RESEARCH PROJECT LIFECYCLE

Evidence Scoping Summary (Gate 1)

Stage: Research Scoping → Gate 1 · Previous template: Research Idea Form (Gate 0) · Next template if it passes: Feasibility and Business Capability Assessment (Gate 2)

How to use this form

Use this form to sum up what is already known about the idea, so a reviewer can decide at Gate 1 whether **"This research project is worthwhile"**. The form itself takes **two to three pages**. The work behind it may take days or weeks, depending on how much evidence exists.

- **Who completes it:** the Research Lead, with the Project Lead.
- **Who reviews it:** the Gate 1 Reviewer. Your organisation names who this is.
- **Start with what exists.** Use evidence toolkits and existing reviews first, then go back to the original studies that matter most. If there is no review, a rapid evidence review can be done in weeks, not months.
- **Summarise, don't copy.** A few sentences per field is enough. Put full notes and reference lists in an appendix.
- **Be honest about gaps.** "No good evidence found" is a useful finding. It may mean this is exactly what needs testing.
- **Think about context.** A result from another country, sector or population may not apply to yours. Say how similar the setting is.

Stage: Research Scoping → Gate 1 · **Previous template:** Research Idea Form (Gate 0) · **Next template if it passes:** Feasibility and Business Capability Assessment (Gate 2)

A. The project

Most of this section carries forward from the Research Idea Form. Check it is still right.

Field	Your answer
A1. Project title *(essential)* As on the Research Idea Form.	
A2. Project reference From the Research Portfolio Register.	
A3. Research Lead *(essential)* Name and role of the person leading the scoping.	

Field	Your answer
A4. Gate 0 decision date *(essential)* The date the idea was judged "Good idea, worth scoping".	Date: _____ / _____ / _____
A5. The scoping question *(essential)* The idea written as a question the evidence can answer. For example: "Do plain-English reminder letters increase on-time payments?"	
A6. What changed since Gate 0 Anything new about the problem, the idea or the group of people it is for.	

B. Where you looked

Field	Your answer
B1. Sources searched *(essential)* List the evidence toolkits, existing reviews, databases, journals and reports you checked, and any experts you asked.	
B2. Search terms and dates The main words you searched for, and when. This lets someone repeat or update the search.	
B3. Status of Rapid Evidence Review *(essential)* Pick one. A rapid evidence review is a quick, structured search, examination and summary of the best available studies.	☐ Done for this project ☐ In progress ☐ Existing review used ☐ Not done
B4. Number of relevant studies found *(essential)* How many studies test this idea or something close to it. Zero is a useful answer.	
B5. Key studies *(essential)* Up to five of the most relevant studies, with one line on what each found. Put full references in the appendix.	

C. What the evidence says

Field	Your answer
C1. Overall strength of evidence *(essential)* Pick one. **Strong:** several good-quality trials agree. **Moderate:** some good studies, or good studies that disagree. **Limited:** few studies, or weaker designs only. **None found:** nothing tests this idea yet.	☐ Strong ☐ Moderate ☐ Limited ☐ None found
C2. What works best *(essential)* The parts of the intervention, ways of delivering it, or amounts of contact linked to the best results.	
C3. What works less well, or not at all *(essential)* Approaches that showed little or no effect. These are as useful as the successes.	
C4. Likely effect size *(essential)* The size of change seen in the most comparable studies, and the measure used. For example: "a 10 to 15% fall in repeat contacts within a year".	
C5. First estimate of numbers needed Roughly how many people you would need to detect that effect. A rough power calculation is enough at this stage. "Don't know yet" is fine if you name who will work it out.	
C6. Evidence of harm or backfire *(essential)* Pick one, then say what was found. Some well-meant interventions make things worse.	☐ No evidence of harm ☐ Mixed findings ☐ Evidence of harm ☐ Not studied

D. Who it works for, and context

Field	Your answer
D1. Groups it worked best for *(essential)* Ages, needs, risk levels or settings where the effects were largest.	
D2. Groups it did not help Any groups for whom it made no difference, or made things worse.	
D3. How similar is our setting? *(essential)* Pick one, then compare country, sector, population, services and data. Say what is different.	☐ Very similar ☐ Somewhat similar ☐ Different ☐ Not known
D4. Proposed cohort (first draft) *(essential)* Who we would include, written so someone else could find the same people, or the method that will be used to identify the cohort. Avoid relying on professional judgement to choose who takes part.	
D5. Gaps in what we know *(essential)* What the evidence does not tell us. These gaps are often what a test should answer.	

E. Risks and pre-mortem

Imagine the project has already failed. Use that to spot the risks now, while they are cheap to fix.

Field	Your answer
E1. Why might it fail? *(essential)* The most likely reasons it would not work here.	
E2. Why might people not take part, or drop out? *(essential)* Think about cost, travel, timing, trust and how people are asked.	

Field	Your answer
E3. Barriers to delivery Staff, data, partners, money, timing or politics.	
E4. How the design could reduce these risks Changes to the intervention, the cohort or the way it is delivered.	

F. Recommendation

Field	Your answer
F1. Recommendation *(essential)* Pick one. **Test it:** worth testing, and the evidence shows how to design it well. **Implement without testing:** the evidence is already strong and applies here. Check delivery matches the original studies. **Stop:** the evidence says it does not work here, or could cause harm. **Pause:** worth doing, but not now.	☐ Test it ☐ Implement without testing ☐ Stop ☐ Pause
F2. Likely study design Pick one. This can change at the next stage.	☐ Randomised controlled trial ☐ Quasi-experimental ☐ Qualitative ☐ Not decided yet
F3. Reasons *(essential)* Two to four sentences linking the recommendation to the evidence above.	
F4. Next steps if it proceeds Who leads the Business Capabilities stage, and what they need first.	
F5. Appendix Attach or link the full reference list and search notes.	

Gate 1 Decision Record

Gate statement: "This research project is worthwhile". Completed by the Gate 1 Reviewer. Proceed only if the statement is true and there is capacity for the next stage.

Field	Reviewer's answer
Decision *(essential)* **Proceed:** start the Business Capabilities stage. **Implement without testing:** go straight to implementation, with delivery checks. **Pause:** worth doing, but no capacity yet. **Stop:** drop it, for example because the evidence shows no effect or possible harm.	☐ Proceed ☐ Implement without testing ☐ Pause ☐ Stop
Reasons *(essential)* One to three sentences the project team will read.	
Conditions or next steps For example, who leads the next stage, or what must change before it is looked at again.	
If paused: review again on	Date: ____ / ____ / _____
Reviewer role *(essential)*	
Reviewer name(s) *(essential)*	
Decision date *(essential)*	Date: ____ / ____ / _____

Tell the project team the decision and the reasons, whatever the outcome. Record the decision in the Research Portfolio Register and the Gate Decision Record log.

Evidence Scoping Summary (Gate 1) · Template 2 · Version 1.0, November 2026. Part of the ResearchCore Research Project Lifecycle toolkit. © ResearchCore Ltd 2026. Licensed under CC BY 4.0: you may use, adapt and share this template, including commercially, if you credit ResearchCore.

Based on the Research Project Lifecycle: Olphin, T.P.A. (2023). *Research Project Lifecycle: A Structured Approach to Conducting Research in the Public Sector.* Reading, UK: Thames Valley Violence Reduction Unit. © Crown Copyright 2023, Open Government Licence v3.0. www.researchcore.co.uk