Define the Problem – Detailed Guidance

Specifying a knowledge gap, defining your end-users, narrowing it to a focused and feasible question, explaining exactly what you're measuring, and using prior experience to develop a plan that allows systematic investigation.

Review the guidance organized by the elements below. Being clear on these details from the outset will limit future setbacks.

We recommend using a tool to help guide defining the problem and have created a worksheet to help teams gather and reconcile the information quickly and clearly.

Effective projects start with shared clarity: teams must explicitly define the problem, the target population, the scope, the intended outcomes, their starting point (what's already known), and each member's roles to avoid misalignment and wasted effort.

Engaging partners, documenting decisions, and using structured tools (like Logic Models or SMART goals) ensure all partners are working toward the same goals with realistic expectations. A clear, comprehensive plan built on these elements improves collaboration, efficiency, and the likelihood of achieving meaningful, timely results.

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1. Define and describe WHAT PROBLEM your team wants to solve

Why It Matters

It is important to ensure that all members of the team agree on what problem is being solved.

It is surprising how often a team thinks they are working on the same problem only to find that different team members have nuanced but important distinctions in what problem they believe they are solving.

Actions Steps

- **Write down or document** agreed upon definitions for future reference. The Worksheet will help guide this process.

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- **Think of your funder as a stakeholder** and ensure that your priorities align with priorities or needs that funders might have identified.

Example

One team member may think they are developing a new pathway to make a process easier and quicker for clinicians, while another may assume the primary goal is to make the process easier for patients. While some projects can do both, without talking about this at the beginning, these disagreements can lead to disappointing results or delays.

Impact Summary

Avoid delays and disagreements later in the implementation process

Tools and Resources

- The Define the Problem Worksheet helps teams document decisions made.

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2. Define WHO you're solving the problem for

Why It Matters

As you define the problem, be sure to clearly identify who you're solving it for. This seems straightforward or even obvious, but projects can go awry if different people think they are fixing things for different groups or purposes.

Action Steps

- **Consider your lived experience.** It may also be relevant in addressing the problem
- **Engage those directly affected by the problem** to collect deeper contextual information
- Depending on the project, often this work is done in parallel with the Engagement work.

Example

One team member may think that you are working for all patients with dementia while another may think you are only working for one type of dementia like Alzheimer's. This innocent difference could lead to very different design or testing decisions down the road.

Impact Summary

Team members have shared, clearly defined **understanding** of the target population

Ethical, respectful and context-aware engagement with target group

Tools and Resources

- The Engagement component contains more information on this topic.

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3. Define the SCOPE of your project

Why It Matters

Getting clear on what you can do with the available resources you have is fundamental for your project success and to ensure you can achieve project objectives.

Clarity and agreement on your scope helps prevent scope creep, overcommitment, unrealistic goals, and misalignment across team members.

Action Steps

- **Discuss and document** planned activities, deliverables, and timeline with all partners
- **Have a clear plan** for reviewing your scope if things change – be prepared to adapt plans as issues arise.
- **Review scope often** to minimize creep.
- **Keep your scope at the top of meeting notes** and refer to it as you move forward to make sure, you're still working towards the goals agreed upon.

Example

One team member may assume the project includes developing a full implementation plan for a new intervention, including training and evaluation. While others have planned only for preliminary needs assessment and baseline studies for their new intervention. Pursuing this without grounding on agreed upon scope could lead to inefficient use of resources, time and effort.

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4. Discuss the OUTCOMES of focus

Why It Matters

By creating collective clarity on the anticipated outcome, teams can work toward various ends in a cohesive nature versus fragmented or asynchronous efforts.

Action Steps

- **Identify short-term and long-term outcomes** – consider using a logic model to define outcomes – these can be concretized in the Pragmatic Pilot Trials component.
- Develop or adopt the Specific, Measurable, Achievable (feasible), Relevant and Time bound (SMART) approach to frame your goals and outcomes
- Most projects will have a clinical outcome (e.g. blood pressure), a person-centered outcome (e.g. self-efficacy) and an implementation outcome (e.g. reach, adoption)
- Review the Pragmatic Outcomes in the Pragmatic Pilot Trials Detailed Guidance (link) for more specifics on selecting outcomes

Example

One team member might assume the focus is on improving service quality outcomes, such as adherence to or fidelity with prescribed evidence-based intervention. While other team members may be targeting downstream outcomes, like improved patient health. Both are valid, however, the process required to achieve these outcomes differs significantly.

Impact Summary

Shared vision/goal/outcome to address the identified problem

Logical pathway from input to outcomes

Tools and Resources

- The Define the Problem Worksheet helps teams document decisions made.
- Logic Models are a visual representation of your project definition, context, activities and target outcomes. We encourage your team to develop one to help clarify these issues.
    - Note: there are three different levels of logic model templates here, depending on how detailed you want to be at this time. Review all 3 and decide which is best for you.

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5. Define WHERE you are in the process

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Why It Matters

Nearly all projects that teams initiate these days build upon the work of others.
It is important at the beginning to pause and gather as much information as you can on what has already been done so that you are not reinventing the wheel and/or stepping into the same traps that other teams have already experienced.

Also consider who is funding the grant. Different funders may influence how you focus the scope of the project, and what similarly funded projects may look like.

Action Steps

- **Review the literature** to see what others have done in similar work
- **Review your prior work** to make connections that may help with the new project
- **Consult with team members**/others that have done similar work

Impact Summary

Avoid duplication and ensure continuity of efforts and activities

Reduce learning curve and speed onboarding of new team members

Ensure that the project you do **fits with the resources and real-world limitations** of your team

Tools and Resources

- The Define the Problem Worksheet helps teams document decisions made.

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6. Define ROLES of the team members

Why It Matters

Clearly defines who is going to do what at the beginning of a project is an essential step to avoid confusion and duplication of efforts. This helps remain within project scope.

Action Steps

- During your workplan development, **identify key activities** each team member could take on and ensure these activities are within the defined scope
- **Document team roles and responsibilities**
- **Designate roles** for individuals under the categories of activity lead, support, reviewer, and approver
    - Note: roles on team often change over time during a project – anticipate this and review roles periodically

Examples

One team member may assume they are responsible for project design and planning, while others may also share similar responsibilities, with slight variation in the specific tasks within those areas. This can lead to duplicated effort and leave other important tasks undone. Roles should be assigned based on project tasks that each team member can take on without overlapping.

On a new team, a project coordinator is used to being responsible for making and accepting edits to revised documents freely. The new project lead prefers to make final decisions. Without clarifying the roles ahead of the work, the lead and coordinator become frustrated, and the project is delayed due to the added back and forth needed to move deliverables forward.

Impact Summary

Synergized team with clear roles and responsibilities

Accountability and trust among team members

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7. Make a PLAN

Why It Matters

Planning is the foundation for successful, efficient, and collaborative projects. A well-structured plan ensures that everyone on the team is aligned on the problem, goals, scope, roles, and outcomes. Without a clear plan, teams risk miscommunication, duplicated efforts, and delays.

Actions to Consider

- Follow this guidance to ensure a comprehensive plan is developed from the outset.

Example

A team launched a project to improve care coordination but hadn't defined whether the focus was on clinicians or patients. As the project progressed, conflicting assumptions led to confusion, rework, and missed deadlines. Once they paused to clarify the problem, scope, and roles, the project regained momentum and delivered meaningful results. The comprehensive plan is the key to success.

Anticipated Impact

Strong alignment across the team

Clear direction and shared understanding of goals

Efficient use of time and resources

Reduced risk of delays, confusion, and scope creep

Increased trust and collaboration among team members

Tools and Resources

- D&I Models Webtool Planning section – This webtool section helps teams create a 'moderately complex' logic model to better define the problem and subcomponents within. You can complete all of the sections or just those most directly relevant to your project.

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