

PROJECT SCALING DECISION FLOWCHART

Determine When and How to Scale: Growth, Replication, or Partnership



HOW TO USE THIS TOOL:

Start at the top. If all items in a section are **GREEN**, move to the next step.
If any item is **YELLOW**, review and strengthen before moving forward.
If several items are **RED**, pause and strengthen the project before scaling.

STEP 1

CONFIRM READINESS TO SCALE (BASELINE)

Is the project ready to scale? Assess all areas before choosing a scaling pathway.

1. CLEAR OUTCOMES



- Goals and outcomes are defined
- Credible data shows positive results
- Outcomes are consistent across settings/participants

2. DEMAND & RELEVANCE



- Documented demand (waitlists, requests, policy interest)
- The problem remains significant
- Aligns with current priorities

3. CORE MODEL CLARITY



- Core components clearly defined
- Clear on what must stay the same vs. adapt
- Written guidance (manual, toolkit, SOP)

4. OPERATIONAL STABILITY



- Runs reliably without constant troubleshooting
- Roles and skills are clearly defined
- Budget and cost structure are understood

5. RESOURCE FEASIBILITY



- Funding (current or potential) can support expansion
- Leadership and staff have capacity to scale
- Infrastructure/systems can handle growth



ALL GREEN?

You are ready to choose a scaling strategy.



ANY YELLOW?

Strengthen areas before moving forward.



MULTIPLE RED?

Pause and strengthen before scaling.

STEP 2

CHOOSE THE RIGHT SCALING STRATEGY

Select the pathway that best fits your goals, context, and capacity.



A. GROWTH

Expand what you already do in the same system

BEST FIT IF:

- Demand exceeds current capacity
- The model works well in its current setting
- Expansion does not require major adaptation
- You have operational control and want to keep it

READINESS CHECKS:

- Staffing can increase without reducing quality
- Systems (data, training, supervision) can scale
- Costs per unit are predictable
- Quality assurance processes are in place

⚠️ RISKS TO WATCH:

- Staff burnout
- Quality dilution
- Infrastructure strain



B. REPLICATION

Repeat the model in new settings

BEST FIT IF:

- The model is clearly defined and transferable
- It has worked in more than one context (or is adaptable)
- There is interest from other locations or organizations

READINESS CHECKS:

- A replication guide/toolkit exists
- Training and onboarding are standardized
- Fidelity measures are defined
- Adaptation guidelines are clear

⚠️ RISKS TO WATCH:

- Loss of fidelity to the model
- Over-standardization (not adapting to local context)
- Insufficient training/support



C. PARTNERSHIP

Leverage others to expand reach

BEST FIT IF:

- Other organizations have reach, credibility, or infrastructure you lack
- Scaling independently would be inefficient or too costly
- The work benefits from shared ownership

READINESS CHECKS:

- Roles and responsibilities clearly defined
- Alignment in mission and values
- Governance and decision-making agreed upon
- Data-sharing and accountability systems are in place

⚠️ RISKS TO WATCH:

- Misaligned expectations
- Loss of control over implementation
- Communication breakdowns

STEP 3

APPLY CROSS-CUTTING FILTERS (APPLIES TO ALL PATHWAYS)

EQUITY & ACCESSIBILITY

- Scaling increases access for underserved groups
- The model can adapt to diverse populations

POLICY & SYSTEMS IMPACT

- Scaling supports broader systems change (if relevant)
- Opportunities to influence policy or practice

SUSTAINABILITY

- Plan for long-term funding
- Not dependent on one person or short-term grant

EVALUATION & LEARNING

- Can track outcomes at scale
- Feedback loop for continuous improvement

QUICK REFERENCE

GREEN
Ready
Move forward

YELLOW
Caution
Strengthen first

RED
Not ready
Pause and address gaps

OPTIONAL SCORING

(For internal use)

Score each item:
3 = Fully ready
2 = Partially ready
1 = Not ready

AVERAGE SCORE

(Across all items)

2.5 - 3.0 Ready to scale
1.8 - 2.4 Pilot scaling approach cautiously
1.0 - 1.7 Reassess before.

STEP 4

MAKE THE DECISION



MOSTLY GREEN?

You are ready to scale.

Choose your pathway:
Growth, Replication, or Partnership
and create your action plan.



MIXED RESULTS?

Pilot cautiously.

Strengthen weak areas and consider starting with Growth to build capacity, then expand through Replication or Partnership.



MULTIPLE RED?

Not ready to scale.

Address critical gaps in readiness before proceeding.
Reassess later.

★ Scaling is not just about doing more—it's about increasing impact, maintaining quality, and ensuring sustainability.