opportunity to consult others.

Areas	Answers to Key Questions
Complexity and flexibility	
Adapter profile	
Impact goal	
Support	
Evidence	
Interactions among adapters	
Financial relationship with adapter	

Now consider what model makes the most sense for your program. Use the following table to understand how your answers to the above questions help determine which model and role is the best fit. As a reminder, there are nine main models best positioned to help scale impact for Jewish community programs.



	Open sourcing	Training	Loose networks	Accreditation	Association	Strategic partnership	Centralization	Licensing	Branching
Complexity and flexibility	Best for simple programs or a set of principles	Best for simple programs or a set of principles	Best for simple programs or a set of principles	Best for a standard set of principles that must be adhered to	Best for moderately complex programs	Best for moderately complex programs	Best for moderately complex programs	Best for moderately complex programs	Best for highly complex programs
Adapter profile	No selection of adapters	Adapters must request training	Minimal control over which adapters are allowed into network	Adapters must pass standard for certification	Best for moderately complex programs	Adapters are recruited or screened	Adapters are already known, or recruited and screened	Adapters are already known, recruited, and screened. License is typically renewed annually or every 2-3 years	Adapters are hired directly by the originator
Impact goal	Requires upfront time to develop content, but can reach unlimited communities	Requires upfront time to develop training, but can reach a large number of communities	Possible to reach many communities rapidly	Possible to reach many communities rapidly	Requires time to establish association, can reach a small or large number of communities	Limited number of communities and speed due to partnership building and partner support	Can reach a small to large number of communities or member organizations	Can reach small to large number of communities	Creating a new branch or regional office requires significant time, effort, and resources
Support	No ongoing support	Initial light support through training, no or limited ongoing support	Limited initial or ongoing support	Typically, no initial or ongoing support beyond renewing of certification	Possibility for significant initial and some ongoing support, including marketing, shared resources	Significant initial and ongoing support, including initial launch support, and ongoing troubleshooting	Moderate to significant initial support, varying levels of ongoing support	Significant initial support, ongoing support level varies	Significant initial and ongoing support within organization
Financial relationship with adapter	Typically provided as a free resource, or incentivize adapters with small grant	Originator charges fee for training service	Option for adapters to pay small fee for membership	Option for adapters to pay small fee for membership	Option for adapters to pay small fee for membership	A grant is shared across partners or partners seek separate funding	Central organization usually seeks funding and sometimes distributes a portion of it to the network members	Adapter pays a license fee on an ongoing basis	Some type of shared funding structure with adapters
Evidence	No evidence or data shared back	No evidence or data shared back	Adapters share data with each other across the network	Adapters must share evidence of compliance with standards for certification	Adapters share data with each other across the network	Adapters may be required to collect and share back select data and evidence	Adapters may be required to collect and share back select data and evidence to Center	Adapters usually share evidence	Adapters collect the same data or evidence across the organization
Interactions among adapters	Typically, no interactions	Typically, no interactions	Adapters can identify each other, and may spontaneously interact with each other	Adapters can identify each other, but are unlikely to interact	Adapters have a strong relationship with each other and interact in formal network	Typically, no interactions	Adapters may have limited interaction with each other	Adapters usually have some to limited interactions with each other	Adapters interact in organizational meetings or cross-regional initiatives

STOP AND THINK

Use the table from the above page to help you determine what model(s) might make the most sense for your program.

Part 1: Circle the level in each row that most closely aligns with your answers.

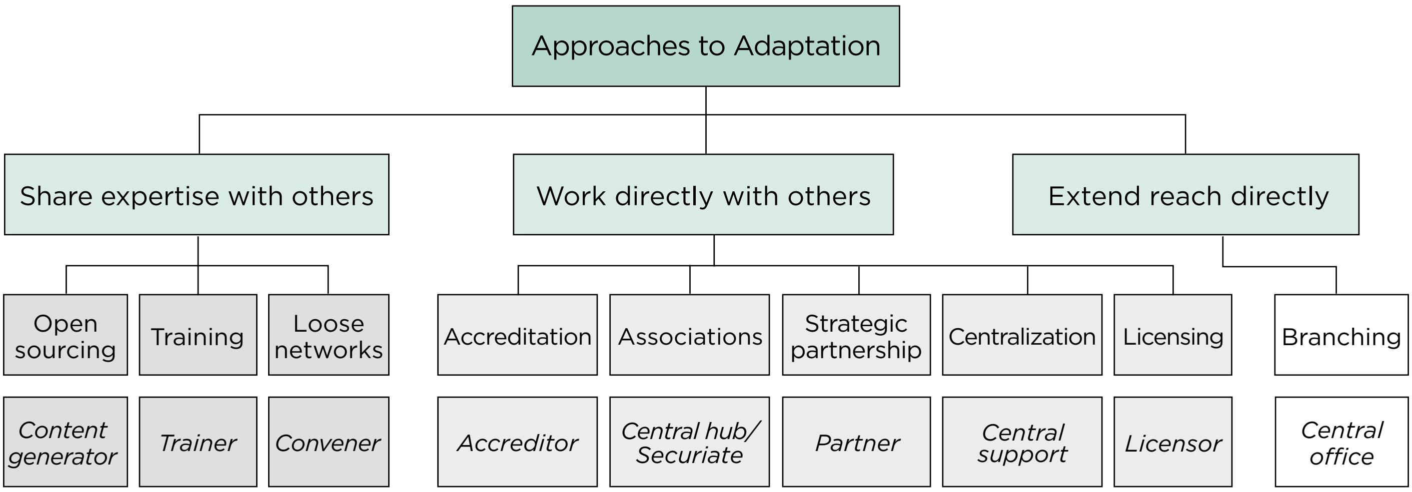
Part 2: Which model's column has the most circles? What model(s) do you think might make the most sense for your program? Why?

It's important to also consider the role you and your organization want to play in helping other communities take on your program. Models where you share expertise with others tend to require less effort because content is typically generated once and put out into the world. Models where you work directly with others or extend reach directly are more involved.

Depending on the model you choose, your role can look quite different. For example:

- In an open sourcing model, your role likely involves generating resources that advise others on how to create programs or interventions in their local area or improve what they are already doing
- In a loose networks model, your role likely involves helping convene other organizations or individuals with a common sense of purpose and community
- In a strategic partnership model, your role likely involves developing relationships with others and supporting them by providing initial training, resources, and remote or in-person ongoing support

See a summary of the roles associated with each model below:



STOP AND THINK

Do you already have a sense of the roles that you want, or feel prepared, to play?

You or your organization need not always play a direct role. For example, if you choose an association or centralization model, you could involve a third party or partner to serve as the central hub.

DETERMINING ROLES AND RESPONSIBILITIES

Roles and responsibilities define which activities will be completed by you and which will be completed by others who adapt your program.

WHY DO I NEED TO THINK ABOUT ROLES AND RESPONSIBILITIES?

- Adapters can understand what is expected of them
- You can prepare for activities required to support adapters
- You can more easily communicate the structure of your partnership to others, including funders

GUIDANCE TO DEFINE ROLES AND RESPONSIBILITIES

Determine who is responsible for your program activities, as well as the key systems and structures to deliver the program. Use the list below to identify and differentiate between an adapter's key responsibilities and yours. Depending on your program, you may not have relevant responsibilities for each area, or you may need to add other areas.

Area	You	Adapter
Program Activities	Which program activities, if any, will you carry out?	Which program activities is the adapter expected to carry out?
Materials	Will you provide any job aids e.g., templates, tools, or handouts?	• Is the adapter responsible for developing their own materials? • Adapt materials to their local community?
Facilities and Local Partnerships	Will you support partners to secure facilities or develop local partnerships?	• Is the adapter responsible for securing a site or facility for the program? • Is the adapter responsible for building local partnerships?
Staff Functions	Will you provide staff role descriptions? Help train staff?	• Are new staff roles needed? • Will the adapter recruit and train any new roles?
Business Systems or Equipment	Will you provide business systems such as software licenses, or equipment such as tablets?	Is the adapter expected to bring their own business systems or equipment?

↓ *cont.*

Data	• What information or data do you need to collect centrally? • Do you need to analyze and report this information or data?	• What information or data needs to be collected at a local level? • Does the adapter need to analyze and report this information or data?
Continuous Learning	Will you share lessons learned and new improvements with adapters? How?	Will adapters share lessons learned and new improvements back to you? How?

EXAMPLE

This is an example of a program that is using a "work directly with others" scaling approach.

Area	You	Adapter
Program Activities	Create event topics	• Select and schedule local events • Promote upcoming events • Host event • Share follow-up materials with participants
Materials	• Share example facilitation guide • Share example workbooks	Customize facilitation guide and workbooks to group needs
Facilities and Local Partnerships	None	Identify and secure location for group events
Staff Functions	• Provide example job description for lead facilitator • Train lead facilitators in orientation sessions	• Identify at least 2 individuals to be lead facilitators • Lead facilitators attend orientation session
Business Systems or Equipment	Share standardized Google forms for attendance and post-event feedback	• Provide tablet or laptop for participants to check in • Capture attendance and post-event feedback in Google forms
Marketing	Provide sample communication materials	Share communication materials with local synagogues
Data	Collect and analyze attendance and post-event feedback across all communities	Send attendance and post-event feedback on monthly basis
Continuous Learning	Organize and lead quarterly partnership call to share lessons learned	Participate in quarterly partnership call to share lessons learned

STOP AND THINK

Part 1: Use the table below to define the division of roles and responsibilities for your program.

Area	You	Adapter
Program Activities		
Materials		
Facilities and Local Partnerships		
Staff Functions		
Business Systems or Equipment		
Marketing		
Data		
Continuous Learning		

Part 2: Continue to revise roles and responsibilities until your answer is "yes" to the following two questions:

1. Is it realistic that adapters will be able to take on each of their responsibilities?
2. Do the responsibilities above cover all the crucial elements of your program?

DEFINING YOUR ADAPTER PROFILE

This section outlines the minimum requirements that other individuals or organizations will need to meet in order to adopt and take on the program in their community.

WHY DO I NEED TO THINK ABOUT THE ADAPTER PROFILE?

- Clearly outlining the elements helps other individuals or organizations evaluate their own fit
- Working with the right individuals and organizations helps maintain the quality and impact of the program in a new community
- You may find there is a need to select or screen out individuals or organizations

DEPENDING ON YOUR PROGRAM, ADAPTERS MIGHT BE:

- A regional office that your organization already has or will set up
- A school, synagogue, senior center, or other community organization
- Another nonprofit or organization
- An individual

GUIDELINES FOR DEFINING YOUR ADAPTER PROFILE:

Use the following elements to create a list of critical and desirable criteria for others who adopt and take on the program.

Element	Description
Shared values and mission	How closely do they need to be aligned with you in mission, or perhaps more broadly, values, approach, or ethos?
Shared ideology	How closely do they need to be aligned with you in ideology?
Financial situation	Do they need to have any specific financial practices, secured funding for taking on the program, or expected funding?
Technology	Do they need to be able to support certain levels of technology, or have software licenses?
Legal structure	Do they need a specific legal status?

↓ *cont.*

Equipment and facilities	Do they need to have a venue, operating space, equipment, or requisite materials?
Staff structure	Is there a minimum number of staff or management structure to take on the program?
Staff or individual capacity	Is there a minimum amount of staff or individual time that should be dedicated in order to deliver the program?
Staff capabilities	Do staff or individuals need specific experience, certifications, or other qualifications?
Qualifications and reputation	Any requirements about the adapter's previous track record and experience?
Existing relationships	Any relationships or access to networks that the organization or individual must already have in place?
Leadership	Are communal leaders enthusiastic and do they appreciate the potential of your programs?

Here's an example of what the adapter profile might look like for a Jewish teen leaders fellowship:

Elements	Critical Criteria	Desirable Criteria
Shared values and mission	Committed to empowering teens as leaders	
Legal structure	Currently incorporated as or in the process of becoming a 501(c)3	
Equipment and facilities	Secured venue for teen groups to meet in person	Area to store materials between sessions
Staff capacity	Capacity to devote 10 hours a month to prepare and facilitate sessions	
Staff capabilities	Experience working with middle school-aged teens	Local connections to diverse speakers
Existing relationships	Relationships or existing programming in at least three middle schools	

STOP AND THINK

Use the below table to write out your critical and desirable criteria.

Part 1: For each element in the table below, consider whether they are critical or desirable criteria for others who will adopt and take on the program in their community.

Element	Critical Criteria	Desirable Criteria
Shared values and mission		
Shared ideology		
Financial situation		
Technology		
Legal structure		
Equipment and facilities		
Staff structure		
Staff or individual capacity		
Staff capabilities		
Qualifications and reputation		
Existing relationships		
Leadership		

Part 2: How will you verify or assess each criterion for individuals or partners? Is it reasonable to expect that other individuals or organizations can meet all of the criteria? If not, are there any criteria that are desirable, but not critical?

PRO TIP

Doers and payers at scale: There are two critical players at scale—those who adapt and implement (the doers), and those who pay for it. In this section you've identified your ideal adapter profile. A similar exercise can be undertaken to identify the profile of your ideal payer at scale, after thinking through funding structures (section 4.4), and as you're developing your value propositions (section 4.5) for these key stakeholders.

FROM THE SOURCES: ON ADAPTORS AND ADAPTATION

****Pirkei Avot 1:1 - Establishing the Shalshelet haKabbalah**

(1) Moses received the Torah at Sinai and transmitted it to Joshua, Joshua to the elders, the elders to the prophets, and the prophets to the Leaders of the Great Assembly.
They said three things: Be patient in [the administration of] justice, raise many disciples, and make a fence round the Torah.

משנה אבות א׳:א׳

(א) מֹשֶׁה קִבֵּל תּוֹרָה מִסִּינַי, וּמְסָרָהּ לִיהוֹשֻׁעַ, וִיהוֹשֻׁעַ לִזְקֵנִים, וּזְקֵנִים לִנְבִיאִים, וּנְבִיאִים מְסָרוּהָ לְאַנְשֵׁי כְנֶסֶת הַגְּדוֹלָה. הֵם אָמְרוּ שְׁלֹשָׁה דְבָרִים, הֱווּ מְתוּנִים בַּדִּין, וְהַעֲמִידוּ תַלְמִידִים הַרְבֵּה, וַעֲשׂוּ סְיָג לַתּוֹרָה:

QUESTION FOR CONSIDERATION:

1. Is what the Leaders of the Great Assembly said the same as what was transmitted to them? Could it have been inspired by it? What might we derive then about the concept of adaptation in Jewish tradition?
2. What is established or implied by this text that suggests a future for Torah from the Great Assembly right on through to our own generation and beyond? What light might this shed on the power of scaling with regards to sustainability and longevity as well as growth?

*****Pirkei Avot (The Ethics of the Fathers)** is a section of the Mishna (often referred to as the "oral law," the first codified rabbinic literature and commentary on the Torah from the first and second centuries). Pirkei Avot is a collection of pithy moral teachings from the rabbis of that era and is often studied singularly rather than in its Mishnaic context. It is some of the most often-quoted Jewish wisdom.*

On Adaptation: "Shalshelet HaKabbalah" (the chain of tradition):

Pirkei Avot 1:1 originates a beautiful concept in Jewish wisdom known as the shalshelet haKabbalah, or the chain of tradition. Ultimately, this idea admits that Judaism is expressed through this unending, sacred chain. We are inheritors of a great tradition, accumulated wisdom and insight that are passed down from one generation to the next. Transferring our legacy is not necessarily automatic or easy. Many originators do not immediately think to grow their impact through active scaling, and consequently great programs are sometimes restricted to the geography and longevity of the originator alone. Additionally, the idea of a chain of tradition does not have to imply one of replication. We can and should expect those who inherit our innovations to revise and revive them each step of the way, adapting for the specific conditions of their own communities and ensuring that the scaled innovation successfully takes root. To this end, a further Jewish source may shed light. As originators scaling our innovations, we ought to hope the same for those who take on our ideas. A sign of successful scaling is successful adaptation.

תנא דבי אליהו זוטא, סדר אליהו זוטא ב׳:א׳

(א) פעם אחת הייתי מהלך בדרך מצאני אדם אחד ובא אצלי בדרך (עסק) מצות והיה בו מקרא ולא היה בו משנה ואמר לי רבי מקרא נתן לנו מהר סיני משנה לא נתן לנו מהר סיני ואמרתי לו בני מקרא ומשנה שניהם מפי הגבורה נאמרו. ומה בין מקרא למשנה אלא משלו משל למה"ד למלך ב"ו שהיה לו שני עבדים והיה אוהבן אהבה גדולה ונתן לזה קב חטין ולזה קב חטין ולכ"א מהן נתן ג"כ אגודה של פשתן הפקח שבהן נטל את הפשתן וארג מפה יפה ונטל את החטין ועשאן סולת ובררה וטחנה ולשה ואפאה וסדרה על השלחן ופרס עליה מפה יפה והניחו עד שבא המלך והטפש שבהן לא עשה כלום. לימים בא המלך לתוך ביתו ואמר להם לשני עבדיו בני הביאו לי מה שנתתי לכם אחד מהן הוציא את הפת של סולת על השולחן ומפה היפה פרוסה עליו ואחד מהן הוציא את החטין בקופה ואגודה של פשתן עליהם אוי לה לאותה בושה ואוי לה לאותה חרפה איזה מהן חביב יותר הוי אומר זה שהוציא פת על השלחן ומפה יפה פרוסה עליו.

Tanna debei Eliyahu Zuta, Seder Eliyahu Zuta 2:1

(1) One time I was walking on the way. A man found me, and went with me on the way of mitzvot, and he had mikra (i.e., written law) but no mishnah (i.e., oral law). And he said to me, "Rabbi, mikra was given to us from Mount Sinai. Mishnah was not given to us from Mount Sinai." And I said to him, "My son, mikra and mishnah were both of them said from the mouth of God." And what is the difference between mikra and mishnah?

[I went on to] tell him a parable: To what is this matter similar? To a human king (lit: a king of flesh and blood) who had two servants, and he loved them both dearly. He gave them each a kab (a measure) of wheat and a bundle of flax. The wise one of them took the flax and wove a beautiful cloth, and took the wheat and made it into fine flour, and sifted it, and ground it, and kneaded it, and baked it, and set it on the table, and spread the beautiful cloth over it, and left it there until the king should come. And the foolish one of them did nothing. After some time the king came into his house, and said to them, to his two servants, "Bring to me what I gave you earlier." One of them brought out the bread of fine flour, on the table, with the beautiful cloth spread over it. And the other of them brought out the wheat in a pile and the bundle of flax upon it. Woe for that shame! Woe for that disgrace! Which one was more favored by the king? The one who brought out the bread on the table with the beautiful cloth spread over it... And so it is with the gift of Torah... "When the Holy One gave the Torah to Israel, it was given to them as wheat from which to bring forth fine flour, and as flax from which to weave a garment..."

QUESTION FOR CONSIDERATION:

1. What new element does Eliyahu Zuta introduce to the concept of adaptation that elevates it?
2. What do these texts offer us as originators as new measures of success in scaling our ventures?

Even the Torah was given with the intention that its recipients would transform it beyond that which it already was, that it would be adapted by its users in order to maximize its applicability. As originators scaling our innovations, we might hope the same for those who take on our innovations. A sign of successful scaling is successful adaptation.

DETERMINING START-UP AND ONGOING SUPPORT

Start-up support defines everything that you will provide to adapters initially so that they can successfully adopt and set up the program or intervention in their community. Examples of start-up components include initial training, launch materials, or financial incentives.

Ongoing support defines everything you will provide to adapters on a consistent, ongoing basis so that they can successfully deliver the program or intervention in their community. Examples of ongoing support may include direct coaching, refresher trainings, or access to technological resources.

WHY DO I NEED TO THINK ABOUT START-UP AND ONGOING SUPPORT?

- You can encourage others to adopt and deliver your program in their community through a compelling package of support
- Those taking on the program can clearly understand what support they will receive
- Those taking on the program can clearly understand what support they won't receive, which helps them anticipate additional resources they will need to provide themselves.

GUIDANCE TO DEFINE START-UP AND ONGOING SUPPORT

1. Start by reflecting on the "core" essential elements that you defined in the previous section "Capturing the core components of your program." What support will new adapters need to be able to launch each essential core component?
2. Next, reflect on the roles and responsibilities for others who adopt the program. Is there any other support adapters will need to carry out their responsibilities?
3. Choose what type of support you will provide to adapters. The right support varies widely based on your program, and your chosen model. Determine what support will be provided just at the beginning, and what will be provided an ongoing basis.

↓ cont.

QUESTIONS TO CONSIDER

1. Will the support provided be enough to enable another individual or organization to take on and adapt the program in their own community?
2. Can elements of the start-up package be provided remotely, or do they require in-person support?
3. Should this support be provided by you, an external party, or through peer-to-peer support?
4. If there are multiple people or organizations who adopt the program, will they be able to interact and communicate with one another through regular meetings, forums, or online channels? And if so, who will convene, initiate, and monitor those communications?

EXAMPLE

Below is an example of start-up and ongoing support with a Jewish teen leadership program.

Start-up Support	Ongoing Support
Support • Marketing support to recruit first fellowship participants • Grant template and assistance writing grant for program **Training** • Initial 3-day training for facilitators **Tools or Equipment** • Example exercises for participants to reflect on each group session • Grant template language	**Support** • Remote help in case there are difficulties in setting up the speakers or running the group sessions • Marketing support to recruit fellowship participants and peer leaders • Publicity by including new program on organization's website **Training** • Biannual 2-day refresher training for facilitators **Tools or Equipment** • Updated versions of materials

If you find that there is not a lot of ongoing support required for others to effectively take on and adapt the program, it's a good indication that you want to choose a model where you share expertise with others (open sourcing, training, or loose networks). If you find that others will need some, or substantial ongoing support to be successful, it's a good indication you want to choose a model where you work directly with others (association, accreditation, or strategic partnerships).

STOP AND THINK

Part 1: Use the below table to write out your start-up and ongoing support

Start-up Support	Ongoing Support
Support:	**Support:**
Training:	**Training:**
Tools or Equipment:	**Tools or Equipment:**

Part 2: What does your start-up and ongoing support suggest about the type of model you should choose?

ESTIMATING COSTS AND FUNDING STRUCTURE

Estimating Costs is the practice of outlining the initial and ongoing costs that will be needed for your model to succeed.

Funding structure is the arrangement where you determine who is responsible for covering these costs. At this stage, hopefully you have an idea of the scale strategy you aim to pursue. This stage will help you resolve what your efforts will likely cost, and who should cover those costs.

WHY DO I NEED TO THINK ABOUT ESTIMATING COSTS AND FUNDING STRUCTURE?

- Ensures that the model you are designing is financially viable
- Sets expectations early on for what costs are likely involved, and who should cover those costs
- Identifies and articulates a realistic financial request to funder partners

GUIDELINES FOR ESTIMATING COSTS

There are four main buckets to consider when estimating costs:

1. **Initial costs for you:** What are the initial costs that you will incur to prepare your program for others to adapt? What are the initial costs that you will incur when supporting others to start up or launch the program?
2. **Initial costs for adapter:** What are the initial costs for an adapter to start up or launch the program?
3. **Ongoing costs for you:** What are the ongoing costs that you will incur when supporting others to deliver the program?
4. **Ongoing costs for adapter:** What are the ongoing costs for an adapter to continue delivering the program?

Initial and ongoing costs vary and depend on the model you have selected. Some models, such as open sourcing or loose networks, require less of your ongoing involvement and therefore won't have many ongoing costs for you. Models that work directly with others or extend reach directly will have higher initial and ongoing costs.

Common costs that fall into each of these buckets include:

	You	Adapter
Initial Costs	• Staff time for initial meetings and trainings • Staff time to develop operational manuals or other job aids • Staff time to provide advisory services • Direct costs for start-up program materials (including marketing materials, equipment, or tools)	• Recruitment of new staff if needed • Staff time and direct costs for initial marketing • Staff time to adapt materials to local community context • Direct costs for start-up program materials (including marketing materials, equipment, or tools)
Ongoing Costs	• Staff time for ongoing coaching support • Staff time to provide refresher trainings • Recurring direct costs such as licenses	• Staff time to deliver the program • Direct costs for ongoing program materials (food and drink, clothing, etc.) • Recurring direct costs for equipment or facilities

ESTIMATING INITIAL COSTS

You need to consider the costs to both you and your adapters of getting a new program to the point where they are ready to begin operations. List the different elements of support the program will need to allow new adapters to get up and running (see earlier section on “core” and “start-up and ongoing support”) and how much each will cost to provide. Decide whether you want to charge adapters for the cost of this initial support and how much. We recommend that you aim to break even on start-up costs.

Next, list the additional costs that an adapter will incur in starting up your program. If you expect your adapter to be an existing organization, then they may already have resources that can be used and their costs may be limited. An individual starting from scratch may have to buy equipment, rent facilities, etc., making it more expensive. Think about whether the total start-up cost for a new adapter is reasonable. Will they have the money themselves; will they be able to fundraise for it? In some cases, you may want to help new adapters fundraise for part or all of their start-up costs, however, an adapter’s willingness to fundraise is a good initial indication of their commitment.

ESTIMATING ONGOING COSTS

There are a number of ways that money can flow between adapter and originator on an ongoing basis.

- **Originator to adapter:**
  - **Central fundraising/large contracts:** You may wish to raise money centrally for projects that will be delivered locally by your network of adapters. This type of arrangement is more likely in open sourcing, strategic partnerships, or loose networks models where you may provide a financial incentive for adapters.

- **Adapter to originator:**
  - **Fee for service:** You may want to charge adapters for services provided. For example, if you are using training or consultancy models, you might want to charge for the cost of delivery.
  - **Ongoing fees:** You may want adapters to pay an ongoing fee to you. For example, if you are using association models, you might want to charge an annual membership fee.
  - **General income:** If expanding reach directly through branching, all income is likely to come back to you at the center anyway, before then being redistributed according to local and central budgets.

- **Pricing Strategy**
  - There are a number of strategies to employ when setting fees. Some of these will require desk-based market research or speaking with existing or potential adapters. You can use one of the following, or a combination of the following strategies to help you:
    - **Value-based pricing -** setting prices based on an adapter's perceived value of a product or service.
    - **Ability to pay -** charging based on what the adapters might be able to afford. Explore the profile of the adapter you are seeking and consider what that adapter might be able and willing to pay.
    - **Market based pricing -** setting prices based on what other similar types of programs cost.
    - **Cost recovery -** charge directly what the scaling operations cost your organization, so that you break even.
    - **Cost-plus or a target return on investment -** set a price based on your cost plus a set percentage, or enough to achieve your target return on investment.
  - Build in flexibility and be open to adjustments. As you pilot your model, you may discover your costs aren't that high and it may be helpful to lower your price. You may realize your costs are much higher and you need to increase your price. You may discover no one is able to pay for the full program, and then need to figure out alternative ways of funding or subsidizing the costs.

GUIDELINES FOR DETERMINING FUNDING STRUCTURE

Replication can be funded by a combination of your program, an external funder, or the adapting organization.

EXAMPLE

	Originator program/ funder funds	Joint/funders fund together	New adapter/funder funds
Pros	Originator coordinates the adapted network and has transparency over finances	• Buy-in from the adapter • Collaboration could open up opportunities	• Buy-in from the adapter • Less investment and time from originator required
Cons	• Requires significant effort and time from originator • Less buy-in from the adapter • May be resistance from originator's funder community	Requires coordination between adapters and different funders	• Could limit potential adapters if their funding is restricted • Could be competing for same pool of national funds

Questions to consider in order to determine your funding structure:

Originator program/ funder funds	Joint/funders fund together	New adapter/funder funds
Do you have the time and resources to invest in funding new communities to take on the model?	• How much time and resources will it require to coordinate funding for supporting adapters? • Is there potential for coordinating fundraising together from local or national funders? Are there advantages to this?	• Is it possible that adapters would be competing for the same pool of funds? • Are adapters capable of raising funds for the program and any fees for support?

Here's an example of what the initial and ongoing costs might look like for a Jewish teen leader fellowship that chooses to use a Strategic Partnership model:

	Originator	Adapter
Initial costs	• Staff time to provide advisory services • Venue and logistical costs to host facilitator's initial training	• Staff time to speak with middle schools and distribute marketing materials • Staff time to screen application responses and select fellows • Travel costs for facilitator initial training
Ongoing costs	• Staff time for ongoing coaching support • Staff time to provide ongoing support • Licenses for the application that hosts feedback forms • Venue and logistical costs to host refresher trainings	• Staff time to schedule speakers and facilitate discussion • Speaker fees • Costs to rent the room • Materials for creative exercises following each session • Travel costs for refresher trainings

STOP AND THINK

Take some time to estimate initial and ongoing costs, as well as to choose what type of funding structure makes the most sense for you, using the below exercises.

Part 1: Use the guidance below to estimate the initial and ongoing costs to you and the adapter.

1. List the different elements of support the program will need to allow new adapters to get up and running and on an ongoing basis (see earlier section on "core" and "start-up and ongoing support").
   - Estimate how much each support element will cost to provide
   - Decide whether you want to charge adapters for the cost of this support and how much
2. Now list the additional cost elements that an adapter will incur in starting up and running your program. Estimate how much each element might cost.

	You			Adapter	
	Elements	Ballpark cost	Cost passed to adapter	Elements	Ballpark cost
Initial costs					
Ongoing costs					
Total estimated cost	-	$	$	-	$

3. Think about whether the total initial and ongoing costs to a new adapter are reasonable. Will they already have access to funds? Will they be able to fundraise for it?

Part 2: Now that you have considered your costs and what will be passed on to the adapter, here is another example estimating costs and the funding structure between an originator and adapter with a couple of additional considerations:

- Revenue sources for both originator and adaptor. In this example, the originator has revenue sources from funders and adapters, while the adapter has revenue sources from the originator, funder, and end participants.
- Multiple years of financial flows. In most adaptation models, costs and revenue will change from year to year for the first few years and then stabilize. For example, in this model, the originator's costs will decrease year by year, as adapters require less support.

This is a funding structure where both originator and adapter are paying for adaptation. The originator is covering most of their costs in preparing for scale and training the adapter, while the adapter is paying for operating the program on a continuing basis.

EXAMPLE

Costs

	Originator		Adapter	
	Year 1 (start up)	Year 2 (ongoing)	Year 1 (start up)	Year 2 (ongoing)
Operational staff	$20,000		$20,000	$30,000
Training for students	$5,000	$2,500	$5,000	
Ongoing advisory		$7,000		$7,000 (fee for advisory services)
Marketing to participants	$5,000		$5,000	$5,000
Materials and equipment	$5,000		$10,000	$1,000
Facilities				
Grant for adapter	$5,000		$1,000	
Total costs	$40,000	$9,500	$41,000	$44,000

Revenue

	Originator		Adapter	
	Year 1 (start up)	Year 2 (ongoing)	Year 1 (start up)	Year 2 (ongoing)
Revenue from funder	$40,000	$2,500	$26,000	$34,000
Revenue from adapter		$7,000 (fee collected for ongoing advisory)		
Revenue from originator			$5,000 (grant provided from the originator)	
Revenue from participants			$10,000	$15,000
Total revenue	$40,000	$9,500	$41,000	$49,000

If it is applicable, you can also add in financial flows for additional adapters for future years. Ask yourself: how many adapters will you support each year in order to reach your impact goal? Will an increasing number of adapters deliver economies of scale? e.g., could you combine training sessions for multiple adapters, lowering the costs of training for your organization?

Part 3: Tailor the financial model to your program and your adaptation model, and use it as a tool to pressure test the model and ultimately help you reach your impact goal.

IDENTIFYING YOUR VALUE PROPOSITION AND HONING YOUR PITCH

This section outlines the added value a potential partner would gain, and answers the question, “what makes this opportunity preferential to all the other options this partner has for spending their finite time and resources?” Because it looks at the adaptation opportunity from the partner’s perspective, it will differ depending on your audience.

WHY DO I NEED TO THINK ABOUT THE VALUE PROPOSITION?

- Key to attracting the right adapter and funding partners
- Helps establish the messaging needed to explain the benefits in partner terms
- Ensures everyone involved is creating and deriving value from the adaptation work

GUIDANCE TO DEFINE THE PARTNER VALUE PROPOSITION

1. Start by identifying your partner segments. What types of individuals and/or organizations are likely to be your adapters? Your funders? Who are the audiences you need to convince when presenting the adaptation opportunity?
2. Next, consider what aspects of the core may be most attractive and relevant to each type of partner. From that partner’s perspective, what problem(s) do they have that the adaptation work might help solve.
3. Develop a short list of high potential value propositions for key audiences (e.g., JCC, synagogue, Jewish day school, funder program officer, etc.)
4. Test these messages by talking to people and getting early feedback on what resonates and what does not

EXAMPLE

This is an example of a value proposition to a synagogue for a Jewish teen leaders fellowship:

- This product: When Two Sit Together: A Peer-to-Peer Relational Engagement Curriculum for Teens
    - **Addresses these problems:**
        - Engaging teens in organized Jewish programming past B’mitzvah
        - Centering teen voices and capabilities as connectors, leaders, and builders of inclusive community
        - Identifying programmatic gaps in the teen-serving marketplace and being informed about what kinds of things teens want or are looking for to help them thrive

- **With this solution:** A ready-made, proven, highly customizable and impactful ten-lesson curriculum, grounded in Jewish wisdom to train teens in peer-to-peer relational engagement and community organizing skills and strategies
- **For this stakeholder:** Federation Youth-Serving Professionals
- **By doing this:** Teens will develop the skills to become trusted peer connectors and changemakers
- **So that:** They can help their peers to thrive, engage in meaningful self discovery, explore entry points to Jewish life and programming, and experience a strong sense of belonging

!! STOP AND THINK

Part 1: Brainstorm the key stakeholders you'll need to speak to based on your adapter profile and funding partner segments ("doers" and "payers").

Part 2: For each, use the table below as a format to outline a value proposition statement.

Guidance	Component of value proposition statement	Stakeholder 1	Stakeholder 2
What do you call your solution?	This solution, product, or service:		
What problem(s) this stakeholder has that your solution solves?	Addresses this problem:		
What's on offer, in summary?	With this solution:		
Specifically, who?	For this stakeholder:		
Narratively, how does the solution work?	By doing this:		
What are the outcomes, e.g., what does this stakeholder's problem look like when it's solved?	So that:		

Part 3: Test some messaging with those in your network to see how it resonates, and further craft your pitch.

DEFINING DATA NEEDS

Data needs refer to any metrics or processes that you or adapters want to collect and analyze in order to understand the outcomes and impact of the program, as well as learn and adapt.

WHY DO I NEED TO CONSIDER DATA NEEDS?

- Assess the success of your program in another community, and potentially identify needs for additional support
- Benefit from lessons learned across communities
- Ensure data collection expectations and practices are clear and manageable for adapters
- Communicate impact to potential funders and partners

GUIDELINES FOR DATA NEEDS

The model you have selected will determine what kind of data you will likely want and be able to collect from adapters. In models like open sourcing, training, consulting, or loose networks, you likely do not have an ongoing relationship with adapters, and it is typically more difficult to request data.

QUESTIONS TO CONSIDER

1. **Data needs** – What is the data needed for? Reporting to funders? Understanding progress toward your impact goal? Understanding where the program is working well, or where things need to be improved?
2. **Key criteria** – What data do you collect currently to measure the impact of your program? What are the key performance indicators that will allow you to understand whether others are successfully able to adapt your program (is it number of participants, frequency of programming, benefits to the lives of teenagers, etc.)?
3. **Data collection and analysis process** - Considering the adapter profile, can a potential adapter conduct the data collection and analysis process? How much of a burden is this for the adapter?
4. **Data collection systems/tools** – Are there any restrictions or preferences for the format in which you will receive the adapter's data? Will it require the adapter or your organization to institute any new systems or tools?
5. **Continuous improvement** – How will you interact with adapters to share lessons learned with each other across communities?

Once you have determined data collection and reporting needs, you should decide who is responsible for collecting, analyzing, and reporting the data. Revisit and update your roles and responsibilities accordingly.

Here's an example of what the data needs might look like for a Jewish teen leader fellowship that chooses to use a Strategic Partnership model:

- **Data needs:** Impact metrics will be included in biannual reporting for funders. Desire to gain an understanding of what is working well and make strategic choices about where to put resources.
- **Key criteria:** Collect "current engagement" metric classifying teens by their engagement in Jewish programs in the past 12 months as well as the outcomes for the 14 Outcomes that Positively Impact the Lives of Jewish Teens framework.
- **Data collection and analysis process:** Minimal burden on adapters as most organizations are already using some form of a survey to collect data from programming.
- **Data collection systems and tools:** Adapter and originator will use the same survey format for teens and parents involved in the teen leader fellowship.
- **Continuous improvement:** Adapter and originator have an hour-long virtual meeting with each other on a monthly basis to share ideas.

STOP AND THINK

Take some time to write out your data needs, using the table below.

Consider: What is the process you will use to share data? Are there any considerations for privacy and confidentiality? Visit here for shared frameworks, tools, and data collection instruments for Jewish teen engagement

	Your responses
Data needs	
Key criteria	
Data collection and analysis process	
Data collection systems/ tools	
Continuous improvement	

FROM THE SOURCES: DEFINING DATA NEEDS

במדבר א׳:א׳-ב׳

(א) וַיְדַבֵּר יְהֹוָה אֶל־מֹשֶׁה בְּמִדְבַּר סִינַי בְּאֹהֶל מוֹעֵד בְּאֶחָד לַחֹדֶשׁ הַשֵּׁנִי בַּשָּׁנָה הַשֵּׁנִית לְצֵאתָם מֵאֶרֶץ מִצְרַיִם לֵאמֹר׃ (ב) שְׂאוּ אֶת־רֹאשׁ כָּל־עֲדַת בְּנֵי־יִשְׂרָאֵל לְמִשְׁפְּחֹתָם לְבֵית אֲבֹתָם בְּמִסְפַּר שֵׁמוֹת כָּל־זָכָר לְגֻלְגְּלֹתָם׃

Numbers 1:1-2

(1) On the first day of the second month, in the second year following the exodus from the land of Egypt, the Eternal One spoke to Moses in the wilderness of Sinai, in the Tent of Meeting, saying: (2) Take a census of the whole Israelite company [of fighters] by the clans of its ancestral houses [by its tribes] and list the names of every male, head by head.

רש״י על במדבר א׳:א׳-ב׳

מִתּוֹךְ חִבָּתָן לְפָנָיו מוֹנֶה אוֹתָם כָּל שָׁעָה – כְּשֶׁיָּצְאוּ מִמִּצְרַיִם מְנָאָן, וּכְשֶׁנָּפְלוּ בָּעֵגֶל מְנָאָן לֵידַע מִנְיַן הַנּוֹתָרִים, כְּשֶׁבָּא לְהַשְׁרוֹת שְׁכִינָתוֹ עֲלֵיהֶם מְנָאָם, בְּאֶחָד בְּנִיסָן הוּקַם הַמִּשְׁכָּן וּבְאֶחָד בְּאִיָּר מְנָאָם׃

Rashi on Numbers 1:1-2

Because they [the people] were dear to God, God counts them every now and then. For instance, when they went forth from Egypt God counted them (Exodus 12:37), when many of them fell in consequence of their having worshiped the golden calf God counted them to ascertain the number of those left (Exodus 30:16); when God was about to make the Shechinah dwell amongst them (i.e., during the construction of the Tabernacle - Exodus 40:2), God again took their census.

***Rashi (1040-1105): Rabbi Shlomo Yitzchak, known by the acronym of his initials as Rashi, was arguably one of the most influential Jewish commentators in history. He was from the Champagne region of northern France and a vintner by profession. His writings and methods of textual interpretation spread rapidly and influenced all successive Rabbinic commentary.*

QUESTION FOR CONSIDERATION:

1. According to Rashi, why does God count the people so often?
2. How might this change your perspective on data collection and analysis?
3. What does Rashi suggest about the relationship between originator and adaptor? In what ways might data collection be an obstacle for strong relationships with your adaptors? In what ways might it help strengthen connections?
4. Despite the emphasis on "counting heads" here in the Book of Numbers, good data collection practices seek to quantify more than attendance or participation. What additional metrics come to mind when you think about evaluating the success of your scaled model?

Rashi suggests that the census (here in Numbers 1:1 and elsewhere) is a sign of God's affection and love for the people. You count the things you care about. There's an old Jewish folk tale about a town that builds a new synagogue. When the building was completed the architect invited the whole community in to see it. The people, speaking excitedly to one another, pointed out all the beautiful elements of the new building, from the plush seats in the congregation to the meticulously carved holy ark encasing the Torah scrolls. Finally, a townsperson noticed the synagogue's one construction flaw. "There are no lights in the building," she exclaimed. "How will we pray, learn, or gather?" The architect then made his way through the crowd, passing out lamps to each person and directing their gaze to dozens of empty brackets on the walls. "Each time you come here," he said, "bring your lamp, light it, and hang it on the brackets. You, the people of this community, you are the lights that will enable this place to be bright and warm. By your light will others pray, learn, and gather. And know too, that when you are not here, this space will be a bit darker in your absence."

Data collection is not only about counting people or things, it is also one way to make people or things count!

DETAILING YOUR MODEL

In Section 2.3, you answered a few key questions about your program and scale goals, and selected a model that was the best fit for your program. Continue to use this framework to design and refine it, but remember the chosen model is a reference, and you are designing a customized model for scaling your program.

Your scale model contains numerous strategic and operational elements, many of which have already been covered in this toolkit.

As you build your plans, you may encounter additional components in the areas below. Note that some of these components may not be relevant to your program, and will not need to be defined.

DESCRIPTION OF MODEL COMPONENTS

Model component	High level description
Problem Definition	The problem(s) the organization/program is trying to solve
Vision	World the organization hopes to see
Mission	What the organization is trying to achieve
End Game	The specific change the program is trying to make
Scale Objectives	There are two types of scale objectives: 1) Social objectives associated with programmatic impact, and 2) Business objectives that are related to the organizational goals, such as financial sustainability
Impact Goal	Defines the impact the program wishes to achieve, with measurable and realistic targets

Core	Essential elements of the program or organization that create impact in your community, and therefore should be included any time the program is adopted by another community
Roles and Responsibilities	Outline of which activities will be completed by you and which will be completed by others that adapt your program
Initial and Ongoing Support	Everything that you will provide to adapters initially and on an ongoing basis, so that they can successfully adopt and set up the program
Offer	What value you are offering adapters through the program and corresponding support
Adapter Profile	Minimum requirements that other individuals or organizations should meet in order to adopt and take on the program in their community
Potential Adapters	Consideration of the existing market for organizations or individuals that could potentially take on the program; a way to pressure-test the Adapter Profile
Quality Management	Measures put into place to ensure high quality execution of the program
Impact Evaluation and Data	Metrics or processes that you or adapters want to collect and analyze in order to understand the outcomes and impact of the program, as well as learn and adapt
Brand and Marketing	Determining how you and your adapter will brand and market the program (for example, cobranding or separate branding)
Governance	The framework for decision-making between the originator, adapter, and if applicable, the adapter network
Legal	Legal implications of a potential model, and what, if anything, will be done to protect the program's intellectual property and reputation
Costs and Funding Structure	Outlining the initial and ongoing costs that will be needed for your model to succeed, as well as the arrangement where you determine who is responsible for covering these costs

As you begin to pilot your model, continually revisit these elements and refine them as you learn what works.

CREATING YOUR TOOLKIT

A toolkit provides detailed information about how to successfully implement a program or intervention as well as practical resources, such as sample marketing materials. A well-designed toolkit can bolster quality and consistency of the program, and can be an invaluable tool for equipping others to take on the program or training new staff.

WHY CREATE A TOOLKIT?

- Set a standard and ensure quality and consistency for your program
- Provide a single source of information for people to refer back to as they carry out the program
- Help new staff or others taking on the program to get up to speed quickly

DEFINING THE TOOLKIT PURPOSE

1. **Define your end user –** Is the toolkit going to be used by program directors or individuals who manage or coordinate the program? Staff who deliver specific aspects of the program?
2. **Determine the context in which end users interact with the toolkit –** Will it be available for anyone to download and use on their own? Will it be provided after an initial round of training? Or supplemented with ongoing coaching?
3. **Determine when and how the user needs to reference information** - Are users going to reference the toolkit online, or use it as a physical job aid? Is the toolkit best kept as one document or divided into different sections according to who needs to implement each aspect of a program?
4. **Consider the degree of detail needed for the toolkit –** What is the right length and scope given your program and degree of flexibility in program implementation? The level of standardization can range from broad design principles to fully specified services and procedures. Finding the right degree is a balancing act that should reflect the specific program and the importance of adapting to local context.

DETERMINING TOOLKIT CONTENT

Toolkit content should reflect the aspects of programming that are required to drive impact.

1. Start by reflecting on the "core" essential elements that you defined in the previous section "Capturing the core components of your program." For each core element, consider what an adapter would need to know in order to successfully deliver the element.

2. Reflect on the roles and responsibilities of others who adopt the program. Consider what an adapter would need to know in order to fulfill their responsibilities.

As a reference point, toolkits typically cover the following content:

Introduction	Set-up	Delivery	Management
Set context about the program, and how the toolkit is intended to be used	Provide guidance for planning or set-up activities prior to running the program	Provide guidance for day-to-day operations of the program	Administrative policies or processes that are required for the program
Typically covers: • Index • Introduction • Objectives of the program • Mission • Values • Glossary of terms	Sections may include: • Securing venue and equipment • Setting up systems or events • Planning schedules • Marketing the program	Sections may include: • Steps needed to run the program • Processes for collecting and/or reporting data • Processes for quality management	Sections may include: • Safeguarding • Confidentiality • Learning and development policies • Health and safety policies • Brand guidelines

WRITING THE TOOLKIT

It's important to keep a consistent structure throughout a toolkit. Add reference links so it is easy for users to find specific information they need at any point in time. Use bullets and checklists rather than long-form writing to make content easy to understand.

The following is a suggested format for each section within your toolkit:

- **Introduction** - Explains upfront context for the section, why it is important, and defines any key terms.
- **Checklist** – Outlines a concise list of bullet points for everything that should be done within a specific section. In many cases, this may take shape as a step-by-step process. Where possible, include specifics about which role is the primary actor for each step.
- **Lessons learned and resources** – Describes any tips that other communities may benefit from when adapting and taking on the program. Typically, this includes information on best practice, examples, and suggested techniques. This section may also link to external resources.

Link to sample toolkits

IDENTIFYING AND TESTING YOUR RISKY ASSUMPTIONS

WHY DO I NEED TO CONSIDER TESTING MY RISKY ASSUMPTIONS?

At this stage, your plans are full of your best assumptions about what is likely to achieve impact at scale. Assumptions are anything that is unknown and untested. Your assumptions need to be true in order for your plans to succeed.

Proceeding with a learning mindset and finding ways to test your assumptions quickly and cheaply means you will remain nimble and strengthen your plans by confirming what will work, and making changes where needed. While your scale plans might be big, starting small allows you to limit the time and resources expended on your plan before knowing it will work.

A simple way to approach this to identify your riskiest assumptions, and build small cheap experiments with the "Build, Test, Respond" iterative cycle. By collecting data and learning more about your assumptions, you can refine your plans based on real-world learnings.

GUIDELINES FOR IDENTIFYING AND TESTING RISKY ASSUMPTIONS

Start by considering what parts of your plan are untested, and what are your biggest unknowns. Common areas where organizations have assumptions are around the following questions:

- **Value questions –** Will the doers and payers want your solution and stick with it long term? (e.g., are doers interested in the solution, do payers have the means to fund the solution, etc.)
- **Scale questions –** Can it impact a lot of people sustainably? (e.g., are we confident in our core components, can we explain it in a way that means doers can do it successfully, is it cost effective enough compared to other similar solutions, etc.)
- **Impact questions –** Does it create a lasting change? (e.g., does it achieve the desired impact through partners and sustain that impact over time, do we have access to the right data to know for sure, etc.)

Once you've written down your key assumptions, identify the ones that carry the greatest risk if they turn out to be untrue. Often these are the assumptions that you are both least certain about (don't already have data) and pose the highest risk to your success if the assumption proved to be untrue.

For example, if your scale plan depends on an assumption that JCCs across the US will have the resources in their budget to pay for your programming, and it turns out that they do not, your plans may be dead in the water. Finding a way to gather more data by testing this assumption is key!

Once you've identified your riskiest assumptions, develop a testing plan. Elements of a good experiment include:

1. **Targeted learning about actual behavior –** Try and test what people will do, not just what they say they'll do
2. **Small and cheap -** The simplest thing possible, so you learn quickly and can afford to change (small enough you could test next week.)
3. **Clear success metric -** Set a measurable hypothesis
4. **Clear action plan -** Who, what, when
5. **Data -** Decide what qualitative and quantitative data to collect

A simple format for developing a test is to identify:

- **Learning question:** What you're going to test, what you're trying to learn
    - For example: is your objective to build confidence in the quality of your solution? Is it to compare your solution to alternative solutions to understand feasibility? Is it to provide enough information to your key stakeholders to make a decision?
- **Prototype:** The minimum viable product you're going to use to run your test
    - For example: testing if your value proposition is clear and compelling by sharing a 1-page marketing flier with your participants, ending in a call to action; a request for them to sign up for a 20 minute chat to learn more
- **Participants:** Who you need to engage and what actions you want them to take
- **Indicator of success:** How you will know if the test is successful
- **Experimental approach:** How practically the test will be run and learnings will be collected

Be prepared to iterate and update your plans where relevant based on the data and learnings from your test!

CONCLUSION

We hope this toolkit enabled you to explore and understand key concepts related to scaling in the Jewish community. While scale is an exciting topic in the nonprofit sector, taking meaningful steps to carefully thinking through the upfront decisions are critical for success.

To briefly recap, this methodlogy was designed to enable you to:

1. **LEARN KEY CONCEPTS TO BETTER UNDERSTAND WHAT SCALE IS AND ISN'T**
2. **ASSESS YOUR CURRENT AND MODEL FOR READINESS**
3. **LEARN ABOUT THE POTENTIAL PATHWAYS TO SCALE AND CHOOSE ONE THAT IS BEST SUITED TO YOUR IMPACT GOALS**
4. **PREPARE THE NECESSARY ELEMENTS FOR SUSTAINABLE AND EFFECTIVE SCALING**

As you progress in the development and implementation of your scale plans, remember to revisit and revise your decisions. It is important to build in learning throughout the implementation process, so you are able to continuously reflect on and lean into what's working, and make improvements where necessary.

We look forward to seeing where your learnings about scale take you! If you have questions, we encourage you to reach out to the Jewish Teen Funder Collaborative. Please contact Rabbi Dena Shaffer, Director of Learning and Engagement at 585-472-5888 or at dena.shaffer@JewishFederations.org for more information.

Good luck!