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Unpacking social impact scaling strategies: challenges and responses in African social enterprises as differentiated hybrid organizations

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Abstract

Purpose – Social enterprises (SEs) face tensions when combining financial and social missions, and this is particularly evident in the scaling process. Although extant research mainly focuses on SEs that integrate their social and financial missions, this study aims to unpack social impact scaling strategies in differentiated hybrid organizations (DHOs) through the case of African SEs.

Design/methodology/approach – The study entails an inductive multiple case study approach based on four case SEs: work integration social enterprises (WISEs) and fair trade producer social enterprises (FTPSEs) in Uganda and Kenya. A total of 24 semi-structured interviews were collected together with multiple secondary data sources and then coded and analyzed through the rigorous Gioia *et al.* (2013) methodology to build a theoretical model.

Findings – The results indicate that SEs, as differentiated hybrids, implement four types of social impact scaling strategies toward beneficiaries and benefits (penetration, bundling, spreading and diversification) and unveil different dual mission tensions generated by each scaling strategy. The study also shows mutually reinforcing mechanisms named cross-bracing actions, which are paradoxical actions connected to one another for navigating tensions and ensuring dual mission during scaling.

Research limitations/implications – This study provides evidence of four strategies for scaling social impact, with associated challenges and response mechanisms based on the cross-bracing effect between social and financial missions. Thus, the research provides a clear framework (social impact scaling matrix) for investigating differentiation in hybridity at scaling and provides new directions on how SEs scale their impact, with implications for social entrepreneurship and dual mission management literature.

Practical implications – The model offers a practical tool for decision-makers in SEs, such as managers and social entrepreneurs, providing insights into what scaling pathways to implement (one or multiples) and, more

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importantly, the implications and possible solutions. Response mechanisms are also useful for tackling specific tensions, thereby contributing to addressing the challenges of vulnerable, marginalized and low-income individuals. The study also offers implications for policymakers, governments and other ecosystem actors such as nongovernmental organizations (NGOs) and social investors.

Originality/value – Despite the growing body of literature on scaling social impact, only a few studies have focused on differentiated hybrids, and no evidence has been provided on how they scale only the social impact (without considering commercial scaling). This study brings a new perspective to paradox theory and hybridity, showing paradoxes come into view at scaling, and documenting how from a differentiation approach to hybridity, DHOs also implemented cross-bracing actions, which are reinforcement mechanisms, thus suggesting connections and synergies among the actions in social and financial mission, where such knowledge is required to better comprehend how SEs can achieve a virtuous cycle of profits and reinvestments in social impact.

Keywords Dual mission, Scaling strategies, Differentiated hybrid organizations, Social enterprises, Paradoxical actions, East Africa

Paper type Research paper

Introduction

Recent years have been characterized by a growing interest in social enterprises (SEs) as hybrid organizations that combine a pursuit of social mission (addressing challenges and needs of beneficiaries) while achieving economic sustainability from the paying customers (Doherty *et al.*, 2014; Saebi *et al.*, 2019; White *et al.*, 2022). SEs actively contribute with solutions to emerging social challenges (such as poverty, marginalization, low access to healthcare and poor education) (Kim and Kim, 2022; Chatterjee *et al.*, 2022); thus, understanding how SEs can scale the social impact toward beneficiaries is becoming more relevant (Shepherd and Patzelt, 2022; Islam, 2020). In fact, the more SEs are able to scale the dual mission, the more benefits will be generated for broader society (André and Pache, 2016; Siebold *et al.*, 2019).

However, the research stream on scaling SEs mainly focuses on what Battilana and Lee (2014) defined as “integrated hybrid organizations (IHOs),” which pursue social goals as integrated in the activity to pursue commercial goals (Wolf and Mair, 2019; Besharov *et al.*, 2019). In fact, the extant literature documents how IHOs can scale the impact to beneficiaries by increasing the number of paying customers (*scaling deep*) and/or getting more revenues from the sale of products/services to different customers (*scaling breadth/up*) (Desa and Koch, 2014; Bocken *et al.*, 2016; Gordon *et al.*, 2018), thus managing the social mission in combination with the commercial one (Ebrahim *et al.*, 2014). In turn, “differentiated hybrid organizations” (DHOs) separate the social and financial activities (Battilana *et al.*, 2015); thus, they need to scale the revenues from products and services to customers while, creating value for beneficiaries with different kinds of activities (Siebold *et al.*, 2019). Therefore, the current literature is mainly focused on strategies toward commercial scaling, where scaling customers, products and services bring directly to amplify the social impact created to beneficiaries (Bocken *et al.*, 2016; Shepherd and Patzelt, 2022; Lall and Park, 2022). Although this research stream hints at mechanisms that can be commonly shared between the two types of SEs, it highlights a very limited knowledge of what strategies can be implemented by SEs to scale the social impact toward beneficiaries when those are differentiated from customers, which can help address their problems and/or basic needs more effectively without automatic overlap with financial activities (Islam, 2020; Chatterjee *et al.*, 2022). This would be possible by investigating the case of DHOs, thus focusing on scaling social impact in a clear distinction from the financial mission. Moreover, this research gap echoes a growing need to investigate hybridity and dual mission in DHOs by elucidating mechanisms for successfully combining divergent missions, goals and processes by navigating paradoxical tensions (Battilana and Lee, 2014; Battilana *et al.*, 2015; Ometto *et al.*, 2019), usually applying a paradox theory lens (Smith *et al.*, 2013; Smith and Besharov, 2019). Currently, scaling social impact toward beneficiaries remains overlooked, with the neglect of processes and outcomes

of scaling concerning the dual mission of DHOs (Glaveli and Geormas, 2018; Shepherd and Patzelt, 2022). Heeding the research gap in the literature on scaling social impact and dual mission management, this study aims to address the following research question: *How can DHOs scale social impact while effectively managing the dual mission?*

Addressing this gap is particularly relevant because it may present DHOs with the opportunity to conceptualize the pathways in which to reinvest profits (Battilana *et al.*, 2015), thereby contextualizing social impact and its outcomes to beneficiaries (Shepherd and Patzelt, 2022), reaching larger-scale social value (Siebold *et al.*, 2019) and sustainable development (Kim and Kim, 2022). This is fundamental, especially in the contexts of developing countries with severe grand challenges and weak institutional settings where societal needs are diverse and deeply rooted in the local communities (Busch and Barkema, 2021; Chatterjee *et al.*, 2022) and thus requires a proper set of solutions toward beneficiaries who are marginalized, vulnerable or low-income individuals (George *et al.*, 2016; Davies and Doherty, 2019).

Given the nature of the research question, this study is based on a multiple case study method (Eisenhardt, 1989) by deeply investigating four cases of DHOs in Uganda and Kenya, selected through theoretical sampling and analyzed following rigorous guidelines for qualitative methods (Gioia *et al.*, 2013; Gehman *et al.*, 2018). Specifically, the study investigates two work integration social enterprises (WISEs) named Corec and Wawoto Kacel and two fair trade producer social enterprises (FTPSEs) named Meru Herbs and Nucafe. The research was conducted in Kenya and Uganda with focal cases of DHOs because, in such contexts, individuals are strongly affected by multiple and deep basic needs and problems (George *et al.*, 2016; British Council, 2017), therefore offering the best setting for generalizable and rigorous theory building (Eisenhardt, 2021).

The findings illustrate that the cases of DHOs engaged in four social impact scaling strategies (*social impact penetration, spreading, bundling and diversification*), and in each strategy, they experienced specific tensions that affected the social and financial missions. The findings also reveal paradoxical actions implemented to respond to dual mission tensions, labeled *cross-bracing actions*. The analysis allowed us to capture actions between social and financial missions that are divergent yet interrelated (Carmine and De Marchi, 2022; Besharov *et al.*, 2019). The cross-bracing responses prompted the DHOs to figure out synergies and connections between the missions without emphasizing either a social or financial mission (Rozentale and van Baalen, 2021; Lewis and Smith, 2022).

In synthesizing the data, this study offers novel contributions. First, the results contribute to scaling in SEs by defining a nuanced “social impact scaling matrix,” which identifies strategies that DHOs can implement to scale the social impact toward beneficiaries (André and Pache, 2016; Bocken *et al.*, 2016; Shepherd and Patzelt, 2022). Second, the study contributes to paradox theory in the dual mission management of SEs (Smith *et al.*, 2013; Battilana and Lee, 2014; Battilana *et al.*, 2015; Carmine and De Marchi, 2022) by revealing that paradoxes move from latency to saliency in SEs because of processes of social impact scaling, which results in social and financial mission tensions. Further, the study and the model bring a new perspective on paradox in SEs; that is, tensions and responses are not experienced in the duality of missions (inherently) but rather in a dynamic view and based on a certain scaling pathway. In particular, if the dual mission has been differentiated in DHOs, the cross-bracing actions to address dual mission tensions reinforce one another, thereby showing the synergic nature of such paradoxical actions—a proper integration approach (Lewis and Smith, 2022). In this way, the study enables to move theories of hybridity and paradoxes in SEs toward a dynamic perspective (Hahn and Knight, 2021), instead of relying on static mechanisms to combine dual missions (Battilana *et al.*, 2015; Kannothea *et al.*, 2018; Ometto *et al.*, 2019).

The first section of the paper introduces the theoretical frameworks on dual mission management and paradoxical actions in SEs and scaling strategies in DHOs. The methodology is then presented, explaining the data collection and analysis processes.

Lastly, the paper illustrates the findings and proceeds to conclusions by offering an in-depth discussion of the theoretical and practical contributions.

Theoretical background

The paradoxical nature of dual mission in SEs

SEs are leading types of hybrid organizations, as they combine financial and social goals, models and processes to successfully achieve their dual missions (Doherty *et al.*, 2014; Glaveli and Geormas, 2018; Saebi *et al.*, 2019). For this reason, scholars have recognized the paradoxical nature imbued in such organizations, since “social mission and profitability represent two competing but interdependent core elements of social enterprises” (Hahn and Knight, 2021, p. 363). In fact, paradoxes are defined as “contradictory yet interrelated elements that exist simultaneously and persist over time” (Smith and Lewis, 2011, p. 382) (for recent reviews of the paradox literature, see Putnam *et al.*, 2016; Carmine and De Marchi, 2022). Despite divergent views on the ontology of paradoxes in hybrid organizations, recent theorizations explain that paradoxes in SEs are considered both inherent and socially constructed (Hahn *et al.*, 2015; Hahn and Knight, 2021; Smith and Lewis, 2011), meaning that paradoxical elements are *latent* in the organizations based on their “dual” nature, and become *salient* when activated by change, complexity and scarcity and through individual sensemaking (Smith *et al.*, 2013; Lewis and Smith, 2022; Rozentale and van Baalen, 2021).

The theory of paradox in SEs suggests structural mechanisms to balance and achieve a dual mission, which are based on the level of integration between activities toward social value creation and financial viability, which requires hybrid organizing mechanisms to navigate tensions (Battilana and Lee, 2014; White *et al.*, 2022). In this view, scholars have applied paradox theory to explain two mechanisms as the integration or differentiation of the activities related to divergent yet interrelated missions (Smith and Besharov, 2019; Rozentale and van Baalen, 2021; Carmine and De Marchi, 2022). Thus, the degree of overlap of activities related to customers and beneficiaries prompts scholars to distinguish two types of hybrid organization, namely “integrated” and “differentiated” hybrid organizations—IHOs and DHOs, respectively (e.g., Battilana and Lee, 2014; Ebrahim *et al.*, 2014; Santos *et al.*, 2015; Besharov *et al.*, 2019). SEs as DHOs create social impact for beneficiaries, with activities separated from those aimed at pursuing the financial mission and beneficiaries and paying customers considered different groups (Battilana *et al.*, 2015). One leading type of DHO is the WISE, whose “primary goal is to help the long-term unemployed to transition back into the labour market” (Battilana *et al.*, 2015, p. 1659), thereby integrating marginalized and vulnerable people and providing them with salaries and several benefits (Smith *et al.*, 2013). Another type of DHO is the FTPSE, which supports small local producers, especially by campaigning to change traditional trade practices (Davies and Doherty, 2019). Thus, DHOs aim at increasing the social impact created for beneficiaries while separately increasing the commercial revenues from customers, which brings greater complexity and paradoxical tensions compared with IHOs, especially when engaging with scaling (Santos *et al.*, 2015; Battilana *et al.*, 2015; Kannothea *et al.*, 2018; Ismail and Johnson, 2019). For instance, the increase of commercial revenues from customers could lead social entrepreneurs to extend the production capacity in the short term, causing pressures on small local producers in the case of FTPSEs or the need to manage peaks of production in WISEs, which could be managed with marginalized or vulnerable people. In other cases, the increase of commercial revenues is related to the acquisition of new large customers with a consequent reduction of prices and a need to increase efficiency of production, which is paradoxical to the aim of generating benefits for workers or local producers.

Scaling strategies in social enterprises as DHOs

Scaling in SEs has been described as the process of increasing the magnitude of both quantitative and qualitative positive changes in society by addressing pressing social problems

of individuals and society while ensuring the increase of financial viability through commercial revenues (Islam, 2020; Kim and Kim, 2022). However, despite the many existing studies on scaling in SE, the literature has yet to agree on the definition and processes needed to scale this dual mission (Islam, 2020; Shepherd and Patzelt, 2022; Chatterjee *et al.*, 2022). Some authors have related scaling in SEs to providing organizational growth with a greater number of customers (Bocken *et al.*, 2016; Ometto *et al.*, 2019) while providing a larger impact on communities and societies (André and Pache, 2016; Gordon *et al.*, 2018; Kannothea *et al.*, 2018). Other scholars have emphasized the diffusion or replication of a product, service, or organizational model in multiple geographic locations and contexts to maximize the number of people reached by a related social innovation (André and Pache, 2016; Gordon *et al.*, 2018; Busch and Barkema, 2021). Moreover, researchers have primarily gathered this knowledge by focusing on two growth pathways by which SE can scale: *depth* and *breadth* (Desa and Koch, 2014; Kim and Kim, 2022). The depth scaling strategy (also *scaling deep*) is an approach concerned with “improving and enriching the current processes to enhance the impact on beneficiaries” (André and Pache, 2016, p. 665). Breadth scaling strategies (or *scaling wide*), by contrast, involves SEs replicating the model and diffusing the related social innovation to customers in diverse geographical areas (Bull, 2008; Busch and Barkema, 2021; Chatterjee *et al.*, 2022). Combining these two main pathways of scaling, Bocken *et al.* (2016) explained how a SE can scale by extending customer targets or further developing products and services to customers by applying the famous Ansoff strategies (Ansoff and McDonnell, 1988).

However, the current body of knowledge about scaling impact mainly focuses on overlaps between customers and beneficiaries (Desa and Koch, 2014; Wolf and Mair, 2019; Shepherd and Patzelt, 2022), with a strong focus on commercial scaling (Bocken *et al.*, 2016), and on the related challenges of managing financial and human resources (Doherty *et al.*, 2014; Ebrahim *et al.*, 2014; Lall and Park, 2022). The consequence is an unclear knowledge about scaling strategies used by SEs that have customers who are different from beneficiaries, and where specific mechanisms are required to scale the social impact toward beneficiaries (André and Pache, 2016; Shepherd and Patzelt, 2022; Islam, 2020).

A paradox perspective on scaling impact in DHOs

As documented by a paradox approach to SEs, DHOs typically face greater challenges during scaling compared to IHOs because of the tensions involved in managing activities and processes that are separated in organizational form (Smith *et al.*, 2013; Siebold *et al.*, 2019; Ismail and Johnson, 2019; Smith and Besharov, 2019). In fact, in IHOs, in which customers are also beneficiaries, increasing activities toward the financial mission should directly match the increase in the social impact created (Wolf and Mair, 2019). Consequently, IHOs do not consider separate strategies to scale beneficiaries and customers—indeed, growth in the base of customers reached by products and services is equated with increased social impact (André and Pache, 2016; Glaveli and Geormas, 2018). Thus, scaling strategies in DHOs have been much less investigated in relation to the paradoxical nature of the dual mission. In fact, the literature that applies a paradox lens has mainly focused on mechanisms for combining social and financial missions when they are differentiated. For instance, DHOs can navigate paradoxical tensions and thus balance social and financial missions through spaces for “negotiations” and “herding” spaces (Battilana *et al.*, 2015; Ometto *et al.*, 2019), selectively coupling social and financial aspects (Pache and Santos, 2013), or through organizational guardrails in a process of ongoing adaptation of dual mission (Smith and Besharov, 2019).

The result is that, to the best of our knowledge, no studies have documented pathways by which SEs can scale the social impact toward beneficiaries when dual missions are differentiated. Overall, the extant literature has failed to highlight how DHOs can trigger a virtuous cycle of profit and reinvestment, which may produce large-scale social impact while

navigating the paradoxical nature of this organizational form (Smith *et al.*, 2013; Glaveli and Geormas, 2018; Carmine and De Marchi, 2022). This study aims to fill this gap by extending previous research and generating new insights into how DHOs can scale social impact while effectively managing their dual mission.

Research methodology

Research design and case selection

The research aimed to discover new insights into how DHOs can effectively scale their social impact while managing a dual mission. The authors decided to adopt an inductive approach based on multiple case studies because of the exploratory nature of the research question (Eisenhardt, 1989), with an approach suited for questions on the “how” and “why” of a given phenomenon (Gehman *et al.*, 2018). Moreover, multiple case study (vs single case study) is recognized as a suitable method to develop theory that tend “more likely to be parsimonious, accurate, and generalizable” while theorization from a single case is more idiosyncratic to the case, “often overly complex, and may miss key relationships or the appropriate level of construct abstraction” (Gehman *et al.*, 2018, p. 287).

The case selection is based on a theoretical sampling procedure (instead of a random sampling), as it is more suitable given the purpose of theory building from cases (Eisenhardt, 1989; Patton, 1990). The authors looked for cases purposefully selected to ensure analytical generalizability (Gehman *et al.*, 2018) and based on the following criteria: (1) had to be DHOs as per Battilana and Lee’s (2014) definition, whereby activities implemented toward customers are differentiated from the activities to achieve the social mission toward beneficiaries; (2) had to face the broader multitude of basic needs and social issues of beneficiaries, in order to figure out all the possible alternative pathways to scale the social impact; (3) had to be established for more than five years to explore a certain pathway of the organization while not limiting the analysis on a given life-cycle (e.g., start-up and early-stage); and (4) had to be financially sustainable with a demonstrable social impact generated over time. Therefore, to improve the theory generalizability and rigor, the research design was developed to include organizations in an extreme context (Eisenhardt, 1989), in which “the focal phenomenon is likely to occur” and where similarities across cases are likely to improve theory building (Eisenhardt, 2021, p. 149). More precisely, to match Criterion 1, ensuring stronger generalizability, the authors looked for so-called matched pairs (Eisenhardt, 2021), which are cases with similar antecedent features that would allow the researcher to compare the mechanisms and outcomes. Based on the extant literature, the authors have focused on the most relevant types of DHOs, specifically WISEs and FTPSEs (Battilana *et al.*, 2015; Davies and Doherty, 2019).

A major advantage of the research design (matching Criteria 2 and 3) is the decision to focus on DHOs operating in Kenya and Uganda, as they represent a flourishing field for SEs (Kolk and Rivera-Santos, 2018; Ciambotti *et al.*, 2021). These countries are leading Sub-Saharan African economies (George *et al.*, 2016; Busch and Barkema, 2021), ranked among the 30 poorest countries in the world (IMF, 2018) and share several similarities that are very relevant to the project’s objectives. In fact, in such countries, individuals face several challenges and basic needs, such as poverty, hunger, illiteracy, domestic violence, teenage pregnancy, energy conservation and so on (OECD/EU, 2017; Kannothea *et al.*, 2018; Sottini *et al.*, 2022). In addition, poor infrastructure and weak institutional support amplifies power imbalances and creates additional challenges for vulnerable and marginalized individuals, such as farmers, youths and the overall population at the base of the pyramid (Davies and Doherty, 2019; Busch and Barkema, 2021; Reypens *et al.*, 2021; Ciambotti *et al.*, 2022). In such challenging contexts, SEs are viewed as a viable option for addressing the grand challenges of low-income people, with different creative strategies and means, such as inclusive employment, as in the case of WISEs, or developing market opportunities for farmers living in rural areas (OECD/EU, 2017; Kannothea

et al., 2018; Sottini *et al.*, 2022). The authors validated the four cases' sample as appropriate for theory building (Eisenhardt, 2021) by engaging with industry experts (such as the British Council in Kenya) who were asked to evaluate the cases, and they confirmed the sample as a population of "first frontier" cases, as suggested by Hannah and Eisenhardt (2018). Moreover, the authors verified consistency with extant research on hybridity that used two, three, or four cases (Battilana and Dorado, 2010; Bocken *et al.*, 2016). Lastly, the sample size was also based on data availability and cognitive limits due to cultural barriers that are present in African SEs (George *et al.*, 2016; Busch and Barkema, 2021).

Corec is a Nairobi-based WISE that aims to integrate marginalized youths in slums, particularly those who are homeless or living under the poverty threshold, by collecting and recycling plastic and producing building materials. Another WISE is represented by the Ugandan company Wawoto Kacel, which integrates vulnerable women and disabled people to produce handicrafts and textiles. The two cases of FTPSEs selected (Cases 2 and 3) provide support to local farmers to produce organic tea (Meru Herbs) and high-quality coffee beans for foreign and local markets (Nucafe). Table 1 offers an overview of the case studies, with a summary of the targeted beneficiaries, customers, and the products and services offered.

These cases of DHOs in Kenya and Uganda allowed us to unpack strategies for scaling the social impact of these SEs and to better understand the mechanisms (challenges and responses) experienced in the scaling process.

Data collection

As Table 2 shows, data collection entailed multiple sources of information, including initial desk research, four waves of semi-structured interviews and secondary data sources provided by the DHOs, which have been useful for triangulation (Gioia *et al.*, 2013).

To familiarize themselves with the East African context, the authors began with a desk study in January 2018, in they analyzed reports from international and local institutions, including the World Bank, British Council in Kenya, Global Entrepreneurship Monitor and other foundations to identify potential cases. Such expert organizations also validated the selected case DHOs, which were contacted by email to initiate a preliminary conversation.

The data collection continued through the four phases of semi-structured interviews to validate the data along the scaling path of SEs. The use of semi-structured interviews was important to guarantee flexibility in the protocol, as well as to allow the informants speak freely, limit cultural barriers and share necessary information in a constrained time and context (Bernard, 2011). During the four waves of interviews, primary data were triangulated with secondary data as documents provided by the SE to improve data reliability. In this way, the authors engaged in a deep immersion in multiple kinds of data (Gehman *et al.*, 2018), including business models, business plans and annual reports and compared such results with semi-structured interviews and theory. The authors also initiated field visits to headquarters and production plants in Kenya (Nairobi and Kariobangi) and Uganda (Kampala, Jinja and Gulu). The insights from field observations facilitated a better understanding of the reference points of the informants during the interviews. In fact, face-to-face interactions developed support and trust with the informants (Reypens *et al.*, 2021). Triangulation also improved the data reliability and limited the retrospective bias, which has been reduced through the engagement of multiple authors in different phases of data collection and through separated coding during the data analysis (Gehman *et al.*, 2018).

The first phase of semi-structured interviews was conducted in March and May 2018, with four interviews in Kenya and two interviews in Uganda. Interviews were performed with key informants of the DHOs, mainly CEOs or other decision makers, thereby increasing confidence in the reliability of the authors' interpretations. The second round of interviews was carried out in October and November 2018, when four in-depth interviews were

Table 1.
 The case studies

Case	Industry	Setup	Firm description	Beneficiaries	Customers	Products
Corec	Waste management	2010	It employees marginalize people to collect and recycle waste plastics, transforming it into building material and sell, providing affordable and durable construction products to construction companies	– Youth and street boys of slums – Women and disabled people – Parents and wife of youths and disabled people with low income	– Kenyan privates – Construction companies – Wholesalers	– Fencing posts – Roofing tiles – Pavement blocks – Walkway slabs – Garden products
Meru Herbs	Agri-business	1991	It grows, processes and exports high-quality organically certified Herbal teas and Jams, with the aim to achieve sustainable livelihood for the local farmers in Meru	– Rural farmers in Meru with low income – Meru community – Wife and children of rural farmers	– Fair trade-oriented people in foreign countries – Local supermarkets – Tourists – Students from Kenyan universities	– Hibiscus tea – Fruit Jams – Other herbs (Chamomile, lemongrass, green coffee, morning tea) – Tomato sauces – Ecologne for tourists and students
Nucafe	Consumer goods	2003	It establishes a sustainable market-driven system of coffee farmers enterprises/ organizations which are empowered to increase their household incomes through enhanced entrepreneurship	– Coffee farmers – Rural-based farmers associations – Other value chain farmers – Women and youths – Women with HIV – Men and youth with HIV – Disabled women and men – Children of the workers – Returnee women from rebels in Gulu area	– Coffee roasting companies in foreign countries – Local supermarkets – Local customers	– Raw Coffee – Roasted coffee for the local market – Café and coffee shop in Kampala
Wawoto Kacel	Handicraft and textiles	2004	It integrates women with HIV and disabled people to manufacture local handicrafts and textiles in tie and dye technique	– Women and youths – Women with HIV – Men and youth with HIV – Disabled women and men – Children of the workers – Returnee women from rebels in Gulu area	– Fair trade-oriented people in foreign countries – Tourists in Uganda – Fashion designers in Uganda – Schools in Uganda	– Handicrafts products – Interior design products – Fashion products and handmade textiles – School uniforms

Source	Type of data	Quantity	Use in the analysis
Documents and reports	Report from local and international NGOs, government, corporates, banks	520 pages (.pdf)	Familiarize with the local context and business ecosystem
Primary data	Semi-structured Interviews – March 2018, Kenya (4) – May 2018, Uganda (2) – October 2018, Kenya (2) – November 2018, Uganda (2) – April/May 2019, via call (4) – October 2019, via call (6) – November 2020, via call (4)	– 17 h and 53 min of interviews (10 in-loco, 14 Skype call) – 4 headquarters visits – 3 production plants visit	Reconstruction of the set of concepts and capture all the information to the cross-case analysis
Secondary data	Business models Business plan Marketing plan Financial model Annual report and social impact report	122 pages (.ppt) 132 pages (.pdf) 61 pages (.pdf) 42 pages (.xls) 77 pages (.pdf)	Support, integrate and triangulate evidence from interviews

Table 2.
Data sources

conducted in Nairobi and Kampala. These two rounds of data collection yielded the information necessary to determine the strategies to scale social impact and to better assess both the targeted beneficiaries and all the social impact benefits and activities executed. Furthermore, evidence was gathered on the challenges involved in each implementation strategy, which required another round of interviews. The third phase of 10 interviews was conducted in April/May 2019 (four interviews) and October 2019 (six interviews). The aim of the additional rounds of interviews was to deepen the evidence on the challenges of the implementation of each social impact scaling strategy and to analyze their effects on the dual mission. A final round of four interviews was conducted in November 2020, which increased the authors' understanding of the response mechanisms to the challenges experienced. In total, 24 semi-structured interviews were carried out, 10 of which were conducted locally, and 14 interviews were conducted through conference calls. All interviews were recorded and transcribed verbatim and lasted between 40 and 60 min. [Table 3](#) reports the interview data.

Data analysis

To improve the rigor in the data analysis, the authors followed [Gioia et al.'s \(2013\)](#) instructions, moving back and forth between the raw data and the literature to eventually gather the evidence in a data structure and a theoretical model. Starting the data analysis with the research question in mind, the investigators had no *a priori* hypothesis. The study carefully assessed each case independently, using tables to identify raw concepts, also highlighting relevant connections among such constructs ([Eisenhardt, 1989](#)). At this stage, the data were triangulated with previous studies that analyzed scaling in SEs, such as [Bocken et al. \(2016\)](#), [André and Pache \(2016\)](#) and [Kannothra et al. \(2018\)](#). The authors then started to label the social impact scaling strategies mentioned in the interviews, seeking to understand their deployment. Secondary data, such as business models, business plans, marketing plans

Table 3.
Interview data

Differentiated hybrid organization			Primary data			Secondary data	
Case	Type of DHO*	Location	N. of interview	Respondent	Date of interviews	N. of pages	Supporting docs *
Corec	WISE	Kariobangi Kenya	6	CEO and Founder, General Manager	– Mar 2018 (2) – Oct 2018 – April 2019 – Oct 2019 – Nov 2020	103	BM, BP, FP, AR
Meru Herbs	FTPSE	Meru County Kenya	6	Founder, General Manager, Logistic Manager	– Mar 2018 (2) – Oct 2018 – April 2019 – Oct 2019 – Nov 2020	139	BM, BP, FP, MP
Nucafe	FTPSE	Jinja Uganda	6	CEO and Founder, Head of commercialization	– May 2018 – Nov 2018 – April–May 2019 – Oct 2019 (2) – Nov 2020	123	BM, BP, FP, AR
Wawoto Kacel	WISE	Gulu Uganda	6	General Manager, Production Director, Sales and Distribution Manager	– May 2018 – Nov 2018 – April–May 2019 – Oct 2019 (2) – Nov 2020	69	BM, MP, AR

Note(s): * WISE=Work-Integration Social Enterprise; FTPSE=Fair Trade Producer Social Enterprise
 ** BM=Business Model; BP=Business Plan; MP = Marketing Plan; FP=Financial Plan; AR = Annual Report

and reports, were useful to validate both the interviews and interpretations of the phenomenon. The original labels were combined into first-order codes, applying the same process to the additional rounds of interviews.

Through the axial coding method, initial codes were combined into second-order themes, engaging in a systematic comparison of emerging constructs with concepts already existing in theory and adjusting the labels accordingly (Gioia *et al.*, 2013). Heeding the strategies and frameworks applied to IHOs offered by Ansoff and McDonnell (1988) and Bocken *et al.* (2016) and iterating data with insights from André and Pache (2016), the authors have been able to craft social impact scaling strategies. After the initial phase of the coding process, the authors proceeded by coding the emerging themes related to the dual mission challenges. Data were compared with the literature on dual mission management (Battilana *et al.*, 2015; Siebold *et al.*, 2019). This iterative process enhanced data aggregation from first-order codes to broader categories, which are illustrated in the data structure (Figure 1).

Once second-order themes had been identified and grouped into aggregate dimensions, the authors examined the connections and interrelations among these constructs. The purpose was to understand the mechanisms of each social impact scaling strategy and the implications for managing dual missions. The result is a theoretical model that is presented in the next section.

Findings

Through the iterative process of going between raw data and theory, the authors developed a model that describes how DHOs can scale social impact while managing the dual mission. The model of strategies and mechanisms to scale the social impact is shown in Figure 2.

This study initially reveals that the directions in which the DHOs scaled the social impact were twofold: first, targeting the same group of beneficiaries (*social impact penetration*) or developing the impact toward new beneficiary targets (*spreading*); second, increasing social impact benefits with additional products and services to current beneficiaries (*bundling*), or creating completely new social impact activities (*diversification*). The first part of the model

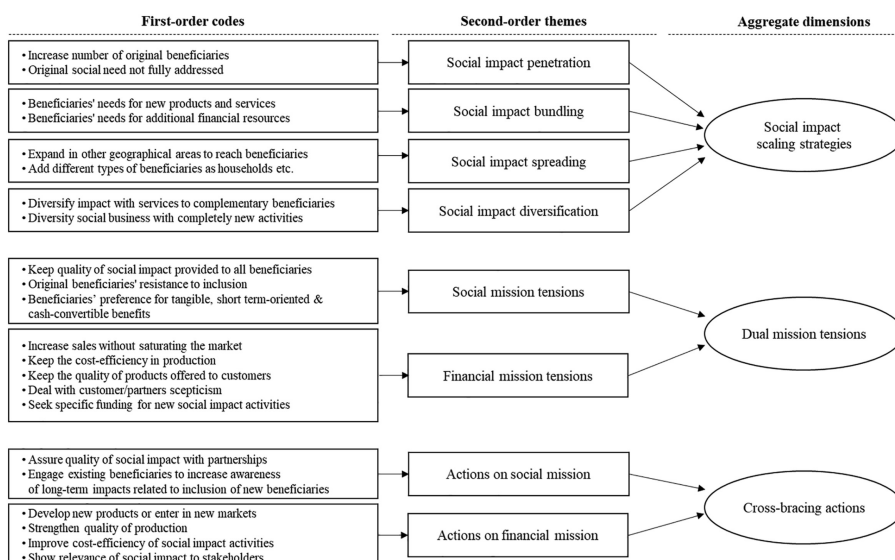


Figure 1.
Data structure

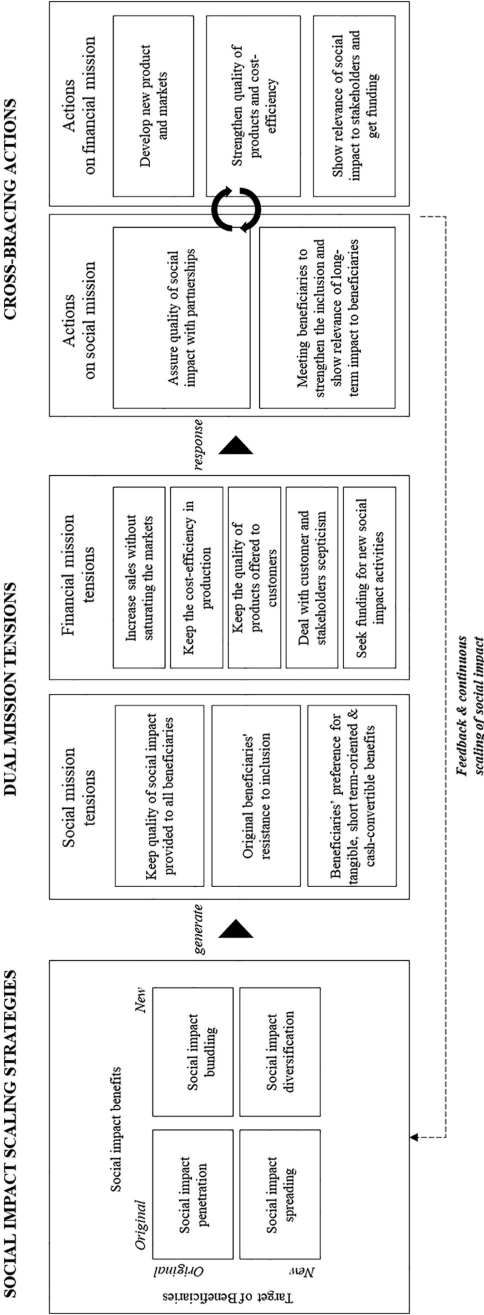


Figure 2.
The process of social
impact scaling whilst
managing dual mission
in DHOs

therefore represents these four specific *social impact scaling strategies*, which are implemented by the DHOs to scale impact as a combination of the beneficiaries and benefits offered.

The model further gathered evidence of how the implementation of different social impact strategies generated specific challenges on social (e.g., assure the quality of social impact provided to all beneficiaries, or the original beneficiaries' resistance to inclusion) and financial missions (e.g., increase sales without saturating the markets or deal with customer and stakeholder skepticism). Consequently, the findings uncover how DHOs responded to the dual mission challenges of scaling by engaging in *cross-bracing responses*. The results reveal that the cases implemented actions related to one mission, which also reinforced the actions related to the other mission. Thus, the cases have been able to scale the impact while managing the dual mission in a balanced way. Table 4 also provides an overview of the results relating to the four strategies, the challenges and the cross-bracing responses, which are then deeply illustrated in the remainder of this section.

Social impact scaling strategies

The findings reveal two directions in which DHOs can focus on scaling their social impact by managing the targeted beneficiaries and/or social impact benefits offered to beneficiaries. By combining these two directions, the data highlight four main pathways, which are illustrated in the remainder of the section.

Social impact penetration. The first strategy, *social impact penetration*, aims at increasing the social impact by providing current social benefits to a growing number of beneficiaries originally targeted. The cases decided to implement this strategy because they recognized that the original social need was not being fully addressed or that the original social impact benefits were sufficient to address that specific social need. For example, Meru Herbs began its activities in 1991 and aimed at increasing the number of farmers involved in the SE's original project, named the Nguuru Gakirwe Water Project, thus moving from 33 to more than 250 farmers involved in tea and herbs production. Similarly, Nucafe increased the number of original beneficiaries over the years by integrating almost 1.5 million rural farmers in Uganda. Corec, a Kenyan WISE that recycles plastic waste and converts it into building materials, employed the same strategy by growing the number of original beneficiaries (street boys) up to 620 youths. Lastly, Wawoto Kacel (a WISE that integrates women to produce fashion artifacts in Gulu) scaled the number of women with HIV as original beneficiaries, as described below:

The Gulu area is dramatically affected by women with HIV; they were coming back from war territories with rebels. [...] We increased the number of our original target of beneficiaries, and now we have around 60 ladies with HIV. (Interview, Wawoto Kacel)

Social impact spreading. The data also reveal a second strategy, which is labeled *social impact spreading*, which is defined as the spread of original social benefits (products and services) toward new targets of beneficiaries. The results show that the main drivers of implementing this strategy were the discovery of other types of beneficiaries with the same social need. For instance, Meru Herbs spread the social mission of providing income to rural farmers to the whole community of Meru:

In 2015, we decided to extend our credit cooperative services to other people, even if they weren't our original beneficiaries. [...] The reason was that we had the opportunity to develop our social impact by including other people who have the same needs as our beneficiaries. (Interview, Meru Herbs)

Wawoto Kacel, the WISE in Uganda, undertook the same spread of social impact by including other targets of beneficiaries as women returning from rebel groups, followed by men and youth with HIV in 2017 and disabled women and men in 2018. In 2015, COREC identified new

Table 4.
The main features of
social impact scaling
strategies in DHOs

Strategies	Dual mission tensions		Cross-bracing actions	
	Social	Financial	Social	Financial
<i>A. SOCIAL IMPACT PENETRATION</i>	– Guarantee the quality of social benefits provided to original beneficiaries	– Increase sales toward customers without saturating the market – Preserve the quality of products/services	– Create partnerships to provide excellent products/services to beneficiaries	– Develop additional products – Develop new foreign markets
<i>B. SOCIAL IMPACT SPREADING</i>	– Guarantee simultaneously the quality of social benefits provided to original and new beneficiaries – Overcome the original beneficiaries' resistance to the inclusion of other beneficiaries	– Increase sales toward customers without saturating the market – Preserve the cost-efficiency	– Create partnerships to provide qualitative products/services to beneficiaries – Meeting for integrating new beneficiaries	– Develop new foreign markets or new products – Strengthen the quality of production through certification
<i>C. SOCIAL IMPACT BUNDLING</i>	– Manage the preference of beneficiaries to financial benefits (short-term impact) rather than non-monetary benefits (long-term impact)	– Keep the focus on production – Overcome the skepticism about the social impact of additional benefits – Financing the additional products/services	– Meeting with beneficiaries to show the long-term benefits	– Show relevance of social impact toward customers and partners – Improve cost-efficiency of social impact activities
<i>D. SOCIAL IMPACT DIVERSIFICATION</i>	– Manage the reference of beneficiaries to financial benefits (short-term impact) rather than non-monetary benefits (long-term impact) – Beneficiaries' resistance to the inclusion of other beneficiaries/benefits to the community	– Keep the focus on production – Skepticism about the usefulness of diversification – Preserve the cost-efficiency – Financing the social impact	– Meeting with beneficiaries to show the long-term benefits – Meeting for integrating new beneficiaries	– Show relevance of social impact toward customers and partners – Improve cost-efficiency of social impact activities – Find partners for training and financing of new diversified projects

types of beneficiaries, such as women from Wendo Women Group and started to integrate them in the operations.

Social impact bundling. *Social impact bundling* is defined as the strategy implemented by a DHO to offer to the existing target of beneficiaries not only the original benefit to solve their basic need, which is at the core of the social mission (i.e., creating income opportunity for the FTPSEs, or a workplace, a salary and basic trainings for WISEs), as well as a bundle of additional benefits. Such benefits are provided for free when the DHO discover the new social needs of their beneficiaries, usually related to the original need (workplace or marketplace), as documented by data analysis. For example, Meru Herbs discovered in 2005 that farmers also had the need for a savings and credit cooperative, and so they helped them create Meru Herbs Rural Sacco (a micro-credit cooperative). The following quotation clearly represents this strategy:

In 2005, we had 46 farmers involved in our social enterprise [. . .], and we asked ourselves, Where do they put their money to preserve their livelihood? [. . .] Then, we helped farmers to develop and manage a savings cooperative also to get small credits to afford school fees or contingencies [. . .]. Now, they can have a safe place to deposit their savings! (Interview, Meru Herbs)

Another example is offered by Nucafe, the coffee producer company in Uganda, which started to provide farmers with other training, such as advocacy programs or succession plans for family farms:

Once we were growing, we had to bundle different services to improve the lives of our beneficiaries as part of our social mission. [. . .] A very important service has been the succession plan for young family members! (Interview, Nucafe)

Similarly, Wawoto Kacel in Uganda enhanced services to their beneficiaries through half-meals, medical coverage, literacy courses and physiological support, and Corec recognized the need for training on marketing, banking, accounting and reporting, as well as the need to provide street boys with a safe and reliable bank account.

Social impact diversification. The fourth strategy identified has been labeled *social impact diversification*. All the cases revealed that they began to create a different type of social impact benefit (with activities that addressed a social need different from the original social mission) for different targets of beneficiaries. For instance, Wawoto Kacel opened a nursery in 2015 for the children of the Gulu community, while Meru Herbs decided to build two bridges on the Kathika River and install solar panels on a public building. Another interesting case of *social impact diversification* was offered by Corec, which discovered that the families of their employees were living in very poor conditions and typically struggled to access adequate healthcare services:

Corec also improved the social impact by targeting the wives of our workers and their parents, typically very poor people living in slums and affected by many diseases. [. . .] Our team today includes six doctors working in our company to provide basic healthcare assistance and insurance coverage to the families of our beneficiaries. (Interview, Corec)

In 2014, Nucafe, as documented in their business models and plan, also diversified the social impact toward new types of beneficiaries with an innovative initiative—the building of a business incubator for agri-businesses in Kampala named CURAD.

Dual mission tensions

The data show that once the cases implemented a specific social impact scaling strategy, they experienced tensions that directly affected dual mission management. These tensions are related to both social and financial missions.

Social mission tensions. First, *social impact penetration* and *spreading* generated tension in assuring the quality of the social benefits provided to the beneficiaries. In fact, by increasing

the number of beneficiaries, SE faced the need to ensure the fulfillment of everyone's social needs. For instance, Wakoto Kacel in Uganda experienced this challenge to the growing beneficiary base:

Increasing the number of beneficiaries means that you need to integrate all of them. You need to grow them, right, but also provide good services, an adequate salary, insurance, and training sessions. (Interview, Wawoto Kacel)

Meru Herbs documented such challenges, which were also observed during the field visit, by meeting with the beneficiaries. The interview revealed the need to offer qualitative training in organic farming to all beneficiaries who have been integrated, without neglecting any of them:

We reached more than a hundred farmers, but if I look back, I need to say that a challenge was related to keeping the social activities to everyone [. . .] I'm thinking about training on organic farming. It's important that everyone receives the necessary training and to ensure a reliable income for the households. (Interview, Meru Herbs)

Even *spreading* the social impact brought the tension of assuring everyone access to social impact benefits. For example, in the cases of Corec and Wawoto Kacel, when the DHOs integrated new targets of beneficiaries, such as returnee women from rebels in 2010, and men and youths with HIV from 2018. This was also validated by the extensive activities explained in the business plans of the organizations.

A second challenge that SE experienced is related to the preference of beneficiaries for financial benefit – something which was tangible, short term-oriented and cash-convertible. It was more difficult for the beneficiaries to accept their value of all other non-monetary benefits (such as training or advocacy services). This challenge of acceptance was documented in *social impact bundling and diversification*, as reported in the following example from Corec:

We do a lot of workshops and training on skills [. . .]. The beneficiaries are not happy. They are almost defiant to accept these services, because they don't understand how they can benefit their lives, especially whether we are thinking about their own future! (Interview, Corec)

Wawoto Kacel in Uganda experienced the same tension with beneficiaries, as during work activities, they were not fully motivated because they preferred cash and tangible benefits. Further, *social impact diversification* generated this challenge, as some services provided to the whole community may be considered less valuable by the beneficiaries. This was reported by Wawoto Kacel regarding the provision of technical skills and a management training program for young women in the Gulu community. Meru Herbs encountered similar resistance during the construction of bridges, when the community members found them not useful, as reported in [Table A2](#) of supplementary material.

A final social mission-related tension was highlighted in the resistance by original beneficiaries in the integration of new types of beneficiaries. This is documented in the case of social impact spreading implemented by Wawoto Kacel:

When you increase the types of beneficiaries [spreading or diversifying, note of the authors], you introduce novelty in your organization. There is a fear of how the original beneficiaries can react to this inclusion. [. . .] There is a fear of how they can react in terms of integration. [. . .] Will they work closely? Would they be happy to collaborate with another beneficiary as a disabled woman? All our strategic choices in terms of social impact have to take care of integration. (Interview, Wawoto Kacel)

Financial mission tensions. The findings also uncover how specific social impact scaling strategies generated tensions toward the financial mission. First, *social impact penetration and spreading* directly affected the production capacity of the DHO, bringing challenges in increasing sales without saturating the market. This challenge is well described in the following quotation from Nucafe:

I think that we have around 1.5 million small farmers all over Uganda! A great impact! [. . .] However, we also had incredible growth in production capacity, which we needed to manage. (Interview, Nucafe)

Second, financial mission-related tensions were experienced at the operational level, with the need to maintain the quality of products offered (1) and preserve cost-efficiency (2). For instance, when implementing social impact *penetration*, Wawoto Kacel documented the tension of maintaining the quality of textile products, as synthesized in the following quotation:

Customers always want high-quality products. I think at Banana Boat [a Ugandan handicraft retailer in Kampala, note from the authors] [. . .] they want the best products to sell. But once you grow the number of beneficiaries, this is not guaranteed. (Interview, Wawoto Kacel)

Spreading the social impact also affected the efficiency of the organization with the introduction of new channels, inbound transportation and warehouse management, as in the cases of Meru Herbs, Nucafe and Corec. This is well documented in the following:

Corec is changing the lives of many youths in various parts of the city [. . .]. We then had a problem of warehousing and transportation. (Business plan, Corec)

Nucafe also experienced the need to keep the focus of beneficiaries on quality production, explaining how the additional benefits provided to beneficiaries may, in turn, jeopardize their commitment toward high-quality coffee production.

A fourth tension is related to skepticism on the part of customers and partners about the effective social impact provided by additional benefits, especially in the implementation of *bundling*. This problem may affect financial sales, as demonstrated by the following:

Offering additional services, such as solar lanterns, for the farmers also affected our financial sustainability. In fact, you pay for these services and products, but you also need to demonstrate to customers that our beneficiaries can live better! [. . .] If you don't do so, people will not buy your products because they start to doubt how you're using the money to provide benefits. (Interview, Meru Herbs)

Further, engaging in *social impact diversification* brought about such skepticism among stakeholders. Wawoto Kacel experienced this issue with partners such as nongovernmental organizations (NGOs) and donors, for whom the real impact generated had to be demonstrated through specific events and meetings. Nucafe also documented the same challenge, as reported below:

We had to demonstrate to our donors that advocacy for our farmers or succession planning in the families increased the social impact. (Interview, Nucafe)

Social impact bundling and *diversification* finally caused another tension, which is related to the need to seek financial resources for introducing additional benefits (*bundling*) or completely new social impact activities (*diversification*), because more diversified social impact activities especially required specific funding rather than using their own savings and income of the organization. Meru Herbs faced this tension in 2014 when they started to provide solar panels to public buildings, as well as in building two bridges for the community, as reported below:

Bridges are also important for our community and for the farmers. [. . .] The main challenge was looking for specific funding to build it. In fact, we couldn't take the cash from the cooperative. (Interview, Meru Herbs)

This challenge was also faced by Nucafe in building the CURAD incubator in 2014, by Corec in Kenya offering medical coverage and life insurance to the parents and mothers of marginalized youths and by Wawoto Kacel in setting up a nursery for the children of the Gulu community.

Cross-bracing actions

Beyond facing dual mission tensions, the cases engaged in cross-bracing actions because they had observed that these actions were related to one mission and reinforced the actions related to the other mission and vice versa. These actions have been labeled as *cross-bracing* because the data unveiled the use of reinforcing mechanisms between the two missions to respond to tensions and assure dual mission scaling.

Actions on social mission. First, to address social mission tensions, the cases implemented actions related to the social mission, such as searching for social partnerships with other organizations to assure the quality of the social impact provided to all the beneficiaries. For example, Corec started to develop social partnerships with some NGOs to assure training activities to the growing number of street boys and homeless youths, as shown in their business plan and reported in this quotation:

We needed to engage more and more street boys and were supported by groups and associations. [...] We then increased the number of youths through youth groups, including Power Line Undugu Youth Group, Evans Karuga and Associates, John Ndung'u, and others. (Interview, Corec)

However, the data showed that social partnership not only allowed the cases to tackle social mission tensions but also to reinforce the actions implemented toward addressing financial mission tensions. For instance, in the case of Corec, partnerships with some NGOs reinforced the action toward ensuring cost efficiency due to a reduced cost in training activities, as reported below:

Partnership with some NGOs, such as World Vision and Norwegian Refugee Council, assured free training services to our employees coming from the street. (Interview, Corec)

Similarly, social partnerships also allowed a better understanding of new markets and new products to be developed (action on financial), as highlighted by Meru Herbs, where the interaction with an Italian NGO helped in developing an outlet market for organic tea in Japan (as documented in [Table A1](#) – Supplementary materials). Further, a partnership with the Taiwanese fair-trade association allowed Meru Herbs to better understand how to blend the tea for East Asian markets, as illustrated in the business plan, thereby improving the quality of products and increasing possible sales in those markets. Similarly, Nucafe built social partnerships with a university in Kampala to access training services for farmers, and this action also reinforced the possibility of investigating new markets:

At a certain point, I started to partner with Makerere University because that was the way to assure high-quality support to our beneficiaries [...]. This was also important when Nucafe entered other value chains as additional markets. (Interview, Nucafe)

Second, the cases developed many meeting initiatives with the beneficiaries to strengthen their inclusion and tackle tensions related to the preference of beneficiaries for tangible, short-term-oriented and cash-convertible benefits. Such meetings with beneficiaries also cross-brace the actions on financial mission, such as better development of products and services and improving the quality of production, as documented in the following:

To preserve the integration of new beneficiaries, such as the men with HIV, we needed to conduct many meetings in which we could show them the opportunity of inclusion. [...] Wawoto Kacel actually means walking together. (Interview, Wawoto Kacel)

We actually look for increasing production and sales by investing in new production and design, for instance, tie, and dye textiles or tailoring, which is very recent. [...] These financial improvements are possible if your beneficiaries feel part of the family so that they can be focused on production. (Interview, Wawoto Kacel)

Moreover, Corec, Meru Herbs and Nucafe experienced greater inclusion through meetings with beneficiaries and partnerships which improved training provision, brought them to strengthen the quality in production of organic teas and jams, roasting of coffee or weaving of textiles, allowing the DHOs to better position their products on the international markets. Examples of this can be found in the selected quotation table (Table A1 Supplementary material).

Actions on financial mission. From the analysis, the DHOs implemented *actions on financial missions* to address financial tensions and those actions also reinforced the actions on social missions. For example, SEs looked for new products and markets (action on financial mission), and this also opened up the scouting of relevant social partnerships (action on social mission). Meru Herbs developed the UK market (in 1997), and through operating in such a fair-trade market, they met with the Soil Association (a UK charity) and received organic certification, which strengthened the quality of products. A new product developed by Meru Herbs was related to:

The eco-lodge opened up to the tourism activity here close to Mount Kenya [. . .]. It was great also because we could invite interns in biology and organic food from the University of Nairobi, and sign a partnership with them. (Interview, Meru Herbs)

Further, Corec, a WISE, started to develop new products, such as pavement blocks (in 2014) and walkway slabs (in 2016) and roofing tiles to construction companies (in 2015), while Wawoto Kacel started to produce additional product lines, such as interior design (in 2006), tie and dye and weaving and tailoring produce (in 2018). The cases perceived a positive interrelation between social and financial actions, as exemplified by Wawoto Kacel, which implemented storytelling during meetings with retail customers, highlighting that these synergies were useful to assure dual mission.

The data further showed that all the actions on financial mission also reinforced those related to social mission, because with additional sales through new products and access to new markets, the DHOs have been able to increase the social impact to all beneficiaries. Similarly, the cases were able to address this social mission tension by showing the long-term impact of services provided and diversified impact on the whole community while simultaneously involving commercial stakeholders to show them the relevance of their impact initiatives to tackle their skepticism and acquire more financial resources. This cross-bracing mechanism was documented by Wawoto Kacel in the storytelling activities with customers, or Nucafe, in which engagement with customers and commercial partners not only enabled funding but also strengthened the possibility of inclusion of beneficiaries, addressing a social mission tension, as illustrated below:

What does it mean – impact? [. . .] You need to prove to customers and donors the relationship between what beneficiaries gain and our mission, to don't compromise the financial mission [. . .]. By meeting customers, we have been able to get funding for diversifying the impact and starting the succession plan as well the CURAD incubator. [. . .] When we did that, we also improved the relationship with our beneficiaries because they saw the long-term orientation of our social impact. (Interview, Nucafe)

Engaging customers and stakeholders also represented an opportunity to increase actions toward inclusion of beneficiaries (action on social mission). In fact, the cases started to invite international partners in Meru to show them the relevance of the social impact, which enhanced the opportunity to meet beneficiaries (social mission-related action). For example, Meru Herbs organized meeting sessions with the farmers to document the usefulness of providing bicycles to women, the construction of bridges and the addition of solar panels on public buildings, initiated by the visits of international donors to the cooperative:

Many partners are coming to see our cooperative in the region of Meru, as we need to show them around. That was a big opportunity, because we could organize meeting with the farmers as good

moment in which it's possible to meet the donors and show what kind of impact we are generating! [...] Our commercial success is given only by the quality of the organic products and the story behind them.
(Interview, Meru Herbs)

By engaging in cross-bracing mechanisms, the cases have successfully responded to the dual mission tensions and achieved scaling of social impact. The next section includes a discussion with detailed contributions to theory and practice.

Discussion

In line with recent calls for studies on scaling social impact in SEs (André and Pache, 2016; Shepherd and Patzelt, 2022; Islam, 2020; Lall and Park, 2022), this work aimed at deepening knowledge about how to scale social impact in SEs, which have differentiated the social mission from the commercial offering. Focusing on DHOs enabled to separate the pathways used to scale the social impact toward only beneficiaries (Battilana et al., 2015; Kannothis et al., 2018; Bauwens et al., 2020). The study, then, unveils a model that depicts (1) how DHOs engage with specific social impact scaling strategies, (2) experience dual mission-related tensions and (3) respond with cross-bracing actions to tackle such tensions assuring dual mission achievement. First, the findings reveal that DHOs may decide to implement four main pathways to scale social impact: providing the same target of beneficiaries with existing social impact benefits (penetration) or new benefits (spreading) and/or develop new targets of beneficiaries with existing benefits (spreading) or new benefits (diversification). Combining the pathways, this research figures out a new “Social Impact Scaling Matrix,” which allows research to move beyond the scaling deep and wide framework (Desa and Koch, 2014; Islam, 2020; Kim and Kim, 2022) because it allows scholars to consider the scaling of social impact not only in relation to the products and services to customers (Bocken et al., 2016; André and Pache, 2016) (see Figure 3).

The findings also reveal that the decision to engage with a specific scaling strategy generates different but specific dual mission tensions, as reported in Table 4. In particular, the results document how each social impact scaling strategy affects the social mission in terms of quality of the impact provided, beneficiaries’ resistance to integration of new beneficiaries and beneficiaries’ preference for financial benefits (tangible, short-term-oriented and cash-convertible). Scaling the social impact also generates challenges on the financial mission, including the need to increase sales without saturating the market, ensure cost efficiency,

		Social impact benefits	
		Existing	New
Target of beneficiaries	Existing	SOCIAL IMPACT PENETRATION	SOCIAL IMPACT BUNDLING
	New	SOCIAL IMPACT SPREADING	SOCIAL IMPACT DIVERSIFICATION

Figure 3.
The Social impact
scaling matrix

offer quality of products, focus on production and deal with skepticism of customers and partners (Kosmynin, 2022; Lall and Park, 2022).

DHOs are able to navigate such dual mission tensions through *cross-bracing actions that are directly* related to one mission, which also reinforce the action related to the opposite mission. This study then uncovers the existence of mutually reinforcing mechanisms that are useful in DHOs in combining the dual mission during scaling (Siebold *et al.*, 2019; Bocken *et al.*, 2016; Glaveli and Geormas, 2018). In particular, the cases assured the quality of social impact with partnerships (*social action on social mission*), which also helped to maintain cost efficiency (*action on financial mission*) because of free partnerships. Overall, through the implementation of cross-bracing responses to tackle dual mission challenges, DHOs effectively scale the impact to beneficiaries while managing the dual mission, as well as continuing the scaling process with new or additional social impact scaling strategies.

Contribution to the scaling of social impact in DHOs

Until now, the extant literature has investigated ways by which SE can scale the social impact as *breadth scaling* and *depth scaling*, illustrated in different frameworks (Islam, 2020; André and Pache, 2016) but mainly referring to IHO, in which the social mission is integrated in the commercial offering (Bocken *et al.*, 2016; Shepherd and Patzelt, 2022). Consequently, the resulting scaling strategies identified so far (e.g., scaling deep with the same products to the same customers, scaling wide with more products and services, diversifying to new customers, etc.) are useful for SEs such as IHOs, in which growing the customer base with products/service and markets/customers almost directly means creating a greater impact on the customers that have a need or problem to be addressed (André and Pache, 2016; Wolf and Mair, 2019; Islam, 2020). In contrast to those previous studies, unraveling the *social impact scaling strategies* allows to fully capture the possible scaling pathways to increase social impact when activities are differentiated (Battilana *et al.*, 2015; Bauwens *et al.*, 2020). It furthers it allows us to complement the extant knowledge on organizational scaling with deeper and clearer mechanisms to create value for beneficiaries (Shepherd and Patzelt, 2022).

The unpacking of social impact scaling strategies has important implications for the theorization of how SEs can better and greater address grand challenges and complex problems (George *et al.*, 2016; Kim and Kim, 2022; Chatterjee *et al.*, 2022). The contributions are threefold. First, by mainly focusing on IHOs (such as SEs operating at the base-of-pyramid), scholars tend to overlook scaling as a phenomenon related to beneficiaries who are also paying for products/services (André and Pache, 2016; Bocken *et al.*, 2016). In doing so, current knowledge fails to explain the link between such strategies and the address of locally rooted problems with marginalized, vulnerable, or low-income individuals (Busch and Barkema, 2021; Davies and Doherty, 2019; Ciambotti and Pedrini, 2021; Kim and Kim, 2022). For instance, Kim and Kim (2022) illustrated that scaling deep is a more relevant strategy for achieving local sustainable development. However, the framework in this study could extend the pathways through which depth can be achieved at the local level through extending benefits with *bundling* or integrating new beneficiaries through *spreading*.

Second, research on social entrepreneurship explained as an ideal condition for hybrids to engage in a *virtuous cycle* of profit from financial mission and reinvestment in the social mission (Doherty *et al.*, 2014; Battilana and Lee, 2014). However, the current knowledge on scaling in SEs does not allow to fully capture the various pathways to reinvest the profits in scaling the social impact, which is possible through the unpacking of scaling strategies in DHOs, as in the call for further research by Shepherd and Patzelt (2022) and Islam (2020).

Third, and importantly, this study sheds new light on the interplay between social and financial tensions, as well as the corresponding mechanisms for navigating such tensions. This extends extant knowledge, which has identified financial challenges related to scaling a

dual mission (e.g., [Doherty et al., 2014](#); [Glaveli and Geormas, 2018](#); [Siegnier et al., 2018](#)), such as access to funding, especially when operating under resource scarcity ([Busch and Barkema, 2021](#); [Ciambotti et al., 2021, 2022](#)). In theorizing cross-bracing actions as reinforcing mechanisms, we contribute toward a brighter view of tensions and responses as interrelated, opening a future debate on what enacts such linkages and connections among social and financial aspects in SEs and the outcomes of such interplay.

Contribution to paradox theory and hybridity in social enterprises

This study contributes to the literature on dual mission management in SEs that discusses how to embrace divergent yet interrelated missions and thus manage tensions concerning social and financial goals and activities ([Smith et al., 2013](#); [Doherty et al., 2014](#); [Glaveli and Geormas, 2018](#); [Smith and Besharov, 2019](#); [White et al., 2022](#)). The theoretical contributions offered to paradox theory and hybridity are twofold.

First, this study contributes to this research stream by providing a different explanation of the origin and experience of dual mission tensions. Recent advances in paradox theory and studies on hybridity in SEs moved from the historical debate of whether paradoxical tensions are inherent in the organization ([Smith et al., 2013](#)), or socially constructed by individuals and experienced as dialectic, dilemma, or myth ([Putnam et al., 2016](#); [White et al., 2022](#)). Interestingly, [Hahn and Knight \(2021\)](#) and [Lewis and Smith \(2022\)](#) explained the origins of such (paradoxical) tensions as latent in the organization by nature of dual mission, and that become salient when activated by change, complexity and scarcity, and through individual sensemaking ([Lewis and Smith, 2022](#); [Rozentale and van Baalen, 2021](#)). Heeding such recent advances, not all challenges of SEs are paradoxical by nature ([White et al., 2022](#)); this study shows that the implementation of a certain social impact scaling strategy in DHO generates tensions that are not only related to the social mission but also to the opposing (financial) mission. Thus, conceptualizing them as paradoxical (“divergent yet interrelated tensions,” [Carmine and De Marchi, 2022](#)), this study contributes to paradox theory by revealing that paradoxes come into view through the scaling pathways of SEs, because it is the scaling strategy adopted that moves paradox from being latent to salient (experienced in the highlighted dual mission tensions). This is possible because scaling is one of the activities in SEs that generates great complexity and requires change and several resources to be enabled ([Kannothra et al., 2018](#); [Ismail and Johnson, 2019](#); [Lall and Park, 2022](#)). From this perspective, this study contributes to a better explanation of what brings latency and saliency in SEs ([Hahn and Knight, 2021](#)) and to a deeper explanation of the rise of paradoxical tensions at scaling ([Ismail and Johnson, 2019](#); [White et al., 2022](#)).

Second, this study and the theoretical model point out a new perspective on paradoxes in SEs and hybrids, which is a more dynamic and fluid experience of paradoxes and responses in dual mission management. In fact, although scholars have highlighted differentiation as a key approach to respond to the inherent paradox of dual mission ([Battilana et al., 2015](#); [Smith and Besharov, 2019](#)), which is inherent in DHOs, the literature on tensions-responses to paradox is still adopting a static approach. That is, the literature identified various “statical” responsive mechanisms that are reactive to tensions in the need of combining dual missions ([Carmine and De Marchi, 2022](#)), such as selectively coupling ([Pache and Santos, 2013](#)), spaces for negotiations ([Battilana et al., 2015](#)) and herding spaces ([Ometto et al., 2019](#)). In turn, the view offered in this paper shows that initially, the SEs differentiated their missions in a DHO form and enabled social impact scaling strategies, but with the experience of dual mission tensions at scaling, they responded through cross-bracing mechanisms that underline a more integration approach to actions. In fact, while differentiation allows to focus on a specific social impact scaling, cross bracing appears as an “integration approach [that] emphasizes synergies and connections” instead of a clear separation ([Rozentale and van Baalen, 2021](#); [Carmine and De Marchi, 2022](#)).

Therefore, this study brings a nuanced view concerning the relationship between a differentiation approach to scaling strategies and an integration of response actions, contributing to a better explanation of how “individuals and organizations can manage proactively opposing sustainability elements by simultaneously integrating them” (Carmine and De Marchi, 2022). Thus, SEs, which are DHOs, perceive and enact synergies at scaling through the connection of social and financial actions (Hahn *et al.*, 2015; Carmine and De Marchi, 2022), resulting in mutually reinforcing mechanisms (Glaveli and Geormas, 2018; Siebold *et al.*, 2019). Shifting from a static representation of differentiation and including a combination of an initial differentiation and further integration of activities enable to point out even more *productive* actions for achieving a greater dual mission (Bull, 2008; Battilana *et al.*, 2015) and ultimately sustain a *virtuous* cycle of profit generation and reinvestment in greater social impact instead of a vicious one (Battilana and Lee, 2014; Lewis and Smith, 2022). In this regard, an implication of this model is that future scholars can build on this theorization to better capture a processual view of paradoxes enacted over time and explore the combination of paradoxical (responsive) actions – instead of focusing mainly on a combination of dual missions (Hahn and Knight, 2021; Carmine and De Marchi, 2022) and therefore better and deeper comprehend the complexity, the system and the dynamism of organizational paradoxes (Lewis and Smith, 2022).

Practical implications

The study offers relevant contributions to social entrepreneurs and managers, as well as to policymakers and entrepreneurial support organizations (e.g., NGOs, social investors and other ecosystem actors). Social entrepreneurs and managers of SEs could better understand the potential pathways to scale their impact toward beneficiaries and identify the appropriate scaling strategy. The matrix represents a valuable tool for decision making because it allows entrepreneurs to better figure out one or multiple social impact scaling strategies, with a more conscious understanding of tensions related to social and financial missions. The study also offers a set of managerial practices (*cross-bracing actions*) that can be implemented to address dual mission tensions. This unlocks the opportunity for social entrepreneurs and managers to enact synergies between contrasting goals and processes and achieve balanced growth over time (Smith and Besharov, 2019; Siebold *et al.*, 2019).

Further, the results of this research offer relevant suggestions to government and policymakers, especially in contexts in which social entrepreneurs lack policies and effective support from institutions (Kolk and Rivera-Santos, 2018; African Economic Outlook, 2019). The results suggest a framework to narrow policies and support programs offered to SEs with specific categories of beneficiaries involved and tailored assistance in their growth pathway. For instance, support mechanisms and funding schemes could be tailored for SEs involved in extending the beneficiary base to other targets, such as disabled people or vulnerable women (*social impact spreading*), or to social entrepreneurs who contribute to community development through bridges, schools and psychological counseling (*social impact diversification*).

Finally, the results offer implications for NGOs and other ecosystem actors (such as social investors, micro-finance organizations and accelerators). Various players are typically involved in promoting and sustaining social entrepreneurship (Doherty *et al.*, 2014; Ciambotti *et al.*, 2021; Sottini *et al.*, 2022). The framework offered by this research hints to such actors the possibility of crafting programs and support mechanisms and collaborating with SEs in specific social impact scaling strategies in order to increase the impact and overall societal development. Lastly, social investors could better understand if SEs are implementing the right strategies in place to scale social impact toward their beneficiaries.

Conclusions: limitations and future research

Scaling social impact is a complex process for SE that combines divergent goals and processes. The model in this study shows the strategies that DHOs can implement to scale the social impact and reveals how tensions at scaling are addressed through cross-bracing actions between the two missions. However, based on this complexity and the vast literature on scaling (André and Pache, 2016; Islam, 2020; Shepherd and Patzelt, 2022), this research presents some boundary conditions that are open for future research. First, this study aimed at focusing on how DHOs can scale *only* the social impact, but SEs must balance a growth in social impact with scaling the financial mission through “commercial strategies” (Bocken *et al.*, 2016). Accordingly, more research is needed to explore possible linkages between social impact scaling strategies and commercial offerings. New studies will be particularly important to discover possible common patterns of implementation of scaling strategies or whether there is a sequential process of deployment.

Second, the research setting is based on SEs operating in developing countries, which allowed the full spectrum of strategies to be captured because of the vast societal needs of local communities, marginalized and vulnerable individuals (George *et al.*, 2016) and the most influential types of DHOs (WISE and FTPSE) to be investigated. While this is in line with very recent research (Battilana *et al.*, 2015; Davies and Doherty, 2019), the authors acknowledge that more studies are needed to extend and generalize the framework by looking at other types of SEs, as well as investigating other research settings, such as developed countries, where beneficiaries may experience fewer or more diverse challenges and needs.

Third, this study is based on a comparative case study approach with four cases of DHOs. While the rigor of the data collection and analysis allowed for a generalizable model, the authors recognize the importance of testing and validating the model empirically, with a larger set of SEs. Consistently, the study shows social impact scaling strategies and related challenges that affect dual missions. However, more research is needed to test if and how social impact scaling strategies have a lesser or greater impact on dual mission performances. Specifically, scholars could ask what strategies impact financial performances, if there are variations and the possible mediation/moderating role of cross-bracing responses in social and financial performances.

Overall, this study revealed how DHOs can effectively scale their social impact while managing the dual mission, with relevant implications for theory and practice. These contributions promote further debate about how SEs scale their impact while simultaneously assisting managers and social entrepreneurs to build and grow successful organizations.

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(The Appendix follows overleaf)

Table A1.
The social impact
scaling strategies
implemented by
the cases

Company	Social impact scaling strategies			
	Social impact penetration	Social impact spreading	Social impact bundling	Social impact diversification
Corec	– Increase the employment of youths in Kariobangi by increasing youth groups with training sessions on plastic collection and cleaning (from 30 to ~ 620 youths) (2010)	– Korogocho (2010) – Dandora (2013) – Rongai and Huruma (2014) – Employ women and disable people (2015)	– Training on marketing, banking, accounting and reporting (2012) – Bank account to youth and marginalized employees (2013) – Mobile phone to most marginalized youth and street boys (2015)	– Support to parents and wife of youths with medical cover and life insurance (2016)
Meru Herbs	– Increase farmers that benefit from Nguuru Gakirwe Water Project and cultivate tea to have income for their life (from 33 to ~ 285) (1991)	– Drip Irrigation System to farmers and the local community (1995) – Integrate women with low income or unemployed into the cooperative (2005) – Extend Meru Herbs Rural Sacco to the communities of the County (2015)	– Organic farming courses (1995) – Organic Certification support (1997) – Meru Herbs Rural Sacco (savings and credit cooperative society) (2005) – Bicycles for women (2005) – Solar lantern for the farmers (n/a)	– Bridges (2012, 2017) – Solar panel to the public buildings (2014) – Twinning schools to provide school bursaries (2017) – Bursaries for the children of Meru Herbs' workers and community farmers (2017)
Nucafe	– Increase farmers groups and farmer ownership (from 600 to ~ 1.5 mln) (2003)	– Policy advocacy for rural-based farmers associations (2010) – Training center to other value chains stakeholders as maize, fruit processing (n/a) – Export the model to other countries as Kenya and South Africa (2018)	– 3 days training to farmers (Group dynamics, governance, sales and business readiness) (2008) – Policy advocacy to farmers (2008) – Provide farmers with bank accounts and loans (2010) – Facilities to add value (2013) – Provide succession planning in family (2018) – Training Centre (2018)	– Gender Equity Enhancement service for women and youths (2012) – CURAD Incubator (2014) – Learning activities for students ~ 70 interns per year (2016)
Wawoto Kacel	– Increase number of marginalized workers (from 5 to ~ 60 women with HIV) (2004)	– Returnee women from rebels (2010) – Men and youth with HIV (2017) – Disabled women and men (2018)	– Food and medical expenses covered (2016) – Literacy course (2016) – Entrepreneurship course for old workers to open a farm (2016) – Micro-loans to workers (2017) – Phycological support (2018)	– Nursery for children of workers and the Gulu community (2015) – Support in paying school fees for children of the workers (2017) – Include sanitary assistance to children of the workers (2017) – Technical skills and management training program for young ladies in Gulu area to develop micro-enterprises (2019)

		Social impact scaling strategies
2nd order themes	Representative quotations	
<i>A. Social impact scaling strategies</i>		
1. Social Impact Penetration	"The youth unemployment and criminality situation was important to see the social need to address: I said we could collaborate with youth groups through NGOs to collect garbage, in this way we can gain motivated young people, ready to learn and cheaper than others" (<i>Corec</i>) "In the beginning, we had only 33 farmers in our social enterprise. [...] What we are offering in terms of services to them was enough! So, we had to continuously grow the number! The need for income for households is huge, and we can address such a need" (<i>Meru Herbs</i>) "We needed to engage more and more street boys and were supported by groups and associations. [...] We then increased the number of youths through youth groups, including Power Line Undugu Youth Group, Evans Karuga and Associates, John Ndung'u and others" (<i>Corec</i>) "The Gulu area is dramatically affected by women with HIV; they were coming back from war territories with rebels. [...] We increased the number of our original target of beneficiaries, and now we have around 60 ladies with HIV." (<i>Wawoto Kacel</i>) "Since 2003 we increased the number of farmers over time [...] all the same group of beneficiaries, as rural farmers in Uganda. Now we have around 1.5 million of farmers" (<i>Nucafe</i>)	53
2. Social Impact Spreading	"We discovered that there are so many young girls that are not related to our initial group of beneficiaries, because they don't have HIV. At the same time, they have the same problem of vulnerability! They are affected by marginalization, and they don't see a future, a job, not even a hope" (<i>Wawoto Kacel</i>) "In 2015, we decided to extend our credit cooperative services to other people, even if they weren't our original beneficiaries. [...] The reason was that we had the opportunity to develop our social impact by including other people who have the same needs as our beneficiaries" (<i>Meru Herbs</i>) "Year after year, we were seeing that too many people were unemployed, vulnerable or marginalized. For instance, we met many returnee women from the rebels with nothing! [...] We needed to address that need even if we also sought to help women with HIV" (<i>Wawoto Kacel</i>) "Once we were increasing our operations, I looked for other beneficiaries to include by scaling. [...] We included Korogocho, Dandora, Umoja, Ongata Rongai and other slums or poor areas" (<i>Corec</i>)	
3. Social Impact Bundling	"In 2015 we targeted also Wendo Women Group [a local self-help group, note from the authors] to integrate women workers in packaging and other activities" (<i>Corec</i>) "In 2005, we had 46 farmers involved in our social enterprise [...], and we asked ourselves, Where do they put their money to preserve their livelihood? [...] Then, we helped farmers to develop and manage a savings cooperative also to get small credits to afford school fees or contingencies [...]. Now, they can have a safe place to deposit their savings!" (<i>Meru Herbs</i>) "When you come to Uganda you can touch the need of people. Almost all our women are illiterate, and since 2016 we have running literacy courses in English [...] Also, an important problem that they face is related to savings, also because sometimes women have little access to the banks. [...] for this reason we ran a savings and micro-loans association in Wawoto Kacel" (<i>Wawoto Kacel</i>) "In 2005, when we noticed that our women were coming to our fruit processing plant by foot, walking kilometers per days [...] Now they have bicycles to reach the workplace, and improve their dignity" (<i>Meru Herbs</i>) "Once we were growing, we had to bundle different services to improve the lives of our beneficiaries as part of our social mission. [...] A very important service has been the succession plan for young family members!" (<i>Nucafe</i>) "Corec always take care about our street boys, it's our mission [...] but we needed to do more. Because even if we provide them with salary, we need to assure that those money will arrive in their hands. Some of them are illiterate, and most of them don't have a bank account. We had to provide such services to sustain our overall mission!" (<i>Corec</i>) "We decided to open an activity of training on technical and managerial skills in different areas, such as tailoring but also farming. Moreover, we include for them entrepreneurship and management courses so that they can run their small laboratory after a year of training" (<i>Wawoto Kacel</i>)	
(continued)		

Table A2.
Data table: selected
quotations

2nd order themes	Representative quotations
4. Social Impact Diversification	“Corec also improved the social impact by targeting the wives of our workers and their parents, typically very poor people living in slums and affected by many diseases. [...] Our team today includes six doctors working in our company to provide basic healthcare assistance and insurance coverage to the families of our beneficiaries” (<i>Corec</i>) “It’s part of our motto, ‘Hope for Rural Wealth Creation’, [...] and we decided to open a small incubator, named CURAD in partnership with Makerere University. We now include very different beneficiaries, such as maize producers, fruit-processors and others” (<i>Nucafe</i>) “Our farmers and the entire community to move around this area can take also hours! We reduced this time by providing bicycles, but in 2012 and then in 2017 we got the possibility of building two bridges! [...] there were thousands of people around when we opened the bridges!” (<i>Meru Herbs</i>) “In 2015 then we saw that there were many many children in Gulu without access to a nursery [...] I decided to enlarge our nursery to offer this service to the whole community to tackle this social need. We cannot only look inside the cooperative; we are part of a community!” (<i>Wawoto Kacel</i>)
<i>B. Dual mission tensions</i> 1. Social mission tensions	“Increasing the number of beneficiaries means that you need to integrate all of them. You need to grow them, right, but also provide good services, an adequate salary, insurance, and training sessions” (<i>Wawoto Kacel</i>) “You need to keep the group of workers (suppliers) closely to you, and keep growing them through training (to increase quality and design), and offering them services (table crunching to allowed them saving money)” (<i>Corec</i>) “We reached more than a hundred farmers, but if I look back, I need to say that a challenge was related to keeping the social activities to everyone [...] I’m thinking about training on organic farming. It’s important that everyone receives the necessary training and to ensure a reliable income for the households” (<i>Meru Herbs</i>) “Everyone in Nucafe have to receive the same social impact, and for this reason as far as we were increasing the number of farmers in the cooperative, I had to reorganize our model to integrate everyone [...] Also when we entered in other value chains [<i>spreading, note of the authors</i>] I had in mind this important point: assure everyone can be owner of their coffee, assuring an income” (<i>Nucafe</i>) “We grow this base step by step because in this way you can guarantee them all the quality of benefits that we provide (healthcare and insurance cover, the food, a micro-loan, trainings). This is our core! Then, we moved step by step including other beneficiaries, but first you need to take care of them” (<i>Wawoto Kacel</i>) “You need to improve the quality of the social impact and all the bundle of service you offer, otherwise you are telling about cloud and not impact. At the same time, you need to guarantee the quality of the production and you need to sell” (<i>Wawoto Kacel</i>) “We do a lot of workshops and training on skills [...]. The beneficiaries are not happy. They are almost defiant to accept these services, because they don’t understand how they can benefit their lives, especially whether we are thinking about their own future!” (<i>Corec</i>) “Many women are illiterate, or they don’t speak English, but only Choli [local language, note from the authors][...] we offered an English course to improve their communication skills. However, we found them not motivated. [...] it’s a matter of what they can monetize, and what is intangible for them. You need to demonstrate that this service offered is valuable!” (<i>Wawoto Kacel</i>) “There was a huge need especially for women to get bicycles because they usually come from very far away. But when we started that service, other beneficiaries were asking why, and they also wanted such service instead of more training and assistance on saving [...] Sometimes they want tangible benefits and they don’t understand the importance of savings or the impact that we can generate with services to the community of Meru” (<i>Meru Herbs</i>) “Many farmers asked us why we were building bridges for the community [...] They were happy, okay, but it was tough! It was tough because they don’t recognize the value of something which is not directly for them” (<i>Meru Herbs</i>) “When you increase the types of beneficiaries [<i>spreading or diversifying, note of the authors</i>], you introduce novelty in your organization. There is a fear of how the original beneficiaries can react to this inclusion. [...] There is a fear of how they can react in terms of integration. [...] Will they work closely? Would they be happy to collaborate with another beneficiary as a disabled woman? All our strategic choices in terms of social impact have to take care of integration” (<i>Wawoto Kacel</i>)

Table A2.

(continued)

2nd order themes	Representative quotations
2. Financial mission tensions	"All our strategic choices in terms of social impact has to take care about the integration" (<i>Wawoto Kacel</i>) "When we started to offer the same services to other people outside the farmers' group (today, 285), we had a huge problem with our original farmers! Small informal tensions – simply, they were not happy. [...] You need to take care of the original group and take care of the integration" (<i>Meru Herbs</i>) "If you don't take care of inclusion [...] you create discrepancies between beneficiaries . . . and they don't feel part of a family" (<i>Wawoto Kacel</i>) "I think that we have around 1.5 million small farmers all over Uganda! A great impact! [...] However, we also had incredible growth in production capacity, which we needed to manage" (<i>Nucafè</i>) "Customers always want high-quality products. I think at Banana Boat [a Ugandan handicraft retailer in Kampala, note from the authors][. . .] they want the best products to sell. But once you grow the number of beneficiaries, this is not guaranteed" (<i>Wawoto Kacel</i>) "Corec is changing the lives of many youths in various parts of the city [. . .]. We then had a problem of warehousing and transportation" (<i>Corec</i>) "Paying attention to the operating expenses, because if we diffuse the impact in other places and to other beneficiaries, the costs can kill the commercial effort to sell products" (<i>Corec</i>) "When we started to offer the same services to other people outside the farmers' group (today, 285), we had a huge problem with our original farmers! Small informal tensions – simply, they were not happy. [...] You need to take care of the original group and take care of the integration" (<i>Meru Herbs</i>) "Offering additional services, such as solar lanterns, for the farmers also affected our financial sustainability. In fact, you pay for these services and products, but you also need to demonstrate to customers that our beneficiaries can live better! [...] If you don't do so, people will not buy your products because they start to doubt how you're using the money to provide benefits" (<i>Meru Herbs</i>) "Now that we also have the nursery, we have new expenses. We need to keep in mind these benefits to new groups of beneficiaries, otherwise our commercial mission become fuzzy [...] Wawoto Kacel means 'walking together' in Choli [local language, note from the authors] and now we walk together, but we need to preserve the sustainability. With no revenues, everything falls down" (<i>Wawoto Kacel</i>) "We had to demonstrate to our donors that advocacy for our farmers or succession planning in the families increased the social impact" (<i>Nucafè</i>) "Many farmers asked us why we were building bridges for the community [...] They were happy, okay, but it was tough! It was tough because they don't recognize the value of something which is not directly for them" (<i>Meru Herbs</i>) "When we scale the impact with too many activities, there is the risk that beneficiaries lose the focus from production" (<i>Corec</i>) "Bridges are also important for our community and for the farmers. [...] The main challenge was looking for specific funding to build it. In fact, we couldn't take the cash from the cooperative" (<i>Meru Herbs</i>) "Now that we also have the nursery, we have new expenses. We need to keep in mind these benefits to new groups of beneficiaries, otherwise our commercial mission become fuzzy [...] Wawoto Kacel means 'walking together' in Choli [local language, note from the authors] and now we walk together, but we need to preserve the sustainability. With no revenues, everything falls down" (<i>Wawoto Kacel</i>) "You cannot use all the cash of the company to support other types of beneficiaries! You need to find external support to open to new beneficiaries, as with our funds we need to support and exploit the core" (<i>Wawoto Kacel</i>)
C. Cross-bracing actions	
1. Actions on social mission	"Partnership with some NGOs, such as World Vision and Norwegian Refugee Council, assured free training services to our employees coming from the street" (<i>Corec</i>) "We needed to engage more and more street boys and were supported by groups and associations. [...] We then increased the number of youths through youth groups, including Power Line Undugu Youth Group, Evans Karuga and Associates, John Ndung'u, and others" (<i>Corec</i>)

(continued)

Table A2.

2nd order themes	Representative quotations
2. Actions on financial mission	“In one of our trips to Italy, we realized that other products have organic certification, and no one had organic certification in Kenya. It was important to maintain the customer base also: assuring that the product is really organic. [...] But this was actually possible because of the training that have been provided. [...] We realized also that obtain a certification was putting us a step ahead the competition also if it was expensive to obtain” (<i>Meru Herbs</i>) “At a certain point, I started to partner with Makerere University because that was the way to assure high-quality support to our beneficiaries [...]. This was also important when Nucafe entered other value chains as additional markets” (<i>Nucafe</i>) “To preserve the integration of new beneficiaries, such as the men with HIV, we needed to conduct many meetings in which we could show them the opportunity of inclusion. [...] Wawoto Kacel actually means walking together” (<i>Wawoto Kacel</i>) “You need to keep the group of workers closely to you, and keep growing them through training (to increase quality and design), and offering them services (table crunching to allowed them saving money)” (<i>Wawoto Kacel</i>) “Regular meetings with our workers were extremely important because we needed to assure integration and collaboration among the beneficiaries! Showing that everyone gets the salary and benefits” (<i>Meru Herbs</i>) “Increasing benefits for beneficiaries was really important to us, because the street boys face several needs! It’s not only a matter of job creation, we needed to create additional benefits [...] By focusing on such benefits, we faced the risk that these youths just live the company, or they prioritize such benefits and keep less care about the production and manufacturing! We need to produce, we are in business, fighting with competitors” (<i>Corec</i>) “You need to meet them; you need to show that the services we are offering are for the long run! [...] maybe they expect that their life change immediately, but we need time to produce and sell! Let’s think for instance at the economic crunch in 2008, we reduced the sales and that was a moment in which we needed to continue to increase beneficiaries but also looking for the Kenyan market” (<i>Meru Herbs</i>) “With the groups of farmers is important to be close to them [...] they are the owners of their coffee. So, when you meet them you can explain that it’s important to talk about the sustainable development in their life. Not only short-term benefits. [...] Improving different value chains [<i>diversification, note of the authors</i>] also goes in this direction, but we need to talk and explain what we are doing” (<i>Nucafe</i>) “We actually look for increasing production and sales by investing in new production and design, for instance, tie, and dye textiles or tailoring, which is very recent. [...] These financial improvements are possible if your beneficiaries feel part of the family so that they can be focused on production” (<i>Wawoto Kacel</i>) “To assure that all beneficiaries get the salary, we increased the product lines [...] Pavement blocks have been produced since 2014, and we have also introduced gardening products in 2018” (<i>Corec</i>) “You can imagine . . . this growth in social impact required us to increase sales, looking for other available markets for our products. [...] We now export to South Korea, but also, we found a market here in Uganda through the supermarkets” (<i>Nucafe</i>) “When we increased the number of beneficiaries, we needed to ensure the quality of production by managing a larger workforce, otherwise you lose customers, and you lose revenues! [...] But you can actually grow revenues because you integrated employees. So, it was clear to us that growing beneficiaries was reinforcing also the revenue side” (<i>Wawoto Kacel</i>) “We saw the opportunity of producing fruit jams actually because of meeting with farmers! Because we noticed that many of them have a lot of fruit waste. [...] When we integrated the women in Meru Herbs, we then started to produce also fruit jams for the Italian market because the demand was there! You can see in the picture the fruit jams processing plant. [...] That was an important moment for us because we could give them a job, and we could increase the impact” (<i>Meru Herbs</i>) “Networking was extremely important. For example, thanks to the support of CTM– Consorzio Terzo Mondo and Altro Mercato [...] we met a Japanese fair-trade association at a conference, and the Japanese fair-trade company told us how to train farmers to blend also specific herbs and jams [...] Finally, and more important, we got the Japanese market through such support” (<i>Meru Herbs</i>)

Table A2.

(continued)

2nd order themes	Representative quotations
	"You need to improve the quality of the social impact and all the bundle of service you offer, otherwise you are telling about clouds and not impact. [...] At the same time, you need to guarantee the quality of the production and you need to sell [...] by regularly meeting the beneficiaries, they were happier, and they worked better! [...] Improve in productivity, yes! But also, the quality of the textiles ... otherwise you're out of markets. We were training them on production, and assuring the inclusion of all of them ... the quality also has been improved" (<i>Wawoto Kacel</i>) "Many partners are coming to see our cooperative in the region of Meru, as we need to show them around. That was a big opportunity, because we could organize meeting with the farmers as good moment in which it's possible to meet the donors and show what kind of impact we are generating! [...] Our commercial success is given only by the quality of the organic products and the story behind them" (<i>Meru Herbs</i>) "The eco-lodge opened up to the tourism activity here close to Mount Kenya [...]. It was great also because we could invite interns in biology and organic food from the University of Nairobi, and sign a partnership with them" (<i>Meru Herbs</i>) "On customers, we saw that we need to better tell the story of WK by talking about the local conditions of life. In this way, customers react well to the inclusion of other beneficiaries, because they recognize that it's a big social impact that we can provide. It's important to find values and social need which are closely related the social need of the original group" (<i>Wawoto Kacel</i>) "If you are thinking at new benefits (bundling) or diversifying, you need to be accountable of your social impact toward stakeholders. In fact, to do new activities, you can ask for grants or subsidies, but these people can struggle to support you. If you can document more clearly and precisely which impact, you're providing with your bundle of impact or the diversified impact, you will get them" (<i>Wawoto Kacel</i>) "What does it mean – impact? [...] You need to prove to customers and donors the relationship between what beneficiaries gain and our mission, to don't compromise the financial mission [...]. By meeting customers, we have been able to get funding for diversifying the impact and starting the succession plan as well the CURAD incubator. [...] When we did that, we also improved the relationship with our beneficiaries because they saw the long-term orientation of our social impact" (<i>Nucafe</i>) "You need to explain to Foundations, NGOs and generally all your partners what you're doing as novel impact. You can show them the financials, the timesheet and the social impact both direct and indirect of the new social impact provided, but then they need to meet beneficiaries, real persons" (<i>Wawoto Kacel</i>)

Table A2.

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