

# Documenting Status Prior to Temporarily Suspending a Project

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in conjunction with the Project Management Unit and others



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When circumstances result in a project coming to an unexpected stop (e.g. due to funding constraints, unanticipated obstacles, being eliminated from the STIP, etc.) the NCDOT Project Manager needs to collaborate with their technical team to assess and quickly document the current project status. As a part of this effort, they should make note of the following:

- Project accomplishments,
- Deliverables in progress,
- Project impediments, and
- Potential paths forward.

If you are notified of a project needing to be put on hold, NCDOT expects this effort to be completed quickly and efficiently.

The consultant's scope, schedule and budget should be a core focus of the documentation. While the consultant team's documentation should provide the majority of the necessary records, the NCDOT Project Manager needs to cite any unsettled task orders, out of scope work, and other unique project team information that would not be otherwise documented. Where possible, the team should note any additional "institutional knowledge" that could otherwise be lost. A list of the discipline leads, stakeholders and regulatory contacts should be included as well.

Information should all be documented in a manner that any project team can grasp the status and know what is required to re-initiate the project. Due to the array of project variables, it may be 3 months or 3 years before a project is re-initiated, so prepare documentation assuming there will be staff turnover, changes in management, etc. Files and document sets should be properly stored in the project's Preconstruction SharePoint site, with the discipline, topic, key documents, and file properties correctly attributed.

Project Managers have a variety of tools with which to provide this documentation. In many instances, the monthly Project Status Report (or similar progress reporting tool being used) will provide a good summary of past accomplishments, current issues, and near-term future tasks to be completed. By using the Project Status Report and by providing more detail than in a typical monthly update, this documentation may be adequate on smaller projects (e.g. bridge replacements, intersection improvements). This needs to be drafted, finalized and stored in the project's SharePoint site, and an email distribution provided to all team members as soon as feasible.

On larger projects, however, Project Managers should more thoroughly document the project's status. A combination of several tools may be necessary to cover the applicable disciplines and management needs. The project team should utilize some or all of the following:

- Monthly Project Status Report
  - Elaborate on the typical monthly accomplishments
  - Denote any milestones that were approaching
  - Document re-work that may be required to restart the project (such as updating mailing lists, sending postcards, and rescheduling of a public meeting that had to be cancelled)
- NCDOT's [Project Shelving Guidance](#)
  - Use the provided checklists, along with detailed notes, to document progress on deliverables

- Add notes regarding potential work products that may have a limited shelf life, such as traffic forecasts or endangered species surveys
- ATLAS Workbench / SharePoint
  - Use each discipline's tabs to denote the status of individual deliverables
  - Make notes wherever possible to add context, including using the "Precon Notes" field for relevant documents uploaded in the Preconstruction SharePoint site
  - Update the Project Management tab at the bottom of the discipline list, including any and all relevant management notes that may not be well-documented elsewhere

While Project Managers are responsible for preparing their projects based on the information above, the Project Management Unit (PMU) team leads and each Division's Project Development team lead should be the primary point of contact for overarching questions regarding this process. Communication with your project team is of primary importance. Once a project is identified as needing to be halted, the NCDOT Project Manager and their technical leads should be collaborating daily to document all relevant information and suspend the project.

## References

[NCDOT Memo on Use of the Preconstruction SharePoint Application](#)

[NCDOT Environmental Resources website](#)

[NCDOT Project Management website](#)

[NCDOT Project ATLAS Training Manual](#)