

# Scaling in Small Non-Profits:

## Lessons Learned from the Families First Waterloo Region Project



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Project READ Literacy Network is grateful to the Lyle S. Hallman Foundation for their generous support for our Families First Waterloo Region Project. This support allowed us to design and test strategies and ideas to scale the impact of our family literacy program, Get Set Learn across Waterloo Region.

We are excited to grow family literacy in our community by rolling out a Family Literacy Training, Mentoring and Certification program...Phase 2 of this project. If you or your organization would like further information or to ask questions, feel free to contact Project READ at 519-570-3054 or [info@projectread.ca](mailto:info@projectread.ca)

To receive a hard copy of this report, contact Project READ at 519-570-3054 or [info@projectread.ca](mailto:info@projectread.ca) .

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March 2019

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## Executive Summary

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With the support of the Lyle. S. Hallman Foundation, Project READ Literacy Network embarked upon a two-year project to research and test strategies to create sustainability and scale the impact of its successful family literacy program, Get Set Learn (GSL) across Waterloo Region.

Through a process using design-thinking and developmental evaluation and with the support of consultants from Capacity Canada and many other community stakeholders, the project explored, learned about and prototype-tested a series of “Idea Areas” to scale impact.

As this project began, we looked at a variety of ways to scale impact that involved new models or service delivery approaches while creating sustainability. Early ideas or prototypes to scale impact included:

- Expanding GSL to new demographics
- Coaching and mentoring
- Licensing and segmenting GSL Curriculum
- System mobilization

Ideas from the literature became quite informative. Jeffrey Bradach and Abe Grindle’s article in the Stanford Social Innovation Review, “Transformative Scale: The Future of Growing What Works” proposed that there are nine strategies to achieve transformative scale through both organizational and field-building pathways.

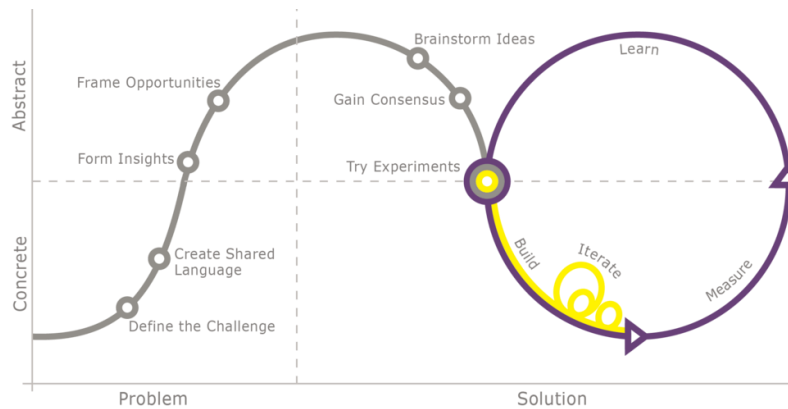


For the full article click this link

[https://ssir.org/articles/entry/transformative\\_scale\\_the\\_future\\_of\\_growing\\_what\\_works](https://ssir.org/articles/entry/transformative_scale_the_future_of_growing_what_works))

This framework helped us understand that there are a wide variety of strategies to scale impact. Some maybe more aligned than others with initiatives and/or organizations.

Our project roughly followed the diagram below. Over two years we moved regularly from concrete to abstract in phases. In the early phases we defined challenges, created shared language, formed insights, framed opportunities and then moved to a more active phase where we implemented a workplan where prototype tests and various iterations were carried out. We built prototypes, captured learning and in the end created an Implementation Plan from what we learned.



Adapted from <http://www.theleveragelab.com/camp-faqs-1>

As a final outcome, four strategies were designed to scale the impact of family literacy across Waterloo Region and create sustainability. They are:

- Families Together: Project READ Mobilizes and Improves Family Literacy System
- Families Supporting Families: A Leading Peer Mentoring Program
- Learning Together: A Community Development Approach
- Family Literacy Certification and Training Program

See appendices for further details.

### Are You Going to Scale?

A project to scale impact is complex and challenging. Be crystal clear you see the need, can demonstrate the need and are committed. On the outside, it may not seem that complex. But it is. A wide variety of factors, skills and mindsets are necessary to arrive at a scale strategy that is a good fit for your organization. Think deeply...surprising features of your organization (such as culture and values) or community maybe key factors in your decision-making process.

Scaling is not an amorphous concept. There are frameworks and a significant body of literature to learn from. Determine what is being scaled. Is it your program or your program's outcomes? Make time to deeply understand your organization's mission, vision, strengths, competencies, values and culture and most importantly the impact of your program or initiative. In addition, understand what you mean by program fidelity and quality standards. What are the non-negotiable parts of your program? What pieces contribute the most to its' success? With program variation there is always risk of mission drift.

Invest in your team. This kind of project will require openness to learning new skills and mindsets especially around managing change and ambiguity. Work to ensure an environment that is a "safe container" to make mistakes and learn. Find a funder that is willing to take risks, is open, flexible and willing to work along side you. Generate enthusiasm with potential champions, end-users and partners. Perhaps most importantly, understand the changing nature of your environment and the eco-system in which you operate.

## Introduction

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As part of the Lyle S. Hallman Foundation Children’s Initiatives, Project READ Literacy Network’s Families First Waterloo Region Project received funding over two years to develop and test strategies to scale the impact of Get Set Learn-one of our successful family literacy programs. As well as impacting more families across the Region, the goal was to develop strategies that would contribute to sustainability for the program and organization.

This report is one of the deliverables of the project. We hope that documenting our experiences, reflections/lessons learned will be helpful to other organizations or groups considering this kind of work. We can particularly contribute what was learned from a “smaller organization” point of view however, most of this information can be useful to organizations of any size.

There is a growing body of knowledge around scaling social impact initiatives—and it is hoped this report contributes in a small way. It was and is a “made- in-Waterloo Region” experience and so naturally is the result of the collaborative work of many individuals, organizations and community stakeholders. We are grateful to the Lyle S. Hallman Foundation who supported this innovative and challenging project and continues to support this journey as it moves forward to an implementation phase. Gratitude as well to Capacity Canada who worked along side us and facilitated this work in many different ways throughout the course of the last two years. In particular, thanks go to Sandra Hanmer, Megan Conway, Jennifer Vasic and Matt Miller.

We are additionally grateful to our Project Reference Group who provided us a great sounding board and connected us to the wider community. They are Laura Dick, Kim Krueger-Kischak, Dorothy Snyder, Robin Crank, Sarah Loat, Karen Morgan-Bowyer and Fauzia Mazhar.

We are happy to connect with other organizations who, after reading this report, might have questions about our project.

## Background

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Project READ Literacy Network is an umbrella organization of literacy and essential skills providers in Waterloo-Wellington. We are a dynamic community collaboration devoted to increasing literacy levels through our work with community agencies and systems. We achieve this through knowledge building, knowledge exchange and assessment and development of knowledge and skills.

Founded in 1988, our agency provides information to the public, research and development to the literacy field, and support to Literacy and Basic Skills agencies in our region and across Ontario. We receive core funding from the Ontario Ministry of Training Colleges and Universities (MTCU) and time-limited project and program funding from the federal Office of Literacy and Essential Skills (ESDC), Region of Waterloo, foundations and corporate sponsorships.

We are a doorway to literacy and Essential Skills services offered in our Region. We develop, in collaboration with the local Literacy & Basic Skills (LBS) agencies, training solutions to meet the literacy needs of our citizens. Members of our network include literacy agencies, English as a Second Language programs, libraries, employment training organizations, and other concerned individuals and groups.

Project READ provides many services to the public and to our network members including educational assessments, Research and Development, Clear Writing and Literacy service planning (community development).

Since 2003, we also provide, as a direct service, community-based family literacy programming. We have several family literacy programs including Get Set Learn: a program for families with children (birth to six) who live on social assistance, Get Set Learn Afterschool: a program for families (birth to 12) delivered in high needs neighbourhoods (schools and community centres) and Learning Together: a program and workshop series for grandparents and grandchildren that addresses the unique learning needs of grandparents who are heavily involved with the lives of their grandchildren. In addition, we have developed two targeted family literacy programs for newcomers.

We believe that literacy and Essential Skills are necessary to function independently to reach an individual's full potential. Low literacy affects many aspects of life including health, income, employment, parenting, education or training and daily living.

Low-literacy levels in Waterloo Region are staggering...and getting worse. One in 4 or 24% of adults in Waterloo-Wellington 16 years and over fall into the lowest level of literacy. They experience daily challenges such as: trouble filling out a catalogue order form; difficulties following dosage instructions on medicine; completing a job application form; using online banking; completing the online application for Employment Insurance; and reading health and wellness information. (Project READ Literacy Network)

Literacy and education are important social determinants of health. (Government of Canada 2019) Individuals with higher education and literacy levels have better health outcomes but also a strong association with better incomes, better and more secure employment and working conditions. Education helps people move up and out of poverty.

The levels of low literacy in Waterloo Region and indeed across Canada have not improved since they began to be measured. This creates a multitude of social problems in communities and also has implications for workers, employers and our economy as, "...more than 40% of Canada's workforce does not have adequate levels of the literacy skills needed to learn efficiently and be highly productive in most jobs. Without this ability, many Canadians will not be able to keep their jobs-or find new ones-and a growing number of employers will not be able to find workers with the skills they need.... compounding the problem is that the likelihood of low-skilled jobs being automated or moved to other countries is growing: the need to upgrade skills in low skilled workers is crucial." (Canada West Foundation p. 2)

Since 2003, Project READ's work in family literacy has proven to be part of the solution to our low literacy problem. Our programs help break the cycle of low literacy where it begins--in families. Within our organization we knew how effective these programs were but efforts to grow were limited by patchwork funding, funder eligibility requirements, and changes in governments' approach to funding literacy. Also many funders would support children's programs, parents' programs but were reluctant to support programs for entire families. However, more families in our community needed family literacy programs and we wanted to find ways to grow and get around some of these barriers.



Since 2003, the Region of Waterloo Social Services has funded our Get Set Learn program for families living on social assistance. This support helped us create a dynamic, effective program with years of evidence of significant impacts on families. More recently, thanks to funding from the Ontario Trillium Foundation, we secured resources to pilot our program in other populations and formats. Parents from rural, newcomer, working poor and middle class families all reported improved outcomes. Families also benefitted from family literacy outcomes delivered in different formats such as family literacy nights at schools and parent-only workshops delivered in community settings.

At the same time, we decided that replicating our program in new geographies and populations was not creating sustainability for the organization nor was it healthy to bring a program into a community only to withdraw at the end of a project. And also what did it mean to create real sustainability? How? What did mean to scale? How? And so the Families First Waterloo Region Project was born...and set us on a path of inquiry and learning.

## What Does It Mean to “Scale”?

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In the early phases of our project we learned about scaling. There are many ways to scale something or grow it...and a variety of pathways. Our project defined scaling as, “A growth process that focuses resources to help organizations achieve greater impact.” The practice of scaling in Canada has, “...evolved from earlier, simpler conceptions to a much more nuanced understanding.” (Riddell and Moore p.32). Before this term came into being, organizations went about this business without naming particular theoretical approaches. They simply tried to do more of a good thing. They replicated or reproduced their program or initiative in new geographies or new demographics. However, if replicating your program this way is not sustainable (or preferable) there are other strategies or pathways to grow. These could look very different from your existing program or initiative but might deliver outcomes equally as well or be more suited to the strengths and capacities of your organization as you try to expand.

As we created this project, we looked at a variety of ways to scale impact that involved new models or service delivery approaches while creating sustainability. Early ideas or prototypes to scale impact of family literacy included:

- Expanding Get Set Learn (GSL) to new demographics
- Coaching and mentoring
- Licensing and segmenting GSL Curriculum
- System mobilization

As we explored various Idea Areas, frameworks from the literature helped make sense of what were learning. Jeffrey Bradach and Abe Grindle’s article in the Stanford Social Innovation Review, “Transformative Scale: The Future of Growing What Works.” was one of these. Bradach and Grindle proposed that there are nine strategies to achieve transformative scale through organizational and field-building pathways.



For full article click:

[https://ssir.org/articles/entry/transformative\\_scale\\_the\\_future\\_of\\_growing\\_what\\_works](https://ssir.org/articles/entry/transformative_scale_the_future_of_growing_what_works))

This framework helped us understand that there are a wide variety of strategies and pathways to scale impact. Some maybe more aligned than others with your initiative or organization. In addition, they are not prescriptive ideas but can be combined and adapted.

## Summary of Strategies for Transformative Scale

### Organizational Pathways

#### 1. *Distribute through existing platforms*

- Hitch a ride with an existing network that can replicate in many locations
- Use a national or regional not-for-profit like the YMCA or Boys and Girls Clubs
- Potential for creating a more sustainable funding model using a large network
- Challenges include finding this large network, ensuring consistent results and creating a network-wide approach to measuring outcomes

#### 2. *Recruit (and train) others to deliver the solution*

- Teach a collective of unrelated organizations to deliver your successful programming
- Increases numbers of participants reached
- Must build a new set of capacities to enable other organizations rather than direct service delivery

- Need to be clear on program fidelity and what is required
3. *Unbundle and scale up the parts that have the greatest impact*
    - Identify essential components that contribute the most to your impact
    - Break those out and take them to scale
    - Can create cost savings
    - Potentially less effort
    - Need to ensure new model works and creates similar outcomes
  4. *Use technology to reach a larger audience*
    - Lower cost pathway to grow reach and impact
    - Good example is the Khan Academy
    - Organization can remain small but create big impact

### **Field-Building Pathways**

5. *Don't just build organizations and programs, strengthen a field*
  - Critical mass of organizations and individuals work together as field
  - Work together to raise awareness of an issue, generate support or funding
  - Improve performance of existing players already committed to the field
  - Develop and disseminate standards, research and tools
  - Expanded use of technology, data and shared performance metrics is a powerful force in building a field
  - Challenge is that it takes a long time to play out
6. *Change public systems*
  - Change a critical part of the system or the system itself
  - Inspire change by demonstrating a better way
  - Inject new leadership
  - A good example are initiatives that seek to change the juvenile justice system by showing that rehabilitation has lower recidivism rates than jail
7. *Embrace the need for policy change*
  - Governments enact policies or legislation that changes the nature of the issue
  - This kind of support can change an initiative from a pilot project to a national program very quickly
8. *Don't ignore for-profit models for scale*
  - Create a for-profit business model
  - Good examples are social enterprise models
  - Classic example is micro finance programs in developing world
  - Could require a combination of non profit, philanthropy and government support
  - Challenges include balancing need for creating both profit and social impact
  - Need to better understand how for profits can contribute to solutions to social problems

### 9. *Alter people's attitudes, beliefs and behaviours*

- For some issues creating scale involves change to create new social norms
- Involves grass roots organizing and social marketing tools
- Good examples are drinking and driving and recycling
- Understand “nudge theory” –helps people make better choices through small scale behaviour change

An article prepared for the JW Connell Foundation by authors Darcy Riddell and Michelle Lee Moore, “Scaling Out, Scaling Up and Scaling Deep: Advancing Systemic Social Innovation and the Learning Processes to Support it” suggests that we think about scale using somewhat different terminology.

“Scaling out” involves impacting greater numbers through replication (greater numbers or geographies) or spreading principles in new contexts. “Scaling up” involves policy or legal change efforts, new policy development and partners. It reflects the notion that the roots of social problems transcend particular places. “Scaling deep” on the other hand involves spreading big cultural ideas, investing in transformational learning and communities of practice. (Riddell and Lee, p.4)

Pathways and approaches to scaling outcomes are indeed complex. While early in a process it is important to understand these as discreet ideas, on the ground, they are always somewhat interconnected. Strategies to scale an idea or an initiative will often encompass several ideas or evolve from one to the next. We found in our project that this very thing happened. For example, while learning about scaling through a “train the trainer approach”, it was impossible not to think about it without referencing a system or imagining partnerships that would be necessary to make it successful. Nonetheless, it was important to give definition to what we were examining. Gaining a common understanding of theory is critical early work.

## **Our Learning Process**

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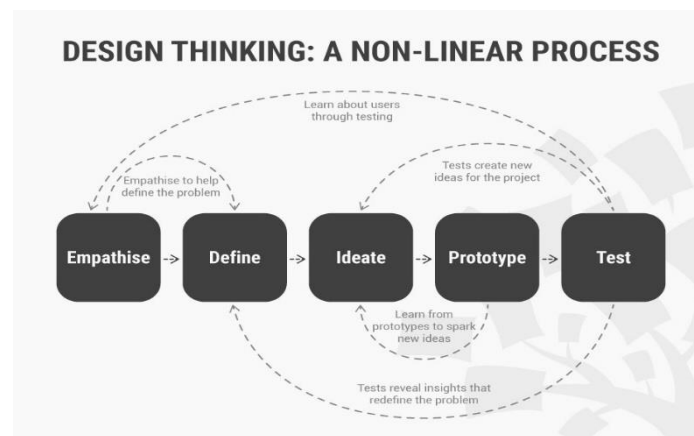
Over the two years of our project, our goal was to research and develop new strategies to scale the impact of family literacy across Waterloo Region. We started with a set of ideas that seemed, early on, like a good fit for our organization and created a process for learning about them. Working together with our consultants, Capacity Canada, we created a process (using Design-thinking and Developmental Evaluation), tools and a workplan to investigate the “Idea Areas”.

### **What is Design-Thinking?**

Design-thinking is the practice of design (typically the tools and approaches) by individuals without formal scholarly background in design. Design-thinking is a human-centred approach to innovation that uses concepts and tools of design to incorporate people’s needs, technology, and requirements for business success. It integrates what is desirable from a human point of view with what is technologically possible, strategically viable, and economically feasible to provide creative tools to address challenges. This approach “utilizes elements from the designer's toolkit like empathy and experimentation to arrive at innovative solutions. By using design-thinking, you make decisions based on what future customers

really want instead of relying only on historical data or making risky bets based on instinct instead of evidence.”( [www.IDEO.com](http://www.IDEO.com) ).

For example, design-thinking has been used to reengineer nursing staff shift changes in hospitals. By closely observing frontline staff during actual shift changes, and combining this with brainstorming and quick prototyping, the health care provider was able to streamline information and create more time for nursing, better patient care, and more satisfied nursing staff (Tim Brown, 2008). Another example of this approach was used at Shimano, a bicycle manufacturer, which learned why 90% of American adults did not ride bicycles. After learning that the complexity, cost, danger, and intimidation of buying bicycles were the main factors why adults chose not to ride, the company developed a “Coasting” bike, a new category of cycling, and developed new sales strategies and a public relations campaign to identify safe areas for cycling (Tim Brown, 2008).



Source: <https://www.interaction-design.org/literature/article/5-stages-in-the-design-thinking-process>

Design-thinking is solution-focused and action-oriented towards creating a preferred future of what could be – it is not problem-based. Overall, it tries to inspire creativity in order to take an abstract idea and create something with it, continually evolving, through a series of activities that allow idea generation and adaptation to occur quickly. This approach uses a design mindset and usually involves a five-stage process:

- (1) empathize
- (2) define,
- (3) ideate
- (4) prototype
- (5) test.

The first stage (empathize) of the design-thinking process is to achieve an empathic understanding of the problem that needs to be solved in order to set aside any assumptions about the issues and gain insight into clients/end users and their needs.

The second stage (define) is to define the problem based on the information gained during stage one in order to generate ideas about features, functions, or other elements that will allow designers to solve the problem.

The third stage (ideate) is where as many ideas as possible are generated in order to ‘think outside the box’, identify new solutions, and view the problem from different ways.

The fourth phase (prototype) is where a number of inexpensive, experimental, scaled-down versions of a program, product, or service are produced and tested within the team or organization in order to adapt, modify, accept, or reject the idea on the basis of user experiences.

The fifth stage (test) is where the complete idea is rigorously tested using the best solutions identified during prototyping and can be redefined based on the results of this stage.

These stages may not always occur in sequence and contribute to the creation of the project – design-thinking is a non-linear process and these stages may be revisited at any time or used in parallel with each other.

### **Why use Design-Thinking?**

Design-thinking allows organizations to ‘rethink’ their approach, services, and products that impact clients—the end users. This approach moves away from looking backwards at historical data to determine what services to provide and how to deliver them. For this project, design thinking enabled Project READ to utilize imaginative, human-centred thinking by focusing on three key aspects. First, using design-thinking, this project could invent a future in order to look at what clients want but do not have currently, to observe client behavior, and ask questions about clientele. Second, this approach allowed Project READ to test new ideas and services by prototyping and adapting in order to adjust in real time to see how clients responded. This reiterative process is beneficial in that modifications can be made quickly and at relatively low costs in order to create effective programming and services. Third, design-thinking then enabled Project READ to bring new services and programs to life by identifying opportunities, resources, partners, etc., based on the refined prototype(s) of programs and services created through the design-thinking process. Overall, design-thinking enabled Project READ to create a future that clients desire, rather than using historical data to anticipate client wants. Using this innovative approach allowed Project READ to develop creative solutions and consider what is technically possible, strategically feasible, and economically practical.

### **Why use Developmental Evaluation?**

Developmental Evaluation (DE) is an evaluation approach that can help social innovators develop social change initiatives in complex or uncertain environments. It is particularly suited to innovation, radical program re-design, replication, complex issues or crises. In these situations, DE can help by framing concepts, test quick iterations, tracking developments and surfacing issues. In our project we used DE to

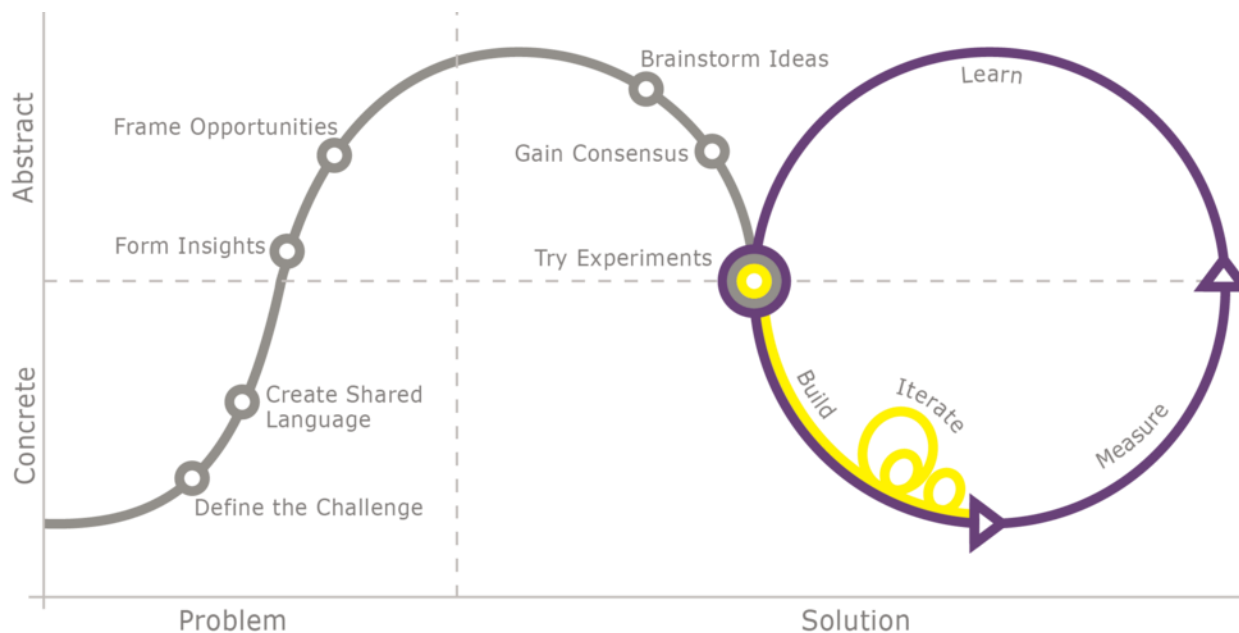
capture learning and help with decision-making. It is a good partner to design-thinking as it captures what is happening in ever-evolving environments. (Developmental Evaluation)

## Project Trajectory

In reflection, now that it is done, our project roughly followed the diagram below. Over two years we moved regularly from concrete to abstract in phases. In the early phases we defined challenges, created shared language, formed insights, framed opportunities and then moved to a more active phase where we implemented a workplan where prototype tests and various iterations were carried out. We designed the prototype tests, captured learning and in the end created an Implementation Plan from what was learned.

These prototypes and associated activities had to be planned but flexible so that evolution and development were possible. Learning how to “fail forward”, and “fail fast” was critical. This was complicated and chaotic and there were times it was a struggle to know where we were in the process. It was not easy to keep people informed and engaged with ideas that were changing quickly and in ways that were hard to define. The complexity made it challenging in many ways.

The activities that served as “prototypes” in each Idea Area were varied. Each time there was a face-to-face meeting, a focus group, a pilot project, a training session...almost anything where learning was happening was considered part of the activities in the prototype testing. Sometimes the activities were very labour intensive, like live pilots of our program. Sometimes they were a phone conversation. In addition to this, the prototype tests and associated activities were investigating ideas or strategies...not concrete items. This created complexity perhaps beyond what was imagined in the outset.



Adapted from <http://www.theleveragelab.com/camp-faqs-1>

## Defining the Challenge

Early in the project an Environmental Scan and Key Informant Interviews were completed. The scan helped to better understand families in the community as it related to practising family literacy. Emergent learnings were that families knew the importance of practicing family literacy but there were various challenges that made it difficult-primarily time, access and technology. However, there was energy along with creative ideas, solutions, and opportunities for supporting a robust family literacy system. The Key Informant Interviews were an opportunity to hear from key stakeholders and share information needed to support early phase decision-making, clarity related to the workplan and ultimate project aims.

## Create Shared Language

Also early on, it was vital to come to a common understanding of terms that would be used throughout the project. This took much more time than initially thought as the terms had different meaning for different groups of people involved in the project. Eventually we reached agreement on these terms and an overall vision for the project.

**Project Vision:** Learning together as a family opens up a world of opportunity and creates connections within families and in communities.

**Family literacy:** Families reading, talking, writing, doing math, and playing together to improve skills for learning and life.

**Sustainability:** Mobilizing people, relationships, resources and capacity to address community needs into the future.

**Scaling:** A growth process that focusses resources to help organizations achieve greater impact

## Form Insights and Frame Opportunities

In addition, in early phases of the project, “prototypes” to learn about scaling impact were built. Later they began to be referred to as “Idea Areas” and the “prototypes” as the activities that were carried out in order to learn. The Idea Areas that were scoped out at that time were: “System Mobilization”, “New Audiences and Technology”, “Training”, “Licensing and Segmenting”, “Partnership Delivery” and “Marketing and Branding”. These “Idea Areas” were somewhat grounded in the scaling pathways we had read about in the literature.

Overall, we wanted to learn how these idea areas might:

- Scale the outcomes of family literacy
- Contribute to sustainability
- Be viable and reasonable for us as a small organization
- Look at implementation phase

In addition, the Idea Areas needed to be strengths-based and grow from existing capacities within our organization. These were identified as:



- Local subject matter experts in family literacy, adult literacy, adult education and intergenerational learning
- Extensive experience in systems mobilization (adult literacy sector), curriculum writing and training, working with marginalized populations
- Connections to many community collective impact initiatives
- Strong and supportive board of directors
- Highly skilled and motivated staff team
- Suite of proven-effective programs and workshops
- Program assets (curricula, workbooks, materials)
- Existing partnerships and relationships in the community (local and provincial)

### Brainstorm Ideas

From these overall learning goals, ideas of what we wanted to learn from each area individually were generated. A series of prototypes (activities and outputs) were designed with a goal to produce this information. The chart below summarizes this.

Summary of Learning Plan			
Idea Area	What do we want to learn? (specific to Idea Area)	Audience	Prototype Test-Activities/Outputs
<b>End User Testing</b>	<ul style="list-style-type: none"> <li>• What end users think/experience</li> </ul>	<ul style="list-style-type: none"> <li>• Past/current participants</li> <li>• Cross section of parents</li> <li>• Professionals</li> </ul>	<ul style="list-style-type: none"> <li>• 3 mini design sprints focusing on               <ul style="list-style-type: none"> <li>○ Peer to Peer Coaching/Mentoring</li> <li>○ Licensing/Certification</li> </ul> </li> <li>• Mini reports</li> </ul>
<b>Idea Area-1 System Mobilization</b>	<ul style="list-style-type: none"> <li>• How to become a support org to ELAWR</li> <li>• What the system looks like</li> <li>• Where the gaps and opportunities are</li> </ul>	<ul style="list-style-type: none"> <li>• ELAWR</li> <li>• Orgs who are part of the system</li> </ul>	<ul style="list-style-type: none"> <li>• Ongoing efforts with ELAWR</li> <li>• “Leave behind” templates</li> <li>• System Map</li> <li>• Host fall Literacy Breakfast</li> <li>• Evaluation and reflection</li> </ul>
<b>Idea Area – 2 New Audiences with a focus on tech</b>	<ul style="list-style-type: none"> <li>• Viability of family literacy outcomes in new audiences, formats and with different players</li> <li>• Effective outreach strategies to new audiences</li> <li>• New sources of income in different sectors</li> </ul>	<ul style="list-style-type: none"> <li>• Parents</li> <li>• Orgs with an app</li> <li>• St. Louis and other newcomer orgs</li> </ul>	<ul style="list-style-type: none"> <li>• App – product research and tech goal development-meet with YMCA First 2000 Days project</li> <li>• Research opportunities with a newcomer and literacy org audience</li> <li>• Pursue new partnerships and funding opportunities with St. Louis Adult Learning Centre</li> <li>• Mini reports</li> <li>• Evaluation and reflection</li> </ul>

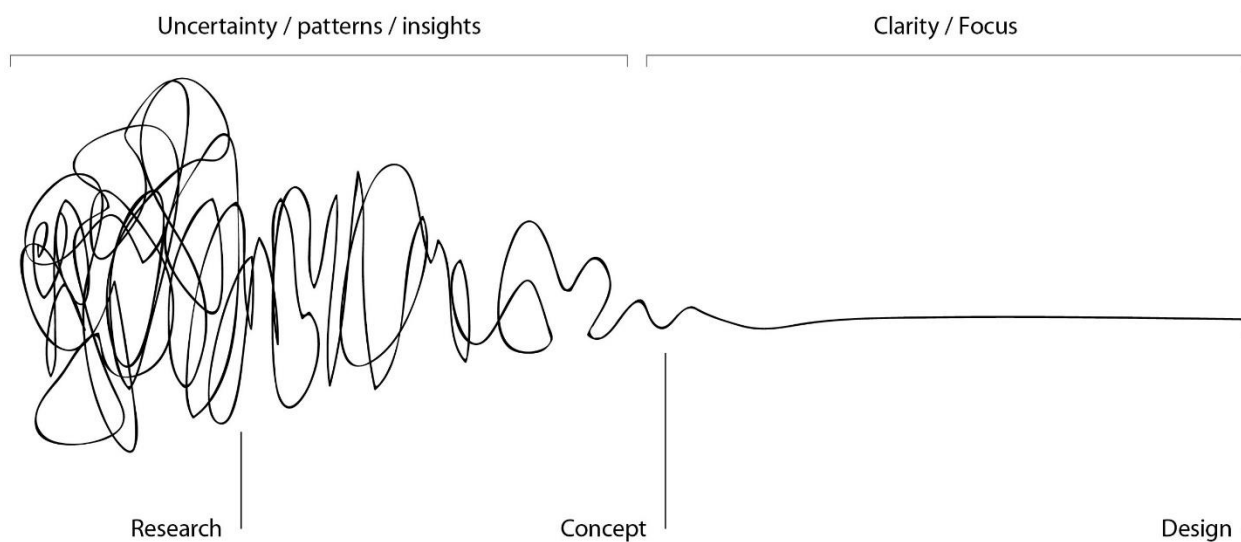
<b>Idea Area –3 Training</b>	<ul style="list-style-type: none"> <li>• What the appetite and need is for training others</li> <li>• Potential training models</li> <li>• How peer mentoring works</li> </ul>	<ul style="list-style-type: none"> <li>• Orgs and other professionals working with families and in literacy</li> </ul>	<ul style="list-style-type: none"> <li>• Market research</li> <li>• Webinar and online video preparation</li> <li>• Curriculum development</li> <li>• Mini pilot and report</li> <li>• Evaluation and reflection</li> </ul>
<b>Idea Area–4 Licensing and Segmenting</b>	<ul style="list-style-type: none"> <li>• What the appetite is for purchasing the curriculum and workbooks and/or becoming a licensed service delivery org</li> <li>• How to license others and what is needed</li> <li>• How much money could we make</li> <li>• What are the costs associated with licensing and developing quality standards</li> <li>• How to maintain program fidelity</li> </ul>	<ul style="list-style-type: none"> <li>• Stork Y and WPL Harper orgs</li> <li>• Families participating in program</li> <li>• Staff working in program</li> <li>• Staff in a coordination role</li> </ul>	<ul style="list-style-type: none"> <li>• Market Research</li> <li>• Full pilot WPL/Stork Family Y</li> <li>• Utilize online webinar from Training Idea area as a test for developing marketing strategy for selling workshops</li> <li>• Report</li> <li>• MOU</li> <li>• Evaluation and reflection</li> </ul>
<b>Idea Area – 5 Partnership Delivery</b>	<ul style="list-style-type: none"> <li>• What the appetite is for partner program delivery</li> <li>• Best practices and competencies for partnership building.</li> <li>• Work effort involved in partnership delivery</li> </ul>	<ul style="list-style-type: none"> <li>• The Literacy Group and Kinbridge CA</li> </ul>	<ul style="list-style-type: none"> <li>• Full pilot for GSL 2.0 with TLG</li> <li>• MOU</li> <li>• Report</li> <li>• Evaluation and reflection</li> </ul>
<b>Idea Area–7 Marketing and Branding</b>	<ul style="list-style-type: none"> <li>• What the other idea areas require from a marketing and branding perspectives</li> <li>• Learn about the costs associated with integrating websites</li> </ul>	<ul style="list-style-type: none"> <li>• Families across Waterloo Region</li> </ul>	<ul style="list-style-type: none"> <li>• Decision made to move activities to Implementation in project phase 2</li> </ul>

## Gained Consensus

The various groups involved in the project reviewed this plan and gave feedback. It was agreed that the results from these activities, using our DE tools, would provide the information we needed to learn about each Idea Area and enable decision-making.

## Try Experiments

### The Design Squiggle



Source <https://medium.com/macmillan-design/communicating-the-complexity-of-design-part-1-cynefin-6279f074ca9c>

Over approximately 18 months a workplan was implemented that consisted of a series of activities and a process to learn about the Idea Areas...the squiggle!

We built, iterated, measured, sweated, scratched our heads and evolved our original four Idea Areas to seven Idea Areas and then eventually into four strategies that we thought could scale impact of family literacy across Waterloo Region. Through our process we decided these Scale Strategies had the best potential to scale family literacy outcomes, contribute to sustainability both for the program and the organization, were viable and reasonable for us as a small organization and had substantial information to create an implementation phase. This is a short paragraph to explain a huge amount of work. It was a multitude of conversations, presentations, meetings, surveys, sense-making sessions, design-thinking workshops, reflections and interviews all with the purpose of learning, pivoting then crafting new strategies that would scale impact with sustainability. However, there were moments or decision points

that were significant and with the developmental evaluation tools to “sense-make” we made our way through the “squiggle” to the other side...from uncertainty to focus.

## Scale Strategies-Decision Points

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### Key Themes

Two reflection sessions were held, one with Capacity Canada’s consulting team and another with key staff from Project READ Literacy Network, to identify key decisions made throughout the project, that were most pertinent to moving the project forward, and to reflect on what was learned in relation to those decisions.

Each group identified various key decision points and discussed consequent learnings, from which the following key themes emerged:

### System Mobilization

- This was a foundational Idea Area and thus an important starting point (i.e., better internal understanding about what it means to mobilize a system; built confidence; provided early wins in relationship building that generated momentum to continue with this Idea Area and launch into other Idea Areas).
- Getting more familiar with what other stakeholders are doing – first through deepening relationships between Reference Group members and then with broader partners at the Literacy Breakfast – generated buzz and momentum.
- Saying “yes” to opportunities to talk about family literacy, literacy, and their linkages helped them put the system at the centre.
- Through this Idea Area the family literacy system was explicitly identified as one component of the literacy system. This recognition brought forth the question “which system, exactly, are we mobilizing?” (i.e., which system is the anchor?).
- Seeing beyond traditional partners in the non-profit and literacy sectors (e.g., business, government, etc.).
- Mapping end-users into the system and having people interact with them through the mini-sprints amplified the importance of end-users.
- Relationships are essential and complex; they require letting go of personal agendas, focusing on what is in the best interest of the whole, can be rebuilt, and enhance influence.

### Project Methodology and Approach

- Initial and ongoing fear of taking risks, ambiguity, and failing (forward and fast), (i.e., fear it might compromise brand, reputation, and/or potential funding opportunities, uncertain how to communicate failures – learnings).
- However, Project READ expressed increased comfort with failing forward. As confidence as subject matter experts increased, there was greater comfort in failing forward also. They also felt like the project provided some safety and flexibility for taking risks and failing, skills they can now transfer to other projects/activities.
- While failing is still hard, Project READ expressed a new belief that failing can also be seen as a success.

## Individual and Organizational Capacity

- In getting started it would have helped to generate greater clarity earlier on about communication channels, decision-making processes (i.e., what should be done via consensus vs. direction), expectations, project scope, roles and responsibilities of various stakeholders, including the board of directors, and accountability structure.
- In getting started it would have been helpful to identify strengths and limitations of various stakeholders, as well as establishing an ongoing communication process.
- Project READ's confidence to speak up and be persistent in raising awareness about literacy and family literacy grew as their unique position as content matter experts and others' lack of awareness/expertise in these matters became starkly clear. They realized they "don't have to apologize" for being persistent in speaking to their areas of expertise.
- Growth in individuals' curiosity and learner's mindset, as well as a growing organizational learning culture.
- Areas of further growth identified (i.e., launching more quickly from idea to action; become even more curious).

## Scaling

- Early scaling happened through system mobilization.
- Activities like the system mapping exercise, ongoing work with ELAWR, project lead reflections, coaching with neighbourhood groups, webinar with Elgin county, and more have helped Project READ challenge their comfort zone to explore scaling their family literacy expertise and services beyond individuals and families (e.g., neighbourhoods, train the trainer, mobilizing the system).

## Other

- Definitions created early were a useful lens through which to include/exclude Idea Areas, though might have aligned Idea Areas even further through definitions.

## Key Decision Points

### Project READ Literacy Network

- What prototypes to pursue
- System mobilization as first prototype
- Through first prototype decided to keep going with the mobilizing system
- Application for another grant
- Peer mentorship prototype
- Research on what the terms were
- Common understanding of language
- Scaling impact and scaling a program
- Prototyping scaling the program
- Environmental scan for decision making regarding populations to focus on
- "Prototype" to "Idea Areas" as way of describing what we were doing
- Established Idea Areas 4 to 7 to 4
- Choosing to do the mini design sprints
- Mini design sprints-were giant turning points in deciding on Idea Areas to take to implementation

- Research start and focus (e.g., surveys, data collection)
- Selecting the Idea Areas
- How to role out the Idea Areas
- What to focus in on for phase 2 (implementation) in next application
- Creation of work plans
- Being backbone for ELAWR
- Certify individuals rather than licensing
- Understanding what certification really is
- Other audiences – realization to broaden the focus – e.g. Francophone
- Okay to fail forward and fast (e.g. decision to not go with the app)
- Importance of clarity on TOR – roles, scope of responsibility, accountability,
- What our next step should be
- Progress of funder in terms of their acceptance
- Setting up project’s foundational pieces

### **Capacity Canada**

- # prototypes
- System mobilization before service delivery
- Mapping the system process
- Service delivery to individuals, organizations, and communities
- Mini-sprints to involve end-users
- Broad-based engagement for Environmental Scan
- Using design thinking prototypes with Overlap
- Recognition of limitations
- Leadership coaching with Project READ
- Detailing workplan
- Reference group restructuring
- Delegating deliverables to Project READ staff
- Capacity Canada check-in schedule
- Role clarity on team
- Nimble and flexible team

## **Scale Strategies for Implementation**

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With the support of our consultants, Capacity Canada, the following Scale Strategies were created and form the basis for an Implementation Plan in Phase 2 of the project.

- Families Together: Project READ Mobilizes and Improves Family Literacy System
- Families Supporting Families: A Leading Peer Mentoring Program
- Learning Together: A Community Development Approach
- Family Literacy Certification and Training Program

They are the final results from our Project and are detailed in the appendices.

## Family Literacy System Map

This map was created with the help of the Reference Group and staff teams and was critical in helping us to visualize the Family Literacy system and where there were gaps, strengths and connections.



## Are You Going to Scale?

If you are thinking of embarking on an initiative to scale your program, keep in mind the following. Issues of funding, capacities, capabilities and leadership are the same whether large or small.

### Laying the foundation

- Myth. Scaling is, “an amorphous concept with no clear definition or discrete path for achievement.” Frameworks for scaling exist and there is a significant body of literature. Do your research and find a framework that suits your organization and project. (Hurst. Demystifying Scaling: Part 1, p. 2)
- Determine what is being scaled. Is it your program or your program’s outcomes? One leads to scale through replication and the other leads to scaling outcomes through program adaptations.
- Surface essential features of the program you want to scale. Perhaps it is not the whole program but parts of it.
- Leverage organizational strengths to create your scale strategy.
- Understand what success means to you and create a vision for the future. (Bradach and Grindle, pp. 11-12).
- Lay the right foundations-people, systems, infrastructure. (Worsham, Clark and Fehrman, p.2)
- Do you have an annual and strategic plan? How does a scale initiative fit in to this?

### **Deeply understand your organization and program**

- Do you understand your organization’s strengths? Complete a SWOT analysis and understand strengths and gaps.
- Do you understand your organization’s core competencies-areas you are exceptional? (Hurst. Demystifying Scaling Part 2, p. 2)
- Do you have Guiding Principles and Values? They will be important anchors in your process.
- Do you understand your organizational culture? Surface how will it might impact your scale growth strategies? (Bradach, p. 20)
- Does your program have clear evidence of impact? Do you have a logic model and theory of change?
- Do you have tried and true evaluation and measurement tools and processes in place? Can you track key performance data? (Bradach, p. 20)
- Do you have buy in from senior leadership? Scaling projects require significant resources and pull attention away from existing priorities. (Cooley and Ved, p.33)
- Does your team have the right skills to manage a project involving ambiguity, risk and complexity? Keep in mind a new scale strategy might require different people, training investments, new technology or more sophisticated financial management. (Bradach and Grindle, pp. 11-12)
- Do you manage costs effectively and understand how they will change with expansion?
- Do you have potential champions, partners and networks that will be vital to leverage in your scale effort?

### **Find a funder willing to take risks with you**

- This kind of project is complex. It will be important to find a funder willing to be a “catalyst” and willing to take risks with you.
- This work may require research into new sources of funding or funders interested in innovation.
- Build relationships and engage them in your process.
- Ask for help and use their community connections.

### **Be open to learning new skills and mindsets**

- Scaling projects are rarely linear or structured. They are more about managing change and ambiguity, “failing fast” and “failing forward” and being flexible.
- Create an environment that is a “safe container” for failing, encourage risk-taking and support the creation of a “growth mindset” (Dweck, p. 13) in staff and stakeholders working in the project. Treat mistakes and failures as opportunities to learn.
- Develop skills associated with being “external facing” and relationship-building.
- Understand the importance of capacity building and learning no matter what kind of scale.
- Use and learning new tools e.g., Design Thinking and Developmental Evaluation.
- Celebrate successes.
- Create a positive climate, a sense of the possible, of breaking new ground and excitement.
- Look to what is working and build on strengths.



### **Establish benchmarks for program fidelity**

- Articulate and standardize key components of your operating model so that you can decide what is important in a scale strategy.
- Define for yourselves what is program integrity/fidelity/quality standards and what is non-negotiable. (Riddell and Moore, p. 15)
- With program variation there is potential for mission drift. Make sure you consider how mission and guiding principles are embedded in your growth process. Variations in the model may diminish or change outcomes. (Bradack, p. 23)

### **Develop common understanding**

- Develop common understanding of goals, processes and terminology.
- Be exceptionally clear on project scope and what you define as success.
- Track project progress and create systems for feedback and communication.
- Keep photos, a visual timeline, a log of reflections, ideas and decisions as you go along. It will enable decision-making and communication

### **Invest in team building**

- Develop trust.
- Create an atmosphere of collaboration and support.
- Develop positive relationships and partners.
- Invest in training and development of staff involved in scale project.

### **Create support systems**

- Scaling is a long game...prepare and steel yourself and provide structures and systems of communication that support those involved.
- Convene other grantees/orgs to share insights. Who else is doing similar kinds of projects?
- Create networking/sharing/community of practice/peer-based learning with others doing similar projects.
- Projects such as this one where there is experimenting, risking, learning and failing have ups and downs. When there are times of clarity and of confusion, we need good leadership. Its important to use stay focussed on the potential: stay curious, stay positive, keep showing up, don't lose faith in the value of what you are trying to do.

### **Connect with your external environment**

- Understand the value of developing relationships and partnerships in the environment.
- Tap into knowledge-base and expertise of networks.
- Understand your environment and community-what are the needs and gaps? What is changing?
- Generate enthusiasm with potential champions, partners and networks and engage them throughout the project.
- Engage potential beneficiaries of your work in the process (clients, partners, funders, community tables, politicians).
- Consider recruiting a Reference or Advisory group with professionals who can give feedback or make community connections for you.

## Conclusion

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In conclusion, it might be important for the benefit of others, to highlight key success factors for a scale project.

Be crystal clear you see the need, can demonstrate the need and are committed to the idea of scaling your program or initiative. On the outside, it may not seem that complex...but it is. A wide variety of factors, skills and mindsets are necessary to arrive at a scale strategy that is a good fit for your organization. Think deeply...surprising features of your organization (such as culture and values) or community maybe key factors in your decision-making processes and results.

Human-centred design is a very powerful tool for understanding your work more deeply and gaining new perspectives. We learned from listening to others who impact or are impacted by our work. A diverse range of perspectives...from stakeholders in other systems to families who receive our service to organizations in different parts of the country who share our desire to bring family literacy to more families were critical as we learned and developed our ideas.

Cultivate an environment where people get comfortable with taking risks, “failing forward” and learning. The concept is good in theory but until we are face to face with it, we don’t realize how programmed we are to get things right the first time. Create “safe containers” for experimentation and failure.

Create a community of sharing and support amongst the people working in the project. Share your questions, your fears and create a climate of trust. This kind of work is not for the faint-of-heart. There are times when the process becomes confusing and chaotic. Stay reflective and open to what you are experiencing and learning.

Our community: individuals, other agencies and stakeholders gave generously of their time and expertise to our project -- the “barn-building” culture is alive and well in Waterloo Region. The significant investment in community engagement in our project and cultivating relationships and partnerships were critical to our results and outcomes.

We are thrilled that the results of our project and the support of the Lyle. S. Hallman Foundation have allowed us to move our Scale Strategies from ideas to reality with a new implementation project. It was hard work. It was demanding. It brought people together and surfaced new ideas. It forced us to look inward and reflect on what we were good at and what was possible. We are grateful to be able to serve more families across our Region and help them create more literacy rich homes and get ready for school.

Joanne Davis  
March 2019

# Appendix 1 Families Together

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CAPACITYCANADA

## Families Together: Project Read Mobilizes and Improves Family Literacy System

### Family literacy

Families reading, talking, writing, doing math, and playing together to improve their skills for learning and life.

### Sustainability

Mobilizing people, relationships, resources, and capacity to address community needs into the future.

### Scaling

A growth process that focuses resources to help organizations achieve greater impact.

### The Challenge

Many organizations and groups have been working to help people improve literacy rates across Waterloo Region for many years now. Sadly, many in Waterloo Region still struggle with literacy skills.

Low-literacy levels in Waterloo Region are staggering...and getting worse. One in 4 or 24% of adults in Waterloo-Wellington 16 years and over fall into the lowest level of literacy. They experience daily challenges such as: trouble filling out a catalogue order form; difficulties following dosage instructions on medicine; completing a job application form; using online banking; completing the online application for Employment Insurance; and reading health and wellness information.

Our work demonstrates that there are many organizations working to improve early literacy adult literacy but very few link and integrate all of these services in a collaborative coordinated way. And with so many organizations working to address the issue without coordination or planning, their efforts will be diminished.

### Description

Families Together is our answer to this problem. Families Together is a coordinated systems leadership approach that pulls together early, family and adult literacy providers in a coordinated way to address family literacy issues. We provide leadership, education, planning and enhanced communication between literacy service providers who serve individuals from cradle to grave. We do this by providing community leadership on family literacy through research on the topic, hosting joint events between adult and early literacy providers and gathering input from stakeholders about needs that are currently not being met.



## Rationale

There will be a significant push in the coming years to “move the needle” on literacy as it is a key focus area to improve child and youth wellbeing. Project READ is well positioned to lead this work. Project READ has a solid track record of coordination and planning, especially leading adult literacy planning in Waterloo Region. Project READ also has experience providing backbone support to the Early Literacy Alliance of Waterloo Region. We understand the importance of coordination and planning and have recognized expertise in these areas.

## Need

This work is critical to improving literacy rates in Waterloo Region. We want to continue to play the critical role of bringing diverse literacy stakeholders together to find solutions that will improve the efficiency and effectiveness of what we do.

## Users

Organizations that provide service to young families in Waterloo Region will be the primary users of this program as will families, children and adults across Waterloo Region.

Systems Mobilization   <i>The intersection of worlds and the literacy trajectories.</i>					
Inputs	Outputs		Outcomes		
	Activities	Participation	Short (6-12 mos)	Medium (1-2 years)	Impact (3-5 years)
Funds	Stakeholder meetings (one-on-one & group)	Literacy service providers	Increased awareness of: <ul style="list-style-type: none"> <li>Project READ</li> <li>The Families First Project</li> <li>Phase II program offerings</li> </ul>	Operationalization of system leadership team	Connected & integrated (family) literacy systems
Personnel		Non-profits			
Space	Webinars	Municipal governments	Improved understanding: <ul style="list-style-type: none"> <li>Literacy &amp; basic skills, generally and in Waterloo Region</li> <li>Family Literacy</li> <li>Impact of low literacy on individual, community, &amp; society</li> </ul>	Expansion of cross-sectoral partnerships	Collective Impact Strategy established
Office supplies	Training	School boards			
Web access	Community education sessions (e.g., Literacy Breakfast)	Post-secondary Institutions	Increased skills in: <ul style="list-style-type: none"> <li>Storytelling about (family) literacy</li> <li>Practicing family literacy</li> </ul>	Greater budget allocation for literacy at Regional Government	More families in the Region benefitting from family literacy
Systems map	Materials (e.g., pamphlets, brochures)	Private sector			
	Social media			Increase in program referrals, incl. GSL for new audiences	
				More requests for (family) literacy training	
Assumptions/External Factors					
System mobilization is foundational to solving complex social problems   The literacy system in Waterloo Region needs to connect and integrate further   Unsuspecting players (e.g., private sector) should be involved in system mobilization   Relationships are at the core of mobilizing systems   Project READ is an expert in (family) literacy   Smart Cities is interested in focus on literacy   Ongoing system transformation (e.g., ELAWR, EarlyON)					
<i>Learning together as a family opens up a world of opportunity and creates connections within families and in communities.</i>					

Inputs/Outcomes



# Appendix 2 Families Supporting Families

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CAPACITYCANADA

## Families Supporting Families: Project READ develops leading Peer Mentoring Program

### Family literacy

Families reading, talking, writing, doing math, and playing together to improve their skills for learning and life.

### Sustainability

Mobilizing people, relationships, resources, and capacity to address community needs into the future.

### Scaling

A growth process that focuses resources to help organizations achieve greater impact.

### The Challenge

Many parents feel a stigma and negative emotions when acknowledging a lack of literacy skills. Feelings of social isolation, loneliness, shame and fear often accompany an inability to read. And the negative effects of not being able to read extend well-beyond parents – children of parents who cannot read face a series of challenges as well and are often not prepared for school and do not perform as well when there.

Parents, although well-meaning in their desire to improve their literacy skills and help their children, face a number of barriers to building and improving their literacy skills. They identify a lack of time, lack of support for other siblings and an uncertainty as to where to go given existing barriers. Project READ has offered targeted family literacy programs for years; however these programs only reach a small number of participants and have limitations in terms of length and frequency of support.

### Description

Families Supporting Families addresses this unique problem through a proven peer mentoring program. Through data collected during our design sprints with past and current family literacy program participants we learned that peer mentoring is already happening organically and informally among families. There was also specific interest in participating in a peer program as a way to gain skills, engage in community and help other families...

it was starting to become clear that a peer mentoring model would be a good choice of strategy to scale the impact of family literacy.

### Users

Over the next two years, 20 Peer Family Literacy workers will engage with over one-hundred families to support parents' skills and confidence working with their children. Parents stretch their own literacy skills. Children are more ready for school. We will train and coach the Peer Workers them and help them to learn these important mentoring and facilitation skills and we will work with over thirty parents and over fifty children to spread this approach across neighborhoods that have the greatest literacy challenges.



## Rationale

Our community is home to several other successful peer programs: Parenting Now's Experienced Parents, the Region of Waterloo Peer Health Workers and Peer Nutrition Workers. We have already been offered supports in terms of documents, manuals and information sharing from these programs. Our participants in Get Set Learn also told us they would like to work with us for longer to improve their literacy skills in a more informal way and with peers and social connections they make during the program. By supporting this informal learning model, we also intend to not only build literacy skills in participants but also employment skills in the mentors themselves.

## Families receiving the service:

- Reduces transportation barriers
- Reduces complexity
- Helps with system navigation if it comes to them
- Enables participation
- Tailored to needs of the family
- Easy on time – appointments could be scheduled for client
- Socialization for kids
- Flexible location and timing
- Normalize parenting challenges

Peer Coaching, Mentoring & Training		Families helping families.			
Inputs	Outputs		Outcomes		
	Activities	Participation	Short (6-12 mos)	Medium (1-2 years)	Long (3-5 years)
Funds	Program development	Neighbourhood Associations	Increased understanding: <ul style="list-style-type: none"> <li>• Peers' capacities &amp; needs to deliver peer coaching</li> <li>• Appetite for peer mentoring across the community</li> </ul>	Expansion of peer mentoring to other neighbourhoods/organizations etc.  More peers employed as GSL facilitators	Self-sustaining family literacy supports in place  Increase employment rates
Food	Training manual	Community Centres			
Transportation	Human Resources Planning	Faith Communities	Increased knowledge: <ul style="list-style-type: none"> <li>• Best practices in training &amp; supporting peers</li> <li>• Best practices for evaluating peer models</li> <li>• Risk management considerations</li> </ul>	Increased sense of belonging, connection, & confidence reported by peers	Challenging deficit perspective of people and neighbourhoods of low-income
Personnel (e.g., admin & peers)	Evaluation & learning plan	Municipal Governments			
Space	Marketing & Communications Plan	School Boards	Increased skills: <ul style="list-style-type: none"> <li>• Training &amp; supporting peer mentors</li> <li>• Peers' leadership, teaching, and case management</li> </ul>	Improved employability, leadership, and communication skills reported by peers	
Office supplies	Policies and procedures	Non-profits			
Cell phones		Literacy service providers			
Training		Employment services			
		Service sector			
<b>Assumptions/External Factors</b>					
Peers are already doing this work informally   Peers want to learn from peers   Peer model embraced by community through KW Counselling study "Exploring the Future of Parenting Education."   Peers are experts					
<i>Learning together as a family opens up a world of opportunity and creates connections within families and in communities.</i>					

Inputs/Outcomes

## Peers themselves:

- Makes extra money
- Potential first steps towards employment
- Learn to problem solve daily barriers to work
- Makes connection with others
- Help with systems navigation
- It's education, training, and IT support
- Builds self-esteem and self-worth
- New friends
- Helps with childcare
- Build skills (good for finding jobs)
- It is evidenced-based
- On-going learning for peer
- Get adult time and interaction
- Builds broader outcomes beyond family literacy
- Reduces isolation





# Appendix 3 Learning Together

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CAPACITYCANADA

## Learning Together: A Community Development Approach

### Family literacy

Families reading, talking, writing, doing math, and playing together to improve their skills for learning and life.

### Sustainability

Mobilizing people, relationships, resources, and capacity to address community needs into the future.

### Scaling

A growth process that focuses resources to help organizations achieve greater impact.

### The Challenge

Many newcomers to Waterloo Region want to improve their literacy skills and lack resources and supports to do so. Literacy scores are lowest in neighborhoods with high levels of newcomers and also in neighborhoods with high poverty rates.

Newcomer parents in particular are looking for skills to navigate the school system, to support their child's education and to have enhanced literacy skills to support employment. Beyond newcomers and those living with limited financial means, there are countless other user groups within Waterloo Region with an appetite to improve their literacy and specifically their family literacy capacities. A one-size-fits-all approach won't work for these diverse possible family literacy clients.

### Description

Learning Together is both an approach to work with different audiences as well as the programs and services tailored to meet new audience need. Learning Together will provide customized coaching and support services to a broad array of clients to help them identify their family literacy needs as well as the tools and supports required to do so.

It will provide a series of coaching services to identify the family literacy problems and to identify possible family literacy supports that will meet these emerging needs. It will tailor family literacy programming to meet the needs of newcomers, the working poor, seniors and grandparents along with a broad range of other community groups and demographics.



## Rationale

Project READ has been excited by the interest from a variety of different user groups with an interest in helping to meet family literacy needs. These include neighborhood groups, youth serving organizations, newcomer and reception services along with counselling and community groups. Working alongside these unique users in a tailored and focused way will allow us to co-create solutions that best meet these unique user needs.

**Learning Together | A Community Development Approach.**

Inputs	Outputs		Outcomes		
	Activities	Participation	Short (6-12 mos)	Medium (1-2 years)	Long (3-5 years)
Funds	Modify curriculum	Families: <ul style="list-style-type: none"> <li>• With ESL</li> <li>• Indigenous</li> <li>• Francophone</li> </ul>	Increased awareness: <ul style="list-style-type: none"> <li>• Family literacy</li> <li>• Navigating the school system</li> </ul>	Increase in program referrals	Families learning together
Space	Modify training program & materials	Partners (e.g., neighbourhood associations, libraries, employment services, non-profits etc).	Increased knowledge: <ul style="list-style-type: none"> <li>• Family literacy</li> <li>• Parents as first teachers</li> <li>• Positive discipline</li> </ul>	More organizations facilitating GSL	Family literacy and GSL are "household" names in the non-profit sector
Food	Hire facilitators		Increased skills: <ul style="list-style-type: none"> <li>• Literacy &amp; basic skills</li> <li>• Employment searches</li> <li>• Reading, playing, singing, talking together as a family</li> <li>• Positive discipline</li> </ul>	GSL 3.0 expands to more new audiences (e.g., tech, middle-income)	GSL to new audiences generates revenue
Transportation	Evaluation & learning plan			Greater budget allocation for literacy at Regional Government	
Personnel (e.g., admin & facilitators)	Marketing & communications plan				
Space	Outreach – through families and potential partnerships				
Office supplies					
Training					

**Assumptions/External Factors**

Family literacy is important | All families benefit from practicing family literacy | Families do not know what family literacy is and its associated skills | Smart Cities might have a focus on Literacy | Ongoing system transformation (e.g., ELAWR and Early ON)

*Learning together as a family opens up a world of opportunity and creates connections within families and in communities.*

Inputs/Outcomes



# Appendix 4 Family Literacy Training and Certification Program

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CAPACITYCANADA

## Family Literacy Certification and Training Program

### Family literacy

Families reading, talking, writing, doing math, and playing together to improve their skills for learning and life.

### Sustainability

Mobilizing people, relationships, resources, and capacity to address community needs into the future.

### Scaling

A growth process that focuses resources to help organizations achieve greater impact.

### The Challenge

Many organizations that interact with children, adults and families struggle with how to support those facing literacy challenges. Often these organizations don't hold literacy as a focus of their work; however, they are acutely aware of the negative impacts of low literacy on their clients. One in 4 or 24% of adults in Waterloo-Wellington 16 years and over fall into the lowest level of literacy. They experience daily challenges such as: trouble filling out a catalogue order form; difficulties following dosage instructions on medicine; completing a job application form; using online banking; completing the online application for Employment Insurance; and reading health and wellness information. They often interface with a number of other organizations including schools, EarlyON, healthcare facilities, etc. and yet their literacy skills often serve as a barrier to them in a myriad of ways.

### Description

The Family Literacy Certification and Training Program will provide organizations and individuals with a philosophy and approach that has proven literacy outcomes for adults, children and whole families.

With a rigorous approach to training and standards, the program closely monitors outcomes from participating agencies and offers certification. Organizations can choose to run the family literacy program as standalone program or embedded into other types of existing programming. We plan to certify a small number of organizations annually and to work with these cohorts to continuously improve the certification we provide. Organizations and practitioners who are certified will then be able to offer family literacy training to participants and will receive regular coaching and follow-up from our trainers.



## Rationale

This Family Literacy Certification and Training Program will allow us to improve the literacy levels of many more families in Waterloo Region. We know that our program works to improve literacy skills and yet our delivery methods limit the number we can serve. Working with other organizations while closely monitoring standards and outcomes will allow us to improve the literacy levels of many more individuals while maintaining a reasonably low cost per participant.

## Users

Over fifteen organizations have already identified interest in being trained to facilitate this certification approach. Organizations include, EarlyON, the YMCA and others.

Certification & Training <i>Families accessing consistent &amp; high-quality family literacy supports.</i>					
Inputs	Outputs		Outcomes		
	Activities	Participation	Short (6-12 mos)	Medium (1-2 years)	Long (3-5 years)
Funds	Training manual	Literacy service providers	Increased understanding: <ul style="list-style-type: none"> <li>• Training needs</li> <li>• Certification processes</li> <li>• Legal considerations</li> <li>• Appetite for training &amp;/or certification</li> </ul>	Creation of evidence-based inventory of family literacy knowledge & skills	Sustainable funding for Project READ
Personnel (e.g., admin & facilitators)	Training materials	Non-profits			
Space	Facilitator's guide	Municipal Governments	Increase knowledge: <ul style="list-style-type: none"> <li>• Legal process of certification</li> <li>• Evidence-based training &amp; certification practices</li> <li>• Marketing &amp; communications</li> </ul>	Development of training & certification materials, including facilitator's guide	More organizations facilitating GSL
Office supplies	Webinar complement	School boards			
Web access	Standardized assessment	Post-secondary institutions	Increased skills: <ul style="list-style-type: none"> <li>• Marketing</li> <li>• Incentivizing training &amp; certification</li> </ul>	Program evaluation & learning plan established	Consistent & standardized family literacy practices
Legal	Marketing & communications plan				
	Program evaluation process and materials			Marketing plan developed & implemented	
<b>Assumptions/External Factors</b> Importance of emphasizing family, not only early childhood and adult, literacy   Family literacy should be standardized   Project READ is the right organization to lead licensing and training   Many service providers are not familiar with different pillars of literacy   Project READ needs sustainable funding stream beyond grants and Regional Support					
<i>Learning together as a family opens up a world of opportunity and creates connections within families and in communities.</i>					

Inputs/Outcomes



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