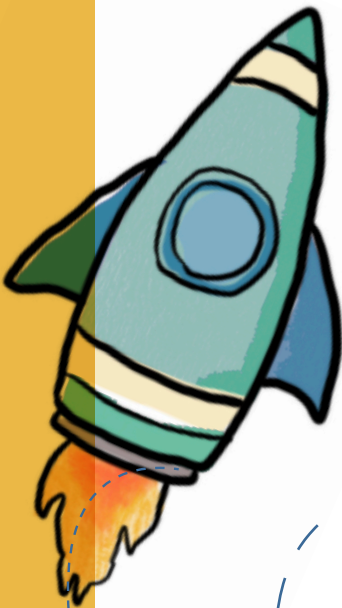


The Scaling Tool-Box

for Social [Urban] Innovators

*This Tool-Box intends to empower Social
Urban Innovators Scaling-Out their
projects through Network Formation.*



User Guide

This Tool-Box is developed by **Chiara Marradi** as a part of her Strategic Product Design Master Thesis 'A Design Tool-Box to scale Social Urban Innovations from one context to another' at Delft University of Technology.

It is designed for Designscapes Social Urban Innovators, in association with the EU Designscapes project; under the guidance of Dr. Ingrid Mulder and Dr. Alicia Gonzales.

For more details on the thesis & the Tool-Box, check the Thesis Report
Or drop an email at
marradidesignstudio@gmail.com

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SCALE-OUT, ACHIEVE IMPACT.

Are you ready to get on board?

Let's start together this challenging journey!



Are you a Social Urban Innovator?

Did you implement your project successfully and now you wish to take it over to a new location?

Do you want to achieve larger impact and bring positive change in the society but you are struggling on your scaling process?

Then this Tool-Box is what comes handy for you!

What is this Tool-Box about?

It is a 'box' full of smaller boxes and tools which helps Social Urban Innovators to replicate their intervention and scale-out from a context to another, in order to achieve larger social impact.

When should you use it?

No matter where you are on your journey or what are the challenges you are facing, the tools and activities you will find in this 'box' will help your Team to capture what to scale and articulate strategies on how to do it.

What do you get out of it?

The Tool-Box gives you an accessible process to help your team make change happen and achieve larger social impact. This Tool-Box can help your team to proceed with confidence in the process by providing you the needed knowledge to overcome potential challenges. It support you developing strategies to achieve your goals throughout Network Formation!

For who is this Tool-Box?

This Tool-Box comes handy for every Social [Urban] Innovators who needs support over the scaling journey. It suits different needs and scenarios.

Since scaling is a complex matter and challenges are always beyond the corner, this Tool-Box will make your challenges less scary and it will empower your Team overcome those with fun!

The Social Innovation Scaling Journey...

...is like an 'Interstellar adventure'!

A metaphorical storytelling will be used to guide you through the process to make it more fun, engaging and accessible!



Now that you implemented your project in the first place you are getting ready to transfer and scale it to a new urban context....

However the scaling journey is long and will put you in front of different challenges to overcome.... Here is where this Tool-Box comes at hand for you! The Tool-Box will support and facilitate you in the scaling journey to achieve your Impact Goals!

This Tool-Box aims to support you in replicating and scaling-out to new contexts in order to overcome challenges and bridge gaps to achieve impact, throughout network formation.

**But, how will this Tool-Box help you overcome the challenges?
How will it support and navigate you through the Journey?**

This will be explained in the following pages of the Guide, so keep reading.

What's in the TOOL-BOX?

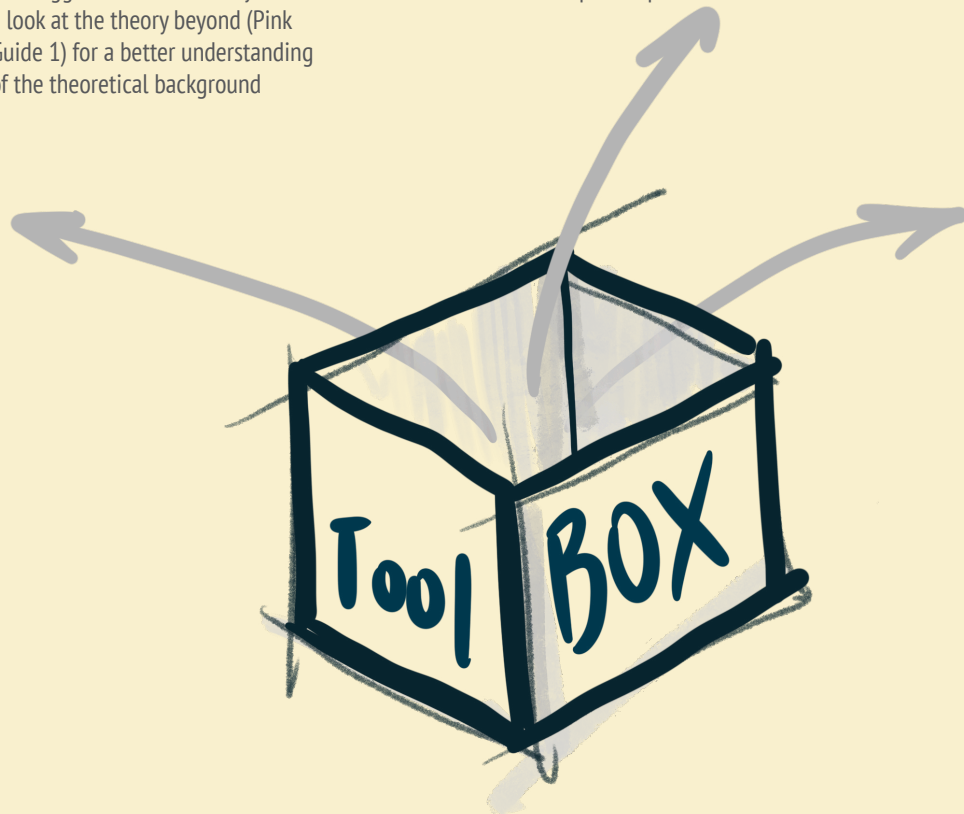
Let's open the Box!

Reading Instructions:

This Tool-Box contains three smaller packages and each package contains other elements. This User Guide is divided (per color) in three smaller guides explaining you each 'element' part of the Tool-Box.

It is suggested to first briefly take a look at the theory beyond (Pink Guide 1) for a better understanding of the theoretical background

about the scaling context. Then you can read Guide 2 (green) presenting the tools and activities which are the practical translation of the theoretical framework of scaling. Eventually, Guide 3 (yellow) provide the instructions to use the tools and perform the activities in a Workshop Set-Up.



The Scaling FRAMEWORK

The Framework provides you with a **theoretical overview about the crucial steps, principles and criteria** to keep in mind when scaling-out. It functions as a theoretical motivation and guidance. This contains two elements:

- **Scalability Criteria and Principles of Social Innovation**
- **The Scaling Process Map**

These will be further explained in the Pink Guide.



The Scaling TOOLS

These Scaling Tools will provide you with **accessible activities and exercises supporting you to take actions and overcome the challenges** when replicating to a new context. In this smaller 'box' you will find:

- **The Strategic Blueprint**
- **Two (canvas) Activities**
- **The Action Cards Deck**

These are presented and contained in the Green Guide.



The Scaling WORKSHOP

The Scaling Workshop will facilitate you performing the activities and using the Tools. **The Scaling Workshop will provide you with an interactive, engaging and safe space** where collaborations and actions will take place.

Instructions and Facilitation Recommendations for the Workshop are explained in the Yellow Guide.

The Value & Characteristics of the Tool-BOX

ACTIONABLE

It empowers users to take actions and develop strategies to Scale. It helps setting SMART Goals, plan next steps and activate strategic collaborations.

OPERATIONAL

It navigates the users along the journey, facilitating them to proceed with confidence in their own process.

FLEXIBLE

It responds to different purposes and needs, and it can be used by different social initiatives at different stages of their scaling process.

ITERATIVE

It allows the users to go back and forth and keep track of progresses along the journey.

COLLABORATIVE

It opens up collaborative discussions and reflections within the Team Members. It triggers collaborations and communication with external stakeholders and local partners.

ENGAGING

With the use of a metaphorical storytelling the Tool-Box results to be interactive and engaging. It facilitates the users to go through the challenges in a fun and easy way.

What other Users say about the Tools

'I think I would like to show the results of this activity to the other Team Members as a discussion point to plan next steps, and also to then structure a GNATT chart about long-term planning.'

Martina Monelli, Social Innovator & Service Designer

'It helped us having a big overview of how our initiative [T.Ospito] is moving and where is it going!'

Ginevra Romagnoli, Social Innovator

'I think is a good converging tool for the stage where we are right now with the project [Start Park].'

Rita Duina, Social Innovator

'It also good to have this as a moment of reflection on the process and see how far you've come.'

Giulia Sala, Social Urban Innovator and Project Manager

'It would be super interesting to use this tool to meet with the local cultural associations... so that we could make our ideas more tangible and feasible to be communicated to other stakeholders.'

Martina Monelli, Social Innovator & Service Designer

'... it's really fun to do it and very refreshing! I enjoy it because it was really easy and engaging.'

Hannah Rasber, Social Innovator

Guide 01

The Scaling **FRAMEWORK**

*Theoretical Guidance to understand the
Scaling process of Social Innovation and
the Criteria to achieve Social Impact*

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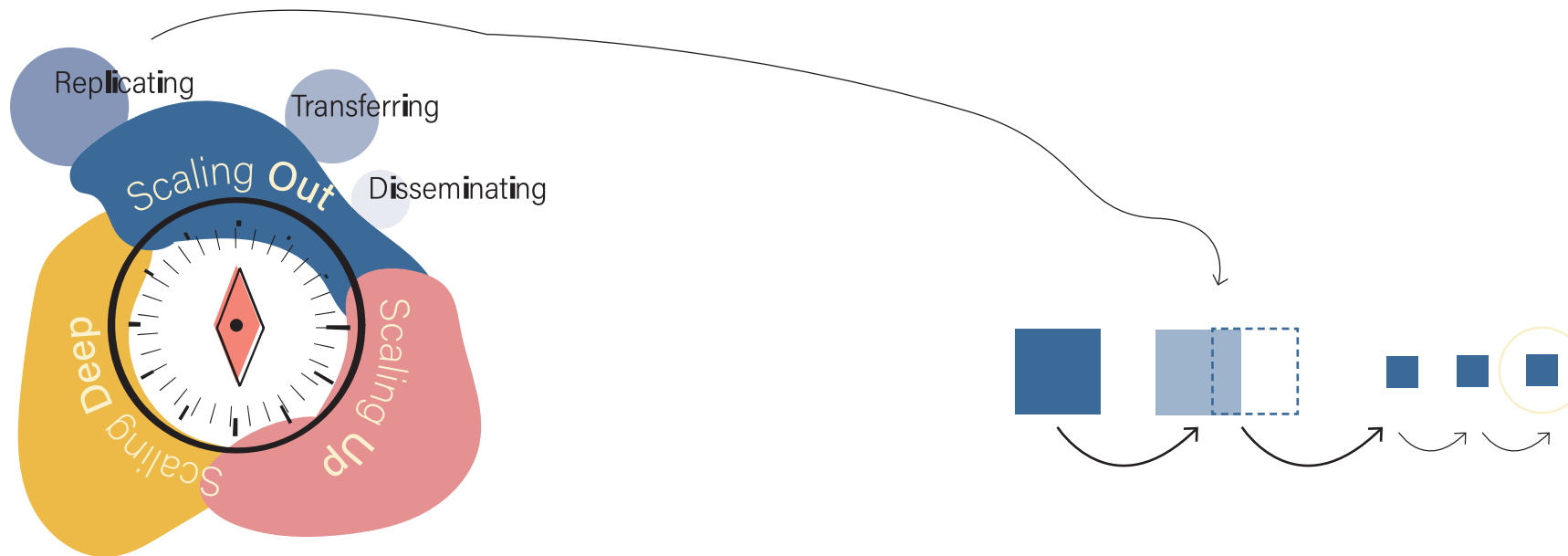
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What does Scaling-OUT mean?

There are different Scaling Approaches possible to achieve impact. This Tool-Box will focus on Scaling-Out Social Urban Innovations, and more specifically on replicating from context to context, which is the first 'step' to Scale-Out, and achieve impact.



“Expanding, replicating, adapting and sustaining successful programs or projects in multiple geographic spaces and overtime to reach a greater number of people”.

Cooley and Linn (2014)

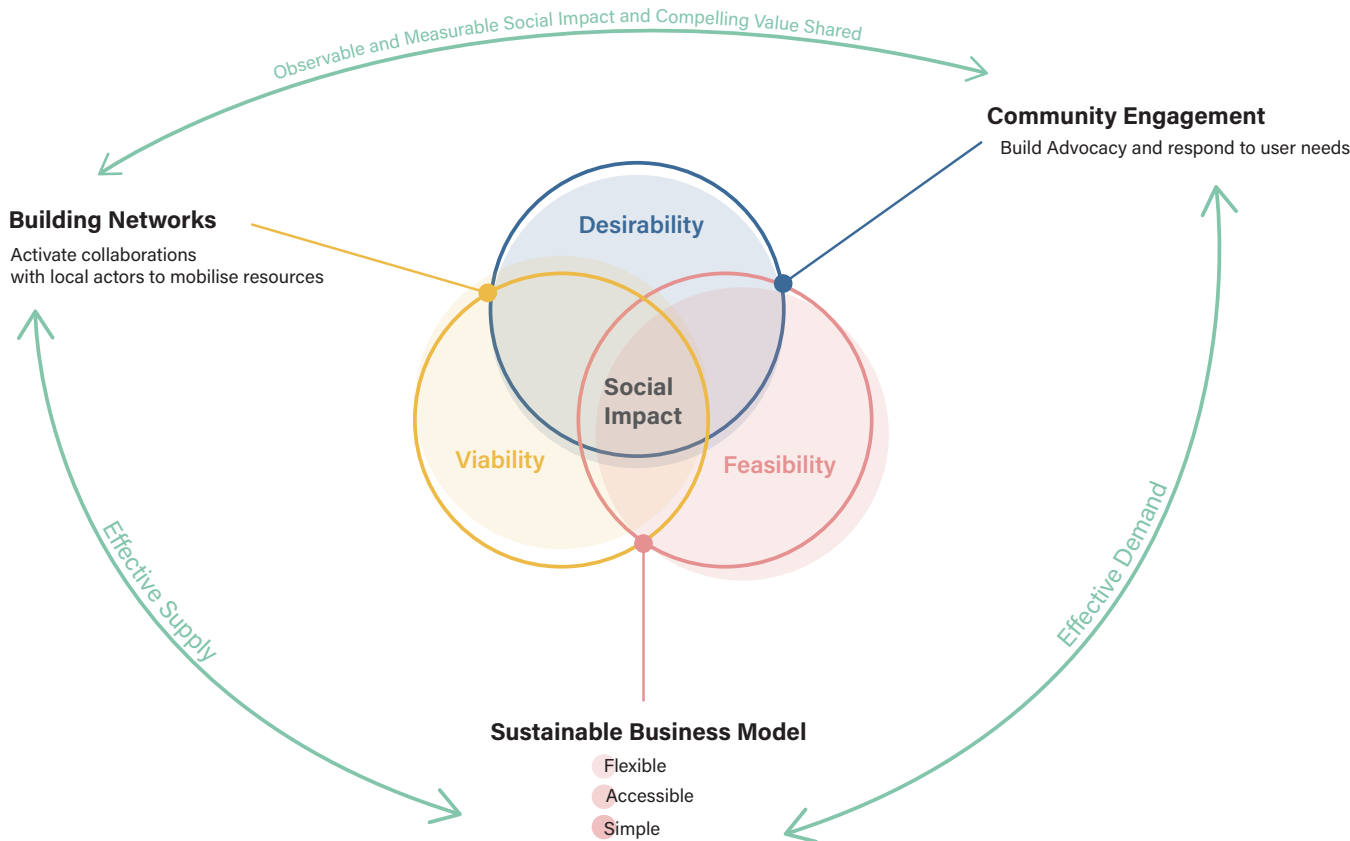
Scale-Out is a process of multiple steps to achieve larger impact in different geographical contexts.

The first step is to take the project implemented in the first context and adapt it to the new one, once this scalability has been proven successful multiple other implementations could be generated.

The social impact of an innovation is the change that occurs in communities or social grouping as the result of the innovation (Acs, Zolta & Sany, 2009).

Scalability Criteria & Principles of Social Innovation

In order to achieve Social Impact, there are some key factors and criteria that need to be taken into account.



Your project and innovation needs to prove to be viable, feasible and desirable in order to create impact.

Viabile

Can it sustain itself in the long-term?

Feasible

Do you have the skills & capabilities to make it work?
Do you have enough resources to make it real?

Desirable

Does it respond to social needs?
Does it generate demand in the local community?
Does it create value for the people and overall society?

In order to be viable, feasible and desirable you will need to develop a Sustainable Business Model which is flexible, accessible and simple to be scaled. In order to ensure a sustainable business model, you need to align effective demand with effective supply.

An effective strategy to Scale-Out...

An effective way to mobilize resources and align demand and supply to ensure a viable and desirable solution is 'Scaling through Network Formation'.

By forming networks you will be able to activate collaborations and get the support from local actors to mobilize the resources needed, and generate effective supply. By building community you will build trust and advocacy, hence effective demand will be achieved. However, in order to form networks and build community you need to show the value, demonstrate the impact you can reach by sharing a 'narration of change' and a strong compelling story.

Scale effectively means being able to achieve the greatest impact with the minimum resources necessary!

The Scaling Process Map

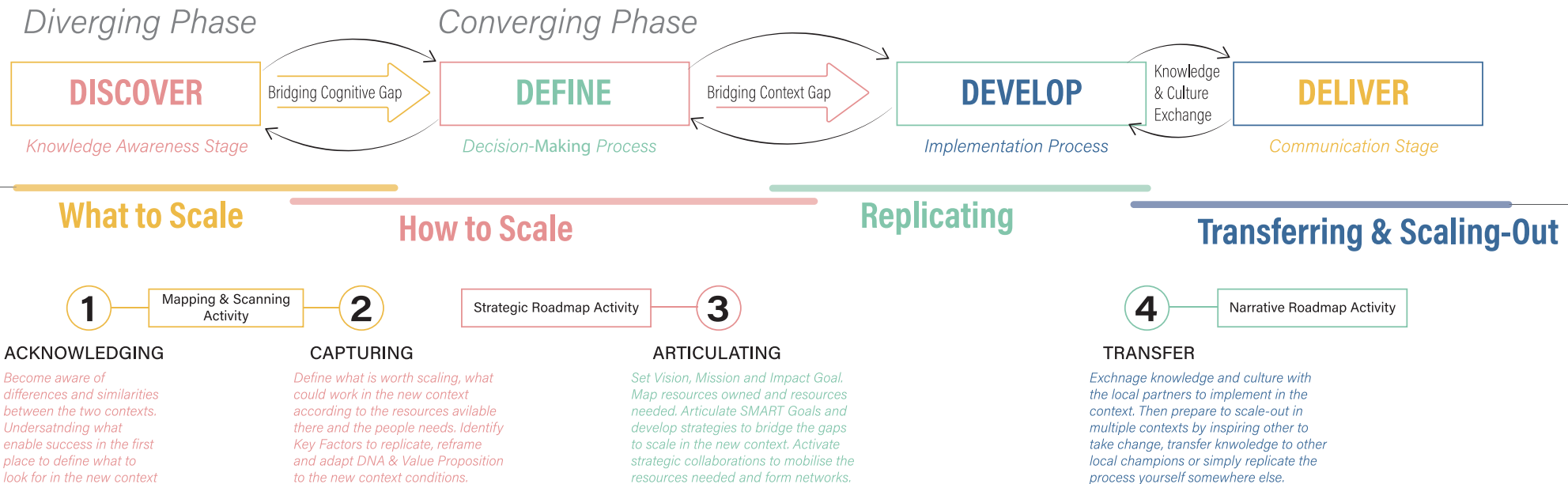
The process of scaling is not linear and may differ in different context scenarios. However, some crucial steps have been identified that need to be taken into account in order to scale-out effectively.

The Process Map illustrated below shows the crucial steps and stages of the Scaling Process of Social Innovations.

There are **two main 'gaps' Social Innovators should bridge before implementing the project in the new place: the Cognitive (knowledge) Gap and the Context Gap.** First you need to capture what you are going to scale. On the base of that, you will then define how to scale by articulating and developing strategies to achieve your goals.

But, no worries!
Tools and Activities are contained in the Tool-Box that will guide you through the first three steps of the process and will support you bridge the gaps to scale.

In the Green Guide you will find the **Strategic Blueprint**, an action map providing you guidance about all the activities and steps that should be taken along the journey. Moreover, the 'Discovery' and 'Define' Stage will be covered by the **two (canvas) activities** which you can use and perform in a Workshop Set-Up.
Check the Yellow Guide for more details about the **Workshop Activity**, the goal of this is to facilitate you perform the two activities in a collaborative and interactive setting.



Guide 02

The Scaling **TOOLS**

The practical activities supporting you to overcome challenges and take actions toward your Impact Goals.

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The Strategic Blueprint

& Action Road Map

This Blueprint/ Roadmap aims to make the scaling process more feasible by suggesting you activities and actions to follow along the path. It is a detailed version of the Scaling Process Map, zooming-in into each of the stages and unfolding the steps and actions to take. Therefore, it is actionable and operational, it will empowers you to take actions and confidently proceed in your journey.

What to Scale

DISCOVER



1

Set a Destination

Where do you want to go?
What do you want to achieve?

1. Define Social Impact Goal
2. Set a North Star (indicator)
3. Set Vision & Mission

Why is it relevant?

Taking a good idea to scale requires a strong strategy and coherent vision. Without a vision and goal in mind is difficult to set a strategy. It's like when you leave for a journey, if you do not have your own final destination, it will be difficult to set the right navigation, and you may end up totally lost. Moreover, if you don't know where you want to go, it will be difficult to decide what to bring with you, what is worth replicating to achieve your goals.



2

Scan DNA

What is your project about?
What is the core and meaning of it?
How do your project respond to social needs?

Define your project / innovation:

- Who is your Target Audience?
- What is your Value Proposition?
- Define Points of Uniqueness
- Uncover Minimum Critical Elements

Why is it relevant?

In order to scale-out effectively and understand what will be worth replicating or what need to change you need to first assess what of the project is a key factors to create value and generate the impact desired. For this reason, it is important to go to the roots of the problem and the reasons of the project to identify those few key factors.

Extra Tips:

Use the Laddering Technique to go deeper to the root of the problem you are addressing (asking why, why..) and how your project respond to do that. Try to uncover those elements that are essential to generate the effects desired.



3

Context Mapping

How is the new context different / similar?
Which context factors will influence your project?
What is a threat and what an opportunity?

1. Map Context A
Identify conditions that enabled you to succeed;
Map Challenges, how did you overcome those?

1. Explore Context B
Acknowledge differences and similarities;
Can you find the same 'opportunities' in the new context as well?
Will be the challenges different?
What can you learn from the previous experience?

Map Assumptions of what you do not know yet as next steps / goals

Why is it relevant?

In order to scale-out effectively and achieve larger impact, it is not enough decide what to scale by looking only internally to the project. The key factors of the project that will be replicated will be decided mainly based on the needs of the people and context conditions present in the new location. Therefore, it is essential to become aware of the differences and similarities in order to better understand how to react to certain changes and to be able to adapt in the new context. Also, getting to know which are the context factors that may have an influence on the success of the project is a way to set the right strategies to overcome potential challenges. While comparing with the previous experience is a strategic way to use the knowledge gained to avoid to make similar mistakes, and leverage on what worked well before.



4

Understand People Needs

What are the needs of the people in the new context?
How are those needs different / similar to Context A?
How will you respond to their needs?

1. Compare Social and People Needs of Context A with the new Context.
2. Map Assumptions and then validate them with the users.
3. Define benefits and values you are generating for the users, community and society.

Why is it relevant?

Understanding the needs of the people as well as the one of the overall community and society is important to create effective demand, hence being able to implement the project and build advocacy.

Extra Tips:

Avoid the mistake of assuming what you do not know. Go to the context and engage with the community. Perform user's interviews or co-create with them a 'desirable' solution to their problems and needs.



5

Reframe DNA

Is the Value Proposition still relevant for the new audience?
How is your project match people needs?

1. Redefine the Value Proposition according to the new context conditions and people needs.
2. Capture what is worth of scaling to generate the desired effects in the new context.

What are the core elements to replicate?
What should be adapted / changed?

Why is it relevant?

The previous steps done allows to be able to re-frame the initial project mean, the DNA and capture what will be scaled in the new context. Because, to scale effectively, it is not worth replicating the whole project as it is. It may require too many resources and in the end it could not work well in the same way, due to those differences and changes.

The Strategic Blueprint

& Action Road Map

How to Scale

DEFINE

1



Map Resources

*What do you have?
Which resources are in the local context?
What are you lacking?
Which resources do you need to mobilize?*

1. Map Internal Resources the one that you have and need for scaling.
2. Look at what the context has to offer and look forward on where you want to go.

What do you still need to get there?

2



Set SMART Goals

*What do you need to do to mobilize the resources needed?
What do you have to do to bridge the gaps?*

Set Goals that are:

Specific, simple, sensible, significant

Measurable, meaningful, motivating

Achievable, agreed, attainable

Relevant, reasonable, realistic and resourced, results-based

Time bound

3



Plan Actions

*How will you achieve your goals?
What need to be done?
What are the priorities?
Who can support and help achieving those goals?*

1. Identify the immediate challenges your team needs to address, then agree on the next steps to take.
2. Plot them on a timeline, to make it more concrete and actionable.

The Strategic Blueprint

& Action Road Map

Network Formation

DEVELOP



1

Build a 'Narration of Change'

What is your story?
How do you show and demonstrate the value you create?

1. Build your own storytelling.
What is the core message to share?
2. Craft a simple story that explains to other people why your initiative is relevant, its value and impact.
3. Then practice sharing it within the Team.

Extra Tips:

Make it visual by using the Storyboard technique.
Use characters, scenes, and conversations to tell a meaningful tale about your initiative.
Use the 'Role Play' Method to help on making it tangible and sharable.



2

Activate Strategic Collaboration & Form Local Networks

How will you communicate the impact to different audiences?

1. Set different Communication Strategies for the different purposes and audiences. Which tone of voice?
Which channel/ medium?
Who is the audience?
2. Share and pitch your narration with the community, stakeholders, users...

Extra Tips:

Use the 'Pitch Canvas' or the 'Audience, Benefit, Goal' framework to prepare your pitch according to who you need to 'convince' and 'inspire'. It may also help the "Leadership Presence" framework to improve your skills and gain confidence, while trying to build trust on your audience.

& Implementation

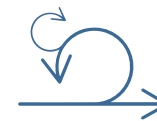
DELIVER



3

Prototype

1. Implement the project in the new context and test it with the local community.
2. Iterate according to the new insights and knowledge.



Learn, Adapt, Iterate

The scaling process is never linear, so maybe you will find yourself going back to some steps and activities performed before. Keep iterating, learning and adjusting your process.
This is the way to success!

Scaling Activity 1

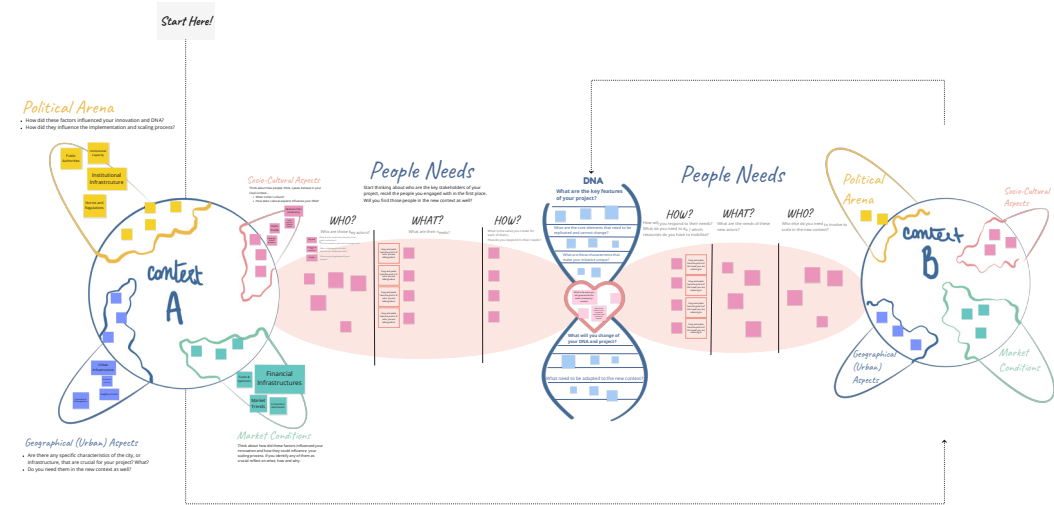
Canvas 1

DISCOVER WHAT TO SCALE

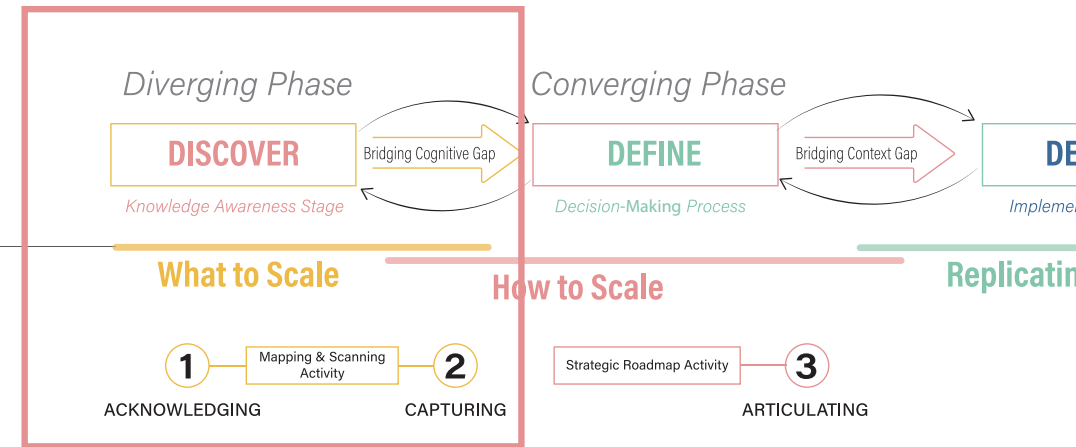
Activity 1 corresponds to the Discovery Phase or 'Knowledge Awareness Stage'; called in this way because it will support you bridging the first identified gap of scaling: the Cognitive Gap. The Activity will guide you achieving the first two steps of the process:

- 1. Acknowledging** differences and similarities between contexts (mapping people needs and context factors). In this step the Probing Cards will come handy.
- 2. Capturing** your DNA and Value Proposition, and decide what will be worth of replication and what will need to be adapted and changed according to the new conditions.

You can decide to use these Canvas Activities independently. However, these activities are meant to be used in the Workshop which has been set-up on Miro Board for you (*check the Yellow Guide for the instructions about that*).



Canvas of the Activity



Zoom-In of the Scaling Process Map where this activity focus on

How to perform Activity 1?

The Steps of ACTIVITY 1 Instructions

1. Mapping Context A;

Look at your context of origin, the ecosystem where your project grew. Once having mapped all the crucial aspects that influenced or played a role in the process, you are ready to make a bridge and compare it with the new context.

2. Mapping & Comparing with Context B

In this case, you will do the same type of thinking exercise for the new context you will scale. Being aware of what worked well in the first place could help look for certain similar conditions in the new one as well, or maybe recreate the same thriving ecosystem of relations.

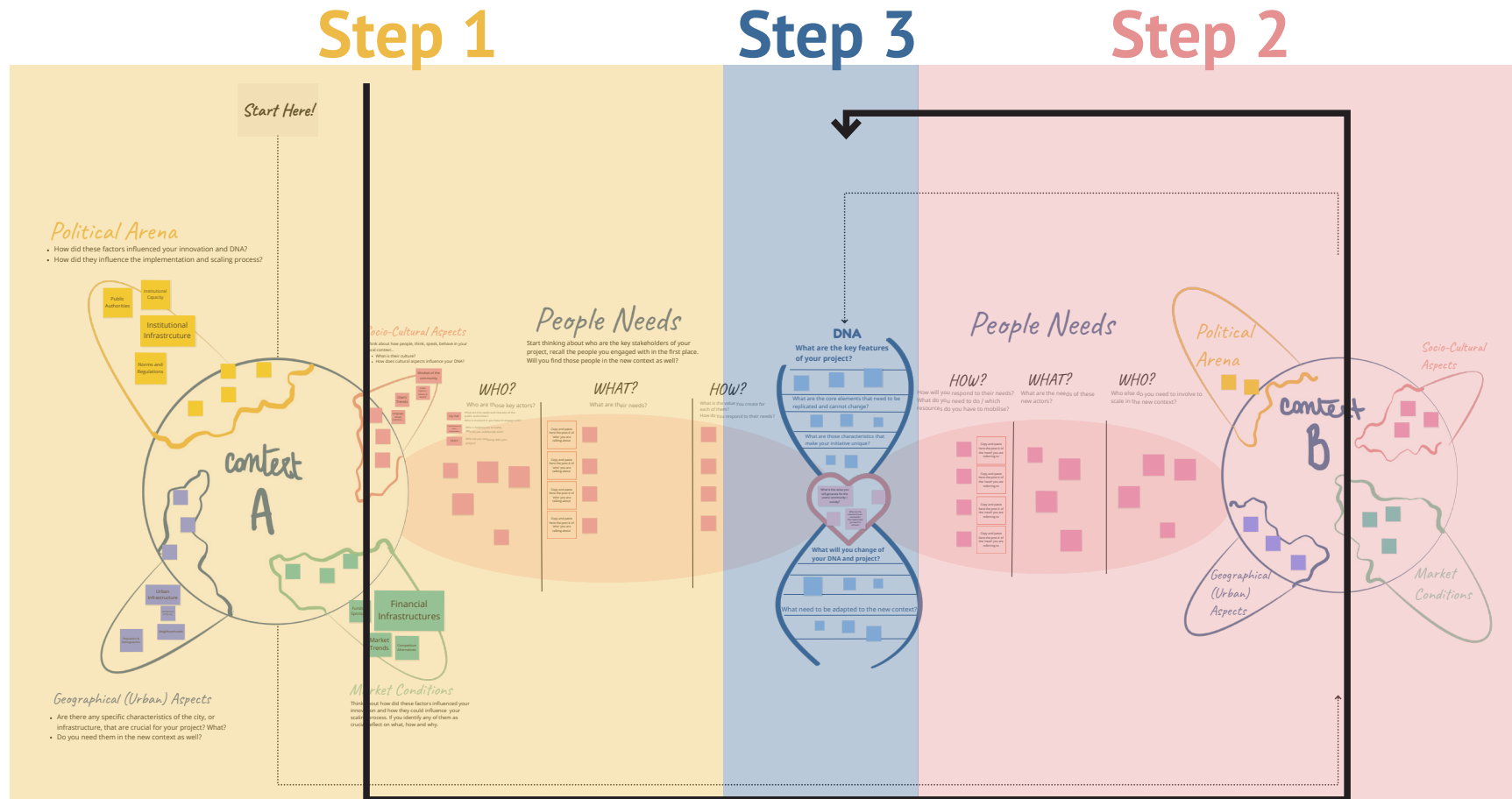
3. Capture What to Scale

By acknowledging differences and similarities, people needs, barriers and enablers, it will be easier to capture what is worth replication or adjust to scale effectively. This step is about re-framing your DNA and the Value Proposition. Identify the essential core elements

of the project that cannot miss being able to generate impact and then adapt the rest to the new context conditions by leveraging on the resources this has to offer.

Once you know what you will scale your initiative, you can start thinking about what you need to implement the project in the context and match local needs with your own goals.

Let's go on with Activity 2!



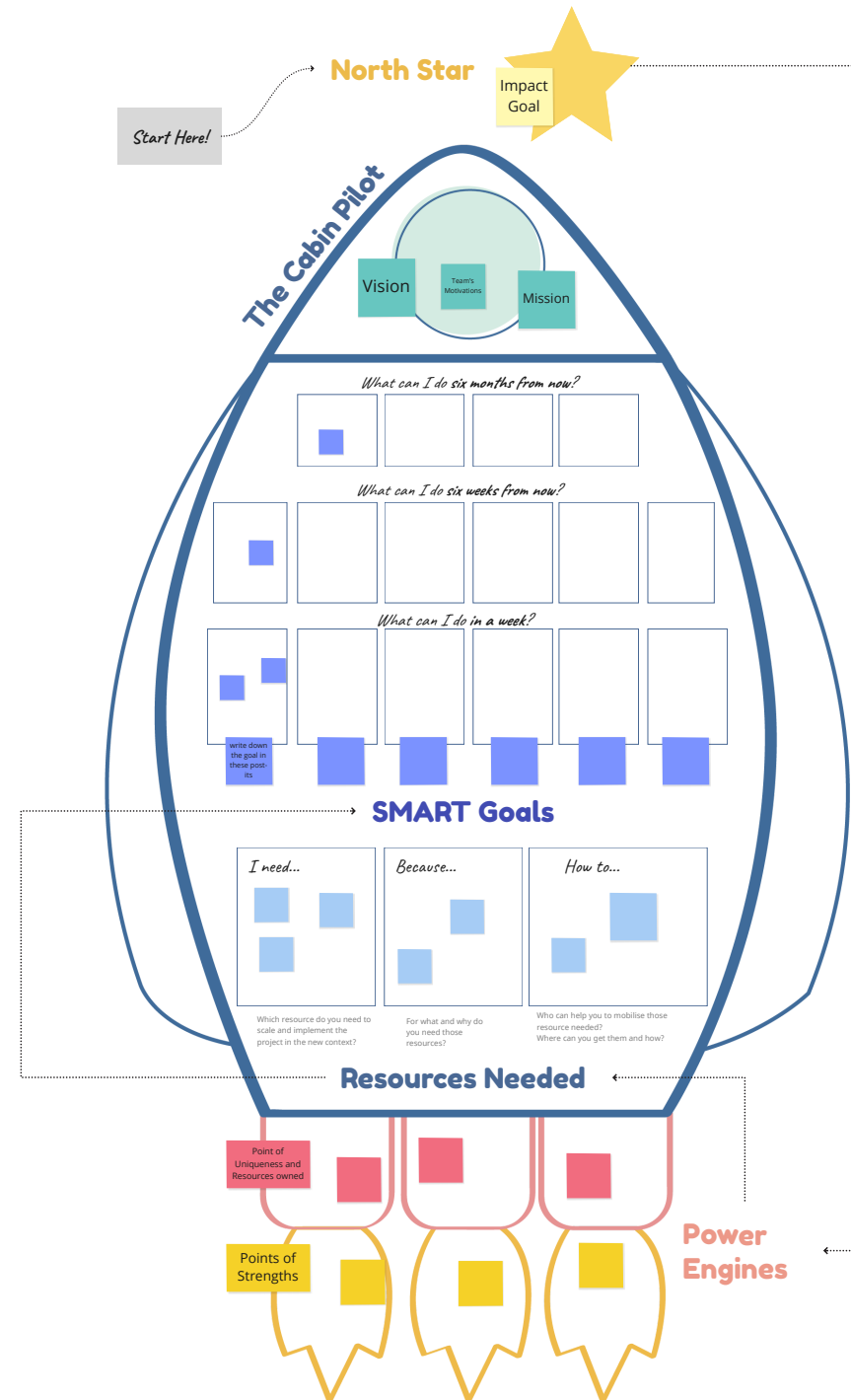
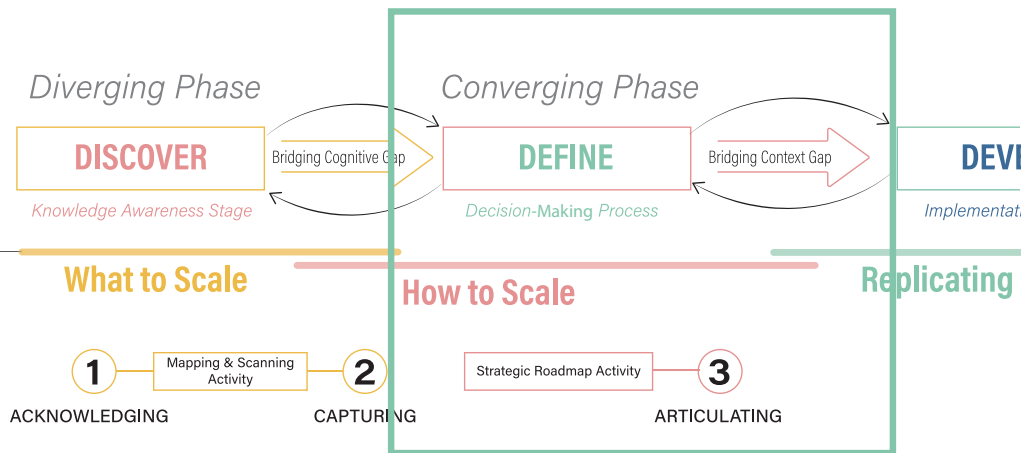
Scaling Activity 2

Canvas Activity 2

DEFINE HOW TO SCALE

Activity 2 corresponds to the Define Phase or 'Decision-Making Stage' of the Scaling Process Map (as in Figure below); it is called in this way because you will need to decide how to scale and which strategies you want to activate to bridge the Context Gap. This Activity focuses on step 3 of the process:

3. Articulating strategies to scale-out your initiative in the new project, by activating collaborations and forming networks.



How to perform Activity 2?

The Steps of ACTIVITY 2 Instructions

1. Set the Final Destination;

Before going anywhere or doing anything, it is always important to have clear where you want to go and what you want to achieve. *In this step with the Team, you will discuss your Impact Goal and set your North Star of the journey.*

2. Map Resources & Match Needs

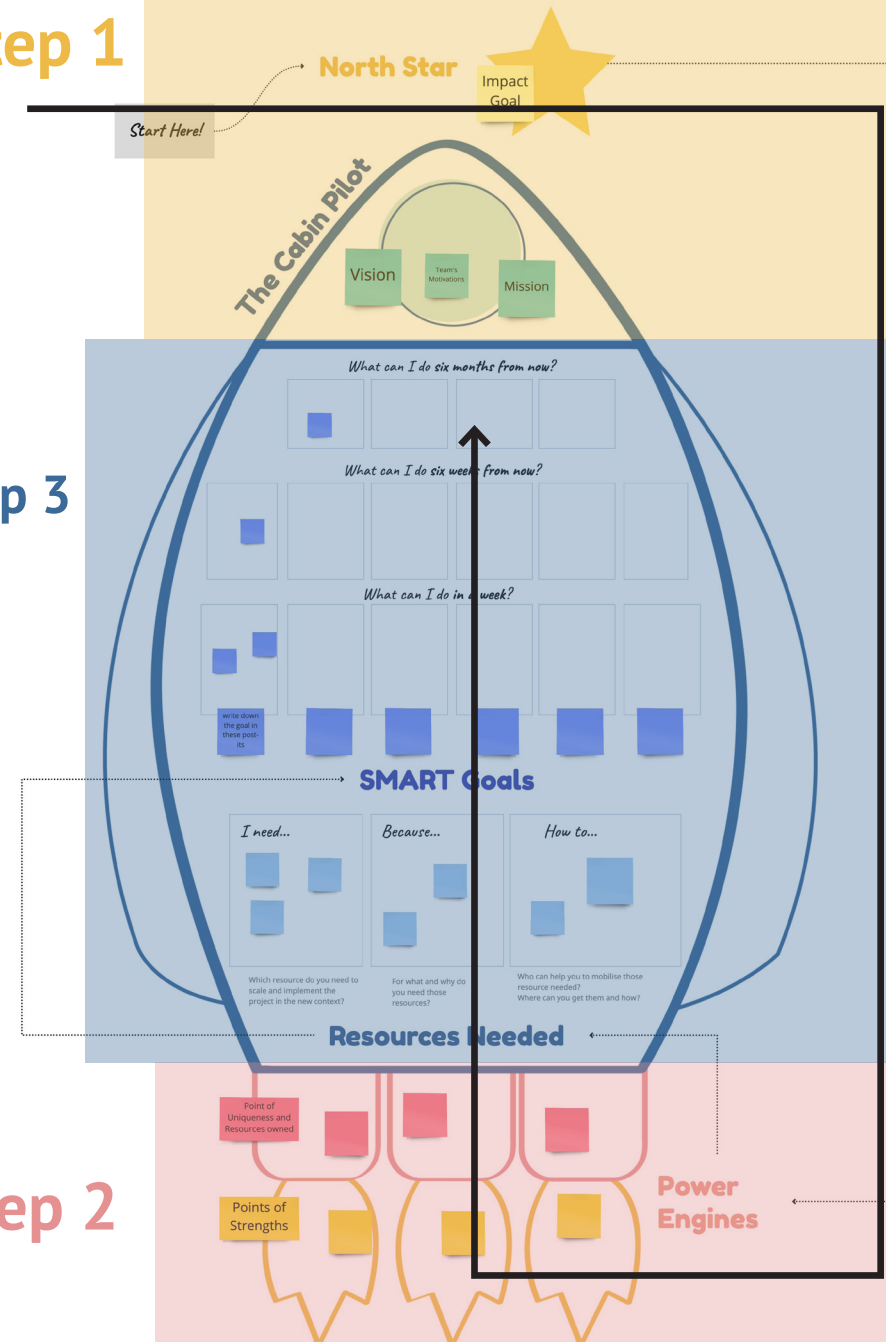
With clear in mind the goal to reach and what will be scaled, the second step would be to map the resources that need to be mobilized to implement the project.

3. Define SMART Goals and Plan Actions

Now that you know what you need to match aspirations and context conditions and scale in the new place, it is time to set SMART Goals that step-by-step will bring you to the final destination set. *It is important to start thinking about who might help you activate and mobilize those resources needed and how you will engage with those people that could support you, achieving your goals.*

After this step, you will need to activate strategic collaborations and engage with people that might support you in achieving your goals. To do so, you will need to form networks and engage with the local community.

Step 1



The Action Card Deck

This Card Deck intends to provide support and inspiration while performing the Activities. It can be used alone or during the Workshop. The cards trigger reflection and discussion among the team, while helping take decisions about the next steps and strategies.

The Card Deck is divided in two sets of Cards:

- **The Probing Cards;** These provide examples of challenges and are meant as inspiration to trigger reflection.
- **The Strategic Cards;** These are more actionable proposing strategies and approaches to solve potential challenges.

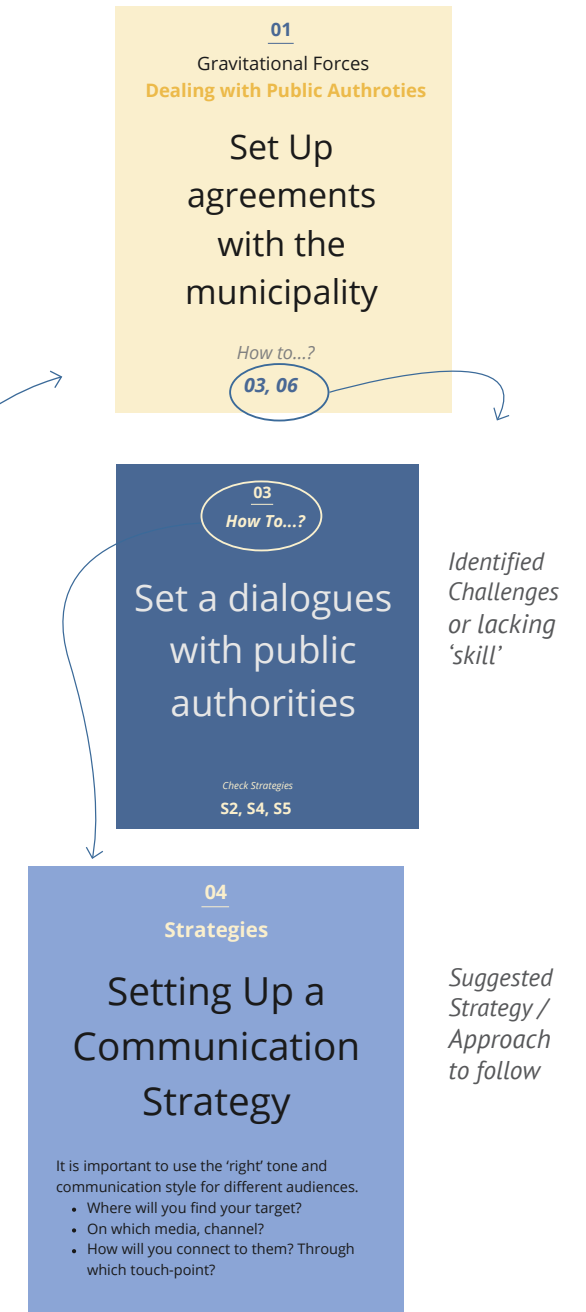
Here you can find an example of how the cards are connected with each others and instructions on how to use them. In the next pages all the cards are provided (in a printable version).

Figure 1. Urban Dimension Category



Figure 2. Sub-Category of the dimension

Figure 3. Examples of Context Factors per dimension



The Probing Cards

This set contains different types of cards:

1. The Gravitational Orbits (fig. 1)

This represents the 4 Urban Dimensions category. These cards provide a short explanation of the category. Each of these is divided into three sub-categories.

2. The Probing Cards (fig. 2)

These cards are the sub-categories identified per urban dimension and provide probing questions that intend to trigger discussion and reflection among the participants. Each of these is linked with more specific examples of context factors; see figures on the right.

3. The Gravitational Forces (fig. 3)

These are the (attractive or contrasting) 'forces' which could be either enablers or barriers influencing the scaling process of your project. The 'contrasting forces' could be fight or tackled with the linked 'How to' and Strategy Cards, functioning as 'defence/attack'.

Gravitational Orbits



POLITICAL ARENA

The space of political discourse and the institutional capacity of the local context.

Probing Card Dealing with Public Authorities

- Who are the public authorities you have to deal or collaborate with?
- How do you engage with them?
- Which type of relationship, collaboration or agreements do you need to set up?
- How do you gain approval from the local government and city hall?
- How do you communicate with them?

Check Examples:

[01](#), [02](#), [03](#), [05](#)

Probing Card

The Institutional Infrastructure & Capacity

- What are the institutions you have to interact with?
- What is the contribution you need from those?
- How is the local government influencing your implementation and scaling process?
- What is the influence of the political party?
- How is the institutional system preventing or enabling you to grow?

Check Examples:

[04](#), [06](#), [07](#), [08](#)

Probing Card

Norms, Laws & Regulations

- To what extent do you rely on certain norms and regulations? What types?
- How are the local regulations influencing your initiative?
- How are you dealing with them?
- How are the norms and regulations in the new context different?

Check Examples:

[09](#), [10](#), [11](#)

01

Gravitational Forces
Dealing with Public Authorities

Set Up
agreements
with the
municipality

How to...?

03, 06

02

Gravitational Forces
Dealing with Public Authorities

Divergent and
contrasting
interests or
visions

How to...?

06

03

Gravitational Forces
Dealing with Public Authorities

Building trust
among local
government

How to...?

01

04

Gravitational Forces
Institutional Infrastructure
& Capacity

Presence of
Conservative
Institutions

05

Gravitational Forces
Dealing with Public Authorities

Gain approval
from public
authorities

How to...?

01, 03, 04

Gravitational Orbits



URBAN INFRASTRUCTURE & Geographical Aspects

This dimension refers to physical assets related with the urban context and its architecture. For instance the presence of certain infrastructures or geographical characteristics.

Probing Card

City Architecture & Infrastructures

- In which part of the urban landscape are you focusing in?
- Which type of neighbourhoods / areas do you need for your innovation?
- How does the urban infrastructure influence your innovation?
- How does the transport system influence it?
- What about the Railroad Infrastructure?
- Do you rely on any specific communication infrastructure? How?
- How does the waste or water management system may influence your initiative?

Check Examples:

01, 02, 04, 05, 06, 07, 08, 10

Probing Card

Population & Demographics

- What is the size of population in the context?
- How this will be different in the new context?
- How does demographic factors influence your innovation?
- Where will you find your target audience? Where is it concentrated?

Check Examples:

03, 09

Probing Card

Natural Landscape

- How does the presence of green in the city influence your project?
- What type of environment are you looking for?
- Are there any urban parks you may need?

Check Examples:

06
Gravitational Forces
City Architecture & Urban
Infrastructure

There is not a good
transportation system
connecting the
different
neighbourhoods

07
Gravitational Forces
City Architecture & Urban
Infrastructure

The railways
system is not
enough
developed

08
Gravitational Forces
City Architecture & Urban
Infrastructure

Neighbourhoods
are really
diverse

09
Gravitational Forces
Population & Demographics

The population
and urban size
is different

01
Gravitational Forces
City Architecture & Urban
Infrastructure

The city is
well
connected

02
Gravitational Forces
City Architecture & Urban
Infrastructure

There is a
wide railway
network

03
Gravitational Forces
Population & Demographics

The city is
crowded

04
Gravitational Forces
City Architecture & Urban
Infrastructure

The city has
traffic
issues

10
Gravitational Forces
City Architecture & Urban
Infrastructure

The city has a
decentralised
structure

05
Gravitational Forces
City Architecture & Urban
Infrastructure

There are a
lot of
industrial
areas

Gravitational Orbits



SOCIO-CULTURAL ASPECTS

Differences of culture & mindset, values & beliefs play a crucial role influencing the replication and adaptation of the innovation.

Probing Card

Culture & Mindset

- What is the mindset of the community?
- What are the cultural roots of your target audience?
- How does this influence your initiative?
- How will it be different in the new context?
- What is the local language?
- What are the rituals people follow?
- What are the customs?
- What are the social activities citizens engage with in the local context?
- What are the main socio-cultural associations present in the area?

Check Examples:
01, 03, 05, 08, 09, 10

Probing Card

Public Opinion, Values & Beliefs

- How do people think and behave?
- What is the general public opinion?
- What are the main values of your target audience?
- How do those elements influence your project?
- How are they different/ similar between the two contexts?

Check Examples:
02, 04, 06, 11

Probing Card

User Trends

- What are the cultural and social trends of the community?
- Which trends do your audience follows?
- What are the latest trends influencing the community?
- How are those trends influence your initiatives?
- What are the opportunities or threats?

Check Examples:
07

01
Gravitational Forces
Culture & Mindset

The local community has a conservative mindset

How to...?
01

02
Gravitational Forces
Public Opinion, Values and Beliefs

Citizens lack of trust on innovative ideas

How to...?
01, 02

03
Gravitational Forces
Culture & Mindset

There is a hierarchical culture

04
Gravitational Forces
Public Opinion, Values and Beliefs

There is a conflict of values

How to...?
06

05
Gravitational Forces
Culture & Mindset

Lack of community engagement

How to...?
01, 02

06
Gravitational Forces
Public Opinion, Values and Beliefs

People are influenced by the political party beliefs

07

Gravitational Forces
User Trends

Young people
tend to move
out of the
urban center

08

Gravitational Forces
Culture & Mindset

There is an
entrepreneurial
culture

09

Gravitational Forces
Culture & Mindset

Religion and
Spirituality
plays a role in
the society

10

Gravitational Forces
Culture & Mindset

Cultural
Associations
are active in the
context

11

Gravitational Forces
Public Opinion, Values and Beliefs

There is
environmental
awareness
among citizens

Gravitational Orbits



MARKET CONDITIONS

This dimension refers to the capacity of the economic infrastructure of the context to foster and enable innovation to thrive. This could be influenced by various aspects such as the entrepreneurial culture, trends and the competition, but also the financial infrastructure.

Probing Card

Financial Infrastructure

- How does the financial system work in the context?
- What is its capacity of enabling innovation to thrive?
- Are there any public / private funds allocated for sustainability and social projects?
- Are there any impact and innovation hubs?
- Which type of funds and sponsors are there in the context?
- Which of them could support your project?

Check Examples:

01

Probing Card

Market Trends

- What are the economic trends of the context?
- How do they influence your innovation?
- What are the main local businesses present in the local context?
- What are the most active?
- How do they influence the context and your project?
- Are there any business partners you can collaborate with?

Check Examples:

02, 03

Probing Card

Competitor Landscape

- What are the competitors present in the local scene?
- What are the threatening competitive alternatives?
- How do they influence your capacity to scale?
- How do you differentiate your project from those?

Check Examples:

04

01

Gravitational Forces

Financial Infrastructure

There is little
budget for
social projects

How to...?

04, 05

02

Gravitational Forces

Market Trends

The market is
active and the
economy is
thriving

03

Gravitational Forces

Market Trends

Private
companies are
investing more in
sustainability

04

Gravitational Forces

Competitor Landscape

There are similar
competitive
alternatives in
the market

The Strategic Cards

This set contains two different types of cards:

1. The 'How to'

These are suggestions of potential challenges Social Innovators could face when scaling and are mainly related to a lack of knowledge or capacity needed. These are then linked to suggested strategies or approaches, providing guidance on building those lacking knowledge and skills.

2. The Strategies

This set provides suggestions of potential strategies and approaches you can activate to overcome challenges you may encounter during the process. These cards are linked with the previous one and some of the 'Gravitational Forces' presented before.

It is suggested to check the card before starting using them in the activities and in the workshop. During Activity 1 and 2, there will be specific moments where the use of the cards will be suggested and highlighted through facilitation 'boxes' in the workshop Setting.

The 'How to' Cards



The 'Strategies' Cards

01
Strategies

Through Peer-to-Peer Learning and Social Interactions

It is important to ensure that learning opportunities are built into projects. Ensure mutual learning through moment of exchange and interactions and disseminate those learnings across the organisation and the ecosystem of networks to ensure the development of an open and receptive mindset to change.

02
Strategies

Set Up a Clear Common Vision

For new practices to be adopted, they have to be linked to a clear common vision. This can be co-created together with the different parts involved in the process.

03
Strategies

Inspire and motivate through Strong Leadership

A leader's attitude which articulates the need for change by sharing his passion and motivations will inspire others to follow the same path. Leadership is also vital for mobilizing people and resources when necessary, in order to ensure project legacy.

04
Strategies

Setting Up a Communication Strategy

It is important to use the 'right' tone and communication style for different audiences.

- Where will you find your target?
- On which media, channel?
- How will you connect to them? Through which touch-point?

05
Strategies

Using Storytelling and Narration Techniques

- What is the core message you want to share and communicate?
- What are the benefits and values you bring to the society and users?
- What is the change you will create?

Once having reflected about those elements create your own story and make it compelling!

06
Strategies

Participatory and Collaborative Approaches

Building and nurturing a community is the way to effectively achieve positive change. A strategy could be to involve the users and stakeholders along the process and co-create with them, in order to generate lasting legacy and build trust. Moreover, by fostering ownership you may ensure new ambassadors of change!

Guide 03

The Scaling **WORKSHOP**

An interactive, collaborative and accessible space to perform the scaling activities and keep track of your progresses along the journey.

Table of Contents

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Facilitation Guidelines	
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Workshop Legenda	
Workshop Overview	

This Tool-Box is developed by **Chiara Marradi** as a part of her Strategic Product Design Master Thesis 'A Design Tool-Box to scale Social Urban Innovations from one context to another' at Delft University of Technology.

It is designed for Designscales Social Urban Innovators, in association with the EU Designscales project; under the guidance of Dr. Ingrid Mulder and Dr. Alicia Gonzales.

For more details on the thesis & the Tool-Box, check the Thesis Report
Or drop an email at
marradidesignstudio@gmail.com



The Workshop Activity

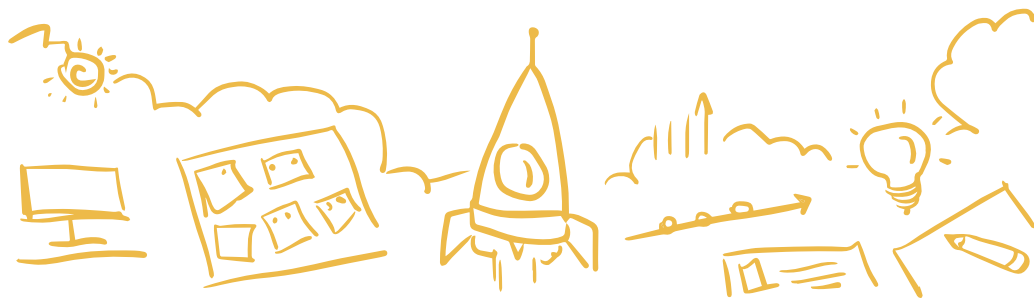
Using the Scaling Tools

The **Workshop Activity** includes the two activities and the cards presented in the previous Guide. It will guide you through them and facilitate you capturing 'What to Scale' and articulate 'How to Scale', with the final goal of achieving impact through Network Formation and Strategic Collaborations.

Since it is flexible, everyone can decide how to set-up the activity. However, to make it user-friendly and accessible, full-guidance, instructions, and recommendations are provided in this short Guide and on the Online Set-Up's Preparation Phase.

Preparation is key for the best results!

So it is important to read the Guide and the instructions to prepare for the activities. These are all steps needed to get closer to achieve your Goals!



Using the Scaling Tools in a Workshop

Facilitation Recommendations



Preparation & Familiarization

The Scaling Tools presented before are designed to be used in a Workshop Set-Up / Creative Session.

- **The Workshop is flexible**, it gives you the opportunity to set it up according to your scenario and needs.
- It is recommended to perform the Workshop Activity **with your Team**.
- Having **expertise in the field of Social Innovation is required**. This means that you and your Team already implemented the project in the first context, so you gained experience.
- The overall Workshop is structured in a way that is **accessible for everyone and easy to understand**, thanks to the metaphorical storytelling and full facilitation guidance provided. However, it is ideal if participants have some **familiarity with innovation and design processes**, this will speed up the processes and the flow.
- The workshop can be carried out physically (offline) or digitally (online). For now, a full facilitation guidance is setup **on the creative platform of Miro**.

Prepare and set-up your own workshop before the actual session, sit and plan it together with your Team. During the preparation, you will discuss with your Team when to carry the activities (date & time), your goals and wishes and how to perform the workshop (online/offline, who will participate, which activities, time to spend on it...). In this way, you will be ready to kick off directly!

Using the Scaling Tools in a Workshop

Facilitation Guidelines



About Time Management...

Are you a first-time user?

The supposed duration for the **Full Workshop** (Activity 1 + 2, excluded the Preparation Phase) would be 2-3 hours or a half-day long workshop with several breaks in between. Energizers will be incorporated into the process to stimulate creativity. Short breaks after each step are recommended.

However, time is relative. It depends on your purposes and scaling stage but also on your familiarity with such design tools.

The Workshop Activity could be set-up in your own way, following your goals and pace. You can decide to perform both activities on the same day (highly recommended) or split the workshop over multiple days.

If you are going to perform only part of the Activities, the **Partial Workshop** is shorter and will take about 1/1.5 hour.

I used the tool before...

In this case, it will require you less time to perform the activities because there will no need to read all the instructions again.

- **Activity 1** can last from 45min to 1 hour based on how much in-depth you want to go in each step. Time also depends on the numbers of participants; the more people, the longer it will take.
- **Activity 2** can last from 20 min to 1 hour based on your goals and how long it will take for you to agree and make decisions with the Team.

Which stage of the scaling process are you at?

The Toolbox is flexible and iterative; hence it can be used by various social urban innovators during different stages of the scaling process. Either you are at an early stage of your journey or at an advanced stage, the Tool-Box is still relevant. *Use the Scaling Process Map to identify the phase you are at in your Scaling Journey; check it before starting!*

[Check Step D of the Preparation Phase on Miro Board]

Requirements to start the Workshop:

1. You have implemented the project in the first context
2. You know where you want to scale and the Impact Goal you want to achieve, the final destination.

You did not set your navigation yet?

There is some preparation work to do for you before starting with the Activities. No worries, nothing too complex!

Activity 0

This one will help your Team agree on the Impact Goal to achieve and set your North Star. To do so, you will go deeper, capturing the core meanings of your project and the reasons or motivations behind it. This will help you match your goals, the effects you want to generate and the Value Proposition responding to the people's needs.

You can find the activity fully explained on the Miro Board online!

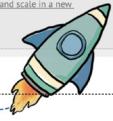
The Interstellar Journey of Scaling

An Action Toolkit to Scale-Out Social Projects

Welcome to this Workshop Activity!
If you are here, you probably heard about the Scaling Toolkit, if not I will tell you more about it in a moment.

I guess that if you got in 'contact' with the Scaling Toolkit, your goal is to scale the project you just implemented in one context, to another one. Then, you are in right place, the Toolkit and this Workshop Activity will get you ready to transfer and scale in a new urban context.

Let's Kick-Off
The scaling Journey is long and will put you in front of different challenges to overcome... this Toolkit will support you in the process! It will facilitate your scaling journey to achieve your Impact Goals.



1. General Introduction

This is the **General Introduction**. You can skip this, if you read the whole Guide, and jump directly to Step D.

Step. A

Download and Read the User Guide

Step. B

Watch the short animation

2. Workshop Activity Set-Up

Step C explains shortly what is the Tool-Box and the Workshop about, it's a summary of this User Guide!

Step. C

About the Workshop Activity...

Step. D

Where are you at in the Scaling Process?

Don't miss **Step D**. Here, with your Team you will have the space to setup and plan your workshop activity and recommendations will be provided.

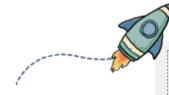
Step E provides the detailed instructions regarding the steps of each activity, but if you read it already on the User Guide you may skip this part.

Step. E

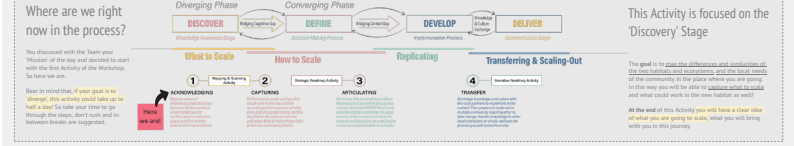
Instructions & Recommendations

Online Workshop Set-Up

Workshop Legend



Let's Start the Journey toward a new Planet!



The long boxes will keep you updated about the process and progresses achieved during the activity.

Guide These Boxes provide guidelines and instructions

Tip These Boxes provide suggestions and extra tips during the activities

Step. 01

Map your habitat and ecosystem.



We need to understand how we are going to survive in a new habitat... in order to do so we first need to acknowledge the factors and characteristics of our habitat that made us grow and thrive (the context enablers).

The whole Workshop is led through a metaphorical storytelling. The storyboard will guide you step-by-step through each of the activity. These boxes provide you with the needed instructions to perform each exercise.

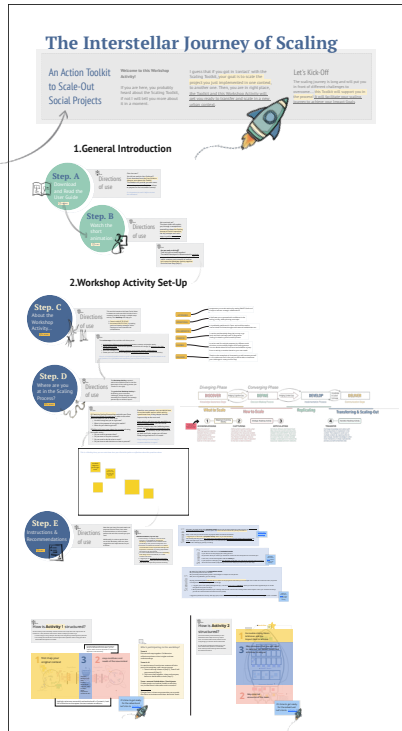
Screenshot of the Preparation Phase Instructions on the Online Miro Board. Once read the User Guide, start from this part before starting with the activities.

Online Workshop Set-Up

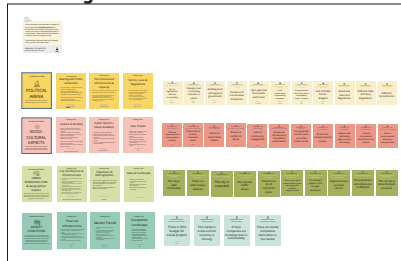
Workshop Set-Up Overview

This is the overview of the Boards you will find once you will access the Workshop Activity on Miro.

PREPARATION PHASE



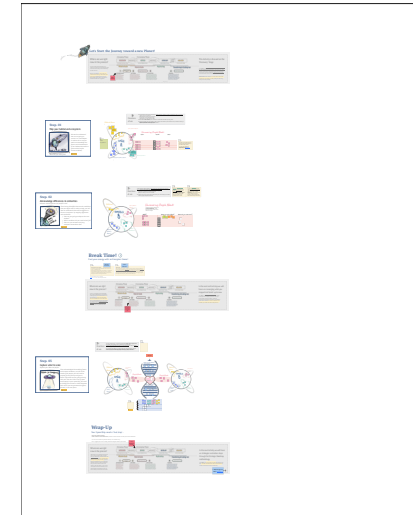
Probing Cards



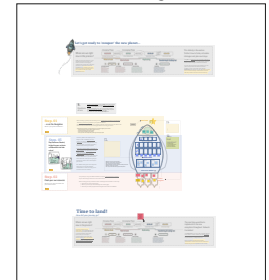
Activity 0



Activity 1



Activity 2



Strategic Cards



You are almost ready to kick-off and start this adventure...

Only a few steps are remained to do before setting the Workshop.

1. Print or download the Set of Cards. Take a look at them or discuss with the Team.
2. Set date and time for the session, gather the Team online on a video call, and access the WorkSpace on Miro.
3. Start by reading the instructions in the Preparation Phase whiteboard.

It's time to take actions and leave for
this adventure...
Let's get on board together!

Designed by Chiara Marradi

In collaboration with
Designscapes Program
Participatory City Making Lab
and as part of the TuDelf
Graduation Research Program

For more details check the Thesis Report *here*.
For accessing the Workshop Space on Miro or more
info about the Tool-Box, please drop an email:
marradidesignstudio@gmail.com
