**Sample Merger Summary:**

**CP 2A, Bridging Decisions and Alignment Review**

INSTRUCTION SHEET – DELETE THIS PAGE BEFORE FINALIZING THE PACKET

This CP2 Merger Summary Example and Guidance is to be used for all projects in Merger.

This instruction sheet is intended to assist the writer and should not be included with the CP2 Merger Summary submittal. For additional information please see the [Merger Guidance](https://connect.ncdot.gov/resources/Environmental/EPU/Merger/Documents/Merger-MOU.pdf#page=47).

**Hidden Text/Guidance**

This document uses the “Hidden Text” feature of Microsoft Word to assist the writer in in the creation of a CP2 Merger Summary. Hidden text can be enabled and disabled by going to File > Options > Display and then check/uncheck Hidden text. It is highly recommended you enable the guidance text if this your first time working in this document.

The purple hidden text explains the type of information needed.

The red Example Text sections provide example language. This language is not intended to be copied and pasted exactly as stated and should be modified to change the specifics as it pertains to your project.

The blue text are hyperlinks to guidance.

**Format**

Use text formatting (i.e. font, size, bold, italics, etc.) specifically as presented in this template. Follow the header and footer format as shown.

Insert Summary Date

**Meeting Summary**

INSERT STIP DESCRIPTION

INSERT COUNTY(IES)

INSERT STIP No.

INSERT DATE/TIME of the Merger Meeting

**Meeting Attendees**

**List federal Merger Team Members first (USACE first federal listed), followed by state Merger Team Members, followed by NCDOT PM and staff, followed by consultants. Use an asterisk or some other superscript to denote those who attended by phone.**

|  |  |  |
| --- | --- | --- |
| Name | Organization | EMAIL ADDRESS |
|  | USACE |  |
|  |  |  |
|  |  |  |
|  |  |  |

\*Attended via phone

**Start by mentioning who led the meeting, introductions, and who presented the project materials. Also include the meeting purpose**.

A meeting was held on [Insert name], to discuss and reach concurrence on Merger Process Concurrence Point 2A (Major Hydraulic Structures and Alignment Review) for STIP Project [insert name and description]. NCDOT distributed, on [date], an informational packet to the participating agencies and team members for their review prior to the meeting.

[Insert name] began the meeting with a brief summary of the purpose of the meeting, and introductions were made by each member of the group present or participating via telephone. [insert name] then provided a PowerPoint presentation (attached) on the project’s location, background, and existing conditions. The following summarizes the main topics discussed.

**The discussion summary should list each substantive question raised by Merger Team members and provide documentation of the response. If the response includes a future action item, it should be included in the summary and in the action item section.**

1. ***Project Overview Discussion:***
* [insert text].
1. ***Major Hydraulic Structures Discussion***

Note any items discussed here, particularly if there were changes to the proposed structures (e.g. bridge type, bridge length, culvert type, culvert size).

* [insert text].
1. ***Alignment Review Discussion***
2. ***Avoidance and Minimization Measures Discussion:***

**The summary should include any avoidance and minimization measures discussed during the meeting.**

* [insert text].
1. ***Next Steps/Schedule Discussion:***

**The summary should include any items discussed during the Merger meeting that pertain to subsequent concurrence points, a timeline for major deliverables and an estimate of when the next Merger meeting would take place. If concurrence is not reached, or if there are outstanding items to be clarified, this should be discussed here.**

* [insert text].

***Action Items:***

**The action item discussion should include the action, responsible party, and when the action is anticipated to take place. If an action item was resolved prior to finalizing the meeting summary, it should be indicated, and that information included in the action item discussion.**

* NCDOT will send a DocuSign for Merger Team concurrence within the next five business days. Signatures are requested within one week of receipt.

Please direct any comments or questions to [insert name and contact information].