When scaling out
is not enough:
Strategies for system change

Frances Westley and Nino Antadze
University of Waterloo, Canada

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Strategies for System Change

Nino Antadze, PhD
Post-doctoral fellow
School of Environment, Enterprise and Development
University of Waterloo, Canada
Email: *nantadze@uwaterloo.ca*

Frances Westley, PhD
J. W. McConnell Chair in Social Innovation
The Waterloo Institute for Social Innovation and Resilience
University of Waterloo, Canada
Email: *fwestley@uwaterloo.ca*

Abstract

Most social entrepreneurs start their work on a local level; the goal is to tackle a certain social problem. When successful, they next work to "scale out" the initiative, disseminating it to other individuals, organizations or communities. However, over time the same social entrepreneurs discover that to reach their goal they need to change the system that created the problem in a first place. We define the latter as an effort to "scale up" social innovation.

This shift from a "scaling out" strategy to "scaling up" is not simple. In this research we investigate how successful social entrepreneurs face the challenge of scaling up their social innovation. We focus on the skills and approaches that are necessary for moving from scaling out trajectory to the scaling up one and argue that the ability to see the larger context, recognize and seize the opportunities is central for successful scaling up efforts. We introduce the notion of system entrepreneurship and explain that the major difference between successful social entrepreneurs and system entrepreneurs is the ability to manage the context and orchestrate an interplay between the openings and actions that can move social innovation forward.

We illustrate our argument by drawing on the cases of selected non-for-profit organizations that became engaged in scaling up efforts in the past few years. The article presents four case studies out of which one showcases a successful story of scaling up social innovation to a policy level, whereas the rest of cases explore why social entrepreneurs were not able to move their social innovation to a higher scale. While bringing examples of both successful and not-yet-successful cases of scaling-up, we hope to contribute towards better understanding of why certain social entrepreneurs and non-for profits are able to alter the larger system, while other fail to do so.

1 Introduction

Social entrepreneurs operate in complex environments characterized by a multiplicity of linkages and feedbacks and high degree of unpredictability (Goldstein, Hazy and Silberstang, 2008). In this setting, social entrepreneurs strive to create social value by employing innovative ways of addressing acute social problems. In order to survive and respond to the challenges presented by such complex environments, social entrepreneurs need to adapt, evolve and meet emerging needs and opportunities (Dorado, 2006).

In this paper, we distinguish "scaling up" from "scaling out" strategies. "Scaling out" refers to the efforts to disseminate social innovation, so that its benefits can be felt by more communities and individuals. "Scaling up", however, refers to efforts to connect the social innovation to opportunities (resources, policies, values) occurring in the broader economic, political, legal or cultural context. When scaling up is successful, the innovation becomes "part of the water supply", a taken for granted element of the institutional context. While social entrepreneurs often stay engaged through the scaling out phase, it often requires a different form of entrepreneurship, which we label "system entrepreneurship", to challenge and possibly alter the overall system that creates the social problem in the first place (Westley and Antadze, 2010). In order to do so, social innovations need to be "scaled up" so they can impact the broader system. This involves a range of disrupting, convening, visioning, brokering, partnering, selling and networking skills (Westley et al. 2013) which may or may not be part of the social entrepreneur's repertoire.

We define social innovation as "a complex process of introducing new products, processes or programs that profoundly change the basic routines, resource and authority flows, or beliefs of the social system in which the innovation occurs. Such successful social innovations have durability and broad impact" (Westley and Antadze, 2010, p.2). Therefore, institutional change is required if ideas addressing the system dynamics that create social problems are to become mainstream. And for this to occur and be durable – that is, for innovations to move across scales and transform legal, economic and policy regimes – it is essential to understand the complex dynamics involved in system change, particularly because failure is more common than success in these endeavors.

Although it promises profound and durable change, scaling up strategy often proves to be challenging. Moving social innovation from a local scale to a policy domain is a complex and hence unpredictable process, full of emerging barriers and opportunities, and in order to succeed on this way social entrepreneurs need to apply a large array of skills and competences. These skills and competences are not the same as those that helped social entrepreneurs succeed on the local level. Their efforts to scale out social innovation, disseminate it widely, and enter new markets, will not automatically lead to the changes in the broader context. Barriers may be encountered on a number of fronts:

1.   **A leadership crisis**: In order to scale up social innovation, social entrepreneurs need to make a shift to a broad system perspective, sense existing opportunities, seize them and thus, move their social innovation forward. At times this means handing off leadership to those who possess a different skill set, which in itself represents a "critical transition".

2.   **An organizational crisis:** As is the case of all critical transitions, the likelihood of failure is high. The very efforts and organizing that has led to a successful invention, determined by the dissemination of the idea to other individuals, organizations or communities, may in fact be a barrier to switching to a systemic focus and strategy.

3.   **The opportunity context:** Despite an organization and leadership shift, the time may be wrong for scaling up, in terms of the receptivity of the current political, economic or cultural contexts.

In order to understand better, how these skills are applied or where the social entrepreneurs find themselves failing to apply these new approaches, we investigate case studies of non-for-profit organizations that, after being successful on a local scale, and scaling out, decided to move their efforts upwards and tackle the larger system.

2 Methodology

This research employs case study approach. For the current case studies, non-for-profits were selected to be studied from among participants of the Applied Dissemination Group – a group of 24 not-for-profit organizations funded by the J. W. McConnell Family Foundation on the basis of their initiatives to create social change.

The main method for data collection was personal, non-structured interviews with the leader and, in most cases, founder of the organizations. The interviews were mainly conducted in the offices of the organizations in order to witness the atmosphere and the environment in which the interviewees worked. Each interview was recorded, transcribed, and open coded. The "line by line" coding enabled us to detect the nuances and "open up the text and expose the thoughts, ideas, and meanings containing therein" (Strauss and Corbin, 1998, p.102). The detailed study of the data helped us to understand the views of our interviewees and the way they comprehended their reality, and thus, to minimize our personal biases or the possible influence from our pre-determined perceptions (Charmaz, 2000). Through open coding we broke down the data in order to generate the categories and sub-categories.

After completing the open coding, we reassembled data in order to make more accurate connections between categories and sub-categories. As Strauss (1987, p.64) explains, at this stage of data analysis "the analyst begins to build up a dense texture of relationships around the 'axis' of the category being focused upon." Throughout the research, the data collection and data analysis were not strictly separated phases, but rather they informed each other. After completion of the preliminary analysis, we were able to share our findings with the representatives of the organizations that we studied. This meeting served to confirm the accuracy of our analysis and to refine our findings.

3 Case studies
3.1 PLAN

Planned Lifetime Advocacy Network (PLAN) was founded in Vancouver, Canada two decades ago by the parents of children with disabilities, inspired by the leadership of Al Etmanski and Vickie Cammack. PLAN worked to develop a different concept of disability, focusing on the gifts that people with disabilities have rather than on their deficits. The group began by searching for a secure future for their children that was both financially and socially secure. This was to be achieved by building a lifelong social network around the person with a disability. The results were very positive and the demand for PLAN grew, as Al and Vickie worked to disseminate their model to communities across Canada. But as their success grew, so did their dissatisfaction.

Even though PLAN's concept of creating network of friends around the person with the disability proved to be very popular, Al and Vickie decided to step back from what was considered an extremely successful replication model and focus on altering the larger system that contributed towards the exclusion of those with disability from the mainstream society. They recognized that being safe and secure was not enough. The disabled and their families wanted a good life, one that involved contribution and participation. This in turn meant that the disabled needed to break out of the straitjacket of broader conceptions of the disabled on the one hand, and the financially restrictive disability pensions, on the other. They started Philia, an organization devoted to creating a broad, national level dialogue between thought leaders and the disabled. They also developed and later actively advocated for the nation-wide changes that would bring long-term financial security to the people with disability. This strategy resulted in a breakthrough: the establishment of the first Registered Disability Savings Plan (RDSP), which made it possible for the disabled to amass savings without losing their disability payments. Beyond serving individual families through networks of support, through the introduction of the RDSP, PLAN was able to change the life conditions for all people with disabilities in Canada.

3.2 JUMP MATH

Junior Undiscovered Math Prodigies (JUMP) was started by John Mighton in 1998 as a new approach to teaching math by working with educators and enhancing the potential of the average school child to learn math (JUMP Math, 2013). John created an organization with a strong belief and firm vision that such an assistance was necessary for those struggling with math and that these efforts would result in creating a numerate society. John always struggled with math at school that made him wonder if there were limits to his abilities. The same continued at the university before he came across the story of Sylvia Plath who taught herself to write. The example of Sylvia Plath served as an inspiration for John. He believed that anybody can learn math, and realized this belief by earning a Doctorate degree in mathematics. Over the years, John volunteered in math programs to help students. The results were very positive. Soon he realized that kids had much larger potential than what they were given credit for.

The major strength of the organization was consistency and drive towards attaining its goals and vision. With the strong belief in the importance and need to help students to excel in math, John decided to train some of his friends to be tutors. However, soon JUMP moved from offering a tutoring program to being invited to the classrooms. The new revelation that this novelty brought was the evidence that children learned better when they were together in a non-competitive and supportive environment. JUMP started to drive its energy towards teaching teachers and providing resources for them. Gradually a network of teachers who could support, inform, and mentor other teachers was created. Teachers represented the primary base for the dissemination of JUMP's ideas. They actively volunteered to make a contribution. The teachers' network served as a forum for discussions and exchange of information and experience. Teachers were being seen as major agents for change, who were able to reach out to the students and to other teachers. Currently at least 50 000 schoolchildren are served by the JUMP program, with about 50 per cent growth per year.

The outcomes of JUMP program are also very positive. For example the results from Lambeth School in the UK show that for the group of students who used the JUMP Math approach for two years, 60 per cent performed at or above their grade level, whereas before JUMP instruction began only 12 per cent of the group performed at or above their grade level (JUMP Math, 2009). Currently, JUMP tutoring program is used by 85 000 children across 400 schools (JUMP Math, 2013). Initially, the idea was to help those children who were marginalized and often struggled at school. Over time, John and his colleagues realized that by reaching out to more and more schoolchildren, they could raise the average standard in math. However, it was not only about math. John believed that the academic success of the kids and their future contribution to the society were linked.
By being better educated and aware of their own potential, they could become active citizens who would be able to make informed decisions. John believed that the academic success in math could "spill over everywhere in their lives."

However, in order to realize this intention, JUMP had to tackle significant challenges. The organization experienced the lack of resources as it was largely depended on the support of funders. Despite its success, the program was not picked up to be part of the regular curriculum and therefore was not supported by public funding. The lack of sufficient financial and human resources prevents JUMP from responding to existing opportunities, and is often named as the source of frustration in the organization. Coupled with this, is the inability to influence the basic math curriculum in Canadian schools.

3.3 Tamarack

Tamarack – an Institute for Community Engagement – was founded in 2001 with the aim to support "learning communities to help people collaborate and to co-generate knowledge that solves complex community challenges". By achieving this goal, Tamarack aims to eliminate poverty in Canada (Tamarack, 2013). Tamarack's mission of creating vibrant communities is informed by the belief that larger change starts at the community level. Over the years, Tamarack has been very successful in facilitating new local partnerships and networks. As a result, the life of thousands of people have been improved.

The major strength of the organization is that it facilitates the emergence of new local networks and partnerships and builds on existing community assets. Tamarack engages 15 cities in pan-Canadian learning communities. Compared to Tamarack's initial goal of moving 5000 people out of poverty, the number of people whose lives have been improved has reached 147 000.

While being successful on the community level, Tamarack experiences the challenge of connecting place-based strategies to broader policy/economic change. Although the need to bring in changes on a system level was clearly understood, Tamarack admits that it did not succeed in altering national level policies. High turnover within the organization contributed to being unable to scale up social innovation. While being "high-performing dysfunctional organization", Tamarack failed to get engaged in the national policy level conversations. The outcomes were very different on local and provincial level, where Tamarack's efforts resulted in the local and provincial policy shifts. However, even at the provincial level, the impact of Tamarck's ideas were unevenly distributed – some parts of the country benefited more from Tamarack's innovation than others.

3.4 CCCO

The Centre for Children Committing Offences (CCCO) was established in 2001 with the goal "to reduce crime by preventing children from becoming future offenders through the application of proven clinical and community based approaches" (CDI, 2010a). In order to achieve this goal, CCCO developed a program called Stop Now and Plan (SNAP) that aimed to assist child offenders under 12 to continue school education and overall change community's approach towards high risk and disruptive children. The program was developed and refined over a decade, and their evidence-based approach and positive impact gained international attention.

CCCO collaborated with communities, schools, and mental health administration, and focused on teaching self-control and problem solving to young offenders. CCCO was established to extend the program impact, and build a successful enterprise model. For years the organization was oriented towards the dual task of finding new markets and building business systems on the one hand, and refining their model for successful replication in different contexts and communities, on the other. The development of strong business model enabled the product to reach more communities, and the program impact was ensured through attention to fidelity and quality control. SNAP's effectiveness has been widely recognized, and to date, SNAP$^{®}$ licenses have been issued to children's mental health agencies, educational facilities, and other community and social service organizations across Canada, United States and Europe (CDI, 2010b). Consequently, the major strength of the organization is that the demonstrated success and adoption of its product gives CCCO credibility, legitimacy, reliability, and reputation.

As their enterprise approach met with success, CCCO began to reflect on how to extend their innovation beyond just controlled dissemination of a positive product. At this point the organization faced the challenge of having emphasized short-term managerial thinking in a complex problem domain. Emphasis on the product and on its replicability and scalability, to some extent, served as a distraction from broader scaling up possibilities. The focus on a successful product made it difficult for the organization to adapt to change or impact the broader system. Despite the fact that the organization has been approached by much larger organizations who see the implications of STOP for fundamentally changing juvenile justice (in the US), such an association is a source of concern, as it is difficult to anticipate the effect of such a context on the product itself.

4 Discussion

The transition from scaling out to scaling up is not an easy one. As the PLAN case reveals, succeeding in moving from scaling out to scaling up demands reframing of the problem to focus on system change, and developing a tailored strategy to achieve it. In order to scale up, organizations need more than a good idea, adequate resources, and leadership capacity and drive; they must also be able to recognize and seize an opportunity without the ability to control it directly (Westley et al., 2006). Critical to this process are the *system entrepreneurs* – individuals or networks of individuals committed to and skilled in changing broader systems and helping social innovations scale up (Dorado, 2005). The case of PLAN reveals Etmanski and Cammack as system entrepreneurs who were not satisfied by incremental (even if significant) improvements for few individuals and sought to change the whole system. Focusing on system-wide alteration and trying to change the existing political, legal, economic, and cultural institutions is the main distinctive feature of the system entrepreneur.

In order to do so, Al tried to seize opportunities and achieve far-reaching goals. Although he was very good in recognizing opportunities and seizing them, he was also very strategic in his action. The strategic character of his behavior was revealed when he refused to personally continue to disseminate PLAN's innovative idea, but rather took a different route, much more targeted on the final outcome – profound system change. It did involve his stepping away from the original innovation, which persists as an initiative under new leadership, and focusing on scaling up *its essence* –the right of all to belong, and a related new notion of citizenship.

Al is a system entrepreneur as he occupies the middle ground between the grassroots idea (financial mechanism to ensure the financial security for people with disability) and the policy level. He saw a new idea, recognized its potential and strength, and framed it for further promotion. In other words, a system entrepreneur tries to "sell" an idea. Therefore, a system entrepreneur is a key player for the cross-scale transformation of the social innovation. Unless the novel idea travels from the individual up to the institutional level, it will not achieve durability and broad impact. Al tried to refine and formulate idea in a way that is more applicable to the policy-makers. Thus, it became easier to move forward the "repackaged" social innovation. Recognizing openings and adequately responding to them by repackaging social innovation is not enough. While changing the appearance of social innovation, its core value should not be altered. Therefore, we speak about changing a form, an outer layer of social innovation, by leaving its content and inner self unchanged

Undoubtedly, the element of luck (being on the right place in the right time) also plays a role. However, if an opportunity or a successful course of events, that often occur quite unexpectedly, is not recognized, the idea may never go beyond the private discussions among the interested individuals. Therefore, unlike social entrepreneurs who create a new idea or product to satisfy unmet needs (Leadbeater, 1997), system entrepreneurs not only introduce an innovation, but also manage the broader context "in such a way that the innovation has a chance to flourish, widening the circle of its impact" (Moore and Westley, 2011, p. 4). The importance of seeing the larger context and opportunities that emerge within it has been highlighted in previous research (Dorado, 2005, Westley et al., 2013). Westley et al (2013) argue that on a different phases of change, a different set of skills are required and in order to achieve successful transformation, the actions of social innovators should be tailored to the changes in a larger opportunity context. Viewing the broader system dynamics, recognizing windows of opportunity and responding to them, are perhaps the central skills that differentiates system entrepreneur from the social entrepreneur.

Similar to PLAN, JUMP Math, Tamarack and CCCO succeeded in creating a vision for their social innovation, developing that social innovation into a "mature" program or product, disseminating it through social networks, and building a platform of trust and legitimacy. Overall, all these organizations have been very successful in scaling out their social innovation - PLAN's concept of creating network of friends around the person with disability became very popular, JUMP has succeeded in popularizing its math program and has helped thousands of schoolchildren excel in math, CCCO has created the SNAP program that has been adopted by multiple organizations and agencies, and Tamarack has succeeded in changing communities and helping many overcome poverty. However, unlike PLAN, JUMP Math, CCCO and Tamarack fell short in connecting their efforts to the opening in the larger context and thus, moving social innovation to the upper scales. The obstacles that JUMP Math, CCCO and Tamarack experienced while trying to scale up their social

innovation, can be analyzed by grouping them under the themes of leadership and organization crises. Even if these obstacles are overcome, successful scaling up efforts require openings in the larger political, economic or cultural contexts that will allow social innovation to be adopted and integrated into the mainstream policies (See Table 1).

Table 1 Leadership crisis, organizational crisis, and opportunity context in the studied cases

Organization	Leadership Crisis	Organizational Crisis	Opportunity Context
JUMP Math	Overrigidity of the vision. Trying to climb through obstacles on the basis of vision and charisma.	The lack of resources to respond to the emerging opportunities that contributes towards building frustration within the organization	Economic collapse/recession that results in the cuts in education
CCCO	Short-term managerial thinking, oriented towards seeking new markets for its product. Long-term, strategic thinking in a complex problem domain lacking	Overcommitment to the polished product and identification with the product as opposed to the broader concern - young offenders	Changes in the legal definition of young offenders
Tamarack	The leader is inspiring speaker and strong visionary, that leads organization to local and provincial level success. However, does not prove sufficient for bringing in federal level changes.	Pursuing the original vision – change starts on local level. Lack of focus on political level, few efforts to engage in federal policy level conversations	Economic collapse/recession that results in resurgence of poverty

JUMP Math has created a product that proved to be effective and popular. The organization had a strong vision of its social innovation, it pursued its goals with persistence and consistency. However, once it was realized that broader changes are necessary in order to eliminate the problem, meeting the emerging challenges became difficult. The organization lacked the resources to respond to the opportunities and seize them, while being fully dependent on the initial vision and leadership.

Although CCCO succeeded in perfecting and disseminating their social innovation, they failed in recognizing openings that would help them in scaling it up. In order to repackage innovation and move it to higher scales, first the emergent opportunities should be seen, understood and seized. While being exclusively focused on further development of their social innovation, CCCO did not see the larger context and the dynamic processes that were taking place on the higher scales. The organization relied on short-term managerial approaches, rather then long-term, strategically oriented planning and leadership.

As successful as Tamarack has been on the local level, it struggled to move its poverty reduction approach into the legal, policy or even cultural mainstream, where it would transcend the efforts of local volunteers and communities and secure gains for the long term. The challenge was to build a bridge across scales and make locally successful social innovation the standard at a provincial and national level. While walking this bridge social innovation needs to become relevant and interesting for the national level goals, it should be presented and showcased not only as something that is able to solve local problems, but as a solution to a system level issues. In order to achieve this having an inspiring visionary as a leader may be necessary, but not sufficient. Making sense of the

opening in the opportunity context and moving social innovation forward needs to be realized in a way that its main value is not compromised and the initial idea behind social innovation stays intact.

Even if the challenges that we listed above are met, the time may be wrong for scaling up, that is, the current context may not be favourable and ready for introducing and institutionalizing novelty. However, different events and processes may serve as openings for social innovation. For JUMP Math it may be economic recession that results in cuts in education sector, Tamarck's social innovation may gain momentum if, as a result of the economic decline, the poverty levels are increasing. CCCO may find it favourable, if the legal definition of young offenders is challenged.

Further insights about the difference between scaling up and scaling out, and why different approaches and skills are required to move from one stage to another, may be revealed by employing the concept of "panarchy". The word "panarchy" was coined by C.S. Holling in his work on adaptive cycle in ecology. Adaptive cycle emerged as a model showing that ecosystems may have multiple equilibriums as they adapt and change over time. This change is not linear, but rather cyclical when the ecosystem goes through the stages of release, reorganization, exploitation and conservation through overcoming critical transitions between each of these phases. However, Holling observed that ecological systems not only exist at different scales (e.g. bacteria, trees, forests), but they go through the cycles in different pace and not simultaneously. Thus, adaptive cycles were seen to be "nested one within the other across space and time scales" (Holling et al, 2002, p. 74). Panarchy implies cross-scale interactions that are considered vital for scaling up social innovation, that is moving it to a higher scales where its systemic impact can be profound and durable (See Figure 1). Panarchic cross-scale interactions help to understand how innovations on a lower scale may trigger changes in the larger systems through the process called "Revolt" - small and fast events, processes and ideas may radically change slowly-moving and large structures. On the other hand, innovation may be hindered through the process of "Remembrance" that preserves existing experiences and practices. As a result, "the fast levels invent, experiment, and test; slower levels stabilize and conserve accumulated memory of past successful, surviving experiments" (Holling et al., 2002, p. 76).
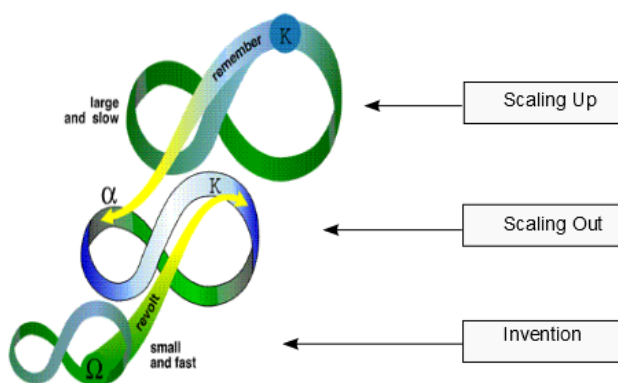

Figure 1 Understanding scaling out and scaling up of social innovation from the perspective of panarchy

In the context of cross-scale movement of social innovation, the smallest cycle is associated with the invention – a novel idea, product or service that addresses social problem. This invention may stay on a local level, serving those within the community. However, efforts can be directing towards disseminating and replicating it and thus, scaling out innovation to enter new markets and serve more people. This process will occur on the upper scale of panarchy. However, in order for social innovation to challenge the existing institutions and bring in the systemic change, social innovation needs to move to the highest scale. This is when social innovation is scaled up as a result of the efforts of system entrepreneurs and depending on the larger context that allows such changes to happen (See Figure 1).

5 Conclusions

The above discussion speaks to the fact that scaling up social innovation is not a predictable and straightforward process. Rather, it may be quite turbulent and unpredictable. Moreover, aside from being difficult to navigate, the scaling-up journey may take a long time. Moving forward on this long and difficult road is possible by being flexible, responsive to emerging challenges and opportunities, and always strategically charged to scale social innovation upwards, without compromising its initial goal.

This article explored four case studies of non-for-profit organizations that aimed to scale it up to a system level. All four organizations were successful in scaling out their social innovation, disseminating it and gaining credibility for the product they developed. However, the difference between PLAN that scaled up its social innovation and the rest of the organizations that have not yet succeeded to do so, is that once successful and effective on the scaling out arena, PLAN was able to reframe the problem and thus, move the game on a different playing field, where different approaches, skills, and competences were required.

How social entrepreneurs will meet these challenges is dependent on their skills, competencies, and experience, as well as the larger context within which they operate. Therefore scaling up journey requires social innovation to constantly adjust and tailor its steps to the changes in the larger context. Seeing the larger context, making sense of it and responding the emerging opportunities may be one of the central challenges that social entrepreneurs may face on their way of scaling up social innovation.

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