Project and authority

Define the project and the decision it needs.

Prepare your own project brief. Record the facts you know and the questions still open. Blank amounts are unknown; enter 0 only when the amount is established as zero.

Project title

Problem and intended benefit

Who will benefit, and what needs to change?

Next decision needed

Decision deadline including time zone

Location

Scope of the project

State what is included and the limits of this review.

Person or role authorized to decide

Evidence of authority

Identify the source, date and limits of the authority.

Resources and delivery

Record each resource separately, including any contribution in kind.

Status: unconfirmed, confirmed or unavailable. A confirmed resource needs its owner and supporting source.

Resource 1

Resource

Owner

Quantity and availability

Permitted use and conditions

Commitment status

Supporting source and date

Resource 2

Resource

Owner

Quantity and availability

Permitted use and conditions

Commitment status

Supporting source and date

Person or role responsible for delivery

Authorized route for participation or follow-up

Use another worksheet for additional resources. Keep contributions in kind separate from cash funding.

Costs and funding

Use USD figures for the same defined period. Leave unknown amounts blank.

Period covered by these figures

Include one-time costs and continuing costs for this period.

Estimated cash cost in USD

Cost estimate source and date

Approved budget allocation in USD

Committed cash not yet received in USD

Exclude cash already recorded as received.

Cash already received in USD

Proposed cash not yet committed in USD

Funding sources, conditions and dates

Identify the payer, evidence and conditions for cash committed or received.

Estimated remaining cash need = cash cost minus committed cash not yet received minus cash received, with a minimum of zero. Calculate it only when all three amounts are known. Keep approved allocations, proposed cash and contributions in kind separate.

Delivery and next review

Set the next action, success criteria and conditions for continuing.

Current approach and alternatives

Include continuing the current approach or not proceeding.

Next action and responsible owner

What will count as success and who accepts it

When should the work pause or stop

What change requires another review

Next review date

Use YYYY-MM-DD.

Decision and outcome

Record the decision actually given, then record what happened separately.

Recorded decision

Pending, proceed, revise or stop.

Reviewer or authorized role

Decision date

Use YYYY-MM-DD.

Basis and conditions of the decision

What actually happened

Identify the observed result, source and date.

For a proceed, revise or stop decision, record the reviewer, decision date and basis. The decision and the observed outcome are separate records.