



Using the scope sheet

INTRODUCTION

A scope sheet is a really great way for you to clearly define a problem before you start trying to solve it. While it might seem like an unnecessary and redundant step in the problem-solving process, it is actually crucial to making sure that everyone truly understands what the problem is and that you are looking for the correct solutions. You can use the scope sheet on your own to think through a problem, but this exercise is most useful when done in a group, perhaps when you are working with a goal team to prepare for a routine and thinking through recommendations on the issues that have surfaced during the process.

OBJECTIVES

- Understand the problem in question
- Gain consensus on what the problem is in detail
- Begin thinking about solutions

MATERIALS NEEDED

- Printouts of the exercise platform on page 3 for all participants
- Recreate the template on page 3 and post on the wall. You can do this by printing a large version of page 3 and hanging that on the wall, or by recreating the template on a dry erase board, flip chart paper, EDI's signature "brown paper," or in a pinch, projection of a computer screen. However you create this, it needs to be visible to the entire group and easy to change and add to
- Writing utensils for all participants

TIME

- One hour

ROLES

- **Facilitator:** As the facilitator, you will lead the group through filling out the scope sheet. You will listen to the discussion of the rest of the group and record answers on the exercise platform. You will also be able to answer questions about how the scope sheet works and what the different categories are. Because defining the problem is only the first step to solving it, it is important to keep the participants from becoming mired in debates about minutiae. If a debate is central to the group understanding of the problem, then it will need to occur, but if the debate goes on too long, it might be a sign that there is more than one problem that falls into this discussion, which might merit a second scope sheet
- **Rest of the group:** The rest of the group will participate in the discussion. They should be able to answer questions about the problem in question, which the facilitator will record. If they would like, they may jot down notes on their handouts as they proceed through the exercise



INSTRUCTIONS

The facilitator will start off by explaining the exercise to the rest of the group and showing them the scope sheet. You can use the introduction above for talking points if it is helpful. Then the facilitator must lead the group through discussions on each category of the scope sheet, one at a time. Each discussion should follow the same basic structure and should take no more than 7 or 8 minutes:

1. The facilitator introduces the category by reading the points below and asks the group to answer the questions posed.
2. With the facilitator recording, members of the group will brainstorm answers to the question.
3. If there is disagreement on a point, the group will politely discuss and come to a consensus, with the help of the facilitator.
4. The facilitator will summarize the points made during the brainstorm and ask for consensus from the group that this accurately describes the problem.

As you discuss each category, it is likely that brainstorming on one area will lead to an insight in another. It is fine to go back and edit things, but make sure that the conversation is still structured and focused as much as possible. The categories and the questions to ask for each are listed below.

- **Question to be resolved:** This is the most important category to answer, as it defines what problem to solve. It should be a thought-provoking and specific question – one that is both debatable (not a statement of fact) and actionable. It should also be narrow enough to be easily defined, but not so narrow that it doesn't actually address the problem. It is important to spend time at this stage validating that this is really the problem that you want to work on. Our colleagues at The Aspen Institute have a series of questions for this:
 - Is the problem bothering you enough that your thoughts regularly return to it?
 - Is it a problem that is not already on its way to being resolved?
 - Is it something that is important to you?
 - Is it something you are actually willing to work on?
 - Is it something that will have a dramatic impact on adult practice and student outcomes if you solve it?
- **Current theory of action:** Is there currently a theory or hypothesis for how to solve this problem?
- **Context:** What are the most important circumstances surrounding this problem? What do the key data say, and what is the history behind this?
- **Criteria for success:** How will you know (and how will everyone agree) that you have solved the problem? Try to express in terms of both the quantitative and qualitative evidence that you would see.
- **Decision makers:** Who will need to agree to the solution? Who may have the power to block it? You may also note how you will keep them informed and help them make the right decisions.
- **Other key stakeholders:** Who else needs to be consulted or informed as you work through problem solving?
- **Key sources of insight:** What are the most important sources of evidence that you will turn to as you solve the problem? Make this list as specific as possible.
- **Scope and constraints:** What is "in" and "out" of scope? What explicit constraints do you face as you come up with potential solutions? Some of this may be implied in the basic question, but here is where you make sure to state it explicitly.

**TEMPLATE: SCOPE SHEET****Basic question to be resolved****Current theory of action for solving this problem****1. Perspective/context****3. Decision makers****2. Criteria for success****4. Other key stakeholders****5. Key sources of insight****6. Out of scope**