RESEARCH PROJECT LIFECYCLE

Research Idea Form (Gate 0)

Stage: Research Idea → Gate 0 · Next template if it passes: Evidence Scoping Summary (Gate 1)

How to use this form

Use this form to put forward a new idea for research or evaluation. It should take about **15 minutes**. A reviewer then decides at Gate 0 whether the idea is a **"Good idea, worth scoping"**.

- **Who completes it:** the Proposer. Anyone in the organisation can suggest an idea.
- **Who reviews it:** the Gate 0 Reviewer. A person or panel your organisation names.
- **Essential fields** are marked *(essential)*. A form can't pass Gate 0 until they are complete. Everything else is optional.
- **"Don't know yet" is a good answer** at this stage. Acknowledging what we don't know is one of the most useful things we can do. Write it rather than guessing.
- **Keep it short.** A sentence or two per field is enough. Evidence and detail come later, at Research Scoping.
- **Many ideas are welcome.** Many will be paused or stopped at Gate 0, and that is the process working. It frees time for the ideas most likely to make a difference.

Stage: Research Idea → Gate 0 · **Next template if it passes:** Evidence Scoping Summary (Gate 1)

A. About the idea

Field	Your answer
A1. Short title *(essential)* A few words someone else would recognise, e.g. "Plain-English reminder letters"	
A2. Proposer name and role *(essential)*	
A3. Team or organisation *(essential)*	
A4. Contact email *(essential)*	
A5. Date submitted *(essential)*	Date: ____ / ____ / _____
A6. Partner organisations involved, if any	

B. The problem and the idea

Field	Your answer
B1. The problem *(essential)* What is going wrong, for whom, and how do you know? One or two sentences.	
B2. The idea *(essential)* What would you do differently? Describe it so someone outside your team could picture it.	
B3. Who it is for *(essential)* The group of people it would reach, e.g. "customers who miss two payments in a row". "Don't know yet" is fine.	
B4. What should change *(essential)* The outcome you hope to improve, and how it is recorded now, if it is.	
B5. Roughly how many people or cases a year Your best estimate, or "don't know yet".	
B6. Why now? E.g. a funding call, a new service starting, a known problem getting worse.	

C. Fit, risks and resources

Field	Your answer
C1. Where the idea came from *(essential)* Pick one	☐ New idea ☐ Existing service with more demand than capacity ☐ Partner about to start it anyway ☐ Funding call ☐ Other

Field	Your answer
C2. Fit with our aims *(essential)* Pick one, then name the priority or goal it supports	☐ Strong fit ☐ Some fit ☐ Unclear ☐ No fit
C3. Could it backfire or cause harm? *(essential)* Pick one, then say what you know. Some well-meant ideas are known to make things worse.	☐ No known concerns ☐ Possible concern ☐ Known to cause harm ☐ Don't know yet
C4. Is anything like it already running or tested here or elsewhere? If you know of it, name it	
C5. Rough resources Staff time, budget or data needed, as far as you know	
C6. Anything else the reviewer should know	

Gate 0 Decision Record

Gate statement: "Good idea, worth scoping". Completed by the Gate 0 Reviewer. Proceed only if the statement is true and you have the capacity to scope it.

Field	Reviewer's answer
Decision *(essential)* **Proceed:** start Research Scoping. **Pause:** worth doing, but no capacity yet. **Stop:** drop it, e.g. it is already known to cause harm or doesn't fit our aims.	☐ Proceed ☐ Pause ☐ Stop
Reasons *(essential)* One to three sentences the Proposer will read	
Conditions or next steps E.g. who leads scoping, or what must change before it is looked at again	

Field	Reviewer's answer
If paused: review again on	Date: _____ / _____ / _____
Reviewer role *(essential)*	
Reviewer name(s) *(essential)*	
Decision date *(essential)*	Date: _____ / _____ / _____

Tell the Proposer the decision and the reasons, whatever the outcome. Stopped ideas are logged, not lost: record them in the Research Portfolio Register so the thinking is there next time.

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