

# How Social Entrepreneurs Zig-Zag Their Way to Impact at Scale

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## SUMMARY

This article provides guidance to social entrepreneurs and their funders as they seek to advance the enterprise from startup to scale. It focuses on the evolution of four social entrepreneurs and their decision-making paths as they attempt to scale their respective organizations. It then develops a framework to understand how social entrepreneurs alternate between pursuing activities to increase the scale of their work and delivering social impact in a “zig-zagging” process.

**KEYWORDS:** nonprofit organizations, social entrepreneurship, systemic impact, scaling, strategy process, social well-being

Recent discussions on social entrepreneurship have focused on how to achieve impact at scale, sometimes also called “transformative impact” or “scaled impact.”<sup>1</sup> Traditionally, “scale” refers to the process of replicating services from location to location in order to reach more beneficiaries,<sup>2</sup> and “impact” refers to the ability to create “lasting changes in the lives of people and their societies.”<sup>3</sup> By combining these concepts, “impact at scale” means “impact that actually approaches the size of the [social] problem.”<sup>4</sup> A growing body of literature has developed on this topic. Many of the articles highlight the various activities and strategies that social entrepreneurs engage in to achieve scale.<sup>5</sup> While these papers have surfaced many interesting examples of “scaling,” implicit to these discussions has been the assumption that scaling an organization’s activities will lead to significant impact. This assumption is problematic, particularly when it comes to tackling social problems. More

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of something, be it more instruction time in the classroom or more homeless shelters in a city, does not necessarily translate to better outcomes for the beneficiaries. What matters is whether the added instruction time leads to better performance and higher graduation rates and whether the additional shelters leads to a better chance of recovery and rehabilitation.

So how do social entrepreneurs achieve impact at scale? Our field research reveals that social entrepreneurs do not always follow a linear path to scale. What works well at a local level many times becomes cumbersome to implement at scale. Even after raising resources to expand operations, they may discover that scaling alone does not address the underlying root causes of the social problem. Striving for impact adds a significant degree of complexity to their growth trajectory. As a result, many will have to end up changing the course of their strategy and organization, when they expand along the complementary impact dimension, in conjunction with, or in lieu of, pursuing further scale. Our research suggests that it is through such an emergent process of “zig-zagging” that successful social entrepreneurs achieve impact at scale.

We offer a framework for understanding the process by which social entrepreneurs “zig-zag” their way to impact at scale. Using examples taken from in-depth case studies developed specifically for this research, we illustrate the zig-zagging paths that four social entrepreneurs took and the decision dilemmas they faced. Social entrepreneurs and funders can use the framework to chart their own successful strategy.

## Social Entrepreneurship and Social Entrepreneurs

Although there are some similarities,<sup>6</sup> social entrepreneurship has evolved as a separate field from conventional entrepreneurship and has a distinct focus on creating social value, with or without the accompanying financial value.<sup>7</sup> Social entrepreneurship involves individuals or groups who have a mission to solve a social problem by pursuing opportunities, engaging in innovation, and undertaking high degrees of risk with limited resources.<sup>8</sup> Social entrepreneurs require the ability to create bridging relationships across stakeholders, allowing the entrepreneur to effectively manage critical working resources.<sup>9</sup>

Martin and Osberg, however, view social entrepreneurship as a more strategic process. According to them, the change-making activities undertaken by social entrepreneurs are motivated by two special characteristics: the ability to recognize a status quo that marginalizes specific groups, and the ability to create a new, more equitable status quo.<sup>10</sup> Their contention has found some empirical support from Weerawardena and Mort, who found that social entrepreneurs have a long-term focus as they seek improvements and opportunities to create social value.<sup>11</sup>

Combining the above perspectives and focusing on entrepreneurs rather than activities, Zahra et al. offer a more comprehensive typology of social entrepreneurs. One type, called social bricoleurs, uncovers social needs that are otherwise not apparent and uses readily available resources to create simple small-scale

solutions. As a result, they are narrowly focused on serving the immediate population by solving a single issue. The second type is a social constructionist, who focuses on tackling social problems that are inadequately served by existing enterprises. Social constructionists deliberately create solutions that can scale to other areas or with growing demand. They are also interested in creating reform, so they often restructure processes and create large organizations to execute these processes. The last type is the social engineer, whose focus is on changing social systems. To do so, social engineers must create widespread support for their ideas and are often driven by “missionary zeal,” which can include breaking rules and changing norms.<sup>12</sup>

While offering useful typologies of social entrepreneurs and what they do, what is missing from the extant literature is the evolutionary process from one stage to another as social entrepreneurs grow their enterprise. What we find is that the transition from stage to stage is often complex and difficult to program in advance. The discovery process leads to a nonlinear growth strategy with implications for how the entrepreneur and his or her organization evolve.

## What Is Scale?

The notion of scale is anchored at a starting point. It is often at the level of a local area or a local problem that the entrepreneur is trying to solve. From that point on, scaling usually refers to growth in numbers: more people, more locations, and more programs. One such perspective refers to increased activities and growth through increasing employees, locations, and resources.<sup>13</sup> Yet another perspective refers to the number and types of activities undertaken by an organization.<sup>14</sup> Scaling has also been referred to as those steps taken to improve productivity and program efficiency through financial and operational actions.<sup>15</sup> This perspective builds on the concept of economies of scale, rooted in traditional economics, which focuses on reducing unit costs by distributing fixed operating costs (such as those for machinery, facilities, or salaried labor) over the maximum capacity of a system.<sup>16</sup> For example, when a school system has reached capacity, with every class in every school having close to the maximum number of students, then the system is said to have reached operating scale.

In social enterprise, there is a second level of scaling that is related to the concept of market reach, the ability to reach a sizable portion of the target group, or reaching as many beneficiaries as possible.<sup>17</sup> From this perspective, scale is a reflection of the entrepreneur’s ambition in terms of the number of people in the “market” with unmet needs and the capacity to reach that group. This latter definition of scaling implies growth beyond the starting geography or the initial scope of the program. It takes it to yet another level beyond the successful completion of the startup phase.

Typically, social entrepreneurs scale by replicating their activities in new locations.<sup>18</sup> This process of replication, also called “branching,” means that organizations must create standardized processes that are easy to reproduce across

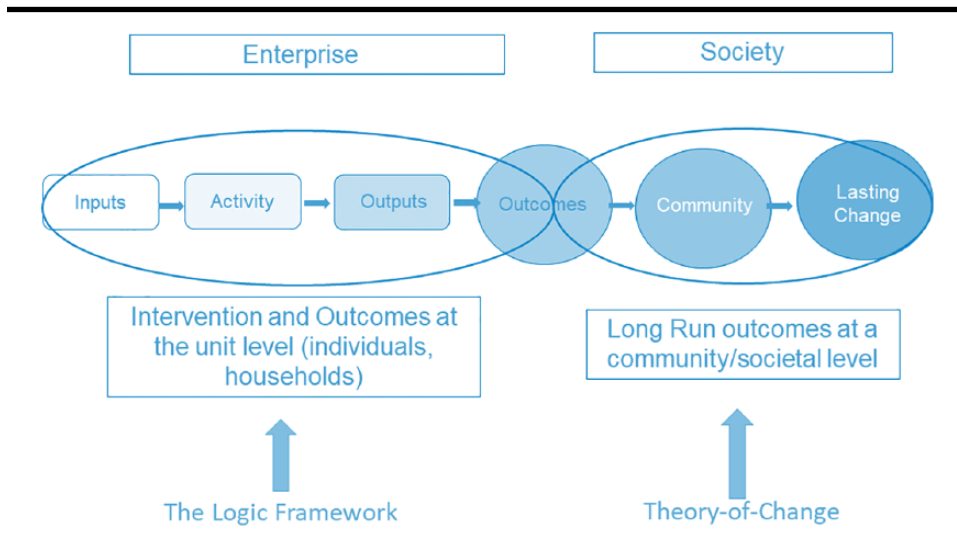
multiple geographic sites while also perfecting programs to achieve better outcomes.<sup>19</sup> Replication presents significant funding challenges to social entrepreneurs, who must expand their sources of revenues to fund these extensions.<sup>20</sup> An alternate, lower cost, model for scaling is “capacity building” or formally partnering with other organizations that can deliver the same or similar services. This model requires identifying core program elements, codifying them for use by others, and adapting those elements for the expanded applications.<sup>21</sup> Such social entrepreneurs focus on creating effective training programs to transfer knowledge and processes to organizations that they see as a good fit.<sup>22</sup> Another scaling model called package dissemination leverages an “open source” concept. This model requires that social entrepreneurs create an openly available program or platform for other organizations to use at no cost or through flexible licensing. By essentially “giving away” core programs, this model allows other organizations or individuals to independently adapt services or products to fit their needs while also benefiting from lessons learned among peers who are pursuing the same types of social goals.<sup>23</sup>

However, focusing exclusively on achieving scale assumes that scale and impact are *perfectly correlated* and ignores the difficulty of establishing clear causal links between service delivery and long-term impact to the beneficiary. For example, microfinance has long been touted as a means to alleviate poverty, and proponents have collected a substantial body of positive anecdotal evidence.<sup>24</sup> Consequently, microfinance models scaled quickly and proliferated across the globe, but a series of randomized controlled trial studies on the impact of microfinance indicates that there is no strong evidence for significant poverty reduction or other long-term positive impact for beneficiaries.<sup>25</sup> Given the complex nature of poverty in many countries, no doubt microfinance provides beneficiaries with a valuable service, but, taken by itself, is not enough to create the impact intended. Consequently, exclusive focus on scaling may not be sufficient to achieve impact, especially when social entrepreneurs are attempting to solve highly complex social problems.

## What Is Impact?

Similar to scale, impact has two embedded levels in the context of achieving change. The first is the well-understood logic path from Inputs to Outputs to Outcomes for the individuals or communities receiving products or services from the social organization. Inputs represent activities undertaken by the social enterprise that lead to outputs, or short-term results for the beneficiary, which are then meant to lead to outcomes, or more sustained improvements.<sup>26</sup> Often referred to in the literature as Logical Framework, the influence of each set of interventions on the next is logical and plausible.<sup>27</sup> Thus, adding more teachers (inputs) is likely to lead to more instruction time per student (outputs), which then may be logically expected to lead to better learning and test scores (outcomes). Following the taxonomy forwarded by Rogers, known or simple phenomena have clear and predictable cause and effect, and more complicated

**FIGURE 1.** The impact value chain.



phenomena have more variables (multiple components) and more interactions at play, but nonetheless the logic path is predictable.<sup>28</sup> Thus, instead of test scores, if we chose college placement as the desired outcome, then students would need instruction in more advanced topics (e.g., math and science) and a supporting mentoring program to navigate through the college admissions process. Consequently, measuring and analyzing learning outcomes, such as test scores, and college placement rates would be good indicators of program effectiveness. This represents the most commonly understood notion of performance for a social enterprise, the direct outcome of a targeted set of interventions. A social enterprise must at least be accountable for this level of performance in order to ensure that they are serving the needs of their chosen audience. This first level of impact corresponds to the first part of the logic model shown in Figure 1, where the cause and effect are largely under the control of the social enterprise.

It is the subsequent path (the second part of the impact value chain in Figure 1) that is complex and less predictable because of the many unknowns in the cause-and-effect chain and the intervention required by other actors. Complex phenomena are represented by recursive, and sometimes, disproportionate cause and effect.<sup>29</sup> The second, extended, concept of impact is aimed at achieving lasting change to serve the entire magnitude of need.<sup>30</sup> This type of impact may require influencing others to contribute to meeting the need, whether through partnerships, increased public awareness, or government engagement.<sup>31</sup> Consider the example of homelessness. While the direct service of a shelter might be solely focused on providing sleeping accommodations and a hot meal, the long-term impact of a homeless shelter might be better measured by whether the homeless individual has been able to rehabilitate himself with some form of steady income, health care, and permanent housing. In order to accomplish this, other agencies external to the shelter itself would have to play a role. Thus, meeting the entirety of needs requires partners, such as government agencies to provide health care

support, other nonprofits to help the recovering persons acquire skills, and placement agencies to get them into steady jobs. Only when all the critical agencies in the system have coordinated their services to meet the total needs of an individual will the homeless person be prepared to move into independent living and housing. While the social enterprise itself, the shelter, might scale to ensure that no homeless person is sleeping rough on any particular day, its real impact can only be gauged when the second part of the social change shown in Figure 1 is also accomplished.

It is this second path that is often referred to as the theory-of-change (TOC) in the social enterprise literature. The logic model can carry an intervention only as far as the boundaries of the enterprise are concerned. Beyond that, multiple interventions by multiple actors would be needed to gain lasting social change. The change path is messy, may depend on multiple, nonlinear paths, and depends on emergent actions at multiple levels. Thus, impact must be understood as a process that extends the benefits into adjacent, complementary areas, all of which are needed to ultimately achieve lasting change.<sup>32</sup>

## The Literature on Impact at Scale

There exists a stand-alone literature, independent of the scaling and impact literature that attempts to address issues of impact at scale. Bloom and Chatterji, for example, propose a framework resting on several key success factors such as alliance building and lobbying.<sup>33</sup> Other scholars have added to that list by including other variables such as the entrepreneur's commitment and managerial competence.<sup>34</sup> Almost all of the studies one way or another circle back to the social entrepreneur or the enterprise and identify the competencies required to be successful. For the most part, this literature focuses on identifying success factors and pays little attention to the evolutionary process and steps that a social entrepreneur has to undertake to reach impact at scale. While there is a rich literature on logic models and TOC,<sup>35</sup> there are few models that demonstrate how social entrepreneurs successfully transition their organizations by adding interventions along the logic pathway to impact. A few empirical studies provide some limited insights, but none build a more general framework regarding the process that leads to impact at scale.<sup>36</sup> Our goal here is to contribute to this nascent literature by more clearly defining the evolutionary process that social entrepreneurs navigate as they reach for impact at scale.

Coming at the problem differently, some recent work has moved away from the social entrepreneur, focusing instead on the system itself as the focal unit of change. The most prominent work in this stream is Kania and Kramer's "collective impact" model, which focuses on self-organized networks of organizations. This model requires creating a joint mission through a common agenda, which allows network members to coordinate actions through mutually reinforcing organizational activities.<sup>37</sup> Notice that such a collective, without strong direction, could well end up replicating similar activities without necessarily completing the activities necessary to achieve system-wide impact. Another related concept is the

“systems entrepreneur” who co-creates a shared understanding of a problem to lead collaborative networks of institutions. By doing so, systems entrepreneurs address those facets of social problems that are too big for any single organization to solve.<sup>38</sup> However, although useful, these models center on a different kind of entrepreneur, one who focuses primarily on connecting the work of others to “connect the dots.” Our interest is in the social entrepreneur who engages in expanding the core service delivery work as a pathway to seeking impact at scale.

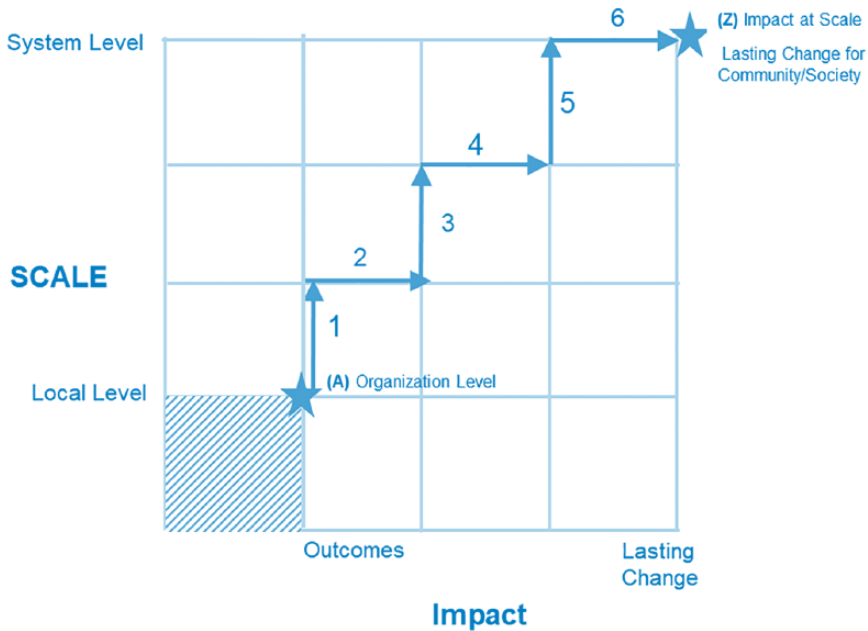
Related to the above literature, there also exists a large stream of literature on “movement building,” which describes the process of how movement builders mobilize external resources. With movement building, social entrepreneurs become activists to influence the actions of others. For example, they can change public attitudes and behaviors through media campaigns or lobby for legislative and regulatory changes.<sup>39</sup> Some of the tactics are particularly relevant to social entrepreneurs who have reached an inflection point, especially as they attempt to scale their impact. We build on some of these insights when drawing inferences from our four field case studies.

## A Framework for Impact at Scale

In reviewing the literature, we broadly identified the two levels of scaling as reaching one’s capacity within a local area or program, and extending beyond that to reach larger numbers to meet the unserved need. On the impact dimension, we identified the two levels as first getting to the end of the logic chain within the control of the enterprise (outputs and outcomes), and then extending beyond to the complementary interventions to attain lasting change in the community. Graphing the two levels of scale with the two levels of impact leads to the diagram shown in Figure 2. Point Z is the desired state of impact at scale, the end goal of reaching the entire target group and achieving large-scale system change. Point A is the initial organizational goal, a target that most social entrepreneurs initially aim for. Its focus is restricted to the activities and goals that a particular organization has undertaken within the confines of its defined geography or program. For example, if an organization is focused on a particular school district, then its scale would be limited to that district. If an organization is focused solely on providing temporary sleeping accommodations for the homeless, then its performance would only be judged against that particular activity. In both cases, an organization’s initial focus would be on reaching their target population, as effectively as possible. It is the expansion process from thereon—as the social entrepreneur learns, adjusts, and evolves to seek a higher level of scale and impact—that we focus on here.

## Method

We draw on material from a series of primary case studies developed explicitly for understanding the decision-making processes of four social entrepreneurs whose respective organizations were at a growth inflection point. Each

**FIGURE 2.** The zig-zagging process.

of the four organizations was part of an intensive workshop on impact at scale. The selection criteria included 15 to 20 years of operation under the leadership of the original founder, demonstrated success in achieving sustainable operations, and active engagement in expansion.

The first author was the primary researcher for all the cases presented here. Data were collected through interviews with the four social entrepreneurs and their key staff members. Field visits to the program delivery sites and interviews with field staff (and beneficiaries) were part of the process. Interview participants were asked to describe their decision-making process as their organizations grew and the key events that influenced those decisions. All cases have been published and are publicly available. The research team is continuing to document the progress of each of the enterprises, subsequent to the actions summarized in the published case studies. Table 1 provides a brief overview of each of the cases.

The intent of our analysis is to identify and understand the decision-making processes across four seemingly successful social entrepreneurs. As such, our approach is in the spirit of hypothesis-building, using comparative case analysis to uncover emergent patterns about complex phenomena over a period of time.<sup>40</sup> While the decision to base our analysis on the observations from our narrow sample of primary case sites constrains the generalizability of our inferences, we considered the limitations to be acceptable for a hypothesis-building study.



**TABLE I.** Overview of Cases.

<b>Social Entrepreneur</b>	<b>Matthew Spacie</b>	<b>Rebecca Onie</b>	<b>Gerald Chertavian</b>	<b>Darell Hammond</b>
Organization	Magic Bus	Health Leads	Year Up	KaBOOM!
Geography	India	USA	USA	USA
Social problem	Approximately 30 million children in India struggle to survive while living in slums or on the streets with limited ability to attend school or develop social and emotional skills.	Nonmedical factors account for up to 60% of health outcomes for low-income individuals; but health care providers are not equipped to address social determinants of health.	Approximately 6 million youths from low-income backgrounds, with high school diplomas, are unable to find long-term, stable employment.	Lack of play opportunities has negative effects on emotional and cognitive development, and communities without access to a playground can experience a 26% increase in childhood obesity. These “play deficits” disproportionately affect low-income children, of which there are 32 million in the United States
Service	Originally, Magic Bus delivered a sports-based enrichment program, called Sports for Development (S4D), to slum children. Led by youths from the local community, the intent of the curriculum was to develop social and emotional skills through sports metaphors. As Magic bus grew, the curriculum also extended into formal education, health, gender equity, and eventually workforce readiness. To provide continuous multiyear support, Magic Bus’s programs include curricula for children and youths aged 12 to 25 years.	Health Leads helped patients obtain nonmedical resources, such as housing, food, and childcare, which were available through social welfare programs; the service was initiated by Health Leads’s volunteers, called advocates, stationed at health care centers. Advocates assisted patients in a number of ways, including explaining eligibility criteria and helping them enroll in programs.	Year Up provided a one-year vocational training program to low-income youths. The first six months included formal, in-class instruction, and the remaining six months were at an internship. Corporate partners provide internship opportunities and had the option to hire students on a full-time basis after the completion of the internship.	KaBoom worked with low-income and high-need communities to design and build playgrounds. Working with corporate partners, “playground builds” were financed and staffed by both community and corporate volunteers.

(continued)

**TABLE 1. (continued)**

<b>Social Entrepreneur</b>	<b>Matthew Spacie</b>	<b>Rebecca Onie</b>	<b>Gerald Chertavian</b>	<b>Darell Hammond</b>
<b>Origins</b>	Spacie conceived the idea for Magic Bus in 1999 while he was serving as chief operating officer for a global travel agency. While playing rugby at the elite Bombay Gymkhana, he observed the large disparities in sports access for slum children. He started in a small way to address this gap.	Onie co-founded Health Leads in 1996 while still an undergraduate student, with her mentor Dr. Barry Zuckerman at the Boston Medical Center.	Inspired by his experience as a Big Brother mentor, Chertavian founded Year Up in 2001. Chertavian had initially proposed the idea as part of his business school application. He returned to the proposal after a brief stint as a technology entrepreneur.	Motivated by his childhood experiences in a group home, Hammond founded KaBoom in 1996 after a career in community organizing at City Year.
<b>Scale</b>	By 2015, Magic Bus had reached 400,000 children and youths in 22 cities in India.	By 2016, Health Leads had initiated 22 desks in six cities, serving 11,500 patients.	By 2016, Year Up served 3,000 youths every year.	By 2016, KaBoom had directly or indirectly helped build over 15,000 playgrounds, which served approximately 2 million children annually.
<b>Impact (Outcomes)</b>	Demonstrated that its students outperformed the national average in school attendance, health/hygiene practices, and making informed choices.	Results showed that 90% of patients were able to secure at least one critical social resource.	80% of youth graduated and gained employment.	Playground use data showed that six out of ten children were nonwhite, 4.4 out of ten children came from families that earned less than \$25,000, 81% were local residents, 70% reported that children increased their amount of playtime, and 82% reported learning something new through play.

## Case Studies: Four Zig-Zagging Journeys

We present brief summaries of cases of four different social entrepreneurs: Matthew Spacie from Magic Bus, Rebecca Onie from Health Leads, Darell Hammond from KaBOOM! (henceforth simply referred to as KaBoom), and Gerald Chertavian from Year Up (YU).<sup>41</sup> These four social entrepreneurs each followed distinctly nonlinear paths, alternating between decisions to scale their organization and extend impact in a process we have termed zig-zagging. In each case, the social entrepreneur's intent was to achieve impact through lasting change. The zig-zagging process depicts how the four social entrepreneurs and their organizations have, thus far, attempted a path of growth from focused interventions (outcomes) to impact at scale (lasting change).

### ***Magic Bus: Matthew Spacie***

*The initial mission.* While playing sports at the elite Bombay Gymkhana, Matthew Spacie was appalled to learn of the lack of sports opportunities for slum children in India. He recalled,

The difference in their circumstances disturbed me deeply . . . I passionately believe that all children have a right to play. And here were children and teenagers denied access to our grounds, watching us and mimicking our actions with no ball or equipment.<sup>42</sup>

So, in 1999, Spacie founded Magic Bus and developed a school enrichment program called Sports for Development (S4D) aimed at children aged 6 to 12 years. S4D's three-year curriculum focused on using sports as a metaphor to instill important life skills, such as resilience and self-confidence. The fully developed program, which took almost a decade to craft, was delivered over 40 two-hour sessions every year (over three years) at government-run schools in poor neighborhoods in Mumbai, India.

*Scaling.* For the first ten years, Spacie focused on developing and refining Magic Bus's S4D curriculum, codifying the training material into a standardized curriculum so that it could be delivered by a cadre of Community Youth Leaders (CYLs), all volunteer young men and women identified and selected from the local community. At the end of that period, with a proven curriculum and an efficient delivery model in place, Spacie began to replicate the program across more schools and cities in India. By 2008, Magic Bus was able to expand its program to 12 schools serving 8,000 children, scaling from serving just 400 children in 2000. During this initial phase, most of its funding came from small private institutions and wealthy individuals.

*Extending impact.* Having built a successful platform, Magic Bus began to attract the attention of large institutional development agencies, such as UNICEF and the World Bank. While these donors, impressed by Magic Bus's S4D model, were willing to fund the organization's further expansion, they strongly urged

Spacie to think more systematically about Magic Bus's impact on children. They required Magic Bus to collect evidence on whether the program had actually benefited the children. Were the children more resilient? Did they make the right choices? Had their behaviors changed? Did the children feel more empowered? Now drawn to the idea of long-term outcomes, Spacie extended the program by two more years, so children would continue until they were 14 years old. The curriculum was also extended to include gender and equity issues, and health education, especially as it pertained to sexual health. Spacie recognized that without the extended curriculum both in terms of time and topics, it would have been impossible to inculcate the critical values of self-reliance and self-esteem, so essential to positive youth development. By 2012, Magic Bus had expanded to 300 schools in eight cities serving 200,000 children.

Magic Bus's success at scale began drawing attention from large corporate donors, who were required by Indian law (passed in 2013) to spend a minimum of 2% of their profits on corporate social responsibility (CSR). Many corporations chose to spend their CSR funds on "education" and reached out to Spacie to co-create programs that would enhance opportunities for youth. Spacie recognized that his organization mainly staffed by volunteers would never be able to provide the academic enrichment and job skills demanded by new funders. Yet he realized that these programs were essential to completing the cycle of uplifting a young person from poverty to livelihood. This could only happen by working with other organizations and institutions in complementary spaces that could complete the logic chain to full impact. The program was further extended by two more years (until age 16), and nearly all the academic enrichment programs were now delivered by external partners with expertise on the subject matter. Spacie observed, "I think we're understanding now a bit more clearly that working in isolation, by ourselves, isn't going to achieve an awful lot. And, that learning has come as we've scaled and got bigger and sought impact."<sup>43</sup> With the launch of these new programs and continued replication, by 2016, Magic Bus had reached 400,000 children across 21 cities.<sup>44</sup> Most of those children received Magic Bus's holistic S4D and academic enrichment programs. Evaluation studies done at regular intervals at funders' requests demonstrated that Magic Bus children were indeed more resilient and more disciplined regarding school work and other healthy behaviors. Magic Bus was achieving successful outcomes up until middle school graduation. With further CSR funding and corporate requests for job skills training, Magic Bus extended its programs for children older than 16 years. However, the job of completing the impact value chain by providing livelihood skills and placing them on jobs was far from complete as the organization struggled to navigate the new tasks and collaborations now required for completing the childhood to livelihood transformation. Only about 10,000 children had entered the livelihood training programs as of 2016.

### ***Health Leads: Rebecca Onie***

*The initial mission.* Inspired by her mentor at Boston Medical Center, Rebecca Onie co-founded Health Leads in 1996 to address critical nonmedical social

needs (such as food, transport, and housing) that adversely affected the health of low-income populations. Research had shown that nearly 60% of their health outcomes were affected by nonmedical factors. Despite this well-known fact, few health care providers addressed social needs as a part of their routine care because of a lack of financial incentives and a lack of training on the part of the health care providers. As an initial step to address this problem, Onie created the Health Leads's service model in a Boston hospital. The core of the program was made up of volunteer advocates, who worked with low-income patients guiding and connecting them to available nonmedical resources. The model required the cooperation of the doctor who after examining and conversing with the patient wrote two separate prescriptions, one for clinical needs and the other for nonmedical needs. The Health Leads advocates who had their "desks" in the medical facility followed up with patients and connected them to the nonmedical resources available at local governmental or nonprofit agencies. This allowed patients to source both their medical and social health needs in an integrated fashion during the same hospital visit.<sup>45</sup>

*Scaling.* Onie originally focused on replicating "desks" across multiple hospitals and clinics. To facilitate this, she worked to codify her service and build a standardized proprietary online platform called Reach. The Reach platform enabled advocates to conveniently serve and connect patients to resources and follow up to inquire whether they had been able to access them. This innovation allowed Onie to leverage her volunteer base and quickly replicate "desks" across multiple clinical sites. By 2013, Onie had scaled Health Leads to serve 22 locations in six cities, reaching nearly 11,500 low-income patients.<sup>46</sup>

*Extending impact.* Even as Health Leads continued to scale, fortuitously for it, the Affordable Care Act (ACA) was passed in 2010. In addition to expanding health insurance coverage, an important goal of ACA was to reduce health care costs and improve quality of care by shifting from transaction-based payments to one based on patients' well-being. In keeping with the new direction, the Centers for Medicare & Medicaid Services (CMS) launched a five-year pilot to test whether meeting social needs would indeed improve health and reduce costs. Health Leads's key funders such as the Robert Wood Johnson Foundation too were keen to recalibrate around the notion of health care quality for the patient. Seeing an opening in the new health care environment that reaffirmed her original mission, Onie decided to change strategic direction. Health Leads decided to slow down the expansion of "desks," despite growing demand. Instead, riding on the momentum from the new health care law, and encouragement from her main funders, Onie chose to shift her focus from individual hospitals to partnering with a large health care system where she could better prove her value proposition. This led to working with Kaiser Permanente, a large vertically integrated hospital chain with 38 hospitals in eight states. Onie recalled,

Scaling direct service is operationally very heavy lifting. Because Kaiser Permanente wanted scaled solutions across their whole system, we were able to leapfrog

that stage of growth and shift from doing the work *for* healthcare institutions to doing it *with* them—and we could focus on helping to build the enabling context that makes it possible for healthcare institutions to do this work themselves.<sup>47</sup>

As part of the new drive, Kaiser Permanente would do longitudinal impact studies of the overall health of its patients receiving nonmedical care. Not only would they be able to gauge the long-run health advantages for patients, they would also be able to measure the cost saving to the system. All these would constitute real measures of impact.

To further drive change, Onie also adopted movement-building tactics by spearheading two major communities of practice, the Health Leads Collaborative and the Leaders Coalition, with the goal of sharing knowledge, including a better understanding of patient needs across health institutions. Onie estimated that the partnership with Kaiser Permanente had the potential to serve 500,000 low-income patients and the coalitions had the potential to influence another 1,100 health care institutions.<sup>48</sup> The work of attempting to build awareness of the social costs of health and documenting its gains proved to be different enough that in 2017 Onie decided to set up and lead a new organization outside of Health Leads.

### ***KaBoom: Darell Hammond***

*The initial mission.* Conditioned by his experience growing up as a kid in a group home, Darell Hammond founded KaBoom in 1996 with the mission “to have a great place to play within walking distance of every child in America.”<sup>49</sup> To fulfill this goal, KaBoom embarked on a strategy called Lead, which entailed working with corporate partners who provided most of the cost of the equipment to build a play area in a community playground. KaBoom developed a tightly orchestrated six-month process where the funding was sourced, a community partner identified, and the play facility designed, built, and commissioned for play. The activity involved mobilizing and coordinating volunteers from the corporate partner as well as from the community. Using this process, KaBoom had built over 2,000 playgrounds by 2010.

*Scaling.* As demand for playgrounds continued to increase, Hammond decided to scale KaBoom’s activities through the addition of a second strategy in 2009 centered on “Mass Action,” an online open source platform that KaBoom created to “give away” tools and training for a “Do-It-Yourself” (DIY) playground. Mass Action had the advantage of empowering communities to build their own playgrounds using KaBoom’s proven process at no cost, allowing for a rapid increase in the number of play spaces built. Mass Action proved to be enormously popular, and by 2012, approximately 8,000 DIY playgrounds had been built.<sup>50</sup> Meanwhile, the Lead model had cumulatively built nearly 2,500 playgrounds. Collectively, the 10,500 playgrounds provided play spaces for an estimated 1.6 million children annually. KaBoom continued to operate at the level of building play spaces. It did not extend itself to tracking and measuring the health of the children it served.

*Extending impact.* Despite its growth, internal data from Mass Action showed that most DIY playgrounds were built in middle-income neighborhoods, indicating that low-income children would not be able to access those added play opportunities, especially in urban areas.<sup>51</sup> Reflecting on the Mass Action expansion phase, Hammond observed,

It scaled us as an organization and we got a lot of pats on the back about it . . . but, when we were honest with ourselves, it actually ended up serving middle-income to upper-income communities . . . It was not on mission for us.<sup>52</sup>

Hammond, therefore, decided not to invest further resources on Mass Action, but instead rework KaBoom’s core mission to make play spaces available within walking distance of every low-income child in America. It was also clear to Hammond that Lead by itself would not scale as rapidly as he would like. Thus, he decided to embark on an influence strategy with a program called “Rally” while continuing with Lead.<sup>53</sup>

Hammond felt that it was important for Rally

to open up the conversation and influence new actors to consider their role in the health of low-income children . . . And, we want it to be about every city government . . . making sure that kids are seen and heard in communities and, by virtue of that, they’re healthier and set-up to succeed long-term.<sup>54</sup>

Through Rally, Hammond hoped KaBoom could increase impact by catalyzing cities, which had the greatest potential to affect low-income children. Consequently, KaBoom launched two major initiatives: “Playful City USA,” a program that provided grants of up to \$50,000 for cities that demonstrated a commitment to improving children’s access to quality play areas, and “Play Everywhere,” a design competition that challenged cities to transform “everyday spaces,” such as sidewalks and bus stops, into play spaces. With this focus, by 2016, KaBoom had given \$6.5 million in grants to 257 communities and municipalities.<sup>55</sup> Meanwhile, the organization’s original Lead model too took on a different dimension. The organization under a new leader started to engage with large-scale public systems such as NYCHA (New York City Housing Authority) to mobilize resources to build over 250 playgrounds across its many dispersed properties for low-income residents. All these changes geared toward achieving accelerated scale called for organizational changes at many levels, including funding, partnering, and measuring impact.

### ***YU: Gerald Chertavian***

*The initial mission.* Motivated by his personal experience serving as a mentor to low-income youths in New York, Gerald Chertavian founded YU in 2001. YU delivered a one-year training and internship program that prepared low-income high school graduates for long-term employment in high-demand career fields. Students who entered the program typically had a high school diploma but were

unemployed and came from circumstances that put them at high risk of failure. They received both professional (soft skills) and technical training (hard skills) for a specific career track and were then placed in internships that were made available through YU's corporate partners. The program was highly streamlined and rigorous, enabling YU to achieve graduation and placement rates of above 80%.

The advantage of YU's logic model was that it carried the young person all the way to getting their first job. It was not just whether they graduated, but the young men and women from YU were placed on jobs earning good entry-level salaries, and achieving favorable outcomes, for a large majority of youth who entered the program.

*Scaling.* Because of its high-quality programming and early success, Chertavian was able to raise money from wealthy philanthropic individuals to enable him to rapidly replicate across multiple U.S. cities, and by 2011, YU had expanded from serving 500 students in three cities to serving 1,600 students in eight cities. While the funding was sufficient for this level of scale, the cost intensity of the delivery model constrained its growth going forward. Chertavian found that only 60% of YU's program costs were covered by the internship fees paid by corporate sponsors. The rest had to be covered by philanthropy. In his own words,

we realized that you can't scale infrastructure at the pace needed to have the impact we want. So, we made the strategic decision to partner with community colleges and locate Year Up inside a community college. Our co-located model is 40% less expensive on a cost per head basis.<sup>56</sup>

Community colleges are heavily subsidized by state governments and aim to provide a two-year vocational and skills training education to high school graduates, with similar profiles to those targeted by YU. By using this collaborative approach with third-party providers who already had built-in capacity on the ground, by 2016, YU was able to serve an additional 1,000 students annually through 11 community colleges in addition to the 2,000 students it served directly. Working with community colleges, Chertavian learned that the biggest impediment was getting job placements for all those who graduated. This forced him to turn attention to building the capacity of the larger system.

*Extending impact.* Knowing that there were nearly 6 million young people nationwide who could benefit from the kind of services that YU provided, Chertavian realized that scaling would soon be limited by the number of corporations willing to provide internships and follow-on employment opportunities to low-income youths. This employer limitation motivated Chertavian to explore ways to increase impact by influencing the hiring practices of corporations. As a result, YU adopted movement-building strategies by working with the nonprofit Ad Council and the federal government to create "Grads of Life," a program outside of YU which sought to change employer perceptions of unemployed youth. Enthusiastic response from employers encouraged Chertavian to continue with his



movement-building activities, and he dedicated more YU resources to developing working relationships with national employers, such as the members of the Business Roundtable's National Network of Business and Industry Association.<sup>57</sup>

Reflecting on this significant complementary extension to YU's operations, Chertavian noted,

How do you close the opportunity divide in this country? . . . Recognize that you won't do it purely through an organization's impact. True transformative impact is going to have to punch much more broadly than the confines of the organization itself. You have to reach beyond its borders to seek other collaborators.<sup>58</sup>

What Chertavian was trying to achieve was impact at scale, so that the entire population of unemployed youth would have a chance to succeed.

### *Case Study Inferences*

As one can see, initially, the four social entrepreneurs in our study started as doers, working to deliver innovative solutions to problems in their local community. From there, each one of them began a process of scaling through replication, eking out operational efficiencies, honing core program elements, and extending out to more, similar, beneficiaries. Having achieved a minimum scale, these social entrepreneurs were then ready to consider how to increase their organizations' scale and impact. Much of the learning regarding the complexity of the problem and what it would take to address impact at scale emerged as they went along their zig-zagging path.

For example, Magic Bus's quest for scale pulled them in the complementary impact dimension at the behest of their funders. UNICEF and the World Bank needed to be convinced that S4D programming was indeed enhancing the confidence and self-reliance of the kids. In the process of extending for impact, Magic Bus sought external partners who had the expertise and knowledge to help them expand their core programs. Health Leads in its quest for scale found the process of expansion, one facility at a time, to be cumbersome and slow. The ACA provided them a fortuitous opening, which led them to a large partner, Kaiser Permanente, who was eager and willing to deliver scale because of the potential to gain significant outcomes and savings. In both cases, external actors motivated the social entrepreneurs to take a marked turn in the impact direction. The turn at KaBoom and YU came not from external stimuli but through internal reflection. At KaBoom, the Mass Action program led to rapid scaling, but was not on mission. In search for a solution that would lead to growth and be on mission, KaBoom made a strategic shift toward more "influence" and partnerships with city governments and agencies. The motivation was still to scale, but the nature of the required activities to "influence" others was very different than building playgrounds, and hence the change in direction. In a similar vein, YU's partnership with community colleges was motivated by its efforts to scale and yet be financially sustainable. As a consequence of working with the external partner, it learned the urgent need to add an important complementary activity—the need

to influence employers to open up job opportunities for the kind of young people the community colleges served.

One can see the constant seesaw between reaching for scale and extending for impact. In every case, it was the quest for scale that drove the entrepreneur toward the impact direction. In every case, the entrepreneur needed the partnership of an external organization to be able to navigate their way. Scaling by replication alone took the entrepreneurs only so far, and when they hit a brick wall, they had to turn elsewhere for resources, and along with it came the pull to complementary directions. This is not to say that social entrepreneurs would never be able to scale linearly. Many, in fact, do. Akshaya Patra, for example, is an illustration of this linear growth approach. Founded in 2000, the organization serves midday meals to children attending low-income elementary schools. With a superb production and logistics model, it served 1.65 million, nutritious, midday meals from 25 centralized kitchens to 12,800 schools in India every day in 2018.<sup>59</sup> It has often been urged to extend its model by deliberately linking it to health outcomes of the children, but it has refrained from doing so. Instead, it has stayed focused on scaling the number of children receiving a quality midday meal. Many such social enterprises have chosen to scale linearly, staying focused on the activities that they do very well, allowing others in the larger ecosystem to fulfill the rest of the impact journey.

## Conclusion and Implications

Our field research shows how social entrepreneurs attempt to grow and gain impact through a zig-zagging process that evolves over time. While this may bear some resemblance to Mintzberg and Water's emergent and entrepreneurial strategies,<sup>60</sup> the key difference lies in the social entrepreneur's dual goals of trying to gain scale as well as impact, which motivates them to pursue activities in a complementary direction in addition to pure scaling. This distinction is important because the move in the impact direction necessitates new resources and new capabilities, which stretches the organization in unfamiliar ways. Every one of the social entrepreneurs in our cases started small to solve a local need. At the start, every one of them focused on the immediate problem as they saw it. Their passion was to change their "back yard." Their mission gradually evolved over time as they became better informed regarding their purpose and developed relationships with new sets of stakeholders.<sup>61</sup>

There is considerable mainstream literature on how strategy emerges as a consequence of an organization's interaction with its environment. The idea of adaptation in response to new information is not new. Adaptation is necessitated by changes in the customer environment or the supply environment. In the social sector, beneficiaries' core requirements do not change much over time (such as their need for housing, health care, or education), but regardless social enterprises have to constantly evolve for a different reason. Their mission is to change beneficiaries' lives for the better, which requires an extension into beneficiaries'

adjacent needs. For example, after a beneficiary has received job training, one needs to ensure that he or she is placed on a steady job and is provided access to health care and housing. If not, the effect of the original intervention would quickly dissipate. Such an extension into adjacent activities requires collaboration with external partners to buttress the organization's own capabilities. Strategy adaptation, therefore, is primarily an external phenomenon that depends on understanding and leveraging resources and capabilities of other actors and stakeholders in the system in order to extend on the benefits and services for their constituencies. This process of co-evolution of strategy and external alliances is perhaps a unique feature of the social sector.

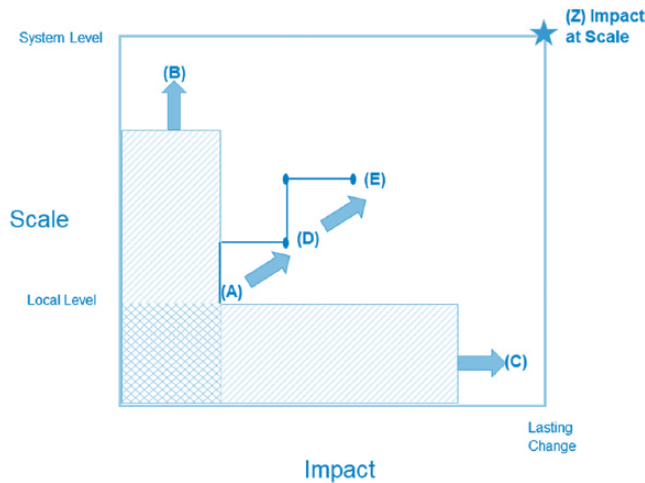
We believe that this zig-zagging process is a better representation of a social entrepreneur's evolution than the heroic portrayal of social entrepreneurs as visionaries.<sup>62</sup> The latter, we believe, is a stylization of social entrepreneurship that relies heavily on evidence from a very select sample of "celebrity" social entrepreneurs who conform to heroic ideals in hindsight. This *ex post* analysis of "superstar" entrepreneurs, like Muhammad Yunus, is problematic in that it portrays them as omniscient visionaries who had a clear idea of the path to impact and the means to achieve it. Yet, even by his own admission, Yunus did not originally start with a vision to make microcredit a universal human right; instead, he focused on a smaller, localized problem. In a 2013 speech, he stated,

What is it that I was trying to do? Not a big thing . . . The first little thing I did was to try to protect people from the village loan shark . . . So, I started lending from my own pocket. And that was the beginning of the whole idea of microcredit.<sup>63</sup>

Thus, while some social entrepreneurs may appear to be visionary in hindsight, it is questionable whether they were initially able to envision the entire system, especially since complex systems, continually shift and change.<sup>64</sup> Instead, it seems more likely that such entrepreneurs learn, adapt, and adjust, just as Yunus has done, to achieve their impact goals.

Following are four summary implications for social entrepreneurs aspiring to deliver impact at scale:

- Driving for impact at scale requires a disciplined reflection on whether the organization has the resources and the ability to stretch itself. Before attempting to scale, the entrepreneur needs to ensure that their organization's operating model is effective and efficient in addressing the mission at hand. Without it, more scaling brings on more deficits with respect to finances as well as the organization's capabilities. Sometimes scaling could provide the pathway to sustainability, as was the case with YU. If so, then the projected operational model must be robustly calibrated before undertaking the expansion. Any stretch along the impact dimension must prove itself through successful outcomes for the beneficiaries. The entrepreneur must therefore carefully assess the organization's potential resources before undertaking any move in

**FIGURE 3.** Approaches to impact at scale.

the complementary dimension. Remaining focused on delivering the organization's founding goals is a valuable contribution in many cases (i.e., sticking to point A, the organization's mission goal in Figure 3).

- It is more pragmatic to scale in the linear dimension, that is, reaching more numbers with a well-honed model. This is direction B shown in Figure 3. Such a path will require additional funding, new partnerships, and expanding the organization. But because the operating model has been shown to be successful, attracting additional resources could be comparatively easier than a move in the horizontal dimension. Having reached a significant size, such an organization may then have the credibility to influence and nudge others in the problem space toward collective impact, even though the organization itself may never deviate from its linear growth path. The goal would be to get a seat at the table of influence to enable the collective capability of other organizations in the problem space to reach impact at scale.
- Moving in the horizontal (impact) dimension is certainly harder because that involves charting new territory, moving into adjacent activities, and/or cultivating funders and partners in complementary dimensions that often have quite different operating models. Internally, it could cause disruptive changes to the organization because of the new required capabilities. Social enterprises moving in this direction must be braced for managing organizational complexity as they pursue a new set of activities. But those who advance to the C position would have demonstrated that, however hard, it is entirely possible to extend the model along the direction of the complementary impact activities.
- Our exploratory field research implies that social entrepreneurs who aspire to impact at scale will be drawn to a zig-zagging path. Such is the nature of the industry forces they navigate. Given the complexity of social problems at

scale, it is most likely that they may not be able to advance to a system-wide solution, by themselves. Some, like those in our sample, will reach positions like D or E in Figure 3, which is the furthest they can realistically get to.

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