

Provide the investment board a single, legible summary of every initiative and its stage.

Complete one form per initiative, or one row per initiative in the online version.

Initiative or Project

Stage

Last Decision Date

Last Decision (scale / hold / stop)

Next Trigger

The evidence threshold and date that unlocks the next step.

Funding Step Requested

Primary Owner

Evidence Snapshot

Key metrics with values and dates of the sources.

Top Risk

Status

Not started

In progress

Done

Blocked

Next Checkpoint (date)

Prepared By / Date