FUNDING FOR SCALE: THE ROADMAP

HOW TO WIN UNRESTRICTED FUNDING

See the signs funders look for and how to shape a clear case for unrestricted philanthropic funding support.

SPRING IMPACT

WHAT IT HELPS YOU DO

Flexible funding = rocket fuel for scaling.

It gives you room to strengthen your model, test smarter ways of working, and build the parts of your organisation that restricted grants won't cover.

Scale funders look for clear signs that this type of support will unlock stronger impact. They want to see solid outcome data, a pathway to scale that names both the doer and the payer, and leadership that can handle larger, flexible funds with care.

"Restricted grants help you run projects. Unrestricted grants help you build organisations to shift societal problems"

- Interviewee from *Spring Impact's Securing Non-Profit Funding* study

WHAT FUNDERS LOOK FOR

Funders who give unrestricted philanthropy assess patterns and trajectories over time. This guide helps you show the signals funders look for. Each of the six areas has three levels. Early signs. Strong signs. Clear case.

You can use these levels to find where you stand today and to plan the steps that move you forward.

The six areas are:

1. Impact potential
2. Cost-effectiveness
3. Pathway to scale
4. Doer and payer at scale
5. Organisational readiness
6. Leadership and culture

SPRING
IMPACT

IMPACT POTENTIAL

"We recognize social entrepreneurs whose innovations have already had significant, proven impact on some of the world's most pressing problems, and invests directly in the promise of even greater impact at scale."

- **Skoll Foundation**

EARLY SIGNS

Outcomes clearly defined and aligned to your aim	❏ A clear, measurable problem is defined. ❏ A first Theory of Change sets out how the work leads to outcomes. ❏ Key outcomes are chosen and linked to the mission.
Clear method for tracking outcomes	❏ A simple system is in place to track activities and outputs. ❏ A basic monitoring plan links delivery to outcomes. ❏ Early assumptions in the Theory of Change are tested and refined.
Early data that holds steady across more than one group	❏ Pilot data from more than one group or site shows similar patterns. ❏ Early results are repeatable rather than one-off.
Early feedback from users or partners	❏ First signs of improvement appear in target outcomes. ❏ Feedback from users or partners confirms relevance and value.

STRONG SIGNS

A clear link between your model and outcomes

➡️

- ❏ Short- and medium-term outcomes achieved, aligned with mission.
- ❏ Logic models or causal pathways established, showing how inputs lead to results.

Outcome data from several sites or groups

➡️

- ❏ Programmes delivered across groups with consistent outcome improvements.
- ❏ Standard measurement tools applied, showing replication and stability.
- ❏ Results benchmarked against similar initiatives.

Strong feedback from users or partners

➡️

- ❏ External evaluations secured, validating impact.
- ❏ Recommendations received from partners and funders, reinforcing credibility.

Evidence of data use in planning

➡️

- ❏ Model refined and strategic decisions guided by data insights.
- ❏ Culture of continuous learning and adaptation demonstrated.
- ❏ Further learning agenda and evidence-building plan thoughtfully developed.

CLEAR CASE

Strong and stable outcome data across several settings	❏ Longitudinal data shows sustained positive outcomes and lasting change. ❏ Strong results verified across multiple settings and partners. ❏ Independent evaluations (e.g. RCTs) confirm credibility.
Proof that core parts of the model drive results	❏ Core components isolated as drivers of outcomes. ❏ Clear causal evidence shows impact can be traced to the intervention.
Signs of results when others deliver your model	❏ Model replicated successfully by external partners at scale. ❏ Outcomes persist when partners deliver. ❏ Data has influenced policy and sector standards.
Clear view of how flexible funding would deepen impact	❏ Flexible funding shown to unlock marginal impact at scale. ❏ Track record of using flexible funding for reliable, long-term results.

SPRING
IMPACT

COST-EFFECTIVENESS

"Our best partners display: A clear business model and cost structure that demonstrates greater efficiency over time."

- **Dovetail Impact Foundation**

EARLY SIGNS

| A first cost-per-outcome figure | ❏ Initial Cp/O calculated with a simple, transparent formula.
❏ Basic inputs and method documented. |

| A small test of one cost lever | ❏ Pilot run to test one idea for reducing costs or improving efficiency.
❏ Results recorded with impact on Cp/O. |

| A note on where savings may come from later | ❏ 2–3 main drivers identified to reduce or stabilise Cp/O at scale.
❏ Future innovations (technology, automation, digital tools) highlighted as cost-reducers. |

| An initial payer test | ❏ Credible hypothesis on long-term payer at scale.
❏ Case made for affordability of lower Cp/O. |

STRONG SIGNS

Cost-per-outcome tracked across more than one site

❏ Cp/O tracked and compared across different sites.
❏ Differences used to spot inefficiencies and standardize best practices.
❏ Benchmarked against peers or societal cost of the problem.

A clean list of your main cost drivers

❏ Costs broken down clearly.
❏ 3–5 largest drivers identified.
❏ Admin/overhead costs tracked intentionally.

A simple view of how costs may change with scale

❏ Basic financial model shows how Cp/O changes as numbers grow.
❏ Outcomes growth outpaces cost increases.

Proof others replicate model without additional cost

❏ Partners deliver with similar or lower Cp/O.
❏ Evidence shows admin investments and flexible funding improved efficiency.

CLEAR CASE

Refined your cost-per-outcome analysis	❏ Cp/O includes both direct and indirect costs (overhead, infrastructure, technology). ❏ Shows true cost-effectiveness linked to intervention impact.
A steady cost-per-outcome story over time	❏ Data presented across 3–5 years. ❏ Clear reasons given for cost changes. ❏ Commitment shown to reducing long-term Cp/O.
Examples of cost gains achieved	❏ Documented cases where inefficiencies were fixed and costs reduced. ❏ ROI from efficiency initiatives quantified.
A short view of how flexible funding would improve value further	❏ Unrestricted funding supports next-level efficiency (analytics, redesign, R&D). ❏ Evidence shows past flexible funds improved efficiency and impact. ❏ Future reductions in Cp/O projected from these investments.

SPRING
IMPACT

PATHWAYS TO SCALE

"Through a rigorous vetting process, we find powerful ideas that have been proven to work for tens of thousands of people, and provide the size and nature of support needed to drive results for millions."

- **Co-Impact**

EARLY SIGNS

A clear, simple model established	➤	❏ Solution defined as a systematic, repeatable process. ❏ Conditions (location, target group, resources) for impact explained.

An early idea of scale pathways	➤	❏ Bold vision shared beyond organic growth. ❏ 2–3 potential scale pathways identified (e.g. government adoption, open-sourcing).

Clear signals of user demand	➤	❏ Evidence of strong user interest (waiting lists, repeat participation, referrals). ❏ Stakeholders show willingness to invest time, resources, or funding.

Built early partnerships	➤	❏ At least one external partner engaged to test or co-deliver. ❏ Initial collaboration agreements confirm model's wider appeal.

STRONG SIGNS

A clear articulation of what drives impact	❏ Core elements defined and "secret sauce" clearly articulated. ❏ Model simplified by removing non-essential parts.
Codified the core components	❏ Quality assurance processes and fidelity checks established. ❏ Toolkit or playbook created for external partners.
Tested a scale pathway	❏ 1–2 main pathways piloted. ❏ Pilot data tracked and reported from external partners.
Secured early external validation	❏ Recognition or endorsement received from credible sources. ❏ Third-party evidence confirms effectiveness and scale potential.

CLEAR CASE

Packaged the model for transfer →

- ❏ Model simplified to deliver maximum impact.
- ❏ Materials refined and documented (training, manuals, QA protocols).
- ❏ Fidelity checks in place to ensure replication quality.

A scale pathway is in motion →

- ❏ Primary scale pathway fully active.
- ❏ Evidence shows non-linear growth driven by third parties.

Independent voices back your approach →

- ❏ External stakeholders confirm pathway is sustainable and competitive.
- ❏ Independent evaluations show long-term effectiveness.

Proven systemic value →

- ❏ Model replicable and capable of lasting, large-scale change.
- ❏ Embedded in systems, policy, or recognised as sector benchmark

SPRING
IMPACT

DOER AND PAYER AT SCALE

"If you want to get to real scale, two questions really matter. 1) Who's the doer, and 2) who's the payer?"

-   Mulago Foundation

DOER AND PAYER
EARLY SIGNS

Identified potential doers at scale

- ❏ Mapped who could realistically deliver the model at scale (e.g. government, NGOs).
- ❏ Engaged at least one external partner in pilots or collaborations.

Mapped potential payer at scale

- ❏ Determined sustainable financing sources beyond philanthropy (e.g. government budgets).
- ❏ Analyzed cost feasibility for these payers.

First signals of payer interest

- ❏ Early conversations or expressions of interest from potential long-term payers.
- ❏ Payer incentives mapped and aligned with outcomes.

Alignment with funder priorities

- ❏ Model shown to fit existing funder strategies.
- ❏ Evidence solution addresses priority problems for payers/doers.

STRONG SIGNS

Partners can deliver the model

❏ External partners have delivered the model with fidelity.
❏ Evidence shows replication across different contexts.

Clear view of how unrestricted funds fuel scale

❏ Unrestricted funding applied effectively to pilots, technology, and capacity building.
❏ Additional funding shown to unlock greater impact (e.g., testing scaling ideas)

You're not reliant on a single funder

❏ Funding diversified beyond one grant or stream.
❏ Resilience shown by sustaining operations across multiple revenue sources.

Backbone can handle scale

❏ Operational systems (HR, logistics, supply chains) strengthened for larger volumes.
❏ Efficiency gains demonstrated as delivery expands (e.g. economies of scale)

CLEAR CASE

Doer roles are mapped and owned

➡️

- ❏ Stakeholder roles clearly outlined to avoid duplication and ensure accountability.
- ❏ Joint committees or boards coordinate doers and align decisions.

You have identified funders that matter the most

➡️

- ❏ Funding efforts focused on 1–2 main payer types, alongside philanthropy.
- ❏ Philanthropy positioned as a lever, not the main engine.
- ❏ Resilience shown against funding shocks or donor exits.

Innovation is built into scale

➡️

- ❏ Flexible funding used to test next-generation efficiency (digital delivery, analytics).
- ❏ Unrestricted funds proven to drive measurable improvements in value (ROI).

Your model is now embedded in the system

➡️

- ❏ Evidence of institutionalisation across local, regional, and national levels.
- ❏ Sector peers adopt elements of the model, showing wider influence.

SPRING
IMPACT

ORGANISATIONAL READINESS

"Yield Giving selects organizations that can absorb large unrestricted gifts without undue burden."

- **Yield Giving - MacKenzie Scott**

EARLY SIGNS

Your governance backbone is set up

➡️

- ❏ Bylaws in place with independent board and clear board/staff separation.
- ❏ Board meets regularly and provides oversight.
- ❏ Board members contribute expertise and networks to strengthen the organisation.

Basic financial management in place

➡️

- ❏ Reliable budget-to-actual reports produced.
- ❏ Simple accounting practices with external audits or reviews.
- ❏ Clear financial policies for approvals and accountability maintained.

You are upholding strong ethical standards

➡️

- ❏ Compliant with legal registration and reporting requirements.
- ❏ Clear accountability mechanisms and transparent decision-making processes.

You manage risks proactively

➡️

- ❏ Organisational risks identified and documented.
- ❏ Mitigation plans established.
- ❏ Risks reviewed periodically by leadership and board.

STRONG SIGNS

Governance that adds real value

- ❏ Board brings diverse skills and perspectives.
- ❏ Active committees in finance, audit, and governance.
- ❏ Board evaluates its own performance annually.

Finances are managed with rigour

- ❏ Multi-year budgets and cash-flow projections in place.
- ❏ Program efficiency ratios and Cp/O tracked consistently.
- ❏ Quarterly financial dashboards produced for leadership and board.

Operations built for reliability at scale

- ❏ HR policies, recruitment processes, and staff handbooks established.
- ❏ Digital tools used for finance, HR, and project management.
- ❏ Growth managed without major disruption.

Resilience is part of your DNA

- ❏ Risks reviewed regularly by leadership and board.
- ❏ Contingency reserves or emergency protocols maintained.
- ❏ Succession plans in place for key leadership roles.

CLEAR CASE

Board steers with strength and clarity	❏ Board is engaged and includes sector leaders. ❏ Governance structures aligned with best practice. ❏ Board actively champions the organisation externally.

Finances fuel long-term resilience	❏ Diversified revenue streams. ❏ Stable Cp/O demonstrated over time. ❏ Multi-year commitments secured from key partners.

Excellence in accountability	❏ National/international standards compliance and transparency standards met. ❏ Audited financials published annually. ❏ Recognised by external watchdogs or rating agencies for accountability.

Your model is built for the system	❏ Organisational systems (finance, HR, compliance, IT) are scalable and resilient. ❏ Able to absorb large growth or external shocks while maintaining quality. ❏ Systems benchmarked against industry standards for excellence.

SPRING
IMPACT

LEADERSHIP AND CULTURE

"Founders and/or leadership teams who are proximate to the problems they are solving."

- **Draper Richards Kaplan Foundation**

EARLY SIGNS

Your leadership has a clear, bold vision

- ❏ Founders articulate a clear mission and bold vision.
- ❏ Leadership trusted by staff and community.
- ❏ Leaders seek mentorship and external advice to strengthen their approach.

Trust built through transparency

- ❏ Performance data shared internally.
- ❏ Staff kept informed about organisational priorities.
- ❏ Leaders openly discuss both challenges and successes.

Early innovation mindset

- ❏ Test small pilots and adapt based on feedback.
- ❏ Encourage experimentation at low cost.
- ❏ Celebrate lessons learned from failures.

Strong roots in talent

- ❏ Small team recruited with clear roles and responsibilities.
- ❏ Staff retention is high, with low turnover.
- ❏ Team demonstrates strong capacity to coordinate funder engagement.

STRONG SIGNS

Leaders aligned around strategy and scale

➤

❏ Professional management team beyond founders is established.
❏ Leaders collaborate effectively across functions.

Accountability embedded in culture

➤

❏ Staff performance tracked against clear goals.
❏ Feedback loops connect leadership and frontline staff.
❏ Leaders model accountability by sharing their own performance metrics.

Innovation is woven into daily work

➤

❏ Structured process in place for testing, learning, and scaling new ideas.
❏ Resources allocated to R&D and programme improvement.
❏ Innovation priorities aligned with strategic goals.

Talent is nurtured for scale

➤

❏ Staff training and professional development actively invested in.
❏ High-quality talent attracted and retained.
❏ Internal promotions build long-term organisational capacity.

CLEAR CASE

Your leaders set the benchmark

❏ Leadership team recognised externally through publications, and advisory roles.
❏ Succession plans tested and functional.
❏ Leaders sought after as advisors and collaborators by other organisations.

Openness fuels continuous improvement

❏ Transparency embedded through public sharing of impact and financial data.
❏ Staff surveys reflect strong trust and engagement.
❏ Organisation publishes lessons learned for peers across the sector.

### Innovation that shifts the system

❏ Organisation pioneers new approaches adopted by others.
❏ Proven track record of scaling innovations successfully.
❏ Innovations influence policy and sector standards.

Talent systems built for the long haul

❏ Strong pipeline of future leaders in place.
❏ Organisation withstands leadership transitions without loss of momentum.
❏ Alumni and former staff continue contributing to the sector.
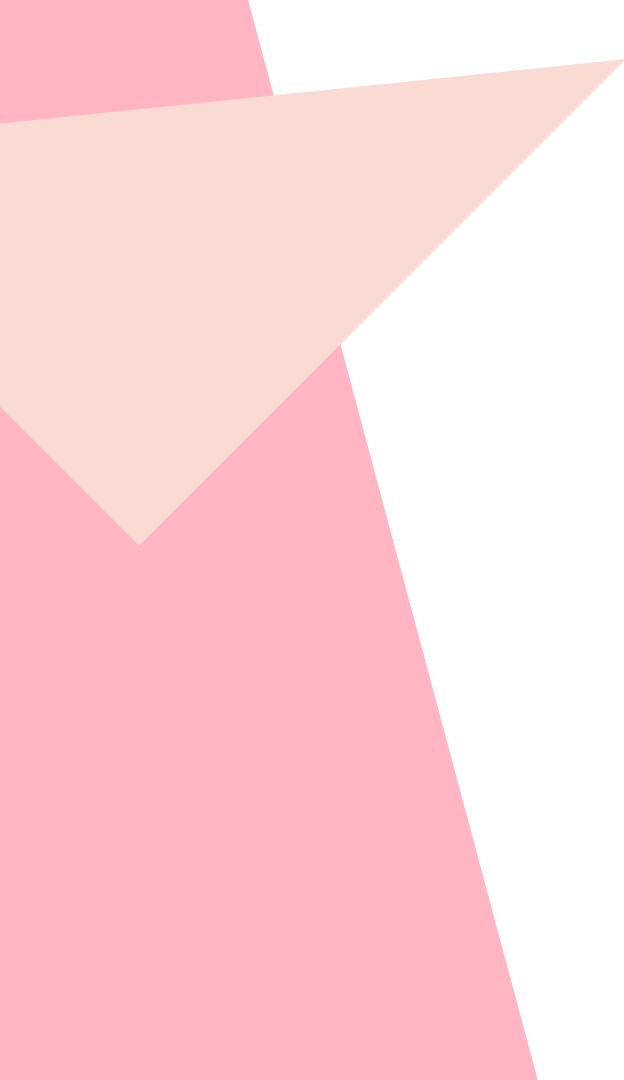
JOIN THE MASTERCLASS

If you want to dig deeper into the insights and learn how to build your own strategy join *Funding For Scale*.

www.springimpact.org/funding_for_scale

SPRING
I M P A C T