RESEARCH PROJECT LIFECYCLE

Gate Decision Record

Used at: every gate, from Gate 0 to Gate 4 · **Completed by:** the Gate Reviewer

How to use this record

Use this record every time a project reaches a gate. It sets down **what was decided, why, and by whom**, in the same way at every gate. Each gate template ends with a copy of it; this standalone version is for panels, portfolios and audit.

- **Who completes it:** the Gate Reviewer, a person or a panel. Your organisation decides who reviews each gate.
- **Pass a gate only if its statement is true.** If it isn't true yet, pause or send the project back with conditions.
- **Every decision needs reasons**, written so the project team can act on them. A stop is a result, not a failure: record it so the learning isn't lost.
- **Paused projects need a date** to be looked at again.

Gate	Statement that must be true	Decisions available
Gate 0	"Good idea, worth scoping"	Proceed · Pause · Stop
Gate 1	"This research project is worthwhile"	Proceed · Pause · Stop · Implement without testing
Gate 2	"This research project is feasible"	Proceed · Pause · Stop
Gate 3	"Research is ready to conduct"	Proceed · Pause · Back to Gate 2
Gate 4	"Research was conducted as intended"	Confirmed · Not as intended: Root Cause Analysis before publication

The record

Field	Answer
Project title *(essential)*	
Project reference From the Research Portfolio Register.	

Field	Answer
Gate *(essential)*	☐ Gate 0 ☐ Gate 1 ☐ Gate 2 ☐ Gate 3 ☐ Gate 4
Study design *(essential from Gate 1)*	☐ Randomised controlled trial ☐ Quasi-experimental ☐ Qualitative ☐ Not decided yet
Route *(essential from Gate 2)*	☐ Full route ☐ Light-touch route ☐ Not decided yet
Documents reviewed *(essential)* E.g. Research Idea Form v1, Evidence Scoping Summary v2.	
Decision *(essential)*	☐ Proceed ☐ Pause ☐ Stop ☐ Implement without testing ☐ Back to Gate 2 ☐ Confirmed as intended ☐ Not as intended: Root Cause Analysis
Reasons *(essential)* Why the gate statement is, or is not yet, true.	
Conditions What must happen next, by whom and by when.	
If paused: review again on	Date: _____ / _____ / _____
Conflicts of interest declared Write "none" if there are none.	
Reviewer role(s) *(essential)*	

Field	Answer
Reviewer name(s) *(essential)*	
Decision date *(essential)*	Date: ____ / ____ / _____
Project team told on	Date: ____ / ____ / _____

Decision log

Add a row each time the project passes through a gate, including repeat visits after a pause. Together the rows show the project's whole route through the lifecycle.

Date	Gate	Decision	One-line reason	Reviewer(s)	Review again on
__/__/____	_____	_____			__/__/____
__/__/____	_____	_____			__/__/____
__/__/____	_____	_____			__/__/____
__/__/____	_____	_____			__/__/____
__/__/____	_____	_____			__/__/____

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