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# Replication School: Scaling Social Innovation through Dissemination Training

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# Replication School: Scaling Social Innovation through Dissemination Training

Impact Entrepreneurs  
School of Business Administration  
Institute for Sustainable Solutions  
Portland State University

February, 2013

Jacen Greene, Cindy Cooper, and Carolyn McKnight

## 1. Abstract

This paper describes a training methodology to scale social innovation through dissemination undertaken in 2012 by Portland State University's (PSU) Impact Entrepreneurs for the award-winning social enterprise Digital Divide Data (DDD). It begins with descriptions of some commonly used terms in the field — social innovation, social entrepreneurship, replication, and impact sourcing — and illustrates how each of these concepts was integrated into the development and delivery of a training program for replication of Digital Divide Data's impact sourcing model. Program outcomes are reviewed, including findings that dissemination training is a viable, cost-effective method for replicating successful social innovations.

## 2. Introduction

In early 2012, Impact Entrepreneurs, a program of Portland State University's School of Business Administration, delivered a pilot "Replication School" in Cambodia. Five social entrepreneurs from around the world gathered at the headquarters of Digital Divide Data, an award-winning social enterprise,<sup>1</sup> to learn from its successful impact sourcing model. Impact Entrepreneurs staff and contractors delivered the program in collaboration with a team of MBA students, providing them with a unique educational opportunity.

According to J. Gregory Dees, social innovation "replication" takes three forms: *branching* by opening new offices; *affiliation* through licensing and franchising; and *dissemination*, an "open source" model of information sharing and informal support.<sup>1</sup> In this paper, we focus on the third approach.

In implementing this training, the Impact Entrepreneurs team was interested in assessing dissemination training as a methodology for "replication" (here used in the sense of propagation or learning, rather than mimicry). In addition, Impact Entrepreneurs was gauging replication as a potential additional offering alongside its portfolio of programs focused on catalyzing social innovations. A hypothesis emerged that designing appropriate approaches to replication *is* the innovation.

Impact Entrepreneurs' participant feedback and analysis found dissemination training to be a highly effective, low-risk, and relatively inexpensive method to scale proven social innovations. By training social entrepreneurs who already have the drive and organizational capacity to disseminate existing, successful approaches from other regions in their own communities, intermediary organizations can expect a higher rate of success in efforts to spread innovation.

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<sup>1</sup> Skoll Foundation Award, 2008; eAsia Award, 2011; Vision 2030 Award, 2012.

### 3. Problem and Opportunity

Globally, 2.47 billion people live on less than \$2 per day.<sup>i</sup> One in seven girls are married before the age of 15,<sup>ii</sup> almost 9 million children still die each year before the age of 5<sup>iii</sup>, and just one natural disaster can displace millions and kill hundreds of thousands. In the face of these and numerous other extreme and complex problems, *social entrepreneurship* has emerged as one methodology that can be deployed across sectors to innovate options for lasting change.

Greg Dees, co-founder of the Center for the Advancement of Social Entrepreneurship at Duke University and a member of the Impact Entrepreneurs advisory board, wrote the pioneering definition of social entrepreneurship:

*Social entrepreneurs play the role of change agents in the social sector by*

- *Adopting a mission to create and sustain social value (not just private value).*
- *Recognizing and relentlessly pursuing new opportunities to serve that mission.*
- *Engaging in a process of continuous innovation, adaptation, and learning.*
- *Acting boldly without being limited by resources currently in hand.*
- *Exhibiting heightened accountability to the constituencies served and for the outcomes created.<sup>iv</sup>*

Social entrepreneurs are committed to innovating effective solutions to social and environmental problems by employing business tools and entrepreneurial methodologies to create social value. Social entrepreneurship is one approach to *social innovation*, defined by Phills Jr., Deiglmeier and Miller as:

*A novel solution to a social problem that is more effective, efficient, sustainable, or just than existing solutions and for which the value created accrues primarily to society as a whole rather than private individuals. A social innovation can be a product, production process, or technology (much like innovation in general), but it can also be a principle, an idea, a piece of legislation, a social movement, an intervention, or some combination of them.<sup>v</sup>*

While social innovations are thus widely recognized as desirable, the allure of new and exciting solutions over proven methodologies can be dangerously seductive. In his article in the *Stanford Social Innovation Review* in 2012, Daniel Ben-Horin noted, "...the problem is not the pace of innovation. The problem is the pace of *propagation* [a.k.a. replication]."<sup>vi</sup> Innovations past need not be discarded in favor of innovations present, and innovation is not synonymous with impact.

Between innovation and large-scale impact often lies a chasm, sometimes referred to as the "valley of death," in which effective and promising innovations may languish without achieving scale. In social entrepreneurship, replication can offer a viable path toward achieving scale. As identified by J. Gregory Dees, social innovation replication takes three forms: *branching* by opening new offices; *affiliation* through licensing and franchising; and *dissemination*, an "open source" model of information sharing and informal support.<sup>vii</sup>

Yet replication is a relatively underexploited path toward bridging the gap between innovation and impact. The scarcity of replication practices is likely due in part to lack of broad exposure across the sector. Rare are the courses, programs, publications and consulting practices focused on replication. There is a pressing opportunity to innovate and advance the practice of replication. In addition, there is at least a perception that funders, not to mention media, are more interested in the glossy front-end of innovation than in moving those once novel ideas to maturity. As Jessica Mayberry, founder of Video Volunteers noted, “Replication is very hard, and one of the things that have made it hard for us is the disinterest in funders to fund things that are not new.”<sup>viii</sup>

#### 4. Impact Sourcing

With the growing ubiquity of Internet connectivity, new opportunities have become available for technology-based social innovations to address poverty in emerging economies. One promising approach is *impact sourcing*, defined by the Rockefeller Foundation and Monitor Group as hiring people at the base of the pyramid — those with an annual income of less than \$3000 in local purchasing power — “as principal workers in business process outsourcing [BPO] centers to provide high-quality, information-based services to domestic and international clients.”<sup>ix</sup> In 2011, the global market for impact sourcing generated “an estimated \$4.5 billion in revenues, representing 3.8 percent of the entire \$119 billion BPO industry and directly employing about 144,000 people across all segments. Of this, \$1.2 billion is estimated to reach [impact sourcing] workers as employment income.”<sup>x</sup>

Driven by international and domestic growth, as well as increasing cost and wage pressures in higher-income developing nations, the global market for impact sourcing is anticipated to exceed \$20 billion by 2015. This would result in more than \$10 billion of additional income for impact sourcing workers. Under this forecast, more than \$200 million in annual revenue and nearly 24,000 jobs would be created just in low-income countries with emerging BPO sectors — the exact areas targeted by the social enterprise Digital Divide Data.<sup>xi</sup>

#### 5. Digital Divide Data

Digital Divide Data, formed in 2001, is a US-based nonprofit organization with a for-profit subsidiary that provides business process outsourcing services such as data entry, document digitization, and database support to organizations worldwide. DDD offices in Cambodia, Laos, and Kenya employ staff with disabilities or from impoverished communities and offer them scholarships to pursue college educations. DDD’s hiring process evaluates “candidates’ aptitude through math and logic tests, gauges their personal drive through interviews, and assesses their financial need through home investigations.”<sup>xii</sup>

Some DDD staff are identified, screened and trained by partners such as Passerelles Numériques, a French charity with schools in Cambodia, the Philippines, and Vietnam. Using a similar selection process to DDD, Passerelles Numériques identifies secondary school students from low-income areas to receive scholarships for a six-month Data Management Operator training program that feeds into DDD.

As of early 2012, DDD had “trained more than 2,000 people with marketable skills, grown to employ over [900] staff, and graduated more than 400 [...] staff from entry-level jobs to employment that earn them four times the average income in Cambodia and Laos.”<sup>xiii</sup> With clients including Yale University, Harvard Business School, and the International Finance Corporation, DDD was able to grow earned revenue to more than \$3.2 million in fiscal year 2011. Their business model has received awards from the World Bank, Skoll Foundation, and Vision 2030, and their business model has been featured in MIT Sloan and Harvard Business School cases.

With support from The Rockefeller Foundation, DDD embarked on a path to use replication as a pathway to more effectively fulfill their mission to “create better futures for disadvantaged youth in developing countries through employment in financially sustainable business.” DDD had already expanded from Cambodia to offices in Laos and Kenya, but sought additional avenues to expand at the rate necessary to fully realize their potential social impact. The Replication School, designed in collaboration with DDD and delivered by Portland State University Impact Entrepreneurs, would focus on dissemination training as an additional channel to cost-effectively propagate DDD’s model for greater scale.

**Metta Thippawong**  
*DDD Training &  
 Development Coordinator*  
*Vientiane, Laos*



I was born in northern Laos. When I was a child I got polio. During that time they didn't have any medicine to prevent this disease in my province. My legs couldn't move.

My disability made me feel like I was a helpless person, a burden for my family. I thought that no one in society or any company would hire me. During that time life was really meaningless for me.

But then I heard about DDD [Digital Divide Data]. Fortunately I got a job at DDD. When I first joined DDD my typing speed was very slow and my computer skills were not good. I didn't have any confidence to talk and share ideas but my job with DDD has significantly changed my whole life.

This job changed me into a more confident person in the sense that not only I can help myself, but also help others. I have learned to speak up for myself. I feel more like a person. Now my family does not worry about me and my future anymore.

## 6. Impact Entrepreneurs

Impact Entrepreneurs, founded in 2010, is a program of Portland State University formed to “unleash the power of business for social impact.”<sup>xiv</sup> Impact Entrepreneurs works to catalyze social innovation worldwide through three main initiatives designed to engage social entrepreneurs at critical stages of their personal and organizational journey, characterized as *inspiration*, *incubation*, and *acceleration*.

While programs differ in specific content, format, scope and consumers, all deliver three educational components which Impact Entrepreneurs considers essential to successfully effecting social change: business fundamentals, social innovation, and leadership development:

- **Inspiration:** Immersive field studies for university students and community members to work directly with social entrepreneurs on location. Visits to social enterprises in India, Nicaragua and Portland have provided inspiration to those learning about the field for the first time or hoping to start their own venture. Topical events and courses round out Impact Entrepreneurs’ introductory social innovation offerings.
- **Incubation:** The Social Innovation Incubator supports both startup and intrapreneurial (i.e., within established organizations) initiatives through mentorship, workshops, networking, visibility, and tailored consulting services. In 2011, the incubator was recognized by *Fast Company* as one of 51 “bold ideas helping to build the cities of America’s future.”<sup>xv</sup>
- **Acceleration:** The Entrepreneurial Leadership Program provides training to staff of social mission organizations, strengthening their capacity and accelerating their impact. Impact Entrepreneurs designs and delivers courses in close consultation with partner clients. As of 2012, Impact Entrepreneurs had trained more than 150 employees of organizations such as Mercy Corps, Digital Divide Data, CARE, Worldvision, IPAS, and Save the Children.

The PSU School of Business Administration and Institute for Sustainable Solutions provide partial overhead support to Impact Entrepreneurs staff. The program funds its budget with earned revenue supplemented by a mix of donations, sponsorships and grants. Four part-time staff design, deliver, and facilitate program activities and initiatives around the world.



## 7. Replication School Design and Delivery

In 2011, The Rockefeller Foundation awarded a grant to DDD to train other Rockefeller grant recipients in impact sourcing. This opportunity would bring together staff from the following organizations at DDD offices in Phnom Penh, Cambodia:

- e.Services (a BPO firm in Ghana)
- Enablis (a nonprofit business incubator in Kenya)
- Daproim (a BPO firm in Kenya)
- Invincible Outsourcing (an impact sourcing firm in South Africa)
- Karakoram Area Development Organization (a community development nonprofit in Pakistan)

On the strength of a previous Entrepreneurial Leadership Program training relationship, DDD selected Impact Entrepreneurs to design and deliver a management training program focused on social innovation dissemination. Impact Entrepreneurs Executive Director Carolyn McKnight worked with DDD Chief Development Officer Michael Chertok to conceptualize this “Replication School.” Organizational development and sustainability consultant Kathleen Wood assisted with program development, pedagogy and methodology. The curriculum encompassed eight weeks of tailored management training, guest lectures from DDD executives, site visits to DDD clients and partners such as Passerelles Numériques, and individual coaching, all delivered onsite in Phnom Penh.

Impact Entrepreneurs also worked with a team of four PSU MBA students to design and deliver specific course elements. As part of the PSU MBA program, students are required to complete a consulting capstone prior to graduation. The capstone team was originally secured to analyze the Replication School as a pilot program for Impact Entrepreneurs and provide recommendations on program efficacy. As the capstone and Replication School design evolved, Impact Entrepreneurs invited the students to participate in program delivery and PSU’s School of Business made funding available to the students to travel to Cambodia. This made the program more cost-effective to deliver while significantly increasing the students’ educational experience. Each student was assigned a topic related to their prior work experience and class concentrations in the MBA program, and developed content with assistance from McKnight and Wood.

**Lindsey Dietz**  
MBA student, class of '12  
Portland State University



I can't describe how lucky I feel to have been given the opportunity to learn more about the social entrepreneurship field through direct experience. Learning that is accompanied by developing curriculum, international travel and interacting with global participants is immeasurable. This is an amazing opportunity and I'm excited to have the experience and all of the life-changing moments that come with it.

McKnight, Wood, and the four student instructors delivered eight modules over the course of the two-month Replication School:

1. Marketing and client relationships
2. Financial management
3. Strategy, social mission and innovation
4. Partnerships and project management
5. Business process design and improvement
6. Problem solving and decision making
7. People and organizational development
8. Leadership development

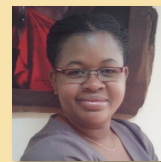
Replication School participants selected a proposed or existing impact sourcing initiative at their organizations that they would focus on throughout the training, culminating in a detailed project plan and presentation with recommendations for implementation or improvement. As the trainings progressed, tools and research from each course were used to further develop the project plans. Final plans and presentations were refined based on individual coaching with Impact Entrepreneurs Ames Fellow for Social Entrepreneurship, Jacen Greene, at the end of the program. Leadership development sessions and individual coaching were integrated throughout the program.

DDD staff also participated in the Replication School, with several management-level employees joining courses related to their organizational role. This enabled them to benefit from the training, while also providing additional detail on the DDD model and operations to the five primary participants. Coupled with the use of a detailed replication handbook previously created by DDD, these joint sessions enabled the primary participants to gain a thorough understanding of the organizational capacity, financial resources, knowledge and partnerships needed to launch a successful impact sourcing operation.

As designed, the Impact Entrepreneurs Replication School pilot pursued three distinct educational outcomes:

1. Train skilled social entrepreneurs to replicate a successful impact sourcing model and equip them with business, social innovation and leadership skills.
2. Help DDD staff develop additional skills and knowledge that would enhance their careers.
3. Provide MBA students with hands-on experience designing and delivering a training program in the field.

**Joan Wekesa**  
*Network Coordinator*  
*Enablis East Africa*



Receiving information and immediately knowing how to apply it within my personal and organizational sphere makes this training very unique. As a leader, I know and believe it is my responsibility to ensure the output of the training is replicated to enhance my personal and organizational development. We are learning a lot from the teachers, fellow participants and mostly the DDD team. It is totally worth my time.

## 8. Results and Evaluation

Less than a year after the Replication School concluded, participants had made significant progress in designing, funding and launching new impact sourcing operations. In the Gilgit-Baltistan region of Pakistan, a new impact sourcing program was funded by German aid organization GIZ based on the strength of a proposal developed at the Replication School. The program will create 2500 new impact sourcing jobs, with a focus on providing employment opportunities to women, individuals with special needs, and internally displaced persons. In Nairobi, Kenya, a program designed at the Replication School hired 412 college students in 2012, providing work experience, additional income, and soft skills training. Also in Nairobi, an impact sourcing training program developed at the Replication School trained 20 entrepreneurs, who in turn hired 54 young employees from disadvantaged populations during 2012.

In their personal evaluation forms, participants varied in their responses as to which topics or sessions they found most helpful, but nearly all of them mentioned the leadership component as delivering exceptional value. One participant remarked in their evaluation that, “Knowing how to be an innovative social leader is as important as the business skills that would sustain the [...] solutions we advance against daunting social problems.” Personal leadership development was clearly an important element for a program designed to empower individuals to effect social change through work in an emerging sector.

Among the four MBA students serving as course instructors, feedback was uniformly positive. They remarked on the personal and career significance of working to further social innovation through program design and delivery overseas and recommended that future training schools incorporate student participation.

## 9. Findings and Conclusion

Impact Entrepreneurs sought to analyze the Replication School pilot to identify key strategies for success and the potential to offer this training to replicate other successful social innovations. In discussions with participants, instructors, and DDD staff, several key findings emerged:

- Select model organizations with proven impact, financially sustainable operations, and clearly documented processes.
- Choose participant entrepreneurs who are highly motivated and work at existing organizations with management buy-in and sufficient organizational capacity to effectively replicate the model.
- Train participants in business fundamentals to ensure they can meet the organizational and financial demands of replication.
- Ensure that participants have a chance to work closely with staff at the model organization, to gain a hands-on understanding of daily processes.

- Integrate leadership training for participants to build their capacity as leaders and help them understand how to influence stakeholders and develop coalitions necessary for success.

The Impact Entrepreneurs Replication School pilot demonstrated that dissemination training could prepare entrepreneurs to replicate successful social innovations without straining the resources of the model organization or its partners. Through a focus on impacts and sustainable finances, but with model elements adjusted to meet the unique cultural and market demands of each new area, entrepreneurs were equipped to import a social innovation. Thus dissemination training shows promise as an approach to cost-effectively move the needle on achieving large-scale impact.

At the time of the writing of this white paper, there is anecdotal evidence to support a perceived bias for social innovations that are new (i.e. untested). It is often commented in this sector that new innovations are more likely to attract resources, including media attention and funding, than innovations that may have once been pioneering but have evolved into well-rooted, well-documented success stories. The authors of this white paper contend that there is significant room for social innovation in the area of replication, to refine approaches for reaching scale whether directly through organizational expansion, through open source dissemination, or using other carefully evaluated propagation strategies. It is our hope that successful replication of existing programs, such as this project supported by The Rockefeller Foundation, continues to gain momentum as a path toward accelerating impact through social innovation.

## Impact Entrepreneurs Contact Info

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## Appendix: Program Instructor/Designer Bios

**Carolyn McKnight**

*Executive Director of Impact Entrepreneurs  
Director of Leadership Programs, Portland State University School of Business Administration*

Carolyn oversees the execution of Leadership Development within the MBA curriculum in the School of Business Administration at Portland State University in Portland, Oregon. An acknowledged figure in the area of corporate leadership and organizational development for over 25 years, Carolyn is leading one of the nation's first programs to integrate leadership development and management of innovation into the MBA experience. Carolyn holds a bachelor's degree in education and a master's degree as well as a Ph.D. in mythological studies/depth psychology.

**Cindy Cooper**

*Director of Impact Entrepreneurs, Portland State University School of Business Administration and Institute for Sustainable Solutions*

Cindy teaches social entrepreneurship and oversees the Social Innovation Incubator at Portland State University's School of Business Administration. She is Co-founder of Speak Shop, an award-winning social enterprise that offers live online Spanish lessons with teachers in Guatemala. Previously, Cindy developed and managed programs for nonprofits such as the Social Entrepreneurship Incubator and Net Impact and worked in international marketing at Nike. She has consulted on social entrepreneurship and sustainability to clients such as Nike, Meyer Memorial

Trust, Verité and Ashoka's Changemakers. She holds a Master of International Management with distinguished honors from Thunderbird School of Global Management and graduated summa cum laude and Phi Beta Kappa from Claremont McKenna College with a B.A. in Psychology and Spanish.

### **Kathleen Wood**

*Senior Associate, The Partnering Initiative*

Kathleen is a senior associate at The Partnering Initiative, a global program of the International Business Leaders Forum and nonprofit working with all sectors to promote and support cross-sector partnerships. Kathleen was a Senior Director at Organic Exchange, a global multi-stakeholder nonprofit focused on creating social and environmental benefits through the expansion of sustainable agriculture. She has been a member of the Better Cotton Initiative steering committee and continues to work closely with the organization. Her undergraduate university work was in environmental sciences and her graduate work focused on Training & Organizational Development, Intercultural Communication and Cross-Sector Partnership for Sustainable Development.

### **Jacen Greene**

*Ames Fellow for Social Entrepreneurship at Portland State University School of Business Administration*

Jacen provides consulting services to nonprofits studying the feasibility of launching their own social enterprise, startup social entrepreneurs seeking help analyzing their triple bottom line, and organizations that support social entrepreneurship worldwide. He has worked with social entrepreneurs in the U.S., India, Cambodia and Central America in sectors as diverse as green energy, impact sourcing, and certified coffee. Jacen graduated Beta Gamma Sigma with an MBA in business sustainability from Portland State University and holds a B.A. in China studies from Willamette University.

### **Joel Barranger**

*Student Instructor/Senior Financial Consultant at Kaiser Permanente*

Joel spent 13 years of his professional life immersed in Finance and Economics. It wasn't until he decided to broaden his business and other skills that he discovered there was more to life and business than just numbers. Joel encountered social enterprise through his experiences at Portland State University, largely drawn from the teachings of Carolyn McKnight and many others within PSU and Impact Entrepreneurs. In particular, he was able to apply his personal and business skills in practical settings for Social Enterprise in India (with the Byrraju Foundation) and Cambodia (with Digital Divide Data), which he considers invaluable. Joel now works for a nonprofit and foresees himself always working to better society through business.

**Lindsey Dietz***Freelance Marketing Specialist*

Lindsey Dietz is a freelance marketing specialist focused on digital strategy and implementation. She has worked in all areas of marketing, including brand management, strategy, events and customer relationship management, and previously served as the Marketing Manager at CyberOptics Semiconductor. Lindsey holds a bachelors degree from the University of Oregon and an MBA from Portland State University. Outside of work, Lindsey is dedicated to environmental and social sustainability and giving back to her local community.

**Josh Mathis***Student Instructor/Commercial Project Manager, Vestas American Wind Systems*

Josh holds an MBA from Portland State University. He is a social entrepreneur at heart, currently working in renewable energy for Vestas American Wind Systems in Portland, Oregon as a commercial project manager. Prior to that, he worked as a wind power project developer in Arizona, California and Washington for EDP Renováveis. Josh graduated from The Ohio State University in 2002 with a BA in International Studies. He started taking socially motivated international trips in 1994 and has had the opportunity to volunteer his services as a medical assistant, translator, business consultant, sustainability advisor and teacher on 4 continents.

**Michael Chertok***Chief Development Officer, Digital Divide Data*

A co-founder and former Board Chair of DDD, Michael previously served as Program Officer in the Global Development Program of the Bill & Melinda Gates Foundation and was a Digital Vision Fellow at Stanford University. Michael was the co-founder and Managing Director of Global Catalyst Foundation, the philanthropy arm of a Silicon Valley venture capital firm, where he facilitated a seed grant to help launch DDD. Prior to this, he helped start the nonprofit organization Schools Online to bring Internet access and training to more than 5,000 schools around the world. Michael holds a BA in Russian Studies from Yale University and an MBA and Certificate in Public Management from the Stanford Graduate School of Business.

**Neil Schimmel***Real Estate Operations Manager, Nike*

A finance professional for 10 years, Neil recently moved into a new and exciting role as Real Estate Operations Manager for Nike, where he's been able to pursue community development work as a committee member for the Nike Employee Grant Foundation (NEGF) in partnership with the Oregon Community Foundation (OCF). A 2012 MBA graduate of Portland State University, Neil was fortunate to focus his education on sustainability in business practice, particularly with social enterprises in developing countries (i.e. Nicaragua and Cambodia) — this remains a passion and he looks forward to future opportunities in this area of business.

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