



SCOPING CANVAS

What: Scope the challenge you want to focus on in your project and define its strategic intent.

Why: The scoping canvas tool helps you clearly define the scope of your project before having identified the specific solution to the challenge you want to solve. The exercise gives you an overview of what you need to consider when designing your upcoming project, and helps you highlight some of the potential challenges or pitfalls you might face, whilst at the same time ensuring that all team members get on the same page (literally!).

When: This tool is great to apply at the end of your assessment and exploration process to help you narrow down and guide your project design.

Step 1

PREPARE THE EXERCISE

To run this exercise, you first need to have a concise – but open-ended – problem statement, or a How Might We statement based on the needs and opportunity assessment you have already done. If you have not already completed that step, you can use the [How Might We tool](#) in this toolkit.

Decide if you are going to run this session in pairs, as a group discussion, or have participants fill out the canvas individually. We recommend pairs to minimise the number of canvasses that go through to the end (the steps below are described for a paired set-up).

Print out the amount of A3 (recommended) or A4 canvasses that you will need for your group, as well as a poster size printout to consolidate all the input at the end. If poster size is not possible to print, you can also draw the canvas on a flipchart. Ensure you have at least three different colours of sticky notes.

This is a long exercise, you may want to consider planning a break halfway through the exercise to keep minds fresh.

Facilitator tip

If organising the participants in pairs, consider who would be best matched for fruitful discussions, and how power imbalances and biases can be avoided.

Step 2

ADD YOUR PROBLEM STATEMENT

Introduce the participants to the timeframe and the purpose of the exercise by going through the following:

INFORMATION

PHASE
EXPLORATION

TIMEFRAME
120-240 MINS

MODE
FACE-TO-FACE

PARTICIPANTS
4 - 10

FACILITATION LEVEL
MEDIUM

MATERIALS
SCOPING CANVAS TEMPLATE
A4/A3, 1 POSTER-SIZE
SCOPING CANVAS TEMPLATE
OR FLIP CHART, MULTI-
COLOURED STICKY NOTES, A
TIMER

- What are we going to do today?
- Why are they invited?
- What are their roles (if participants do not know each other well)?
- What is the timeframe?

In box 1 of the canvas, place the problem/How Might We statement that you want to look at. Spend some time with the group to discuss and confirm why this is the challenge you are looking at. This helps you clearly define – and keep in mind – the strategic intent of the project you are designing.

Example: A problem/How Might We statement could be: “How might we create a more accessible and streamlined process for migrants to integrate into local communities, fostering social inclusion and self-sufficiency”

Allow approximately 10 mins for this step.

Facilitator tip:

Make sure the problem statement is narrow enough to give you a useful scoping. If it is too broad, you will end up trying to address everything. You need to make sure the topic is realistic to address within the timeframe and resources available for the project you are designing.

Reflect on how the chosen problem statement supports the achievement of your programmatic and country strategy. Studies, past evaluations or reviews can help you reflect on why you think this challenge is important for the communities you want to target with your intervention.

For boxes 2–8 outlined below, it is important to assess whether protection, gender, and inclusion aspects, conflict-sensitivity as well as community engagement and accountability aspects, are appropriately considered and reflected to inform the project design. For example, are special needs, potential barriers, or risks of doing unintentional harm being considered? Keep reminding participants when filling out each box if required.

Step 3

FILL IN THE SCOPING CANVAS

Now, ask the participants to fill out the boxes 2–7 in pairs (allow them 5 mins per box) by writing 3–5 brief statements on sticky notes per box and placing them on their canvasses. Items can then be added and removed as you go forward. At the end, they will discuss their inputs in the group.

Box 2: Why this challenge: Outline why you have chosen this specific problem/How Might We statement. Even if the ‘why’ might seem obvious, it is a really good idea to put it down on paper as this helps ensure team alignment and manifest the strategic intent of the project. For example, in the above example How Might We statement, the ‘why’ could be “because migrants are continuously socially excluded and marginalised which negatively affects their mental and physical health and the skills and talents of migrants remain underutilised limiting migrants potential contributions to receiving communities.”.

Box 3: Target group(s): Who is the target group(s) and what value do you want to create for each of them. Try to be as specific as possible and reflect on whether there are primary, secondary, and tertiary target groups. For example, we want to offer livelihoods opportunities (value) to migrant women aged 18-30 (primary target), which will lead to an income (value) for their families (secondary target).

Box 4: Current situation: Are there other stakeholders addressing the same problem? How are the persona(s) in your target group(s) currently dealing with the problem? Here, it would be great – though not necessary – to have completed the [persona tool](#). For example, you may determine that no other stakeholders provide livelihoods

opportunities to your target group, which might result in further marginalisation of young migrant women.

Box 5: Assumptions: What are the underlying assumptions that led you to design this project? Are you, for example, assuming that the lack of livelihood opportunities is the main cause of marginalisation, or could there be other more important factors involved?

Box 6: Questions: What are some of the unknowns we still have and need more information about? For example, do we know exactly how livelihood opportunities and marginalisation are connected in the given context? Would we be able to significantly improve social inclusion among young women if we introduced livelihood opportunities to our project?

Box 7: Goal/Success: What does success look like for this project, what is the core achievement you are aiming for? For example, is the main goal simply to introduce livelihood opportunities for young women, or is it to increase social inclusion by a certain percentage by also focusing on their mental and physical health while ensuring livelihood opportunities?

Allow approximately 35 minutes for this step.

Facilitator tip

Keep moving around between the pairs and help them stay within the 5 minutes per box – some may get stuck, or get into too much details on a certain point, so encourage them to move on and say that you can revisit the points in the group discussion.

Remind the participants to apply a protection, gender, and inclusion, as well as a conflict sensitivity lens, when filling out the canvases.

Before you move on to the next step, allow participants to have a short break. This may also give them an opportunity to reflect on their inputs before you move on to consolidating them.

Step 4

CONSOLIDATE SCOPING CANVAS INPUT

With the canvases now filled out in pairs, it is time to consolidate all the inputs into one final scoping canvas.

The facilitator leads a discussion starting from box 2 to box 7. Do not spend longer than 10 minutes per box. Appoint one or two of the participants to merge inputs so there are no duplicates and that all agreed inputs are noted down clearly on one sticky note per input in each box.

If great insights, ideas, or points come up during the discussion/from the canvases that do not fit the final consolidated canvas, make a 'parking lot' on a flip chart and stick it on the wall with the final canvas. If in need to sort and prioritise ideas consider using the [idea & insights funnel tool](#). These 'extras' may become useful when starting the design and planning phase of your project.

In plenum, discuss and fill out box 8 on related initiative and initiatives: Are there similar projects and research you can learn from? What are the facts and insights you already have to better understand the challenge your project wants to address? Who should you speak to next to uncover the missing information?

Allow approximately 70 minutes for this step.

Facilitator tip

Help participants challenge each other on inputs. Some people might find it difficult to challenge a senior team member and would feel freer if you lead on challenges and probe to get the ball rolling.

Consider putting the canvasses up on the walls, and then get the group to move around discussing each canvas. People often get more energised when standing and moving.

Step 5

DEFINE OUTSTANDING ITEMS

Wrap up the exercise and validate the contents of the final joint canvas. Have a final discussion on outstanding items from the previous step.

Allow approximately 10 minutes for this step.

Next Step: With your scoping canvas done, you are well prepared to start designing and planning your coming project, for example using the [Round Robin brainstorming tool](#) to uncover more/new ways of addressing the problem, or by fleshing out your proposed solution using the [mini theory of change tool](#).

Facilitator tip

Place the final scoping canvas poster on a wall accessible to the whole project team. Remember, the canvas is dynamic and thus to keep revisiting and updating it as the project design and planning progresses.