PROJECT CONTROL RECORD

Project Readiness & Decision Brief

A working brief for controlling the decision, source record, assumptions, unresolved questions, professional input, and immediate actions.

CONTROL	WORKING ENTRY
Project	
Brief ID / version	
Decision owner	
Required decision date	
Prepared / last updated	

Purpose

Use this brief to define the decision ahead, assemble the current project record, distinguish verified facts from assumptions, identify missing evidence and professional input, and assign immediate next actions.

> **Professional boundary:** This brief organizes project information and decisions. Counsel, agencies, and the relevant licensed or qualified professionals retain responsibility for legal advice, governmental decisions, surveys, engineering, environmental analysis, architecture, appraisal, finance, title, and other professional conclusions.

Version 1.0 | Working form and synthetic example

How to use this brief

> **Core operating rule:** Every material statement should identify its record class, source, current status, responsible reviewer, decision affected, and next action.

1. Define one decision, one decision owner, and one required date.
2. Identify the project version and source record being relied on.
3. Record what is verified, received, current, superseded, missing, requested, or awaiting professional or agency confirmation.
4. Separate sponsor decisions, agency decisions, professional conclusions, CDA coordination records, project facts, and unresolved questions.
5. Assign every material gap to an owner with a required deliverable and target date.
6. Connect each open item to the reliance, milestone, cost, schedule, transaction term, approval, or implementation step it can affect.
7. Refresh the brief when a source changes, a plan or approval is amended, professional input arrives, an assumption fails, or the sponsor makes a decision.

Record classes

Record class	Use
Project fact	Statement supported by an identified source in the current project record.
Sponsor direction or assumption	Business objective, selection, instruction, or working premise supplied by the sponsor.
Agency decision	Action documented by the public body or official with authority.
Professional conclusion	Conclusion supplied by counsel or the relevant licensed or qualified professional.
CDA coordination record	Scope, dependency, responsibility, status, communication, or follow-through record.
Unresolved question	Question lacking required evidence, decision, professional conclusion, or agency confirmation.

Controlled status legend

Use only the statuses below. Add dates, source IDs, owners, and next actions in the working tables.

Status	Meaning
Verified	Supported by an identified current source and reviewed by the responsible person.
Received	In the file; current applicability or substantive review remains open.
Current	Confirmed as the version presently used for the stated purpose.
Superseded	Replaced by a later identified record; preserve the version relationship.
Missing	Expected evidence is absent from the record.
Requested	A named person or source has been asked to provide the record or response.
Professional confirmation required	A defined conclusion belongs to counsel or the relevant professional.
Agency confirmation required	A defined status, interpretation, or action requires the responsible agency.
Decision required	The sponsor or another identified owner must select or authorize a course.
Issue identified	A material discrepancy, constraint, conflict, or dependency requires action.
Closed	The item is resolved and closure evidence is identified.

Status use checks

- Verified requires an identified current source and responsible review.
- Received describes possession of a record; it does not establish currency or substantive acceptance.
- Missing and Requested remain open until the record is received and separately reviewed.
- Professional confirmation required and Agency confirmation required must name the question and responsible role or body.
- Closed requires closure evidence, a date, and the person who confirmed closure.

1. Brief control

Establish the identity, ownership, decision date, and refresh discipline for this brief.

> **Instruction:** Use a stable Brief ID and version. Create a separate brief when another decision has a different owner, deadline, or evidentiary basis.

Field	Working entry
Brief ID	Enter current information or record status.
Project name	
Project version or scenario	
Decision owner	
Brief owner	
Prepared date	
Required decision date	
Last updated	
Next scheduled refresh	
Distribution	
Confidentiality designation supplied by sponsor or counsel	

2. Decision ahead

State the decision so the team can identify the evidence and professional input required.

> **Instruction:** Write one decision as an action. Use separate briefs for decisions with different owners, dates, or evidentiary bases.

Field	Working entry
Decision statement	Enter current information or record status.
Decision owner	
Required date	
Options under consideration	
Current sponsor direction	
Decision criteria	
Minimum reliance required	
Consequence of delay	
Revisit trigger	

3. Project identity and control

Identify the project, property, ownership, jurisdiction, version, and authoritative working sources.

Instruction: Flag discrepancies among parcel, ownership, project-name, plan-version, and jurisdiction records. Route title, survey, entity, and legal questions to the responsible professionals.

Field	Working entry
Project name and internal identifier	Enter current information or record status.
Property description or APN reference	
Site address or general location	
Current owner or control party	
Transaction or control instrument	
City, county, and other jurisdictions	
Sponsor project lead	
Current project description date	
Current plan set title and date	
Data-room or source-index location	

4. Development proposition

State the business plan being tested and the assumptions that define it.

Instruction: Identify the source and owner for every material assumption. Preserve sponsor direction as its own record class.

ID / topic	Current statement	Class / source	Status	Decision affected / owner / next action

Include: Use, unit or lot program, product and ownership structure, phasing, commitments, cost and schedule basis, financing assumptions, sponsor priorities, and alternatives.

5. Site, jurisdiction, and policy context

Organize the land-use, policy, physical, and jurisdictional context relevant to the decision.

Instruction: Record the adopted source, date, map layer, or agency record being used. Assign interpretation and applicability to the agency, counsel, planner, or relevant professional.

ID / context	Current source statement	Source / date	Status / reviewer	Decision affected / next action

Review prompts: General plan, specific plan, zoning, overlays, mapped hazards or resources, service districts, access, utilities, interagency context, and pending policy questions.

6. Approval and environmental record

Establish the approval instruments and environmental record being relied on, including later actions and missing exhibits.

> **Instruction:** Preserve actual instruments, findings, conditions, plans, exhibits, environmental documents, notices, and later actions. Treat an absent referenced exhibit as missing evidence.

Approval and source register

ID	Approval or record	Issuer / action / date	Source section or exhibit	Status / last verified

Reliance and follow-through

ID	Current statement or gap	Reliance affected	Responsible reviewer	Evidence / next action / target

7. Maps, access, utilities, infrastructure, and off-site obligations

Connect the development path to technical, property, service, and improvement records needed for implementation.

Instruction: Link each technical conclusion to the plan version and professional work product supporting it. Record agency or third-party action separately.

ID / system	Record / version / source	Current status	Dependency or milestone	Reviewer / next action

Review prompts: Maps, recordation, easements, access, dedications, grading, drainage, water, sewer, dry utilities, capacity, on-site and off-site improvements, agreements, security, reimbursements, and fees.

8. Public-report and common-interest context

Identify DRE, ownership-document, budget, reserve, governance, and sales-readiness workstreams when relevant.

> **Instruction:** Maintain DRE and common-interest records as a separate workstream. Confirm required filings, professional inputs, document sufficiency, and sales restrictions with DRE, counsel, and the responsible professionals.

Field	Working entry
Subdivision filing or public-report phase	Enter current information or record status.
DRE file or reference	
Preliminary, conditional, or final report status	
Governing-document status	
Budget and reserve inputs	
Phasing and annexation assumptions	
Escrow, title, and disclosure inputs	
Agency comments and resubmittal status	
Professional owners	
Sales or disclosure decision affected	

9. Schedule, transaction, and financing milestones

Connect project evidence and open issues to actual business dates and commitments.

> **Instruction:** Record the source of each date and whether it is contractual, agency-controlled, sponsor-selected, professional-estimated, or a working assumption.

Milestone ID / date	Milestone and source	Date class	Predecessor / dependent action	Owner / contingency / status

10. Source and evidence register

Maintain the traceable record beneath every material statement in the brief.

> **Instruction:** Use one row per source. Preserve superseded records and connect them to the current version. Continue on an attached register if needed.

Source identity

ID	Record title	Issuer / author	Date / version	Source location	Status

Review and reliance

ID	Responsible reviewer	Reliance or decision affected	Last verified	Notes / relationship to other records

11. Assumptions, unresolved questions, and missing evidence

Expose the items most capable of changing the development thesis, transaction, approval path, cost, scope, or schedule.

> **Instruction:** Phrase each item so the responsible person can return a defined source, professional conclusion, agency response, or sponsor decision.

Issue statement

ID	Topic / current statement or question	Class / basis	Status	Decision or reliance affected

Resolution control

ID	Evidence or response required	Responsible owner	Target date	Consequence if unresolved / last updated

12. Professional and agency input plan

Route each question to the person or body responsible for the required conclusion or decision.

> **Instruction:** State the required input without assigning legal, technical, environmental, financial, title, appraisal, design, or governmental conclusions to CDA.

Input request

ID	Question or deliverable	Role or agency	Source package / request date	Response required

Follow-through

ID	Named owner if authorized	Target date	Dependency	Status / follow-up owner

13. Decision register

Preserve sponsor and agency decisions, the basis considered, owner, and downstream actions authorized.

> **Instruction:** Preserve the difference between sponsor direction, an agency action, and a professional recommendation. Continue on an attached register if needed.

Decision basis

ID	Decision statement / class	Owner / date required	Options considered	Sources and input considered

Decision and implementation

ID	Decision	Qualifications or conditions	Actions authorized / communication	Revisit trigger / status

14. Immediate-action plan

Convert the brief into assigned work that changes or confirms the decision record.

> **Instruction:** Limit this table to actions needed before the next decision or refresh. Move the longer workplan to the connected Critical-Path Planner.

Immediate actions

ID / action	Owner / deliverable	Predecessor	Target / decision affected	Escalation / status / closure evidence

15. Decision brief summary

Provide a concise dated statement that a decision owner can review without losing the source and qualification trail.

> **Instruction:** Keep the summary factual and dated. State qualifications directly. Link each material assertion to its register ID or source record.

Field	Working entry
Decision required	Complete after the supporting registers are current.
Current sponsor direction or options	
Verified basis and source IDs	
Material assumptions	
Issues capable of changing the decision	
Professional or agency confirmation outstanding	
Immediate actions and owners	
Decision date	
Next refresh date	
Brief owner certification of record currency	

Harbor View Infill, Synthetic Example

> **Synthetic example:** All names, records, dates, locations, identifiers, parties, and facts in this appendix are fictional. They demonstrate record discipline and must not be used for an actual project.

Example decision

Field	Working entry
Decision	Determine whether to authorize the next acquisition-diligence workplan and extend the internal review period.
Decision owner	Sponsor investment committee.
Required date	Synthetic date 30 days after brief preparation.
Current posture	Three defined verification gaps and one sponsor timing decision remain open.

Synthetic example record states

Synthetic example: The eight rows below demonstrate the required status and record-class distinctions.

ID	Record class	Current statement	Status
HV-001	Project fact	Concept Plan A shows 84 residential units and is the version supplied for current sponsor review.	Verified
HV-002	Sponsor direction or assumption	Sponsor assumes 84 units remain the preferred scenario pending technical and agency input.	Decision required
HV-003	Unresolved question	The synthetic approval summary references Exhibit C, which is absent from the data-room index.	Missing
HV-004	Unresolved question	The record contains an unsigned access-easement form and no recorded instrument.	Professional confirmation required
HV-005	Unresolved question	The file contains a synthetic map approval date and an unverified extension reference.	Agency confirmation required
HV-006	Sponsor direction or assumption	Decide whether to request 30 additional synthetic days for defined verification.	Decision required
HV-007	CDA coordination record	Access confirmation and the missing exhibit precede final plan-to-approval comparison.	Issue identified
HV-008	CDA coordination record	Two identical copies of Concept Plan A were indexed under different names.	Closed

Synthetic example ownership and evidence

Synthetic example: Each open item names the decision affected, owner, required evidence, and next action.

ID	Reliance or decision affected	Owner and next action	Source or closure evidence
HV-001	Defines current business-plan scenario.	Brief owner preserves version and study links.	Synthetic Concept Plan A, May 15, 2026.
HV-002	Affects cost, schedule, study scope, and acquisition thesis.	Sponsor confirms scenario for next workplan.	Sponsor direction record pending.
HV-003	Prevents comparison with the approved plan.	Seller contact supplies Exhibit C; counsel and planner review.	Missing-evidence entry remains open.
HV-004	Affects legal-access reliance and site-plan review.	Title counsel and surveyor confirm controlling record and location.	Professional response required.
HV-005	Affects reliance on the existing subdivision path.	Agency request follows counsel review.	Official agency response or action required.
HV-006	Controls transaction timing and professional scopes.	Investment committee decides at next synthetic meeting.	Decision record pending.
HV-007	Controls planner, surveyor, and counsel sequence.	Brief owner tracks HV-003, HV-004, and HV-005 as predecessors.	Dependency links recorded.
HV-008	Removes current plan-version ambiguity.	Data-room owner retains one record and logs the duplicate.	Closure log and fictional file-hash match.

Synthetic example summary

The next workplan can be scoped around three defined gaps: the missing approval exhibit, professional confirmation of the access record, and agency confirmation of the tentative-map status. The sponsor decision on an internal review extension remains open. This example does not establish approval validity, map life, access, development feasibility, value, schedule, or transaction outcome.