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# Towards a ‘Long View’: Historical Perspectives on the Scaling and Replication of Social Ventures

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## ABSTRACT

Social ventures are now widely regarded as playing an essential role in addressing persistent and pervasive societal challenges. This insight has prompted an active search for readily-scalable and replicable business models. However, relatively little consideration has been given to the longer-term growth and performance of these hybrid organizational forms. This paper examines how historically-informed research might enhance our understanding of growth processes. It considers the conceptualization of organizational growth in social ventures and the relevance of prevailing constructs. The explanatory potential of ‘long view’ approaches examined by applying three constructs, opportunity recognition, entrepreneurial adjustment, and institutional structure, in a comparative historical analysis of two British social ventures.

**KEY WORDS:** Social ventures, growth process, scaling, replication, historical methods

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## Introduction

Social ventures are widely seen having an essential role to play in addressing the world's most persistent and pervasive social and environmental problems (e.g. Schorr 2009; Vickers and Lyon 2012). In a context of widespread fiscal constraints and a generalised retreat from direct public sector provision, governments around the world are examining the potential of social ventures as an alternative vehicle for service delivery (Levander 2010; Defourny and Nyssens 2010). This has encouraged prospective founders, leaders and supporters to seek out readily-scaleable and replicable business models. The strength of the growth discourse is indicated by an increasing emphasis on the need to measure and support the scaling up, replication and franchising of successful social ventures (Bloom and Smith, 2010; Mulgan et al., 2007; Shanmugalingam et al., 2011). In practice, social ventures are often established with limited growth aspirations and many remain modest in terms of their organizational scale, reach and impact. However, as has long been recognized with respect to commercial firms, a small minority will experience more rapid phases of growth and transition, which can result in them having a disproportionate impact on the wider community.

Organizational growth has constituted a central theme in organization studies and in mainstream entrepreneurship research for many decades (e.g. Penrose 1959; Van de Ven and Poole 1995). It continues to attract the attention of academics, policy-makers and practitioners and has been recognised as a key issue within the field of social entrepreneurship (Nicholls 2010: 2). However, a lack of new thinking, particularly around the conceptualization of growth, has proved perplexing, prompting several calls for entrepreneurship researchers to question many of their core assumptions (e.g. Macpherson and Holt 2007; Leitch, Hill and Neergaard 2010, Clarke, Holt and Blundel 2014). The emerging field of social entrepreneurship faces a similar dilemma. While much has already been achieved in addressing important questions regarding the creation, management, governance and short- to medium-term performance of social ventures (e.g. Paton, 2003; Spear, Cornforth and Aiken 2009), relatively little attention has been paid to *longer-term* organizational growth processes, either in terms of exploring their underlying dynamics or in assessing the wider implications for economic, social and environmental well-being<sup>1</sup>. Given the increasingly strong political consensus found across the world around the need for rapid scaling and replication of 'successful' social venture models<sup>2</sup>, there is an urgent need to address these empirical and conceptual gaps in our understanding. Moreover, there is a real danger that the vacuum will be filled by inappropriate assumptions about organizational growth processes, which do not provide a sound basis for strategic decision-making or public investment.

The main aim of the paper is to contribute to a better understanding of the drivers of organizational growth in social ventures, including their changing missions and efforts to balance the inherent tensions between economic, social and environmental objectives. We examine different conceptualizations of growth and ask how historical research methods can be used to reveal the underlying patterns, including periods of continuity and short-term changes or discontinuities. Reflecting previous work on organizational growth, we also seek to relate internal processes to contextual factors, including markets, public policy environments and societal norms. While the argument draws on a broader 'historic turn' in

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<sup>1</sup> There are some earlier examples of historical research on the growth of non-profits (e.g. Galaskiewicz and Bielefeld 1998). The issue is also considered *inter alia* in two recent studies (e.g. Woodin, Crook and Carpentier 2010; Armsworth, Fishburn, Davies, Gilbert, Leaver and Gaston 2012).

<sup>2</sup> Examples of related policy initiatives include those initiated by the US Office of Social Innovation and Civic Participation and the UK's Office of Civil Society and the European Union Social Business Initiative.

management and organizational research (Booth and Rowlinson 2006; Godelier 2009), its main focus is on the practical application of historical research methods in empirical research on social venture growth. In its consideration of longer-term growth processes, the paper also serves to highlight a number of practical implications for those seeking to create or reinvigorate a social venture.

Social ventures have been defined as those organizations that have core social objectives, but seek to achieve them through forms of enterprise and trading (e.g. Haugh 2007: 164)<sup>3</sup>. These organizations are often viewed as hybrids because they apply institutional logics that are drawn from the different worlds of the commercial firm, the not-for-profit, and the public sector. As a consequence, they bring together values and practices that might appear to be in competition and in some cases incompatible (Pache and Santos 2012; Jay 2013). Recent studies have observed these tensions through the interpretive practices of practitioners (Seanor, Bull, Baines, and Ridley-Duff 2013). There is also evidence to suggest that the phenomenon of hybridity exerts a distinctive influence on growth processes in these organizations, as tensions emerge over time between their core economic and social objectives (Doherty, Haugh, and Lyon 2014).

The paper is structured as follows. We open with an examination of the concept of scaling up in relation to the proliferation and increasing prominence of social ventures over recent years. A review of related academic debates on the conceptualization of organizational and entrepreneurial growth processes is then linked to a methodological discussion, which focuses on the prospects for incorporating more historically-informed approaches into empirical research on the growth of social ventures. We explore these themes by constructing a case-based illustration that contrasts the growth process in two UK-based social ventures. In the concluding discussion, we draw out some of the main implications of the study for academic researchers and policy-makers working in this area.

## **Scaling-Up: Explaining Organizational Growth**

Despite the attention paid to organizational growth by researchers, policy-makers and practitioners over several decades, our understanding of the underlying processes remains surprisingly limited. There have been two parallel strands in growth research in the mainstream entrepreneurship literature (Davidsson, Achtenhagen, and Naldi 2005). The first strand comprises a number of themes, which may be grouped under the convenient summary term ‘factors of growth’ (e.g. Almus and Nerlinger 1999). The main aim of this research strand has been to identify independent variables, or combinations of variables, that are associated with higher or lower rates of growth, the rates being defined with reference to the chosen indicator and a pre-defined time period<sup>4</sup>. While this literature is characterised by a strictly economic interpretation of growth, based on conventional financial metrics, it has generated insightful discussions regarding the appropriateness of alternative indicators (e.g. Delmar, Davidsson, and Gartner 2003). The second strand, which is the primary focus of this article, may be termed ‘growth process’ research. More than 50 years ago, the economist

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<sup>3</sup> The term, ‘social enterprise’ is also used in quotations and when referring to specific articles.

<sup>4</sup> Organization-level studies in this tradition have addressed several distinct research agendas. These include: isolating discrete characteristics of high-growth rate firms, making *ex-ante* predictions of high-growth rate firms (i.e. ‘picking winners’), identifying generic internal and external ‘barriers to growth’, and creating integrative econometric models (e.g. Wiklund, Patzelt and Shepherd 2009). Delmar (1997) provides a more detailed account of this literature.

Edith Penrose pointed out that process studies, ‘must explain *several qualitatively different kinds of growth* and must take into account not only the sequence of changes created by a firm’s own activities but also the effect of changes that are external to the firm and lie beyond its control’ (Penrose [1959] 2004: 4 – emphasis added). While quantitative measures of size clearly remain relevant, researchers in this strand are therefore more concerned with the ways in which organizations move forward over time. The interconnected nature of the process also implies a need to treat growth as a systemic and relational phenomenon (Johannisson 2000; Bygrave 2007). Early interest in life-cycle models of growth has given way to neo-evolutionary approaches (e.g. Van de Ven and Poole 1995; Barnett and Burgelman 1996; Aldrich and Martinez 2001), which have redeployed the core biological mechanisms of variation, selection, and retention to explain organizational growth process at multiple levels of analysis (Clarke, Holt and Blundel 2014: 241-243).

Considerable progress has been made over the last 50 years in researching particular aspects of the growth process (e.g. examining the role of inter-organizational networks and capabilities). However, the literature is characterised by a proliferation of empirical studies and relatively little work has been done to connect discrete concepts or to integrate explanations across different levels of analysis<sup>5</sup>. In addition, communication between researchers, policy-makers and practitioners has been impeded by a continuing lack of consensus over the meaning of core concepts such as ‘business growth’ (Mutch 2007; Leitch, Hill, and Neergaard 2010), coupled with an unreflective use of biological metaphors in contemporary discourse (Clarke, Holt, and Blundel 2014). Critics have argued that, as a consequence of these conceptual limitations, researchers may be asking the ‘wrong questions’ about growth, while policy makers are continuing to work with the ‘wrong assumptions’ (Achtenhagen, Naldi, and Melin 2010: 289). To date, this critique has been directed primarily at research on the growth of commercial organizations. However, the calls for conceptual refinement are now being extended to hybrid organizational forms including social ventures, community-based ventures and cross-sector collaborations (e.g. Haugh 2007; Heuer 2011).

### **The Concept of Growth in Social Ventures**

Conceptualizing the growth process in hybrid organizations requires attention to both the *commercial* logic (i.e. achieving the necessary financial return to sustain and / or expand the venture) and the underpinning *social* logic (i.e. ‘making a difference’ in line with the organization’s core mission) (Jay 2013). Combining these potentially competing logics has proved problematic for researchers as well as for policy-makers and practitioners. For example, some studies treat the revenue (or turnover)<sup>6</sup> of a social venture as the primary indicator of growth, and use it to make direct comparisons with other organizational forms (e.g. SEUK 2011). However, cross-sector evaluations of this kind have been challenged on a number of grounds. For example, since social ventures are hybrid organizations, financial metrics are only one element of a much broader conceptualization of growth, which need to be assessed alongside other ways of achieving the organization’s social and environmental goals (Corner and Ho 2010; Lyon and Fernandez 2012). This argument is expressed most clearly in the debate over the scaling of social impact (e.g. Bloom and Smith 2010; Desa and Koch 2014). , For example, Urvin, Jain, and Brown (2000) draw on their work on nongovernmental organizations in developing countries to argue that the main purpose of

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<sup>5</sup> By contrast, conceptual development on growth has largely been the result of constructive dialogues with other literatures, such as organizational learning and gender (e.g. Macpherson and Holt 2007; Brush, de Bruin, Gatewood and Henry 2010).

<sup>6</sup> The term ‘gross receipts’ may also be adopted in the case of non-profit organizations.

“scaling up” is to expand impact, rather than simply to grow larger. As a consequence, increasing the size of an organization should be seen as only one element in a more extended taxonomy of scaling<sup>7</sup>. However, the picture appears less clear cut in the case of contemporary social ventures. While underlying social logics may prioritize a broader impact agenda, commercial logic is also a potent driver of organizational scaling. For example, organizational scale can play a decisive role in public sector procurement contracts, where social ventures often find themselves competing with larger for-profit organizations<sup>8</sup>. The present paper retains a focus on processes of organizational scaling over extended periods, but we acknowledge the close relationship between this type of scaling and broader social impacts.

Increasingly social ventures are putting greater energy into measuring their social and environmental performance as well as the financial performance, although many consider the challenges of social reporting to be considerable (Mair and Martí 2006). Social accounting approaches require social ventures to go beyond the recording of outputs in order to assess longer-term outcomes (Mook, Richmond, and Quarter 2003; Nicholls 2009). In contrast to more conventional economic evaluations, which are based around a common language of financial value, social impact measurements use a wider range of indicators, which can limit the scope for making meaningful inter-organizational comparisons (Arvidson, Lyon, McKay, and Moro 2011). The term ‘social’ is also contested, so that one person’s definition of a socially-beneficial impact can be perceived by others as unsocial, if not actively anti-social (e.g. while some may argue that a boxing club located in a disadvantaged community adds social value by mentoring young people, others may see it as having a negative impact on their physical health and well-being). Critics of the growth-oriented policy discourse have argued that the re-application of conventional commercial logics to the growth of social ventures results in a down-playing of important issues such as more qualitative social impacts and outcomes related to social exclusion or environmental benefits that do not fit the dominant views of found in the world of private enterprise (Arthur, Keenoy, and Scott-Cato 2006; Vickers 2010).

The founders and strategic leaders of social ventures have the discretion to choose not only the types of social impact they want to grow, but also their preferred approaches to scaling up. Their efforts to scale social impact may come from the expansion of a social venture’s activities, and in finding new ways of combining its resources and capabilities. Previous research has shown that social ventures can assemble a diverse range of resources for growth through informal processes that are sometimes described as ‘social’ bricolage (Haugh 2007; Smith and Stevens 2010; DiDomenico, Haugh, and Tracey 2010). This theoretical framework, which builds on existing conceptualizations of entrepreneurial bricolage, has been used to examine the micro-processes of value creation in social ventures<sup>9</sup>. Resources can originate from philanthropic sources (e.g. grants, donations and volunteering) but commercial income and trading activities tend to play a more important role, while also enabling the venture to become economically self-sustaining. Social ventures around the world have also responded to particular opportunities that have arisen as public services are contracted out to private and voluntary sector providers. Servicing public sector contracts can help to promote

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<sup>7</sup> The distinction is highlighted by the authors of this study, who emphasise that their focus is on, “how NGOs can scale up their impact *without becoming large*.” (Urvin, Jain, and Brown 2000: 1410 – emphasis added).

<sup>8</sup> In practice, organizational scale and scope are both likely to be important factors in securing competitive advantage in public procurement (e.g. Aiken 2006).

<sup>9</sup> Precursor studies from the entrepreneurship literature include: Garud and Karnøe (2003) and Johannisson and Olaison (2007); the concept has been elaborated in: DiDomenico, Haugh and Tracey (2010).

accelerated organizational growth but they may also limit innovative behaviors as social ventures seek to conform to the expectations of these large and often powerful client organizations, in what some refer to as ‘isomorphic pressures’ (Aiken 2006).

Growth of social ventures does not always entail an increase of employment and an accumulation of assets in a single organization. Scaling up can also be achieved through other means, including the replication and franchising of a successful business model (Bloom and Smith 2010; Mulgan, Ali, Halkett, and Sanders 2007)<sup>10</sup>. However, this is likely to create a distinctive set of tensions in a hybrid organization, as compared to its commercial counterpart. For example, if a purely social logic was applied, replication and scaling would be best achieved through a free and open flow of knowledge and the sharing of relevant experiences. By contrast commercial logic may emphasize the need to protect and exploit intellectual property in order to maximise value at the organizational level. Similarly, while commercial logic remains tied to conventional growth metrics such as revenue and asset values, a competing social logic prioritizes alternative conceptualizations of growth (e.g. impact-related measures such as increasing the quality of support to deprived communities, or preserving as much virgin rainforest as possible) (Lyon and Fernandez 2012).

In this paper, we illustrate the potential of historical narrative analysis of growth processes in social enterprises with reference to three growth-related constructs that are drawn from the entrepreneurship literature: opportunity recognition; entrepreneurial experience and resources; and economic, political and institutional context. The resulting narrative and cross-case comparison is then used to explore differences in growth process over an extended period. The choice of constructs has been guided by three main factors: their prominence in the entrepreneurship literature, their inter-connectedness and capacity to span multiple levels of analysis, and their explanatory potential when applied to the available historical evidence. Numerous studies have demonstrated the importance of opportunity recognition in the entrepreneurial growth process: it allows entrepreneurs to identify new business opportunities, finding niches by making links between markets and new developments (cf. Baron 2006; Popp and Holt 2013). This process also draws on the experience, capabilities and knowledge of the entrepreneur, and the ways that they can draw on previous patterns of activity (Macpherson and Holt 2007) and relational resources (Johannisson 2000). These growth processes are also heavily dependent on the acquired capabilities of the organizations involved (Penrose 1959; Montgomery 1995; Blundel 2002). Opportunity recognition and capability development also interact with contextual factors: entrepreneurs both adjust to dynamic social, regulatory and market environments, yet also have the potential to anticipate and respond to these changes, which can thereby provide new economically (and socially) productive opportunities (Mason and Harvey 2013; Jones and Wadhani 2008).

### **Historically-Informed Approaches and the Methodology to Explore to the Growth of Social Ventures**

To date there have been relatively few historically-informed empirical studies examining the long-term growth process in social ventures. Recent exceptions include Phillips (2006), Aiken (2010) and Woodin, Crook, and Carpentier (2010). However, researchers have access to a variety of historical methods that could be used to study the growth process in these hybrid

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<sup>10</sup> The broader franchising models literature may also offer useful constructs for future social venture replication studies (e.g. Bodey, Weaven and Grace 2011).

organizations<sup>11</sup>. For example, the tradition of entrepreneurial biography could inform an examination of social entrepreneurial founders and their influence on the initial direction of a social venture. While some historical biography is derided as being little more than hagiography or ‘war stories’, there are many examples of scholarly studies that locate the lives of individuals in a wider context, indicating how their subjects interact with other people and with the technologies, cultures, institutions and economic conditions in which they lived (Corley 2006; Stager Jaques 2006). Organizational histories could also provide empirical support for growth process research, though the depth and quality of the analysis would depend to a large degree on the researcher’s ability to access archival material both within and beyond the boundaries of the organization. For example, some of the most revealing organizational histories examine interactions with external actors, such as suppliers, customers, competitors, government agencies and local communities (e.g. Pettigrew 1985; Casson and Godley 2007). In this paper, we introduce two empirical case studies to illustrate how these methods might be applied to study organizational growth in social ventures.

The value of any historically-informed inquiry will be dependent on the degree of rigour applied to the selection and application of particular methods. As a consequence, researchers venturing into this area need to consider their choice of methods, the status of their sources and the styles of writing that are most appropriate. The ‘historical turn’ in management and organization theory has problematized what critics see as an endemic, ‘universalism and presentism’ (i.e. the assumption that organizations are similar irrespective of the local context and historical background) (Booth and Rowlinson 2006). Organizational case analysis is a well-established method that has gained traction in small business and entrepreneurship studies. It has also been adopted in recent research on social ventures, enabling researchers to gain an in-depth understanding of particular phenomena (Urbano, Toledano, and Soriano 2010).

This paper makes use of an historically-informed variant of the comparative case study, sometimes described as an Analytically Structured Narrative (ASN)<sup>12</sup>. These narratives were informed by a wide range of sources of evidence including archival documents, oral histories (from leaders, founders and other staff), official publications and other published materials. The evidence was analysed through an iterative process combining both deductive and inductive elements. The first phase comprised a deductive element, in which the researchers referred to the existing literature in order to identify theoretical constructs that seem likely to have explanatory potential, and conducting an initial coding of material accordingly. For the purposes of this paper, we have analysed the narrative with reference to three sets of growth-related constructs, drawn from the entrepreneurship and social entrepreneurship literatures: opportunity recognition; entrepreneurial experience and resources; and economic, political and institutional context. The second stage was more inductive with the researchers drawing out emerging constructs from the evidence collected during the study. The resulting narrative and cross-case comparison is then used to explore differences in growth process over an extended period. This second set of coding, allowed the research to draw out key issues within the three constructs that were pertinent to understanding the growth of social ventures.

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<sup>11</sup> There is an extensive tradition of historical research on organizational growth in the fields of entrepreneurship and business history. A detailed review of this literature is beyond the scope of the present paper; for recent overviews, see: Cassis and Minoglou (2005) and Jones and Wadhvani (2007).

<sup>12</sup> The term ‘narrative sequence methods’ (NSM) has also been used recently in the field of international entrepreneurship to describe a broadly similar approach, which introduces, “time, timing and temporal processes” in its search for mechanisms underlying observed events (Buttriss and Wilkinson 2006).



The comparative work is combined with efforts to ‘periodize’ the narrative with reference to significant phases in the history of the focal organization and to highlight significant discontinuities. The scope of the narrative is likely to extend beyond the immediate administrative, geographic and temporal horizons of the organization, to incorporate longer-term changes in economic, political and social structures (Whipp and Clark 1986; Smith, Child, and Rowlinson 1990; Knights and Scarbrough 2010). In contrast to more conventional chronological approaches, which are typically structured around the unitary concept of ‘calendar’ time, ASNs emphasise the temporal complexity of unfolding events (Clark 2000: 113; Booth and Rowlinson 2006: 9). This feature, which, while it may seem self-evident to historians, is particularly pertinent to the analysis of organizational growth processes. Efforts to ‘explain’ growth-related phenomena tend to become myopic when overly-simplified temporalities are combined with an unreflective focus on a ‘decontextualized, extended present’ (Booth and Rowlinson 2006: 6). Causal explanations can be undermined because researchers place undue emphasis on proximate, readily-quantifiable, and relatively short-run factors. One of the major challenges in constructing these narratives is to combine, ‘immersion into the history of the industry being studied’, with the necessary analytical clarity (Jones 2001: 918). This becomes particularly acute, when researchers are also engaging directly with ‘key actors’ such as organizational founders. There is a strong case for growth process research to examine the lived experience of these actors, given their capacity for subjective judgements about emerging entrepreneurial opportunities (Penrose 1959; Popp and Holt 2013). As with any historically-based study, judgement is also required when bounding the narrative in order to balance the requirement for clarity and concision against the empirical richness and detail that is needed to provide a sufficiently nuanced and informed account. In this paper, we have used summary tables as a way of abstracting from the narrative. It is also possible to construct ‘temporal maps’ to depict the relationship between observed actions and events over time (e.g. Buttriss and Wilkinson 2006; Blundel 2002)<sup>13</sup>.

## **The Historical Narratives**

### ***Selecting the Organizations***

The following historical narratives examine the long-term growth process in two UK-based social ventures: the London Early Years Foundation (LEYF) and Hill Holt Wood (HHW) (Table 1). These focal organizations were selected to provide a necessarily brief illustration of the explanatory potential of this kind of approach. Each organization is distinctive in terms of its historical origins, strategic intent, legal form, scale of operations, and changing governance arrangements. The choice was also guided by the availability of relevant published documents and archival materials, coupled with access to key actors in both organizations. We conducted a series of interviews with senior management team members of LEYF and with Nigel and Karen Lowthrop, the founders of HHW. Archival material on LEYF was also obtained from Westminster City Archives, which holds minutes, annual reports and other correspondence dating back to the early 20<sup>th</sup> century. Archival material on HHW was accessed during field visits, a review of inspection reports and in the records of the Forestry Commission. We also undertook a critical review of secondary sources, including a history of LEYF, drafted by its

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<sup>13</sup> While historical studies are generally written up as narratives, quantitative analysis also plays an important role in seminal works such as Braudel’s (1981-1984) trilogy *Civilization and Capitalism* (Stager Jaques, 2006: 43). Researchers have also drawn on official data sets to identify temporal patterns in organizational populations over extended periods. The findings of such studies can be used identify new research questions and complement evidence obtained from more in-depth qualitative sources.

current Chief Executive Officer, and published research on HHW (Frith, McElwee, and Somerville 2009).

**Table 1: Overview of the Organizations**

	<b>London Early Years Foundation (LEYF)</b>	<b>Hill Holt Wood (HHW)</b>
<b>First established</b>	1903	1995
<b>Services</b>	Nurseries and other early years services, previously health education	Training provider and conservation area , moving into other environmental activity
<b>Organizational type</b>	Charity and social venture	Community cooperative and social venture
<b>Current employee numbers</b>	320 employees	20 employees
<b>Current Geographic scope</b>	Five London Boroughs	Two rural districts
<b>Changing governance</b>	Some aspects became part of the NHS in 1948 while others remained. Adapted constitution again in 1977	Started as a commercial venture, founders subsequently brought in management committee then transferred ownership of most of asset to the community.

### *The London Early Years Foundation*

The London Early Years Foundation's (LEYF) stated current core purpose is to build a better future for London's children, families and local communities through a commitment to excellence in early years education, training and research. It has 23 nurseries working in the more disadvantaged areas of London. Fees are charged according to ability to pay and current promotional materials focus on quality of provision such as good training, quality food, and working with parents and the local community. LEYF also has a training element that aims to raise standards for all early years' provision in London.

The organization, which has responded innovatively to changing political and economic circumstances for over century, started out in the context of wide spread poverty and high infant mortality rates in inner city London. In its start-up phase, prior to the 1911 Health Insurance Act, slum clearance and public health investment by local authorities, LEYF aimed to help mothers to learn about better childcare particularly in relation to health<sup>14</sup>. The founding team developed a practical scheme of health education through home visits of trained volunteer health visitors, supported by the local council. The organization became an internationally recognized provider of health education with reports of a range of overseas visitors.

In the 1930s this developed into nursery provision and training, as the need for childcare increased in line with changing working patterns and increased numbers of women in the labour market. The provision of nursery care took off in 1943 supported by Westminster

<sup>14</sup> WCS Second Annual Report 1 July 1905 - 30 June 1906 ref 1352/17 City of Westminster Archives Centre

Council, to support women taking up war work<sup>15</sup>. This continued to the late 1950s. While health services continued to be provided, the establishment of the National Health Service in 1948 resulted in responsibility for delivering health services being shifted from fragmented charitable provision to the state<sup>16</sup>. The organization contracted in the face of this expansion in public sector provision.

In the post-war period, LEYF continued to develop its childcare enterprise, with innovations such as using converted buses for mobile ‘Toddler Clubs’. The trustees also decided to continue with its voluntary status in order to continue to experiment and pioneer activities. The policy context changed between the 1960s and 1970s, with increased public interest in nurseries (Harrison, 1983). The 1990s saw the organization moving to financial self-sufficiency through further diversifying its operations. LEYF secured contracts to deliver nurseries for two civil service departments in 1991 and 1993, although in 2000 these became community nurseries. The diversification of income continued with other forms of nursery provision in 2005 and further income came from winning government contracts for new Children’s Centres, and expanding geographically.

### ***Hill Holt Wood***

Hill Holt Wood (HHW) is a 34 acre site in rural Lincolnshire. The venture that carries its name was established to find a way of turning neglected and degraded woodland into a conservation area, and as a social venture owned by the community. Current documentation states that their mission is to, ‘maintain ancient woodland for use by the public; teach and develop young people to help them realise their potential; create products and services valuable to the community; and promote the cause of environmentalism and sustainability. In this way they aim to balance the environmental aims of reducing their impact, their social aims of local community ownership and services for disadvantaged groups, and their economic aims of financial independence and sustainability<sup>17</sup>.

Karen and Nigel Lowthrop bought HHW for £32,000 in 1995 after selling their fencing building business. Karen was previously a teacher and had experience in human resources management, while Nigel had been a conservationist and nature reserve warden before moving into the fencing business. Their initial aims were to restore the wood that had been damaged by neglect and over exploitation and invasive rhododendron. They set about making the conservation viable through small-scale enterprises such as selling firewood and having support from government programmes, which they termed economic conservation. They did this in the form of a business partnership called ECONS, living on site. It became clear that they needed the active support of the local community. They opened up paths, invited volunteers to weekend camps, established parking and information signs and ensured that one of them was always present to talk to any visitors. In 1997 the HHW Management Committee was formed with volunteers from the community and local government officials (O’Brien, 2004). The focus on conservation of the woodland was broadened in 1998, when the opportunity arose to run training courses for young people on behalf of Groundwork Lincolnshire who had a contract from the UK Government programme New Deal for Young people. The training enterprise grew with the reputation of the project resulting in an increasing number of referrals of young offenders excluded from others forms of education.

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<sup>15</sup> Thirty-sixth Report, 1 January 1943 - 31 December 1945, with statement of accounts, 1 April 1942 - 31 March 1945 1352/46 1942 - 1945

<sup>16</sup> Fortieth report, with statement of accounts 1352/50 5 July 1948 - 31 March 1949

<sup>17</sup> Hill Holt Wood, 2004.

In 2002 the Management Committee took control, forming a social venture, employing Karen and Nigel, with one of them as Chief Executive. In 2004 Nigel and Karen handed over the wood and working buildings to the committee. It was now valued at £200,000, but they agreed a price of £150,000, while keeping a plot.

Since 2004, the social venture has grown with new contracts for developing training, contracts to provide countryside services for the local council and the acquisition of another area of woodland located nearby. In 2009 they branched into the neighbouring council area by drawing on their established reputation, to start a substantial £1.6m project training young people related to environmental activity. They are also involved in new plans related to retrofitting and social housing in neighbouring councils.

## **Discussion**

The growth trajectories of both case studies allow for an examination of processes of change and hybridization that are embedded in wider contextual changes related to societal norms, markets and the role of the state. The historically contextualized cases of LEYF and HHW provide an opportunity to explore the role played by a variety of factors that have been brought together in these hybrid organizations and in modifying the founding visions of each social venture. It is also possible to see how interactions between these factors have influenced the growth process in each organization. One of the major analytical challenges in research of this kind is to abstract from the detailed historical information available in order to provide a sufficiently clear representation of events and processes, while also doing justice to their inherent complexity.

The historical narratives show how the concept of growth can be conceived of in very different ways. In each of the cases the organizations can be seen to follow the conventional view of increasing turnover and employment over time. This may not be occurring in a steady period of change, but rather occurs following critical incidents such as the winning of a new contract or the development of a new market. Organizational growth processes are marked by discontinuity and, as the historical narratives demonstrate, there can be periods of contraction and transition. While not found in the HHW case, this formed an important part of LEYF's experience, following the transfer of health service provision from private and voluntary sector providers to the public sector in the early 20<sup>th</sup> century.

The growth of both case study social ventures can also be seen in terms of their wider social and environmental objectives, and not just in financial terms. Growth processes in the case study organizations differ from conventional enterprises in that they have to balance the multiple dimensions of economic, social and environmental factors. With these multiple objectives, questions can be raised as to whether maximising growth of one factor will be at the expense of the other factors or whether these organizations can build their business models in such a way to maximize all three. In both case studies, those involved in leading the organizations appeared to be conscious of the imperative of ensuring the quality of their services, and that this could be compromised by growing too fast. However, the metrics for defining social and environmental impact remain contested. As the HHW narrative indicates, this was a particular issue for this case while there is evidence of environmental and social change, some environmentalists have noted tensions in HHW's approach with the need to generate income and social benefits from using woodlands and its building programme while minimising their negative impact on the environment overall; the entrepreneurs behind the

project defend this business model, arguing that the venture needs these income streams in order to invest in conservation activity that would not otherwise occur. Such tensions between different stakeholders are less evident in the LEYF case.

In this paper, we have paid particular attention to the initial vision of the organizational founders and how it is modified over time. In order to trace the resulting interactions, the historical narrative has identified key developments in each venture, including the entry into new fields of activity, the acquisition of new capabilities and the formation of new relationships. The next part of the discussion is organized around the three constructs related to growth: opportunity recognition; entrepreneurial experience and resources; and responding to economic, political and societal context. These issues all change over time and show how developing lessons from growth of social ventures requires an understanding of specific histories.

***Opportunity Recognition and Network Relationships***

The LEYF and HHW narratives both demonstrate the way in which the identification and pursuit of entrepreneurial opportunity, familiar constructs in commercial entrepreneurship research, may be modified in a social venture. The interplay between economic, social and environmental opportunities is summarized in Table 2.

**Table 2: Opportunity Recognition and Network Relationships**

	<b>London Early Years Foundation</b>	<b>Hill Holt Wood</b>
<b>Identification of social and environmental opportunities</b>	Original idea of health visitors or infant mortality; moved to training for nursery workers and provision of nurseries in 1930s for disadvantaged; recent growth in contracts and new nurseries since 2000	Original focus on conservation combined with training of excluded young people in 1998; has moved into new areas, pursuing social opportunities such as eco-housing and retrofitting of existing buildings since 2009.
<b>Identification of economic opportunities</b>	Originally drawing on philanthropy and giving from its inception in the 1900s. It started having public sector contracts in the 1940s. Development of a funding model using fees from the 1990s onwards.	Forestry sales at first then combined with contracts for training and delivering maintenance services for local authority.
<b>External relationships for identifying opportunities</b>	Important relationships built up with local authorities since the inception resulting in new or jointly provided services. Emphasis on marketing and building relationships with parents. Relationships with other nurseries resulting in growth through mergers.	After starting as a private enterprise, there was greater local community involvement in governance after 1997. Relationships with local authorities also required for negotiating planning permission for buildings in a woodland that can be used to deliver training

		<p>and other social benefits. Networking with local authority staff and elected councillors resulting in the identification of new opportunities for services and contracts that were awarded following bidding processes.</p>
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Each new opportunity allows the social venture to scale up. LEYF record their growth of impact in terms of the benefits to children going through their nurseries, the benefits to parents from having childcare and the benefits to staff from having training and employment. There is also scaling through increasing social impacts beyond the boundaries of the organizations through other organizations replicating their approach or through lobbying policy makers for greater public investment in children’s services. HHW have been able to grow a financially-sustainable organization through delivering training for young people out of work and education in environmental activity while increasing the areas of wood conserved and the number of visitors to its site. Again, the scaling of social impact is also evident through the replication process as other organizations draw on the HHW model and adapt it for their context. In this way the opportunities for scaling are not necessarily restricted to organizational growth, and the social and environmental goals of each social venture are being met when other organizations can deliver the replicated services to a different set of beneficiaries. In contrast, LEYF have considered such an approach to scaling but decided against a franchising model, focussing instead on organic organisational growth.

The analysis highlights the role played by entrepreneurial networks in facilitating both the identification and pursuit of these opportunities. A common feature of both organizations is that the recent history of the past decade has been shaped by leadership of individuals who are strong networkers, building a core of dense ties to their respective stakeholders, such as local communities, political parties and local government representatives, while also drawing on a number of weaker ties required to bring in new ideas and resources. The historical analysis shows that these relationships are particularly important at critical moments in the organizations life. Examples for LEYF include developing nurseries in 1943 and winning new contracts in the 1990s. For HHW, these critical relationships occurred as the organization started its training activities in 1998 and when diversifying in 2010.

***Entrepreneurial Experiences and Adjustments***

It is clear that individual social entrepreneurs in both cases continue to play an important role in defining the growth path of these organizations, whether they are the original founders of a social venture, or the members of a subsequent leadership team who have guided it through significant periods of environmental turbulence and organizational change. These individuals bring prior experience to the venture, which often has a direct impact on its strategic direction. This experience is generally coupled with an ability to mobilize and reconfigure resources and capabilities in pursuit of the organization’s changing mission. These ‘entrepreneurial adjustments’ (Parker 2006; Desa and Koch 2014) in pursuit of economically- and socially-productive opportunities (Penrose [1959] 2004: 31-41; Blundel, Spence, and Zerbinati 2010) are at the heart of the growth process. The narratives indicate that it is possible to identify prominent individuals who have taken on this role as in the case of LYF with an entrepreneurial chief executive. However, leadership in HHW is enacted through the

collective agency of a married couple) (Table 3). In both cases there are key roles in the development of growth strategies for a range of team members.

**Table 3: Entrepreneurial Experiences and Adjustments**

	<b>London Early Years Foundation</b>	<b>Hill Holt Wood</b>
<b>Social entrepreneurs – founding individuals / teams and emerging entrepreneurial leadership</b>	Initially Dr FJ Allan; Richard Saunderson; Margaret Horn; Mayor of Westminster. June O’Sullivan CEO since 2004 with an entrepreneurial finance director and senior team	Nigel and Karen Lowthrop
<b>Influence of prior knowledge and experiences</b>	Started by ‘elites’ of the area in 1902, with local activists working as a team. Recent growth led by a person with sector recognition and leadership skills	Founders had knowledge of forestry, community engagement and training before they started the venture.
<b>Examples of entrepreneurial adjustment (i.e. reconfiguration of organizational resources, capabilities and routines in pursuit of economically- and socially-productive opportunities)</b>	Diversifying and innovating from the early 1900s to develop health services and then children’s nurseries. Shift to services paid for by parents required new commercial capabilities, combined with charitable aims. Bid writing skills developed in response to increase in public service contracting.	Combining business skills from previous self-employment with sector-specific skills. Drew on different capabilities to diversify into education and training. Further resource reconfiguration to combine training and conservation with the provision of other public services such as maintenance of footpaths and open spaces.

***Economic, Political and Societal Context***

The historically informed approach allows for an examination of the broader changes affecting the spheres of operations, including changes in economic conditions, public policies and the regulatory environment. These are often identified as important external drivers affecting entrepreneurial growth processes. The historical informed approach shows how the cases respond to radical discontinuities, such as the restructuring of state institutions, and longer-run developments such as demographic changes and shifts in societal norms (Table 4). LEYF’s growth process has been particularly influenced by the changing role of the state. In its first three decades, it worked in partnership with its local authority before having many of its services subsumed into the National Health Service after 1948. The growth strategies of the past 20 years have also been shaped by a political context in which divisions between state and market are increasingly blurred, with quasi-markets for public services creating an increasingly competitive landscape for social ventures and other civil society actors. Growth has also been shaped by changing societal norms related to the demand for nursery places (for LEYF), and interest in woodland activities and conservation (for HHW). These changes have posed significant challenges for many organizations, but – linking back to the other two

themes – in the case of LEYF and HWW they have also proved to be a source of new market opportunity, which in turn has stimulated strategic change and resource reconfiguration.

**Table 4: Economic, Political and Societal Context**

	<b>London Early Years Foundation</b>	<b>Hill Holt Wood</b>
<b>Re-structuring of state provision and funding arrangements</b>	Health services and education funded by local authority and other sources, but then taken over by the state. Public sector has been involved in purchasing of nursery care since 1942; state involvement in setting of standards that required training for staff; policies providing funding to parents for free nursery places since 2000.	Contracts available from local authorities, including recent programmes such as the government’s ‘Future Jobs’ funds.
<b>Long-term shift in societal norms</b>	Originally health education and the desire to tackle public health issues in inner city London; growth in interest in nursery care and women returning to work.	Local community originally suspicious of people living in woodland; growing interest in conservation and walking; opportunities to diversify into mental health services using woodland in partnership with a national charity, following growing awareness of mental health issues.

**Conclusion: Taking the ‘Long View’ in Research and Practice**

In this paper, we have concentrated on the role that historically informed methods might play in exploring issues related to the growth of hybrid organizations, and illustrated how they might be applied in a short analytical study of two social ventures. Though these historical narratives are summarized for this paper, it is still possible to trace some complex and interconnected growth processes. The narrative also highlights the importance of context-specific factors in shaping the growth trajectories of these ventures. For example, we examined the role of founding entrepreneurs in shaping subsequent patterns of growth, either through specific decisions (e.g. forming particular network relationships), or in less tangible ways such as their influence on core values and ways of organizing. One of the distinctive contributions of the historical narrative is that it recognizes the importance of periodization, identifying the extended periods of continuity that occur over the life of an organization, and the brief yet decisive discontinuities that may both prompt and signal fundamental changes in its strategic direction. For example, the cases of LEYF and Hill Holt Wood highlight the role played by critical incidents in driving rapid and sometimes radical organizational changes (e.g. legislative changes, large public and private sector contracts), while also tracking the



impact of longer-run shifts in societal norms. By taking ‘the long view’ it is also easier to differentiate the multiple roles acquired by key stakeholders and to examine the different ways that organizations respond. In the context of this paper, there are particularly interesting roles played by public sector bodies, which may be acting as customers, regulators and enablers. For example in HHW, the growth has been shaped by the local authority awarding contracts for services, and giving planning permission for building development. LEYF has had a changing relationship with the public sector, with early services being nationalised, then a growth in contracts for services, and more recently a strategy of reducing reliance on the state. While these social ventures share some similarities with private enterprises, the combination of social and financial objectives creates tensions and specific organisational development challenges. Opportunity recognition requires consideration of both social and business opportunities, drawing on both entrepreneurial capabilities and sector specific knowledge of what creates social value.

Hybrid organizations are routinely treated as wholly contemporary phenomena, lacking historical precursors. Historically-informed research provides an important counterweight to the understandable shorter-term focus of many policy-makers and practitioners (Booth and Rowlinson, 2006). More specifically, it can open up previously obscured aspects of hybrid organizational life by: (a) probing in greater detail the unfolding tensions between (broadly) ‘economic’ and ‘social’ or ‘environmental’ imperatives; (b) demonstrating explicitly that entrepreneurial activity is inherently dynamic and relational; (c) exploring how hybrid organizations change their governance, ownership structures and names over time and find other ways to retain their legitimacy in a rapidly changing context; (d) extending the scope of the growth process studies beyond conventional organizational boundaries; (e) probing the underlying causes and the broader consequences of growth; (f) showing how growth is nonlinear and episodic, with periods of rapid change interspersed by periods of stability or even contraction. Historically informed approaches also caution against the tendency towards ‘heroic’ accounts of social entrepreneurial agency. While key individuals play an important role in the historical narrative, these ‘long view’ approaches help to clarify how relationships develop at the individual, organizational, network and institutional levels. However, it is important to acknowledge the methodological challenges involved in constructing historically-informed narratives that span multiple levels of analysis, including the lived experience of organizational actors (Seanor, Bull, Baines and Ridley-Duff 2013; Popp and Holt 2013). While the methodological approach of this paper has provided a useful approach to explore social ventures, we recognise a number of limitations and areas requiring further research in future. Firstly, the cases are both operating in an English policy and cultural context, where there are specific issues related to the role of the state and competitive ‘quasi-markets’. Further work is needed elsewhere. Secondly, as with much historical research, we are reliant on what documentary and oral evidence is available. We also recognise that these sources in themselves are social constructs. Further research is needed to explore the changing discourses and organisational narratives. Finally, this paper focused on three key constructs that are considered pertinent to both mainstream entrepreneurship and to understanding the growth of social ventures: opportunity recognition; entrepreneurial experience and resources; and economic, political and institutional context. While these constructs have a demonstrated their explanatory potential in previous work, other constructs could be explored in future studies, in order to generate a more nuanced historical perspective on the growth process.

Practitioners and policy-makers also stand to benefit from a wider application of historically-informed approaches. Founders and leaders of social ventures often find themselves overwhelmed by urgent, short-term challenges. It is also self-evident that organizational

leadership is ‘lived forwards’, without the benefit of hindsight. However, there may be scope to build ‘long view’ perspectives into their strategizing by encouraging a new set of questions around the medium- to long-term implications of today’s decisions. This study leads to a set of five questions that all social ventures need to consider when developing a strategy.

- *What sort of growth is required?* Growth can come from expanding existing services or diversifying. There are risks related to over-extended operations, diversifying beyond core aims, and giving greater priority to commercial goals at the expense of social value. These can relate to risks of ‘mission drift’ (Jones 2007) and affect the balance of competing commercial and social logics found in all hybrids.
- *Scaling through the organizations or through replicating externally?* As organizations with social value as a core objective, social ventures can scale up their impact through both growing the organization or through replicating their services using other organizations. The latter can allow rapid replication but comes at the cost of sharing intellectual property. This demonstrates the tension between remaining competitive and protecting key assets, while also aiming to maximize the social value.
- *How can you measure growth and scaling?* The multiple objectives of hybrid organizations results in difficulties in measuring the different elements of both commercial and social value expansion. These indicators of success are also likely to change over time as the organization shifts its core objectives.
- *What are the capabilities required for growth?* Growth may require (Social) entrepreneurial approaches and capabilities, and these can come through both founders and recruited leaders. A key capability is the ability to respond to changing contexts and draw on networks for growth. *Such relationship building and networking required contest investment and the ability to capture serendipity.*

Integrating ‘long view’ thinking into policy development and evaluation could also help to promote more context-sensitive policy interventions. For example, the historical narratives illustrated how the response of hybrid organizations to particular policy tools can be heavily influenced by their distinctive organizational histories, including previous patterns of interaction with governmental institutions and other industry actors. For example, the historical narratives illustrated the ways that LEYF, in particular, reconfigured its resources and capabilities in relation to changes in public welfare provision over the past century and the new quasi-market environments of more recent years. In an era of austerity and continuing public sector retrenchment, there is an increasing need for well-informed and targeted policy intervention to promote social innovation while also guarding against unintended consequences. This will require a much better understanding of the distinctive growth patterns of social ventures, taking full account of their historical context.

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