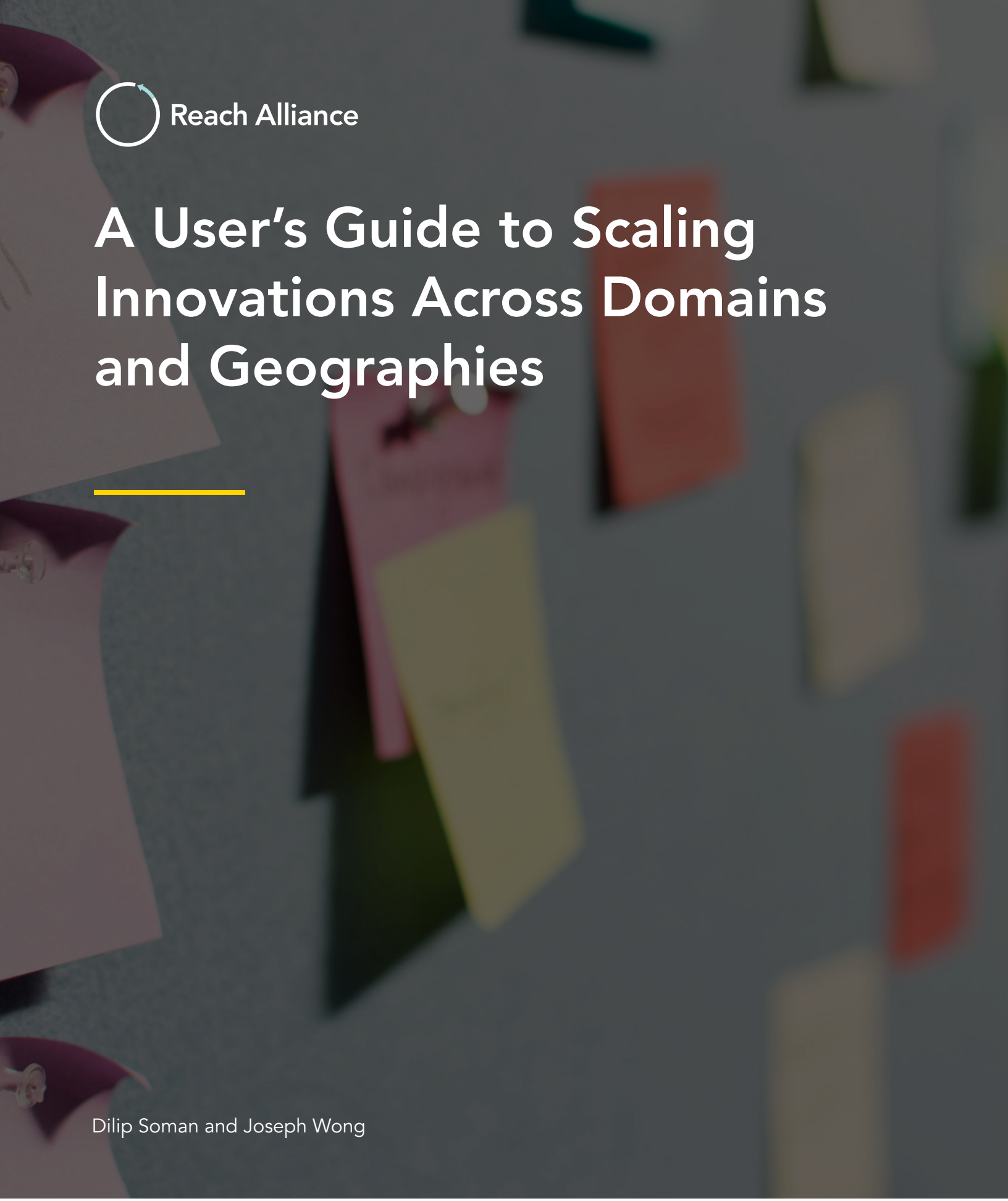


Reach Alliance

A User's Guide to Scaling Innovations Across Domains and Geographies

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Goals

Use the "efficiency core" and local adaptation to successfully replicate, translate, and sustain innovations.

Develop a perspective on the "adopt or adapt" debate.

Quick summary: Scaling is not about copying an entire solution. Identify the efficiency core of the innovation and adopt it. Then adapt everything else to the new local context.

This guide distills these principles into an actionable, step-by-step workflow you can apply to any innovation — whether it's a health intervention, a technology, a community project, or a development model.[1]

Step 1: Start with the Efficiency Core (the Engine)

Identify the mechanism that MUST stay constant for your innovation to work.

The efficiency core is the engine — the part of the solution that produces the critical impact.

Examples

- **Aravind Eye Hospital (Soman et al. 2012):** Aravind's efficiency core is a high-throughput cataract surgery model in which surgeons perform very high volumes daily, coupled with backward integration (e.g., its own FDA-approved intraocular lens manufacturing) which keeps costs extremely low while maintaining quality.

Efficiency core → high-throughput surgical model (not the hospital layout per se)

- **Sprinkles micronutrient powders (Soman et al. 2012):** The efficiency core is the easy-to-use single-dose sachet delivering 16 vitamins and minerals for a young child. They are designed to be sprinkled directly onto prepared food, requiring no refrigeration, mixing, or special preparation. Distribution models can vary by context while keeping this sachet mechanism intact.

Efficiency core → the sachet delivery mechanism

- **Mikoko Pamoja & Vanga Blue Forest (Medeleanu et al. 2025):** Launched in 2019 by neighbouring villages (Vanga, Kiwegu, Jimbo), this larger project uses hydrological restoration and mangrove nurseries. Carbon revenues have funded roads, medical supplies, and a school science lab. Community-led mangrove

1 This user's guide was prepared by Professors Joseph Wong and Dilip Soman, University of Toronto, as a basis for classroom discussion (correspondence: dilip.soman@rotman.utoronto.ca). It is based on Soman et al. (2012) and Medeleanu et al. (2025). While this guide can be used as a stand-alone document, we recommend reading it in conjunction with these two articles.

conservation in Gazi Bay, Kenya (launched 2013) sells Plan Vivo–certified blue carbon credits and reinvests earnings (e.g., freshwater wells, clean cookstoves, schools) via village-led decisions.

Efficiency core → the virtuous cycle: mangrove conservation → carbon credits → reinvestment in community development

How to Identify Your Efficiency Core

- Ask: "If I could bring only one part of my solution to a new place, what part produces the outcomes?"
- Look for:
  - the key process
  - a specific technology element
  - a simple unit of operation
  - a repeatable workflow
  - an incentive structure.

Document that mechanism clearly. This efficiency core is key — everything else is potentially adaptable.

Step 2: Map What Can (and Must) Be Adapted

Don't replicate the entire solution; replicate the engine and adapt the rest. We emphasize that adaptation is not a failure of scaling; on the contrary it is a requirement for success.

Examples

- **Blue carbon projects** adapt conservation strategies based on local ecology, livelihoods, and governance structures (e.g., when forests are used heavily for fuel, a different conservation strategy is needed).
- **Jaipur Foot** (a frugal, locally made lower-limb prosthesis that reduced costs to approximately USD 30 versus thousands in high-income settings, enabling free limb replacements for tens of thousands annually) and Narayana Hrudayalaya adapted models to local materials, labour, and financial constraints (Soman et al. 2012).

How to Map Adaptable Components

Create a simple table with three columns:

Populate this using stakeholder interviews, process mapping, and evidence from your pilot site.

Innovation component	Must stay the same? Why?	Can be adapted? How?

Step 3: Understand Local Context Deeply

Do not assume people will adopt something just because it is "good." Latent demand often must be activated.

- People may not value unfamiliar solutions (e.g., long-term health diagnostics) without a compelling value proposition and a clear positioning statement.
- There might be "sludge" (frictions in the system like cumbersome paperwork burdens, clunky processes, imprecise information about emotional barriers) that hamper take-up.
- In Kenya, future fish stock improvements did not motivate communities; immediate livelihood benefits did.

What You Need to Learn from the Local Context

- What are the immediate needs, incentives, anxieties, and constraints?
- Who are the existing solution providers and how might they join a hybrid model?
- What norms, practices, or institutions shape behaviour?

Tip: Co-creation (as in blue carbon projects; Medeleanu et al. 2025) builds legitimacy, ownership, and sustainability.

Step 4: Choose the Right Scaling Model

There are three types of scaling approaches, each appropriate for different conditions (Soman et al. 2012):

1. Contiguous Scaling

Grow outward geographically from your base.

→ Best when infrastructure or logistics matter (Aravind).

2. Distant Replication

Replicate in a new geography with adaptation.

→ Requires on-the-ground assessment and contextual redesign.

3. Transfer + Translation

Spread knowledge, not the organization.

→ Best for models where the core is a method rather than a physical system (e.g., Grameen microfinance; spreading the microfinance method globally without replicating the original Grameen organization itself).

Blue carbon projects essentially use this third model; the virtuous cycle is replicated, but each community designs its own conservation, governance, and livelihood model.

Step 5: Craft a Clear, Compelling Value Proposition (Positioning Statement)

Your innovation must feel valuable to people *now*, not in the abstract future.

Examples

- Aravind's immediate cure from blindness → extremely strong value proposition.
- Blue carbon revenues directly finance water, schools, and roads → concrete, visible benefits.

Checklist for a Good Value Proposition

- ☐ Immediate benefits?
- ☐ Low cost or low effort for users?
- ☐ Emotional resonance?
- ☐ Evidence of success?

Template for a good positioning / value proposition statement	
Write separately for all stakeholder groups:	
Target:	To whom (which segment) does the offering create value?
Core benefit:	What is the unique value you offer compared to other ways of addressing the same problem?
Secondary benefit:	What are other sources of value?
Support and competitive advantage:	What is the "reason to believe"? What investments, decisions, or assets do you have that let the target believe your value proposition?

Step 6: Build a Sustainable Operating Model

Scaling requires long-term viability, not dependence on the original founder.

- Sustainable models integrate multiple innovations at once (marketing, finance, operations).
- Blue carbon projects rely on revenue streams (carbon credits) + community governance + scientific partnerships.

Design your sustainability model around:

- A revenue or funding model
- Local management capacity
- Training and skill transfer
- Long-term institutional partnerships

Step 7: Build Demonstrated Outcomes, Not Just Outputs

Evidence of impact in pilots or early programs accelerates credibility, financing, and replication.

Examples

- Blue carbon projects measure carbon storage, ecosystem health, and community benefits through rigorous baselines, monitoring, and third-party verification (e.g., Plan Vivo).
- In government programs, confusion between "outputs" (e.g., trainings) and "outcomes" (reduced mortality) impairs scaling.

Practical Steps

- Define what success looks like early.
- Use metrics that matter to communities and funders.
- Build a clear evidence narrative to support replication.

Step 8: Build Local Capacity and Ownership

Capacity building ensures long-term sustainability.

In the Blue Carbon Case

- Villagers learn measurement, seedling planting, hydrological design, and monitoring.
- Community Forest Associations govern the program.
- Local coordinators and forest scholars create continuity.

This is what prevents an innovation from collapsing once the pilot team leaves.

Step 9: Create Hybrid Value Chains

Blend new and existing actors to reduce costs and increase fit.

The Soman and colleagues (2012) article emphasizes hybrid value chains created by integrating local organizations into expanded models rather than replacing them.

For Innovators, This Means

- Identify who already works in the space.
- Partner rather than replace.
- Build shared incentives.

Community-led mangrove conservation in Gazi Bay, Kenya (launched 2013) sells Plan Vivo–certified blue carbon credits and reinvests earnings (e.g., freshwater wells, clean cookstoves, schools) via village-led decisions. This approach was crucial for Mikoko Pamoja, which integrated community groups, scientists, NGOs, and government agencies.

Step 10: Scale by Replicating Small Successes — Not by "Going Big"

"Replicate many small, locally rooted interventions, not one big, centralized project."

This is more achievable and often more impactful in aggregate.

Putting It All Together: A Step-by-Step Scaling Workflow

1	**Identify your efficiency core.** What mechanism creates results?
2	**Break the model into components.** Label each: core vs adaptable.
3	**Conduct deep local immersion.** Needs, constraints, incentives, institutions.
4	**Select the right scaling model.** Contiguous, distant replication, or transfer/translation.
5	**Co-create the adapted model.** With community, local partners, or sector actors.
6	**Ensure a compelling value proposition.** Must be immediately meaningful to users.
7	**Build a long-term sustainability model.** Funding + governance + capacity-building.
8	**Set up outcomes measurement + verification.** Evidence builds trust and accelerates adoption.
9	**Build hybrid value chains.** Integrate new and existing actors.
10	**Scale through repeated small replications.** Each adapted version strengthens the model.

Scaling innovations is not copying one from another. It is the discipline of replicating what must remain constant while adapting the rest to fit the lives, needs, and contexts of new users.

Appendix A — Checklist for Scaling with an Efficiency Core

Efficiency Core
- ☐ I can articulate the core mechanism (in one sentence).
- ☐ I have evidence that this mechanism drives outcomes.
- ☐ I have defined non-negotiables and allowable adaptations.

Context and Co-creation
- ☐ I have mapped user incentives, constraints, and norms.
- ☐ Local stakeholders co-designed the adapted model.
- ☐ Roles and responsibilities are agreed and documented.

Value Proposition
- ☐ Immediate, visible benefits exist for end users.
- ☐ Total user cost/effort is minimized.
- ☐ A quick proof-of-value (pilot) is feasible.

Sustainability Model
- ☐ Revenue/funding sources are diversified and reliable.
- ☐ Local governance is established (committees, coordinators).
- ☐ Capacity-building plan (training, handover) is in place.

Measurement and Verification
- ☐ Clear outcomes and indicators are defined.
- ☐ Data collection is simple and community manageable.
- ☐ Independent verification/audit cadence is set.

Scaling Pathway
- ☐ Chosen model fits context: contiguous / distant / transfer.
- ☐ Site selection criteria and readiness checklist exist.
- ☐ Knowledge package (playbooks, SOPs, training) prepared.

Hybrid Value Chain
- ☐ Existing actors/partners are identified and engaged.
- ☐ Incentives and value sharing are aligned and documented.
- ☐ MOUs or contracts outline decision rights and dispute paths.

Replication Engine
- ☐ Process for capturing lessons between sites is defined.
- ☐ Core KPIs are tracked across all sites for comparability.
- ☐ A lightweight governance for portfolio-level learning exists.

References

Medeleanu, Maria, Frank Mazza, Thaisa Tylinski Sant'Ana, Fatima Formuli, and Joseph Wong. 2025. The Promise of Blue Carbon Credits. *Stanford Social Innovation Review* 23, no. 1: 8–27.

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Cover photo: Colorful sticky notes pinned to board (Patrick Perkins, Unsplash)