

Will the Pilot Survive Scale?

*Separate what the pilot established
from what expansion still assumes*

FOR

boards, funders, commissioners, executives, program teams, and partners considering expansion or replication

USE WHEN

a promising pilot is being used to support more people, more sites, a new population, or a larger commitment

INCLUDES

a conditions-to-travel map, staged expansion framework, worked example, action ladder, and a 15-minute team exercise

A pilot succeeds. Participants report strong experiences, staff solve problems quickly, and the headline result is encouraging. The next question seems obvious: how fast can the program expand?

But a pilot is not only a small version of a larger program. It often operates under unusually favorable conditions: experienced staff, concentrated leadership attention, flexible rules, selected participants, extra resources, and partners willing to improvise. Expansion changes those conditions.

The short answer

Treat expansion as a new decision with its own evidence needs. First state what the pilot actually showed. Then identify which people, staff, resources, delivery processes, and surrounding systems will change. Design the next stage to test the assumptions that matter most before the organization makes a harder-to-reverse commitment.

**A credible pilot result can still be local. Scale asks
whether the conditions behind the result can travel.**

What made the pilot possible?

Look beyond the written model. The effective intervention may include supports that were never named.

People served

Pilot participants may be earlier adopters, easier to reach, more motivated, or referred through a trusted partner. A larger population may face different barriers or include people for whom the model needs adaptation.

Team and judgment

Founders and senior staff often carry relationships, tacit knowledge, and authority that cannot simply be copied into a manual. The exceptional team may be part of the program.

Resources and attention

Pilots may receive lower caseloads, flexible funds, free space, rapid executive decisions, or intensive technical support. Ordinary delivery may not.

Delivery process

Small programs can coordinate informally. At scale, handoffs, supervision, training, data systems, and quality assurance become part of the model.

Surrounding system

A referral partner, employer network, clinic, housing market, or specialist service may support a small volume but become constrained as participation grows.

Time and place

The pilot may have benefited from a particular policy window, funding environment, labor market, or community relationship. Another site or year can change the answer.

Build a conditions-to-travel map

For each condition, mark one of four statuses:

- **Stable:** expected to remain materially the same.
- **Replicable:** can be recreated, but requires explicit resources or process.

- **Changing:** will differ in the next stage and should be tested.
- **Unknown:** not yet understood well enough to classify.

Do not use the map to demand certainty about everything. Use it to identify which changes could plausibly undermine the result or create harm.

A worked example

A rural benefits-navigation pilot served 180 residents through two trusted community organizations. Experienced navigators held small caseloads and could call county staff directly when applications stalled. Enrollment and benefit receipt improved over the prior period.

The proposed expansion would cover seven counties, use newly hired staff, and route cases through a central call center. Three conditions change at once: trusted access points, staff experience, and the informal escalation route. The surrounding county systems also differ.

The pilot result may be credible. It does not establish that the centralized version will reproduce it.

Instead of launching all seven counties at once, the organization begins with two counties that differ in service capacity. It retains a community-based entry point, records escalations, compares navigator caseload and time-to-resolution, and agrees a six-month review before further expansion.

The next stage is not merely more delivery. It is a deliberate test of the conditions most likely to change.

Stage the commitment

A useful expansion plan makes learning part of the decision architecture.

Define the stage. Name the sites, population, duration, resources, and limit of the commitment.

Name the assumptions. Identify the two or three changed conditions most important to success.

Choose early signals. Use measures that can reveal delivery failure before waiting for distant outcomes.

Preserve comparison where possible. Phased rollout, capacity limits, or different operating models may create informative contrasts when their allocation process is understood.

Set a review point. Name who will decide, what information will be considered, and what continuation, adaptation, or stopping options remain feasible.

Plan transitions. A stopping rule should not leave participants without support or staff without a responsible process.

What you can say

- “The pilot produced this result under the staffing and partnership conditions described here.”
- “The next stage will test whether the model holds with larger caseloads and new sites.”
- “Expansion is staged, with a review before the remaining commitment.”
- “These pilot conditions can be reproduced; these others remain uncertain.”

What you cannot say yet

- “The model is scalable,” without naming what will change.
- “The pilot proved expansion will work,” even when the pilot effect was credibly estimated.
- “Fidelity means copying every feature,” when local adaptation may be necessary.
- “The next stage is reversible,” without authority, information, and transition arrangements.

What to do next

Minimum useful step: Write two lists: what the pilot established and what expansion assumes. Do not mix them in the same sentence.

Stronger step: Build the conditions-to-travel map with delivery staff, partners, and people familiar with the new setting. Select early signals for the most consequential changes.

Before full expansion: Review the pilot evidence, the proposed operating model, capacity constraints, possible harm, and the staged decision rules. Preserve an independent review route when the expansion case depends on a contested claim.

A 15-minute team exercise

Choose one pilot being considered for expansion.

1. Ask each person to write three conditions that made the pilot possible.
2. Group them under people, team, resources, process, system, and setting.
3. Mark each stable, replicable, changing, or unknown.
4. Circle the two changes most likely to affect the result.
5. Name one early signal for each.
6. Define the smallest next stage that could test them.
7. Write the review date and the actions still open at that point.

If the team can name only the headline outcome and not the conditions behind it, pause the expansion case long enough to reconstruct the pilot.

A note on adaptation

Variation is not automatically failure. A program delivered in a different community may need different hours, language, relationships, staffing, or sequence. The question is which features carry the intended mechanism and which can change without losing it.

Ask local participants and staff what the model assumes about their setting.

Expansion should not turn fidelity into an excuse to ignore context, or adaptation into permission to deliver an unnamed intervention.

When to bring in help

Outside support can help when expansion requires a major procurement or durable commitment, the pilot evidence is contested, several conditions change together, or the organization needs a staged learning design. It may also be useful when the same party built the pilot, interprets the result, and advocates for scale.

The useful question is not whether the pilot deserves praise. It is what the next setting needs to preserve, what it will change, and how the commitment can remain responsive to what is learned.

Questions to carry forward

- Which conditions were part of the pilot's success even if they were not written into the model?
- What will change most in the next setting?
- What can be learned before the commitment becomes difficult to reverse?
- Who will have authority to adapt, continue, or stop?