

FIRST PERSON CONSULTING · SCALING FIELD GUIDE

The Scaling Field Guide *Toolkit*

Four print-ready canvases, with instructions.

O-DEAR · SCALING PATHWAYS · SCALING CANVAS · FIDELITY CHECKER

fpconsulting.com.au/scaling-field-guide



How to use these worksheets

Four tools that sit across the scaling process: from deciding whether to scale, to choosing a pathway, to planning the work, to checking whether the innovation is still holding at scale. Each is a working document, not a compliance form.

TOOL 01 · SCALABILITY DECISION

O-DEAR

Use: at the point between pilot and scale.
Revisit if the innovation changes.

- 1 Work the five letters together.**
Organisational clarity, Describable, Effectiveness, Adaptability, Reach. A conversation, not a checklist.
- 2 Name any uncertainties.**
Note where the evidence is thin or where reasonable people might answer differently.
- 3 End with a decision.**
Go. No-go. Not yet. Scale back first. Treat "not yet" as a legitimate answer.

TOOL 02 · CHOOSING A PATHWAY

Scaling Pathways

Use: once O-DEAR says go. Revisit as the innovation matures. The pathway will move.

- 1 Map your current pathway.**
Influence and Advise, Package and Deliver, or Partner or Grow. Most organisations are on more than one at once.
- 2 Check for business-model match.**
Each pathway has a different funding shape. A mismatched business model is one of the more common ways scaling fails.
- 3 Decide the direction of travel.**
Which pathway will dominate in the next 12 months, and what will shift?

TOOL 03 · PLANNING

Scaling Canvas

Use: once you have decided to scale.
Revisit quarterly.

- 1 Start in the centre: Core outcomes.**
One sentence, in plain English. What is the scaling ultimately for?
- 2 Work the front of house (left) and back of house (right).**
The left is what the beneficiary experiences; the right is what it takes to deliver reliably.
- 3 Fill the top and bottom strips.**
External influences you don't control; the learning system that touches every other component.

TOOL 04 · REVIEW

Fidelity Checker

Use: every quarter, or on a rhythm that fits.
Not a one-off audit.

- 1 Bring the team who actually deliver.**
The people doing the work should be part of the review.
- 2 Start with Core outcomes, then Change drivers.**
The mechanism can drift while short-term outcomes still look fine.
- 3 Close with one change.**
Pick the single thing to do differently before the next review.

PRACTICAL TIPS

Print at A3 for workshops.

The writing boxes will hold sticky notes comfortably and stay legible from a standing position.

Use colour-coded sticky notes.

One colour for agreements, another for open questions, a third for things to check.

Date and photograph each version.

Most of the learning is in how thinking shifts between sessions, not in any single snapshot.

Don't do them alone.

These are conversation tools. A worksheet filled in by one person in an office is a signal something has gone wrong.

02 TOOL · CHOOSING A PATHWAY

Scaling Pathways

Three pathways, ordered by the level of control the originating organisation retains. Most organisations are on more than one at once.

LESS CONTROL

MORE CONTROL

PATHWAY 01

Influence & Advise

Low control · wide potential reach · best for principles & methods

MODELS Advocacy · consultancy · training · publishing · policy engagement

FUNDING Grants · speaking · training income · consultancy

RISK Dilution in translation; ideas travel further than fidelity

IS THIS US? WHAT WOULD IT LOOK LIKE?

PATHWAY 02

Package & Deliver

Moderate control · codified model that others deliver

MODELS Licensing · franchising · kite-marks · delivery contracts · communities of practice

FUNDING Licensing · subscription · package fees · training income

RISK High fixed cost of producing the package; fidelity monitoring demand

IS THIS US? WHAT WOULD IT LOOK LIKE?

PATHWAY 03

Partner or Grow

Greatest control · direct delivery at scale · longest timeline

MODELS Strategic alliances · mainstreaming · joint ventures · branching · M&A

FUNDING Contract income · service delivery funding · major philanthropy · government

RISK Highest resource demand; identity and mission drift over time

IS THIS US? WHAT WOULD IT LOOK LIKE?

OUR PATHWAY MIX

Which pathway dominates now? Which is emerging? What is the direction of travel over 12-24 months, and what will cause a change?

03 TOOL · PLANNING

Scaling Canvas

Eleven components for planning the moving parts of a scaling effort. Front of house on the left; back of house on the right.

11 External influences

The forces outside your control that will shape the scaling effort: political cycles, economic conditions, demographic shifts, cultural movements.

02 Beneficiaries (external)

Who the innovation is for at scale. Not always the payer.

01 Core outcomes

What the scaling is ultimately for. One sentence, in plain English. The anchor for everything else on this canvas.

06 Partners (internal)

Organisations and actors whose active involvement is required.

04 Delivery context

Where and under what conditions the innovation is delivered.

07 Resources

Financial, human, material. What is needed to deliver at scale.

03 Mechanism

What about this innovation produces the change?

05 Delivery model

How does it reach beneficiaries?

08 Internal infrastructure

Governance, data, HR, training systems.

09 External infrastructure

Regulation, funding, workforce supply.

10 Learning system

Feedback loops · monitoring · evaluation. What touches every other component. Not a single rhythm, a set of them.

11 External influences		
02 Beneficiaries (external)	01 Core outcomes	06 Partners (internal)
04 Delivery context		07 Resources
03 Mechanism		08 Internal infrastructure
05 Delivery model		09 External infrastructure
10 Learning system		

The FPC Scaling Field Guide *Toolkit*

Four print-ready canvases for organisations deciding whether, how, and when to scale.

THE TOOLS

O-DEAR · Scalability decision

Scaling Pathways · How to scale

Scaling Canvas · Planning canvas

Fidelity Checker · Monitoring at scale



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