

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**