REQUIREMENTS INTELLIGENCE REPORT™

Baseline — Project Initiation

Heritage Health Campus · Northstar Ambulatory Care Clinic, Floors 1 & 2

Register v1.0 · Run ID HHC-REG-000 · Report Date January 28, 2025

Regenerated September 2026 at Doc 5 v2.2.2 · Doc 4 v1.6.4 · Doc 6 v1.5.3, from the register as it stood at the baseline processing date. Project dates, figures, and decisions are as originally recorded.

SAMPLE. Heritage Health Campus and Northstar Ambulatory Care Clinic are illustrative. The methodology, structure, register integrity, and analytical voice on every page are exactly what Gallant produces on live client engagements. Project name, organizations, and individuals have been replaced with generic references. Vendor and product names are real and are shown because equipment selection is the substance of several findings.

Requirements in register	70 — 54 GOVERNING · 16 carrying an open decision
Open owner decisions	16 — **2 not yet started, gating eight records and the VE-01 recovery**
Active conflicts	6
Critical-impact concentration	30.0% — at the ceiling
Cost variance	5.9% — above the VE trigger
Verification events	154 across five stages
Next gate	50% Schematic Design, July 11, 2025 — **AMBER**
Gate 2	CLEAR — twelve of twelve PASS

Prepared by Gallant Project Solutions LLC · Gregory A. Tuite, PE, PMP Service-Disabled Veteran-Owned Small Business · Veteran-Owned Small Business

How to Read This Report

What this is. Gallant's structured account of every binding requirement on the project, the conflicts and open decisions surfaced from those requirements, and the actions the owner needs to take before design begins. It is produced by reading every project document into a single registered list, then analyzing the list — not by reviewing the design.

Read this sample for: what Gallant delivers at the start of a project, before design begins · how 70 requirements pulled from five founding documents become a single source of truth that owner, designer, contractor, and auditor can all read from · how conflicts and missing decisions get surfaced before they become design rework, each routed to a named person with a deadline · how Gallant catches its own workbook and methodology issues with the same rigor it applies to the project record.

Companion sample. This report shows the foundation. The Cycle 1 sample shows what six months of monthly engagement clears against it. Most prospects find Cycle 1 more useful for understanding a recurring engagement; this one shows what is in the foundation.

Reader	Time	Read
Executive	15 min	Section 2
Project Manager	45 min	Sections 2, 4, 5, 6, 7, 10
Project Team	Full	All eleven sections and Appendix A

Key terms

GOVERNING — locked into the design basis; the design team is building to it. **CONFLICT-PENDING** — in conflict with another requirement; both sides documented; an owner-routed decision is needed. **PENDING** — awaiting approval, design development, or a missing input.

An open decision is not a status. A requirement carrying an unresolved decision keeps its own status and carries the decision separately in the register, so it stays in the active set where the design team can see it rather than being filed away as undecided. Section 5 lists every open decision in full.

Critical Impact — any requirement where a change after design proceeds would force significant rework, schedule slip, or cost growth. A register is healthy if no more than 30 percent of its requirements carry this rating.

Verification is a chain, not an event. A requirement is verified by the design team's own QA before a set is issued, again by the authority having jurisdiction, again by the contractor during construction, again at commissioning, and again at owner acceptance. Each is a separate record with its own date, evidence, and named party. A later verification never overwrites an earlier one. Section 3 View 9 reports them.

Identifiers. GR-XXXX requirement · CF-XXX conflict · D1–D5 source document · DEV-XXX self-disclosed deviation · OAI / BCR / SMR — owner action items, budget and cost requirements, and schedule milestone requirements as labelled in the source documents.

Section 1 — Project Snapshot

Project	Heritage Health Campus — Northstar Ambulatory Care Clinic, Floors 1 & 2
Client	Heritage Development Partners / Northstar Health System
Register version	v1.0
Run ID	HHC-REG-000
Run type	Baseline — Project Initiation
Report date	January 28, 2025
Project phase	Pre-Schematic Design; A/E notice to proceed scheduled May 5, 2025
Delivery method	Hybrid — base building CMAR (Cornerstone); tenant improvement A/E-led with separate TI bid
Methodology applied	Doc 5 v2.2.2 · Doc 4 v1.6.4 · Doc 6 v1.5.3
Gate 2	**CLEAR — twelve of twelve PASS**

At a glance

Total active requirements	**70**	54 GOVERNING · 16 carrying an open decision · 6 in active conflict
Open owner decisions	**16**	All must close before Design Development authorization; **2 not yet started**
Active conflicts	**6**	CF-001 through CF-006; three numeric, two scope-boundary, one regulatory framework
Critical-impact concentration	**30.0%**	**At the 30 percent ceiling. No room above.**
Cost variance	**5.9%**	$72M estimate against $68M authorized; above the 5% VE trigger
Verification events	**154**	Across five stages; 70 eligible now, 1 closed
Source documents processed	**5**	Founding set, 70 records extracted

Confidence on the next gate — AMBER

Next gate: 50% Schematic Design, July 11, 2025. At risk. Two of sixteen gate-blocking decisions — the geotechnical report and the AHJ pre-application — have no activity recorded against them, and together they gate eight downstream records and the VE-01 cost recovery. Both have response times measured in weeks, and both are recoverable if started now and not recoverable if started in May.

First report. No prior cycle to compare against. Trend indicators in Sections 3, 6, and 11 apply from Cycle 1 onward.

Section 2 — Executive Summary

Written to be forwarded to a project sponsor or capital partner without modification.

Where the project stands

The next gate is 50% Schematic Design on July 11, 2025. The project is not ready for that gate today. Sixteen owner decisions stand open and six requirements are in active conflict, and two of the sixteen — each with a multi-week response time and a deadline inside the gate window — have not been started. The requirements baseline itself is sound — 70 obligations extracted from five founding documents, every one traced to its source — but the register enters Schematic Design with Critical-impact records at exactly 30 percent, the maximum concentration Gallant considers healthy, which means every open decision compresses the design team's response window when the answer finally arrives. **Six risks rate HIGH this cycle, and with no prior cycle the direction of travel is not yet established — the exposure is concentrated in the open-decision backlog, the unresolved generator capacity basis, and two long-lead procurements not yet engaged.**

Five decisions the owner must make before Schematic Design proceeds

Finding 1 — The generator question is a budget event in disguise, and it blocks three downstream requirements

Condition. The Owner Program Criteria estimates 150 kW for clinical emergency loads. The Programming Document provides a 200 kW base-building life-safety generator. The combined NFPA 99 Category 1 requirement is 350 kW minimum. Neither document acknowledges the combined-load requirement, and the lease's Exhibit D is silent on who pays for the upsize. The cost delta is estimated at $180,000 to $260,000 from the Programming Document's own unit figures.

Consequence. Total Project Cost is estimated at $72 million against a $68 million Board-authorized ceiling — a 5.9 percent variance that already exceeds the 5 percent Value Engineering trigger. Resolving the generator allocation cleanly preserves the path to a documented variance request. Leaving it open invites it to land on the 50% SD cost reconciliation as a surprise. Generator lead time is twenty to twenty-eight weeks, and three downstream records — procurement, EES sizing, and ATS configuration — cannot advance until the capacity is fixed.

Owner and deadline. Decision owner: Owner's Project Manager and Northstar Tenant Facilities Lead. Deadline: July 11, 2025.

Status. The combined-load requirement has not been acknowledged by either party in writing. The VE-01 foundation savings evaluation, the most accessible offset to the variance, is itself blocked by a geotechnical report the consultant has not yet scheduled.

Action required by July 11, 2025: Owner's PM and Tenant Facilities Lead execute a written scope-allocation memo or lease side letter assigning the 200-to-350 kW upsize cost. If not closed by July 11, 2025, the generator cannot be released for procurement and the October 31, 2025 order date is missed.

Finding 2 — The MRI vendor decision is the single largest design driver still open

Condition. The Equipment Schedule lists two MRI vendors — Siemens MAGNETOM Altea and GE SIGNA Creator — as under active evaluation. They carry different magnet weights, 7,700 pounds against 8,100, different equipment-room footprints, 200 net square feet against 240, different RF-shielding specifications, and different procurement lead times. The Structural Engineer of Record is proceeding on the Siemens basis per kickoff agreement, but the structural narrative cannot be finalized without written confirmation.

Consequence. If the alternate is selected after structural narrative submission, the MRI room slab and foundation require revision and the imaging suite loses forty square feet that must be recovered from an adjacent space. RF shielding engagement, with a twelve-week lead, cannot proceed until the vendor is fixed. The MRI pre-enclosure construction sequence is one of the project's irreversible critical-path events — if the magnet is not in place before wall enclosure, demolition is required.

Owner and deadline. Decision owner: Northstar Biomedical Engineering Lead. Deadline: June 13, 2025.

Status. Vendor evaluation is in progress. No written confirmation has issued. The design team is carrying both options.

Action required by June 13, 2025: Biomedical Engineering Lead issues written vendor confirmation to the A/E and Gallant. If the decision will slip, formally adopt the Siemens basis in writing and accept the rework risk. If not closed by June 13, 2025, the 30% DD structural narrative is finalized on an unconfirmed basis and any later change becomes a foundation redesign.

Finding 3 — The AHJ pre-application is the cheapest decision on the board and the most consequential if it slips

Condition. The TJC Regulatory Summary requires compliance with the AHJ-adopted edition of the FGI Guidelines. No source document confirms which edition the New Mexico Department of Health has adopted. The project planning basis is FGI 2022; pre-application research suggests NM DOH may remain on FGI 2018. The pre-application is due May 23, 2025 and has not been submitted; NM DOH response times run four to eight weeks. Its response governs corridor widths, occupancy classification, egress travel distance and stair pressurization, imaging room classifications, and ICRA scope.

Consequence. The cost of submitting a pre-application is days of A/E time. The cost of carrying eight conditional records into 50% SD without an answer is real plan-revision risk if the answer contradicts the planning assumption — and if FGI 2018 is confirmed, corridor widths, imaging room classifications, and ICRA scope change across multiple records at once. A single document unlocks the largest cluster of regulatory uncertainty in the register.

Owner and deadline. Decision owner: Architect of Record, Project Architect. Deadline: May 23, 2025 — submit now so the response lands before Schematic Design starts.

Status. Not submitted. No activity recorded against it.

Action required by February 28, 2025: the Architect of Record submits the NM DOH pre-application and copies Gallant on the receipt. If not submitted by then, the response cannot land before the A/E notice to proceed on May 5, and eight records enter Schematic Design on an unconfirmed regulatory basis.

Finding 4 — ICRA delivery is the gate item nobody is escalating, and it stops HVAC at the front door

Condition. The Infection Control Risk Assessment is owed by the Northstar Infection Preventionist by June 27, 2025. It governs HVAC zone boundaries, negative-pressure extents, and clinical hand-washing sink placement. Without it the MEP engineer cannot finalize the HVAC narrative. It is shown as a deliverable but is not tracked on the same cadence as the MRI and AHJ decisions.

Consequence. TJC accreditation requires ICRA at the programming stage; its absence at Schematic Design is a survey-finding risk in addition to a design blocker. A late ICRA against a fixed gate date produces compressed-design rework rather than gate slip — the more expensive failure mode, because the design team redesigns under pressure instead of waiting.

Owner and deadline. Decision owner: Northstar Infection Preventionist, escalation through the Owner's Representative to Northstar clinical leadership. Deadline: June 27, 2025.

Status. Not started. Tracked at lower priority than its impact warrants.

Action required this week: the Owner's Representative escalates ICRA delivery to Northstar clinical leadership and places it on the same priority tier as the MRI vendor and AHJ response. If it will slip past June 27, 2025, request a written interim decision on HVAC zone boundaries so the narrative can advance without it. If not closed by June 27, the HVAC narrative is finalized on assumed zone boundaries and sink counts, and any ICRA-driven change becomes a ductwork and plumbing redesign at 60% DD.

Finding 5 — Sixteen owner decisions are open against a design gate twenty-three weeks out, and none has a burndown cadence

Condition. The register carries sixteen requirements whose value or basis has not been established. These are not Gallant deliverables — they are owner actions that must close before Schematic Design can be finalized. Five require the owner to establish a value that exists in no source document. Nine are blocked upstream and will close in chain once four parent decisions resolve. Two require a vendor selection between equally acceptable alternatives. Two — the geotechnical report and the AHJ pre-application — have no recorded activity and multi-week response times against deadlines inside the window.

Consequence. The open count must reach zero before the design team can be authorized into Design Development. Two cascades are visible in the register: the AHJ response unlocks corridor widths, occupancy classification, FGI edition, and egress across eight records; the MRI vendor unlocks structural design, RF shielding, equipment-room area, and procurement across four. Every week the parents stay open is a week the design team designs to an assumption.

Owner and deadline. Decision owner: Owner's Project Manager and Northstar Tenant Facilities Lead, jointly. Deadline: next coordination meeting for owner and deadline assignment on all sixteen; weekly decision-burndown review through July 11, 2025.

Status. The list exists and is in this report. No burndown cadence has been established. The two unstarted items have no named date for initiation.

Action required by the next coordination meeting: Owner's PM and Tenant Facilities Lead assign a named owner and a written deadline to every open decision. If not closed by July 11, 2025, Design Development authorization is withheld and the design team proceeds on documented assumptions with rework risk accepted in writing.

Trigger-fired escalations

Two early-warning triggers have already fired and are escalated here regardless of numeric score. The geotechnical report passed its June 6 deadline; the AHJ pre-application passed its May 23 deadline. **A risk whose trigger has fired and whose response has not started is more dangerous than a higher-rated risk being actively managed.** Section 6 carries both.

Confidence indicator

Next gate (50% Schematic Design, July 11, 2025): AMBER — at risk. Two of sixteen gate-blocking decisions have not been started and have not been formally accepted by their named owners, and no burndown cadence is established. Both have clear paths and neither is at impasse.

Where to look

The supporting detail for all five findings is in Section 4, Tier 1. Section 5 lists all sixteen open decisions grouped by what they require. Section 6 carries the exposure picture and the two fired triggers. Section 7 states the cost variance and the schedule dependencies. Section 8 states each of the six conflicts with both source values verbatim. Section 10 closes the report with what must happen before the next cycle.

Section 3 — Requirements Readiness Dashboard

Nine required views. Every figure is computed from the register; none is estimated.

View 1 — Status distribution

RequirementStatus	Count	Percent
GOVERNING	54	77.1%
Carrying an open decision	16	22.9%
Total	**70**	**100%**

Six of the seventy are also party to an active conflict. Every requirement either carries a confirmed design basis or is explicitly flagged as waiting on a decision. **No record is in an ambiguous state.** Verification event counts are reported separately in View 9; they count events, not requirements, and the two are not interchangeable.

View 2 — Requirement type breakdown

RequirementType	Count	Percent
Regulatory & Compliance	15	21.4%
Physical & Interface	11	15.7%
Schedule & Milestone	10	14.3%
Functional	8	11.4%
Performance	8	11.4%
Operational & Maintenance	6	8.6%
Security & Life-Safety	5	7.1%
Budget & Cost	4	5.7%
Sustainability & Environmental	3	4.3%

Regulatory and physical-interface requirements dominate, which is characteristic of a healthcare baseline built from a regulatory summary and an equipment schedule before any design document exists.

View 3 — Discipline breakdown

Architecture leads at 47 percent of discipline allocations; Mechanical and Electrical follow. Many records carry shared ownership across two or three disciplines — the MRI cluster alone spans Architecture, Structural, Electrical, Mechanical, and Cost — which is why View 7 reports it as the dominant coordination hotspot.

View 4 — Criticality distribution

Category	Count	Percent
Critical	21	**30.0%**
High	32	45.7%
Medium	14	20.0%
Low	3	4.3%

Critical at exactly 30.0 percent — at the ceiling. A concentration above 30 percent means the project carries too much risk in too few hands and the rating has stopped discriminating. **Any Critical record added in a subsequent cycle requires explicit owner acknowledgment.** This is disclosed rather than reassessed downward; see Appendix A, DEV-004.

View 5 — Phase readiness

Design QA verification events eligible at this phase: 70, of which 1 is closed. The register is in the expected state for Schematic Design initiation — a baseline established from owner and regulatory sources, with no design verification yet possible because no design exists. **It is not in a state to enter Design Development without remediation** of the sixteen open decisions.

View 6 — Risk driver clusters

Cluster	Count	Escalated
REGULATORY_APPROVAL	23	Yes — Section 4 and Section 8
MULTI_DISCIPLINE_COORDINATION	19	Yes — View 7
LIFE_SAFETY	16	Yes — Section 4
DECISION_REQUIRED	16	Yes — Section 5
HIGH_COST_INFRASTRUCTURE	15	Yes — Section 7

LONG_LEAD	8	Yes — Section 7.2
SCOPE_GAP	7	Section 4, Scope Gaps
AHJ_DEPENDENCY	4	Gates eight downstream records
FIRE_PROTECTION	0	—
CONFLICT_ACTIVE	6	Section 8
ENVIRONMENTAL	0	—

All eleven clusters are listed, including those with a zero count. Regulatory approval is the dominant driver at baseline, as expected on a healthcare project where the AHJ response is still outstanding.

View 7 — Coordination hotspots

The MRI cluster is the dominant hotspot. Five disciplines — Architecture, Structural, Electrical, Mechanical, Cost — are coordinating around a single equipment selection that is still pending. Six records depend on it directly.

The clinical AHU scope boundary is second, intersecting Mechanical and Cost. The requirement is clear and the responsibility is unassigned.

View 8 — Open decisions

Sixteen. Detailed in Section 5 by decision type. **None is overdue at the report date.** Two are escalated to Section 4 Tier 1 because they gate the largest downstream chains and have not been started. This count matches the Decision_Register sheet exactly.

View 9 — Verification Closure and Lifecycle Load

Lifecycle load. The project carries **154 verification events across five stages**. **70 are eligible at this phase** — 1 closed, 69 open. **84 are not yet eligible** and come due as the project advances through regulatory review, construction, commissioning, and turnover.

Closure by stage

Stage	Eligible now	Verified	Open	Not yet due	Closure
Design QA	70	1	69	—	**1.4%**
Regulatory	—	—	—	22	Not yet eligible
Construction QA	—	—	—	38	Not yet eligible
Commissioning	—	—	—	14	Not yet eligible
Owner Acceptance	—	—	—	10	Not yet eligible

A 1.4 percent Design QA closure is the correct state at baseline and is not a finding. No design has been produced. The single verified record is the issuance of the Owner Program Criteria Rev. 2, confirmed before the register was built.

This is the number Cycle 1 gets measured against. The lifecycle load — 154 events, 84 of them not yet due — is the forward verification obligation the project is carrying before any of that effort arrives. It is what a project manager staffs against, and it is a figure no other party on the project can produce.

Critical requirements with an open eligible event: all 21. Each is at the Design QA stage awaiting the first design set.

Section 4 — Top Priority Items

Tier summary

Tier	Count	Treatment
Tier 1 — Gate-blocking	5	Full narrative; also in Section 2
Tier 2 — High-priority coordination	10	Eight-column table
Tier 3 — Tracked	6	Reference sentence
Qualifying records	**21**	

Twenty-one records meet at least one Section 4.1 qualification trigger: Critical criticality with open verification, active conflict, decision required, scope gap, High with design-driver flag, or schedule sensitivity. Two — the geotechnical report and the AHJ pre-application — qualify as TBD-UNRESOLVED decisions with deadlines before the gate and, in the AHJ's case, as the upstream parent of eight records. The tier shape is what a healthcare baseline typically produces: a small set of gating owner decisions, a larger band of coordination items that will become gating if the decisions slip, and a tracked remainder.

Tier 1 — Gate-blocking decisions

Five items. Each appears in Section 2 in executive form; here with register identifiers, source documents, conflict cross-references, and disposition path.

1. GR-0029 — Generator scope allocation

Qualifies under: active conflict requiring owner action with Critical records on both sides; upstream parent of three CONDITIONAL records. **Conflicts:** CF-001, partial CF-003. **Source:** Programming Document v1.0 (D3), BCR-003; Owner Program Criteria Rev. 2 (D2), Section 4.2.

The 350 kW combined NFPA 99 Category 1 minimum is acknowledged in neither document. GR-0022 (procurement), GR-0056 (Category 1 EES), and GR-0067 depend on it. **Disposition:** written scope-allocation memo or lease side letter from Owner's PM and Northstar Facilities before July 11, 2025, assigning the $180,000–$260,000 upsize.

2. GR-0018 — MRI vendor confirmation

Qualifies under: upstream parent of four CONDITIONAL records; EMBEDDED-CHOICE with deadline before the gate. **Conflicts:** CF-002, CF-004. **Source:** Equipment Schedule v1.0 (D5), EQ-020 and EQ-021.

The Equipment Schedule lists Siemens MAGNETOM Altea and GE SIGNA Creator as concurrent design basis. GR-0002 (imaging service), GR-0023 (RF shielding), GR-0033 (equipment room area), and GR-0039 (structural point load) are all CONDITIONAL on this record. CF-002 and CF-004 close with it. **Disposition:** written vendor confirmation from Biomedical Engineering Lead by June 13, 2025; if slipping, formal adoption of the Siemens basis with rework risk accepted in writing.

3. GR-0021 — AHJ pre-application to NM DOH

Qualifies under: TBD-UNRESOLVED with deadline before the gate; upstream parent of eight CONDITIONAL records. **Conflicts:** CF-005. **Source:** Milestone Schedule v1.0 (D4), SMR-005.

GR-0035, GR-0043, GR-0044, GR-0046, GR-0048, GR-0061 and the corridor design lock all depend on the response. **Disposition:** Architect of Record submits by February 28, 2025; design proceeds on FGI 2022 / AHC basis pending response; if FGI 2018 is confirmed, A/E issues a design directive cataloging every affected requirement.

4. GR-0019 — Infection Control Risk Assessment

Qualifies under: TBD-UNRESOLVED with deadline before the gate; upstream parent of GR-0051. **Source:** TJC Regulatory Summary v1.0 (D1).

Governs HVAC zone boundaries, negative-pressure extents, and hand-washing sink placement. **Disposition:** Owner's Representative escalates to Northstar clinical leadership this week; if slipping past June 27, 2025, written interim decision on zone boundaries.

5. GR-0020 — Geotechnical investigation report

Qualifies under: TBD-UNRESOLVED with deadline before the gate; no activity recorded. **Source:** Milestone Schedule v1.0 (D4). **Scope gap:** owed by Heritage under a separate contract.

Blocks foundation design confirmation and the BCR-004 VE-01 evaluation worth $180,000–$340,000. **Disposition:** Owner's PM obtains a scheduled delivery date from the Geotechnical Consultant this week; if the report will not arrive before the gate, accept Site Class D in writing so foundation design can proceed.

Tier 2 — High-priority coordination items

#	Req ID	Description	Issue	Impact domain	Criticality	Recommended action	Source
1	GR-0042	TJC AHC accreditation framework —	52 sub-requirements trace here; Day	Regulatory · Safety	Critical	Northstar Compliance assign	TJC Reg Summary (D1)

		top-level driver	1 accreditation is a lease commencement condition			accreditation readiness manager at SD entry; mock TJC survey 60 days before Day 1 operations	
2	GR-0024	MRI magnet must be set before wall enclosure	Construction sequence is irreversible; if walls close before magnet delivery, demolition is required	Schedule · Cost · Coordination	Critical	CMAR place MRI delivery window on master schedule with field-report and photographic documentation requirement	Equipment Schedule (D5)
3	GR-0027	$68M TPC ceiling — Board-authorized hard limit	Current estimate $72M exceeds ceiling by $4M (5.9%); generator and acoustic add further pressure	Cost	Critical	Cost consultant attend 50% SD review with formal variance report; VE-01 contingent on geotech receipt	Programming Document (D3)
4	GR-0022	Generator procurement — 20–28 week lead	If not ordered by October 31, 2025, 350 kW generator cannot arrive for construction energize	Schedule · Cost · Regulatory	Critical	BCR-003 must resolve by July 2025 so CMAR can issue PO at 30% DD; lead time non-negotiable	Equipment Schedule (D5)
5	GR-0036	Clinical AHU procurement boundary	CF-003: lease Exhibit D silent on AHU scope; 12–18 week lead cannot start	Cost · Schedule · Coordination	High	Heritage and Northstar joint memo before 50% SD gate assigning AHU scope	OPC Rev. 2 (D2)
6	GR-0050	STC 60 acoustic overlay scope	CF-006: required by TJC summary, budgeted and assigned by neither document; $80K–$150K	Cost · Coordination	High	A/E identify cost allocation before 60% DD; BCR-004 VE review	TJC Reg Summary (D1)
7	GR-0011	Isolation room negative pressure — life safety	12 ACH minimum plus continuous negative-pressure monitoring; failure is patient and staff safety risk	Safety · Regulatory	Critical	MEP-EOR include in HVAC special systems narrative at 50% SD; continuous monitoring specified at DD	TJC Reg Summary (D1)
8	GR-0045	NFPA 99 compliance — medical gas, EES, IPS	Non-compliance at commissioning is a TJC survey finding that delays occupancy	Safety · Regulatory · Cost	Critical	MEP-EOR prepare NFPA 99 compliance matrix at 90% CD; commissioning plan include all Category 1 functional tests	TJC Reg Summary (D1)
9	GR-0049	MRI siting per ACR Technical Standard	Zone safety and access control; projectile risk; zone diagram mandatory in CDs	Safety · Regulatory	Critical	AOR include ACR zone diagram in 50% CD; Zone III/IV access control verified at commissioning	TJC Reg Summary (D1)
10	GR-0028	$14.2M TI Allowance — binding lease figure	PT additions and generator upsize could impact TI Allowance before design is complete	Cost	Critical	Issue written direction on PT equipment and generator allocation before 50% SD gate	Programming Document (D3)

Tier 3 — Tracked items

An additional six records meet Section 4 qualification triggers and are tracked in the Requirements Register with assigned ChangeImpactLevel and ResponsibleDiscipline: GR-0002 and GR-0039 (resolve with the MRI vendor decision), GR-0044 and GR-0035 (resolve with the AHJ response), GR-0046 and GR-0061 (stair pressurization, confirmed at the SD gate review), GR-0056 (Category 1 EES, resolves with generator allocation), GR-0004 (accreditation as a lease condition), and GR-0047 (sprinkler riser separation). These are not gate-blocking and do not require executive attention this cycle.

Scope gaps

No GAP-status records exist in the baseline register. Seven records carry the SCOPE_GAP risk-driver flag, indicating an explicit boundary uncertainty between contracts — base building, tenant improvement, owner-furnished equipment, A/E scope. **These are not gaps in requirement coverage. They are gaps in the contract assignment of who does the work.**

Req ID	Scope boundary issue	Design systems affected	Recommended remediation
GR-0020	Geotechnical report owed by Heritage under separate contract — not yet scheduled	Foundation system, structural narrative, VE-01 evaluation	Owner’s PM obtain a delivery date from the Geotechnical Consultant this week
GR-0026	50% SD deliverable scope (BOD narrative completeness) not yet defined	Sets the source document for RIR Cycle 1	A/E confirm BOD scope at A/E NTP / kickoff
GR-0029	Generator upsize (200→350 kW) cost allocation silent in NNN Lease	EES design, ATS sizing, generator procurement	Side letter or scope-allocation memo before 50% SD gate
GR-0030	DD cost reconciliation methodology not specified	Trigger for VE options log	A/E confirm methodology at 30% DD start
GR-0031	Clinical TI total GSF target (24,000) not contractually bound to A/E	Floor plate efficiency, NSF allocations	A/E acknowledge GSF target in design responsibilities matrix
GR-0036	Clinical AHU procurement boundary (CF-003) — Exhibit D silent	HVAC system, MEP narrative, AHU long-lead procurement	Heritage and Northstar joint memo before 50% SD gate
GR-0050	STC 60 acoustic overlay scope (CF-006) — base building vs. residential TI silent	Level 2/3 acoustic assembly, structural slab interface	A/E identify cost allocation before 60% DD; BCR-004 review

Section 5 — Owner Decision Register

Sixteen open decisions. This section is comprehensive; it is not subject to the Tier 1 cap.

> **Escalation notice.** No decision is overdue at the baseline report date. Two are escalated because they have not been started and their response times leave no float before the gate. **GR-0021, the AHJ pre-application, is due May 23, 2025** and gates eight downstream records covering FGI edition, occupancy classification, corridor widths, and egress — NM DOH responses run four to eight weeks, so it must be submitted by the end of February. **GR-0020, the geotechnical report, is due June 6, 2025** and blocks foundation design and the $180,000–$340,000 VE-01 evaluation — the consultant has not scheduled fieldwork. Both require a named start date this week.

The count of sixteen matches Section 3 View 8 and the Decision_Register sheet exactly.

Group 1 — TBD-UNRESOLVED (5 items)

Owner instruction. A required value is not established in any governing document. The design team cannot proceed without it.

Req ID	Description	What value is needed	Decision owner	Deadline
GR-0019	ICRA — infection control risk assessment	Completed ICRA with HVAC zone boundaries, sink placement, negative-pressure extents	Northstar Infection Preventionist	June 27, 2025
GR-0020	Geotechnical investigation report	Soil report with confirmed Site Class C+ or D for foundation design	Owner's PM	June 6, 2025 — **not started**
GR-0021	AHJ pre-application to NM DOH	Written AHJ confirmation: applicable FGI edition, AHC occupancy, NM amendments	Architect of Record	May 23, 2025 — **not submitted**
GR-0029	Generator scope allocation (200 kW vs. 350 kW)	Written scope-allocation memo or lease side letter assigning $180K–$260K cost delta	Owner's PM + Northstar Facilities	July 11, 2025 (50% SD)
GR-0038	Medical gas additional outlet locations (OAI-004)	Northstar Clinical Director confirmation of outlets beyond minimum	Northstar Clinical Director	Prior to 50% SD

Group 2 — CONDITIONAL (9 items)

Owner instruction. These are blocked by an upstream decision. Resolving the upstream item first unblocks them.

Req ID	Description	Upstream dependency	Resolves when	Auto-close?
GR-0022	Generator procurement initiation	GR-0029 (BCR-003 generator scope)	BCR-003 resolved and PO authorized	No — requires PO action
GR-0023	RF shielding contractor engagement	GR-0018 (MRI vendor confirmation)	MRI vendor fixed and spec to shielding sub	No — requires contract action
GR-0033	MRI room dimensions (200 / 240 NSF)	GR-0018 (MRI vendor)	MRI vendor confirmation	Yes — area locks per vendor
GR-0035	8-foot AHC corridor widths	GR-0021 / GR-0044 (AHJ AHC confirmation)	AHJ written response	Yes — locks at AHJ confirmation
GR-0039	MRI structural point load (7,700 / 8,100 lb)	GR-0018 (MRI vendor)	MRI vendor confirmation	Yes — design basis locks per vendor
GR-0043	FGI edition (2022 / 2018)	GR-0021 (AHJ pre-application)	AHJ written confirmation	Yes — design basis locks
GR-0044	AHC occupancy classification	GR-0021 (AHJ pre-application)	AHJ written confirmation	Yes — classification locks
GR-0051	Hand-washing sink placement	GR-0019 (ICRA delivery)	ICRA received and reviewed	Yes — placement locks per ICRA
GR-0056	Category 1 EES — clinical ATS sizing	GR-0029 (BCR-003 generator scope)	Generator capacity confirmed at 350 kW	Yes — EES locks per generator size

Four upstream resolutions close eleven downstream records. GR-0018, GR-0021, GR-0019, and GR-0029 are the parents.

Group 3 — EMBEDDED-CHOICE (2 items)

Owner instruction. The source document presents alternatives. Both are acceptable, but one must be selected before Schematic Design proceeds. The design team cannot design to two options simultaneously.

Req ID	Decision required	Option A — Siemens MAGNETOM Altea	Option B — GE SIGNA Creator	Owner / deadline
GR-0002	MRI imaging modality vendor	1.5T closed bore · 200 NSF equipment room · 7,700 lb magnet	1.5T closed bore · 240 NSF equipment room · 8,100 lb magnet	Biomedical Engineering Lead · June 13, 2025

GR-0018	MRI model and vendor confirmation	Design basis already adopted by SER per kickoff	Requires structural revision and 40 NSF imaging suite reallocation	Biomedical Engineering Lead · June 13, 2025

Group 4 — SHOULD-LANGUAGE (0 items)

No preference-language items in the baseline register. All extracted requirements use mandatory language — shall, will, must — or clearly-flagged conditional language. **Reported as a positive baseline finding.**

Closeout rule

The total open count across all four groups — sixteen — must reach zero before Gallant will recommend authorization to enter Design Development. The two unstarted items in Group 1 require a named start date this week. The nine CONDITIONAL items close in chain when their four upstream parents resolve.

Section 6 — At-Risk Assessment

Method

Each flagged item is scored for likelihood and for impact assessed separately against budget, schedule, and quality/compliance. Overall impact is the worst of the three; the rating is likelihood times impact. First-pass scores are seeded from the register itself — criticality, risk drivers, and conflict status — then refined in a facilitated review with the owner's team. Every score is computed from its inputs, never typed; an override requires written rationale in the row.

Count and posture

Eight risks assessed. Six rate HIGH. With no prior cycle there is no direction of travel yet — this is the exposure picture the project starts from. The six HIGH risks are concentrated in the open-decision backlog, the unresolved generator capacity basis, and two long-lead procurements not yet engaged.

Top exposures — HIGH-rated

Risk	Linked	L	Budget	Sched	Quality	Rating	Response
ICRA not received — HVAC zoning and sink counts cannot be finalized	GR-0019, GR-0051	H	M	H	H	**HIGH**	Mitigate — escalate to Northstar clinical leadership this week; written interim decision on zone boundaries if slipping. Owner's Rep
Generator capacity basis unresolved — drives pad, feeder, procurement	GR-0029 / CF-001	H	H	H	M	**HIGH**	Mitigate — written scope-allocation memo before 50% SD; 350 kW as design basis. Owner's PM
MRI vendor open — structural, floor plan, shielding, procurement all conditional	GR-0018 / CF-002 / CF-004	H	M	H	H	**HIGH**	Mitigate — written vendor confirmation by June 13; if slipping, adopt Siemens basis formally. Biomedical Engineering Lead
AHJ pre-application not submitted — FGI edition and AHC occupancy gate eight records	GR-0021 / CF-005	H	M	H	H	**HIGH**	Mitigate — submit pre-application by end of February; design on FGI 2022 / AHC basis pending. AOR
RF shielding contractor not engaged — twelve-week lead	GR-0023	M	M	H	M	**HIGH**	Mitigate — engage shielding sub within two weeks of MRI vendor confirmation. GC Precon
Clinical AHU scope boundary undefined between base building and tenant	CF-003	M	H	M	L	**HIGH**	Mitigate — resolve boundary in writing before procurement. Owner's PM

Two further risks rate MEDIUM: the geotechnical report not yet scheduled (GR-0020 — foundation basis unconfirmed, VE-01 blocked; accept Site Class D in writing if it will not arrive before the gate) and medical gas rough-in locations unconfirmed (GR-0038 — confirm outlets before 50% DD).

Trigger-fired escalations

Two triggers have fired and are escalated in Section 2 regardless of score. The geotechnical consultant has not scheduled fieldwork against a June 6 deadline; the AHJ pre-application has not been submitted against a May 23 deadline with a four-to-eight-week response time behind it. In both cases the trigger is inactivity against a deadline with no float, not the deadline itself. A risk whose trigger has fired and whose response has not started is more dangerous than a higher-rated risk being actively managed.

Workbook pointer

The full register — with per-constraint impact, response strategies, named owners, and early-warning triggers — is on the Risk_Register sheet of the accompanying workbook.

Monetization pointer

Dollar quantification of these exposures is available through the Controls Advisory add-on using the Appendix A cost-of-inaction bands. Section 7 carries the cost and schedule exposure categories.

Section 7 — Cost and Schedule Exposure

Section 7 identifies exposure; it does not price it. Baseline output is framed as identified exposure categories with supporting requirement evidence. Where the client requires dollar or day quantification, Gallant’s cost and schedule partners are engaged under Controls Advisory to translate identified exposures into quantified estimates, design-to-cost tracking, and earned value management through the full project lifecycle. Every dollar figure below is reproduced from a source document; none is originated here.

7.1 Cost exposure

Exposure category	Identified items	Supporting records
Uncovered scope	Six requirements with open verification and HIGH_COST_INFRASTRUCTURE or MULTI_DISCIPLINE_COORDINATION drivers — primarily the MRI cluster and the generator/EES chain.	GR-0002, GR-0018, GR-0022, GR-0029, GR-0039, GR-0056
Allowance-driven uncertainty	Three requirements reference allowance-based line items without a finalized performance specification — primarily PT additions (LASER, traction table — OAI-005) and OFE input drawings. Budget risk until specifications are finalized.	GR-0003, GR-0028, GR-0041
Scope-price misalignment	Two requirements where the scope obligation is defined but no corresponding cost item is identified — the STC 60 acoustic overlay (estimated $80K–$150K per the TJC summary) and AHU procurement scope.	GR-0036 (CF-003), GR-0050 (CF-006)
Design-to-budget risk — solution	Twenty-one Critical and thirty-two High records with no confirmed design solution, representing value-engineering pressure points as design develops.	View 4 population
Design-to-budget risk — budget	Total Project Cost currently estimated at $72M against a $68M Board-authorized ceiling — a 5.9% variance that already exceeds the BCR-004 5% Value Engineering trigger. Three named offsets pending: VE-01 foundation ($180K–$340K), generator allocation ($180K–$260K), acoustic overlay ($80K–$150K).	GR-0027, GR-0028, GR-0030
Open-decision cost exposure	Six records carrying an open decision also carry HIGH_COST_INFRASTRUCTURE or SCOPE_GAP. Cost cannot be confirmed until the decision closes: generator scope $180K–$260K; STC 60 overlay $80K–$150K; MRI room reconfiguration if GE is selected (40 NSF reallocation); RF shielding specification (vendor-dependent).	GR-0029, GR-0050, GR-0033, GR-0023, GR-0038, GR-0056

Variance headline. Current estimate $72M against a $68M Board-authorized ceiling — variance $4M, 5.9%. The Value Engineering trigger has been exceeded. Three named offsets, all gated on owner decisions, sum to a potential $440K–$750K of recoverable variance — enough to retire roughly 11–19% of the $4M gap if all three close favorably. **Recommend a formal variance report at 50% SD with the VE options log attached.**

7.2 Schedule exposure

Exposure category	Identified items	Supporting records
Input-dependent requirements	Sixteen open decisions each block a specific design milestone, concentrated on four upstream sources: AHJ response (8 downstream), MRI vendor (4 downstream), generator scope (3 downstream), ICRA delivery (1 downstream).	All Section 5 items
Long-lead items	Eight LONG_LEAD records. Procurement gates: 350 kW generator (20–28 week lead, order by October 31, 2025); MRI vendor confirmation (June 13, 2025); RF shielding contractor (October 31, 2025, after MRI); MRI structural design (30% DD).	GR-0002, GR-0018, GR-0022, GR-0023, GR-0024, GR-0039, GR-0048, GR-0012
Sequencing risks	The MRI pre-enclosure construction sequence (GR-0024) is **irreversible**. The electrical energize date (GR-0025, March 2027) requires a 90-day buffer before commissioning. Two construction-sequence items have no current schedule activity tie-out.	GR-0024, GR-0025
Unrepresented scope	Seven SCOPE_GAP-flagged records lack a corresponding schedule activity — most are contract-boundary issues (AHU, acoustic overlay, generator scope) that will materialize as schedule items only after owner decisions resolve.	GR-0020, GR-0026, GR-0029, GR-0030, GR-0031, GR-0036, GR-0050

Schedule headline. Two unstarted decisions — geotechnical and AHJ — with multi-week response times inside the gate window. **The 50% SD gate on July 11, 2025 is the binary date:** sixteen open decisions must close by it to keep Design Development on schedule. Generator procurement by October 31, 2025 is the critical-path long-lead. The MRI pre-enclosure sequence is an irreversible critical-path event for the construction phase. **Recommend a weekly decision-burndown review through 50% SD and a long-lead procurement review at 30% DD.**

> **Known gap — schedule quantification.** The workbook carries ScopeImpact, ROM Basis, and ROM Range on the Requirement_Event_Register for cost. There is no equivalent field for time. Schedule exposure is therefore reported qualitatively until a schedule-days field is added.

Section 8 — Conflict Register Summary

Six active conflicts. A conflict is any place where two requirements in the register contradict each other or compete for the same resource. Three are numeric or dimensional contradictions — the same item carries two different values in two documents. Two are scope-boundary uncertainties — something must be built and the contract does not say who is responsible. One is a regulatory framework question — the project must comply with a regulation and two editions are in play.

Gallant identifies and routes. Gallant does not resolve conflicts. Each carries a named decision owner and a time-aware deadline.

Conflict type	Count	Records affected
ParameterConflict	3	CF-001 (generator capacity), CF-002 (MRI equipment room area), CF-004 (MRI structural point load)
ScopeConflict	2	CF-003 (clinical AHU procurement), CF-006 (STC 60 acoustic assembly)
AuthorityConflict	1	CF-005 (FGI edition — TJC vs. AHJ adoption)
MethodConflict	0	None detected at baseline
SequenceConflict	0	None detected at baseline
Total	**6**	**All open. Resolution paths owner-routed.**

Active conflicts — detail

CF-001 · ParameterConflict · GR-0027 ↔ GR-0029

What is happening. Three different generator capacity figures appear across two source documents and no document acknowledges that the combined NFPA 99 Category 1 minimum is the controlling value. The OPC sizes the clinical EES at 150 kW; the Programming Document sizes the base-building life-safety generator at 200 kW; NFPA 99 Category 1 requires 350 kW combined minimum. Neither source assigns the cost delta of upsizing to the controlling value.

Value A — OPC Section 4.2: *“150 kW minimum for clinical TI loads — confirm with electrical engineer during SD.”* **Value B** — Programming Document Section C: *“Base building generator 200kW life safety loads”* (separate from clinical EES).

Recommended action. Owner’s PM and Tenant Facilities Lead align in writing on the 350 kW combined minimum. Assign cost responsibility for the 200 kW to 350 kW upsize — $180K–$260K estimated — by written project memo or NNN Lease side letter before the 50% SD gate, July 11, 2025. CMAR to include the generator on the construction schedule with its 20–28 week lead.

Source documents. Heritage Owner Program Criteria Rev. 2 (D2) · Heritage Health Campus Programming Document v1.0 (D3).

CF-002 · ParameterConflict · GR-0033 ↔ GR-0002

What is happening. MRI equipment-room area is stated two ways in the same document set. The Owner Program Criteria allocates 200 NSF; the Equipment Schedule notes that one of the two MRI vendors under active evaluation requires 240 NSF. The design team cannot draw two different floor plans, and the imaging suite floor plate is finite — 40 NSF is meaningful at this scale.

Value A — OPC Section B, Imaging Suite: *MRI Equipment Room 200 NSF.* **Value B** — Equipment Schedule EQ-021 note: *“GE SIGNA requires ~240 NSF equipment room vs. 200 NSF current program.”*

Recommended action. Resolves with owner action item OAI-001, the MRI vendor selection — see GR-0018, Tier 1 Item 2. The design team continues on the Siemens 200 NSF basis per kickoff agreement. If GE is selected, the A/E flags the 40 NSF reallocation in the 50% SD area-compliance summary and identifies which adjacent space contributes the area.

Source documents. Heritage Owner Program Criteria Rev. 2 (D2) · Northstar Clinic Equipment Schedule v1.0 (D5).

CF-003 · ScopeConflict · GR-0036 ↔ GR-0028

What is happening. The Owner Program Criteria mandates dedicated clinical AHUs separate from base-building residential and retail HVAC systems. The NNN Lease Exhibit D Landlord Work / Tenant Work matrix is silent on AHU procurement — the AHUs appear in neither column. The CMAR cannot begin AHU procurement without an explicit scope assignment, and AHU lead times are 12 to 18 weeks.

Value A — OPC Section 4.1: *“Northstar requires dedicated HVAC systems serving the clinical component, separate from the base building residential and retail systems.”* **Value B** — Programming Document Section C / NNN Lease Exhibit D: silent on clinical AHU procurement; not listed as Landlord Work or Tenant Work.

Recommended action. Owner’s PM and Northstar Facilities resolve the AHU scope boundary in writing — project memo or lease side letter — before the 50% SD gate. The A/E identifies AHU locations and serving zones in the 50% SD HVAC narrative.

Source documents. Heritage Owner Program Criteria Rev. 2 (D2) · Heritage Health Campus Programming Document v1.0 (D3).

CF-004 · ParameterConflict · GR-0039 ↔ GR-0018

What is happening. The Equipment Schedule lists both MRI options as under active evaluation with structurally meaningful weight differences in the same document. The Siemens MAGNETOM Altea magnet weighs 7,700 lb; the GE SIGNA Creator magnet approximately 8,100 lb. The 400 lb difference is structurally significant in the post-tensioned flat-plate design. The Structural Engineer of Record cannot design to two point loads simultaneously.

Value A — Equipment Schedule EQ-020: *"Siemens MAGNETOM Altea — magnet weight 7,700 lbs."* **Value B** — Equipment Schedule EQ-020 note: *"GE SIGNA also under evaluation — est. magnet weight ~8,100 lbs."*

Recommended action. SER proceeds on the Siemens 7,700 lb basis per kickoff agreement. The structural narrative flags MRI structure as decision-pending in the 30% DD submittal. Vendor decision required by June 13, 2025 (GR-0018 / SMR-002) before the 30% DD structural narrative is finalized. If GE is selected, the MRI room slab and foundation design must be revised — flag in the 30% DD coordination memo.

Source documents. Northstar Clinic Equipment Schedule v1.0 (D5) — **same document, internal contradiction.**

CF-005 · AuthorityConflict · GR-0043 ↔ GR-0044

What is happening. The TJC Regulatory Summary requires compliance with the latest adopted FGI edition per AHJ jurisdiction; the project-team planning basis is FGI 2022 Outpatient Guidelines. No document in the baseline set confirms that NM Department of Health has adopted FGI 2022 — pre-application research suggests NM DOH may remain on FGI 2018, which would change corridor widths, imaging room classifications, and ICRA scope across multiple records.

Value A — TJC Summary RQ-002: *"For all new construction, the organization shall comply with the latest adopted edition of the FGI Guidelines per the AHJ jurisdiction."* **Value B** — Project planning basis: FGI 2022, assumed. NM DOH adoption of FGI 2022 is not confirmed in any source document. The AHJ may require FGI 2018.

Recommended action. Architect of Record submits the pre-application to NM DOH — due May 23, 2025 (GR-0021 / SMR-005), submit by end of February — confirming the applicable FGI edition, NM-specific amendments, and AHC occupancy classification. Design proceeds on the FGI 2022 basis until the response is received. If FGI 2018 is confirmed, the A/E identifies all affected requirements and issues a design directive cataloging revisions.

Source documents. Northstar TJC Regulatory Requirements Summary v1.0 (D1) — **internal authority hierarchy the document cannot itself satisfy.**

CF-006 · ScopeConflict · GR-0050 ↔ GR-0031

What is happening. The TJC Summary requires STC 60 / IIC 55 acoustic separation between Level 2 clinical and Level 3 residential. The 8-inch post-tensioned flat-plate structural system alone cannot achieve this rating; an acoustic overlay or floating-floor system on the residential side is required. Neither the OPC nor the Programming Document budgets for the overlay or assigns scope responsibility to the base building or the residential TI.

Value A — TJC Summary RQ-019: *"Minimum STC 60 between clinical floors (Levels 1–2) and residential floors (Level 3 and above). Floor/ceiling assembly between Level 2 clinic and Level 3 residential must achieve STC 60 / IIC 55."* **Value B** — Programming Document Section C / OPC: neither document budgets for the acoustic overlay ($80K–$150K estimated) or assigns scope responsibility.

Recommended action. Acoustic subconsultant confirms the minimum assembly meeting STC 60 at 30% DD analysis. A/E identifies cost allocation of the overlay — Heritage or Northstar — before 60% DD. Cost incorporated in the BCR-004 VE review at the DD gate. Recommend allocation to base-building scope on consistency grounds, since the structural slab is base building — but written owner agreement is required.

Source documents. Northstar TJC Regulatory Requirements Summary v1.0 (D1) · Heritage Owner Program Criteria Rev. 2 (D2).

Two conflicts are internal to a single document. CF-004 places two structurally distinct design bases in the same equipment schedule. CF-005 sets an authority hierarchy the same document cannot satisfy. **A conflict does not require two documents to exist.**

Section 9 — Source Documents Log

Five entries, sequential, append-only. This log is the project's chain of custody — the record of every document processed into the register, in the order processed, with its version, issue date, processing date, records contributed, and conflicts surfaced. It is defensible to an owner, a lender, a federal contracting officer, or an auditor in any delivery context.

Processed documents

#	Document	Type	Version	Issued	Processed	Records	Register after	Conflicts detected
1	Northstar TJC Regulatory Requirements Summary	Standard / Code	v1.0	2025-01-15	2025-01-28	22	v1.0	0 at entry; CF-005, CF-006 in comparison
2	Heritage Owner Program Criteria	OwnerCriteria	Rev. 2	2024-12-10	2025-01-28	24	v1.0	0
3	Heritage Health Campus Programming Document	OwnerBudgetAuth	v1.0	2024-12-01	2025-01-28	8	v1.0	CF-001, CF-003
4	Heritage Health Campus Milestone Schedule	ProgramDoc	v1.0	2024-12-01	2025-01-28	6	v1.0	0
5	Northstar Clinic Equipment Schedule	OFEDoc	v1.0	2025-01-22	2025-01-28	10	v1.0	CF-002, CF-004
	Baseline run	**5 documents**				**70**	**v1.0**	**6**

Every requirement in the register resolves to one of these five by SourceDocumentID. Gate 2 T9 confirms it.

Per-entry relationship detail

#	Document	Authority	Relationships and notes
1	TJC Regulatory Requirements Summary v1.0	Standard / Code · Governing · Prescriptive · High	22 NEW · 0 SUPPLEMENT · 0 CONFLICT · 0 MATCH. Twenty-six TJC requirements processed; 22 extracted as distinct records, 4 consolidated into parent requirements. Regulatory and life-safety categories seeded.
2	Owner Program Criteria Rev. 2	OwnerCriteria · Owner-Directive · Prescriptive · High	24 NEW · 0 SUPPLEMENT · 0 CONFLICT · 0 MATCH. Functional, physical-interface, performance, and O&M categories seeded. The OPC is the primary program document; TJC requirements remain governing for regulatory matters.
3	Programming Document v1.0	OwnerBudgetAuth · Owner-Directive · Interpretive · Standard	8 NEW · 0 SUPPLEMENT · 1 CONFLICT · 0 MATCH. BCR-001 through BCR-004 and four SMR budget/schedule requirements extracted. CF-001 (generator capacity) detected in comparison with D2. CF-003 (AHU scope) detected in comparison with D2.
4	Milestone Schedule v1.0	ProgramDoc · Owner-Directive · Interpretive · Standard	6 NEW · 4 SUPPLEMENT · 0 CONFLICT · 0 MATCH. SMR schedule milestones extracted and linked to Programming Document parents. Adds sequencing specificity not in the Programming Document narrative.
5	Equipment Schedule v1.0	OFEDoc · Owner-Directive · Interpretive · High	10 NEW · 0 SUPPLEMENT · 2 CONFLICT · 0 MATCH. CF-002 (MRI equipment room area) and CF-004 (MRI structural point load — two vendor options) detected. Equipment facility inputs seed physical-interface requirements not present in the OPC.

Six relationship classifications. MATCH, NEW, SUPPLEMENT, CONFLICT, SUPERSEDES, SUPERSEDED. Where a document creates a cross-discipline dependency without contradiction, that is recorded as a coordination dependency link on the affected records and reported in Section 3 View 7 — not as a relationship classification.

Documents referenced but not yet processed

Three governing documents are referenced in the current register but have not been processed into the baseline. **This list is the source for Section 10 and the two agree exactly.**

#	Document	Why it matters	Expected register effect
1	A/E Kickoff Meeting Minutes — May 12, 2025	Already issued. Captures program direction and any decisions resolved verbally.	May close open decisions via owner direction captured in minutes.
2	Schematic Design Basis of Design v1.0 (50% SD)	First formal design output, target July 11, 2025. **Triggers RIR Cycle 1.**	30–60 new requirements as Architecture, MEP, and Structural narratives mature. Likely to supersede several Equipment Schedule records with finalized facility inputs.
3	SD Outline Specifications — Divisions 01/11/22/23/26 (August 29, 2025)	Specification-level requirements codifying materials, equipment, and performance criteria.	50–100+ records, primarily performance and physical-interface. Likely to surface MethodConflicts not detectable until specifications are written.

Section 10 — Next Cycle Dependencies

This section closes the report with what must happen next.

Established baseline document set

Per the Baseline Run rule, the five processed documents constitute the established document set at authority level and records contributed: TJC Regulatory Summary (Governing, 22) · Owner Program Criteria (Owner-Directive, 24) · Programming Document (Owner-Directive, 8) · Milestone Schedule (Owner-Directive, 6) · Equipment Schedule (Owner-Directive, 10). **The first anticipated incremental document is the A/E Kickoff Meeting Minutes, already issued** — the client's team should treat it as a priority submission to keep the register current before design begins.

Input dependencies — owner, vendor, and AHJ actions

Six external inputs block open decisions. Resolution cascades to closure of multiple downstream records. Listed in escalation priority.

Input required	Deadline	Records it closes	Escalation path
AHJ pre-application response (NM DOH)	**May 23, 2025 — not submitted; 4–8 week response**	GR-0021, GR-0035, GR-0043, GR-0044, GR-0046, GR-0048, GR-0061 + corridor design lock	Architect of Record submit by February 28. Design proceeds on FGI 2022 / AHC basis.
Geotechnical investigation report	**June 6, 2025 — fieldwork not scheduled**	GR-0020 + unblocks BCR-004 VE-01 evaluation ($180K–$340K)	Owner's PM obtain a scheduled delivery date this week. Foundation design assumes Site Class D pending receipt.
MRI vendor confirmation (OAI-001)	June 13, 2025	GR-0002, GR-0018, GR-0023, GR-0033, GR-0039 + closes CF-002, CF-004	Biomedical Engineering Lead issue written confirmation. If the decision will slip, formally adopt the Siemens basis.
ICRA delivery (Northstar)	June 27, 2025	GR-0019, GR-0051 + unblocks HVAC zone narrative	Owner's Rep escalate to Northstar clinical leadership and Infection Preventionist this week.
Generator scope allocation (BCR-003)	July 11, 2025 (50% SD gate)	GR-0029, GR-0022, GR-0056, GR-0067 + closes CF-001, partial CF-003 chain	Owner's PM and Northstar Facilities execute scope-allocation memo or NNN Lease side letter.
AHU procurement scope (CF-003)	July 11, 2025 (50% SD gate)	GR-0036, GR-0028 + AHU long-lead procurement (12–18 wk)	Owner's PM and Northstar Facilities written boundary assignment in project memo or lease side letter.

Anticipated submittals before the next cycle

Anticipated submittal	Expected	Pipeline action on receipt
A/E Kickoff Meeting Minutes	Already issued — May 12, 2025	Process in next cycle. **Highest priority.**
NM DOH AHJ pre-application response	May–June 2025	Process as Source Document or Owner Directive on receipt.
Geotechnical Investigation Report	June 2025	Process as Source Document; triggers BCR-004 VE-01.
MRI Vendor Confirmation Memo	June 13, 2025	Process as Owner Directive; closes CF-002 and CF-004.
Infection Control Risk Assessment	June 27, 2025	Process as Source Document; affects HVAC zones and sink placement.
Generator Scope Allocation Memo	Before July 11, 2025	Process as Owner Directive; closes CF-001 and unblocks the BCR-003 chain.
50% SD Basis of Design	July 11, 2025	Process as Source Document. **Triggers RIR Cycle 1.**

Recommended processing sequence

Process the A/E Kickoff Minutes first, to capture program direction and close any open decisions already resolved verbally — that is the cheapest closure available and it may retire several items before anything else arrives. Process the AHJ response as soon as received, because it unlocks the eight-record FGI and occupancy chain and everything downstream of it is waiting. Process the Geotechnical Report as soon as received to unblock VE-01, the most accessible offset to the cost variance. Process owner directives — MRI vendor, ICRA, generator — as they arrive, each closing its chain. Then process the 50% SD Basis of Design on July 11, 2025 to formally trigger Cycle 1.

First gate the owner must prepare for

50% Schematic Design on July 11, 2025. Sixteen open decisions must close. Six conflicts must be resolved or formally accepted with risk acknowledged in writing. **Two unstarted items — the AHJ pre-application and the Geotechnical Report — require a named start date this week.** The next RIR is Cycle 1, produced upon receipt of the 50% SD Basis of Design.

Section 11 — Cycle Comparison

Not applicable. Baseline cycle; no prior register exists.

From Cycle 1 forward this section reports what closed, what opened, what deadlines moved, how verification closure changed per stage with the denominator stated, and how risk ratings migrated. The confidence indicator set in Section 2 — AMBER — is the reference point; any change to it in Cycle 1 is itself a finding.

Appendix A — Deviation Report and Recommended Corrections

Why this appendix exists. Gallant applies the same rigor to its own work product as to the project record. Every deviation found during baseline processing and review is reported here, whether it originates in the project's documents, in the project's current state, or in Gallant's own workbook. Each carries a severity, a recommended correction, and an accountable owner. **Surfacing both categories side by side is a feature of the methodology, not an admission** — clients should expect this in every report they receive.

Gate 2 result

Twelve of twelve PASS. CLEAR FOR RIR GENERATION.

Test	Result
T6 — lineage and event continuity	PASS. Five entries sequential, all fields populated, no transposition.
T8 — Critical concentration ceiling	PASS at 30.0% — **at the ceiling, disclosed rather than excused. See DEV-004.**
T11 — verification event integrity	PASS. Every event resolves to a live RequirementID and carries a stage.
T12 — Summary sheet currency	PASS. Register version matches the last Source_Documents entry.

Deviation summary

Ten findings. Two are Gallant-internal workbook items; eight are project-routed. Sorted by severity, then by domain.

ID	Deviation	Severity	Classification	Owner
DEV-001	Register migrated to current schema; five vocabularies corrected	High	Workbook Integrity	Gallant
DEV-002	Risk driver tags off-vocabulary; no automated test reads the field	High	Register Methodology	Gallant
DEV-003	Equipment Schedule lists two MRI vendors as concurrent design basis	Critical	Source Document — Internal Inconsistency	Northstar Biomedical
DEV-004	NNN Lease Exhibit D silent on AHU and generator scope	Critical	Source Document — Coverage Gap	Heritage + Northstar
DEV-005	FGI edition adoption not confirmed in any source document	Critical	Source Document / Authority	Architect of Record
DEV-006	Geotechnical Report not scheduled against a June 6, 2025 deadline	Critical	Project State — Schedule	Owner's PM
DEV-007	AHJ pre-application not submitted against a May 23, 2025 deadline	Critical	Project State — Schedule	Architect of Record
DEV-008	ICRA delivery tracked at lower priority than its impact	High	Project State — Schedule	Owner's Rep / Northstar Clinical
DEV-009	TPC variance ($72M vs. $68M) exceeds BCR-004 trigger	High	Project State — Cost	Cost Consultant
DEV-010	Critical concentration at the ceiling before design begins	Medium	Register Health	Gallant / Owner's PM

Detail

DEV-001 · Register migrated to the current schema

Severity: High · Workbook Integrity · Found in: all register sheets. This register was originally built under an earlier methodology version. Regeneration to the current schema corrected 8 records that carried an open decision as a RequirementStatus, 106 abbreviated RequirementType labels, 32 criticality labels, 31 source document types, and — see DEV-002 — 21 risk driver tags. **No requirement statement, conflict, decision, or deadline changed.** The corrections were to controlled vocabulary, not to content. Two source documents changed classification: the AHJ determination is now RegulatoryReview, a type that did not exist when the register was first built, and the state amendments are now Code. **Owner: Gallant. Closed at regeneration.**

DEV-002 · Risk driver tags were off-vocabulary and no automated test reads the field

Severity: High · Register Methodology · Found in: Requirements_Register, RiskDrivers column. Twenty-one tags used values outside the eleven-value controlled set. **Gate 2 passed at twelve of twelve with the field still wrong, because no test reads it.** Corrected by hand afterward. This is disclosed because it is the same class of finding the methodology exists to catch — a field nobody checks stays wrong until someone checks it by hand — and because an automated test for it is on the methodology's own action list. **Owner: Gallant. Closed for this register; the test remains open.**

DEV-003 · Equipment Schedule lists two MRI vendors as concurrent design basis

Severity: Critical · Source Document — Internal Inconsistency · Found in: Equipment Schedule v1.0 (D5), EQ-020 and EQ-021. The schedule lists Siemens MAGNETOM Altea as the primary entry at 7,700 lb and 200 NSF, while a same-document note states GE SIGNA is also under evaluation at approximately 8,100 lb and 240 NSF. One source document presents two structurally and dimensionally distinct design baselines as concurrently valid. An OFE document is expected to designate a single confirmed vendor at issue, or explicitly flag itself as preliminary. The current state forces the design team to carry two contradictory bases and has produced two register conflicts — CF-002 area, CF-004 structural — and three CONDITIONAL records. **Correction:** Biomedical Engineering Lead issues a formal vendor-confirmation memo by June 13, 2025 and reissues the Equipment Schedule as v1.1 with the unsuccessful option removed. Until then, A/E and SER document the Siemens basis as the operative assumption. **Owner: Northstar Biomedical Engineering. Target: June 13, 2025.**

DEV-004 · NNN Lease Exhibit D silent on AHU procurement and generator upsize cost

Severity: Critical · Source Document — Coverage Gap · Found in: Programming Document v1.0 (D3) referencing Exhibit D. OPC Section 4.1 mandates dedicated clinical AHUs; OPC 4.2 and Programming Document Section C imply a generator upsize from 200 kW to 350 kW. Exhibit D — the contractually controlling scope-allocation instrument — is silent on both. Exhibit D is expected to assign every major building system to Landlord Work or Tenant Work without ambiguity; silence on systems other governing documents require creates scope conflicts the design team and CMAR cannot resolve unilaterally. **Correction:** Owner's PM and Tenant Facilities Lead execute a joint scope-allocation memorandum or lease side letter before July 11, 2025, explicitly assigning clinical AHU procurement scope and cost, and generator capacity at 350 kW with the upsize cost allocation. The instrument should reference Exhibit D and become a controlled appendix to the lease. **Owner: Heritage Real Estate Partners and Northstar Health System. Target: before the 50% SD gate.**

DEV-005 · FGI edition adoption not confirmed in any source document

Severity: Critical · Source Document / Authority · Found in: TJC Regulatory Summary v1.0 (D1). RQ-002 cites compliance with the latest adopted FGI edition per AHJ. The planning basis is FGI 2022; no document confirms NM DOH has adopted it, and pre-application research suggests FGI 2018 may still govern. When a regulatory framework references AHJ-adopted versions, the project record must contain explicit AHJ confirmation before design proceeds beyond programming. **Correction:** Architect of Record submits the pre-application by February 28, 2025 and places the written response in the project record on receipt. The response closes CF-005 and seven CONDITIONAL records. **Owner: Architect of Record. Target: February 28, 2025.**

DEV-006 · Geotechnical Report not scheduled against a June 6, 2025 deadline

Severity: Critical · Project State — Schedule · Found in: GR-0020 / SMR-004. The report was authorized December 2024 with a June 6 deadline. At the baseline date the consultant has not scheduled fieldwork and no delivery date is on record. Site Class D is assumed without confirmation. Per SMR-004 and BCR-004 Section C, the report must be in the record before structural narrative finalization and is the trigger for the VE-01 foundation evaluation worth \$180K–\$340K. **Correction:** Owner's PM obtains a scheduled fieldwork and delivery date from the Geotechnical Consultant this week. If the report cannot arrive before 50% SD, formally accept Site Class D in writing and defer VE-01; the lost opportunity becomes a known shortfall against the BCR-001 variance. **Owner: Heritage — Owner's PM. Target: delivery date on record this week.**

DEV-007 · AHJ pre-application not submitted against a May 23, 2025 deadline

Severity: Critical · Project State — Schedule · Found in: GR-0021 / SMR-005. The pre-application confirming FGI edition and AHC occupancy is due May 23 and has not been submitted at baseline. NM DOH responses run four to eight weeks. The response governs eight downstream records plus implicit dependencies in ICRA scope and imaging classification. **Correction:** Architect of Record submits by February 28, 2025 so the response lands before the A/E notice to proceed. Until response, design proceeds on the FGI 2022 / AHC basis, and any conflicting AHJ response triggers a design directive cataloging affected records. **Owner: Architect of Record. Target: February 28, 2025.**

DEV-008 · ICRA delivery tracked at lower priority than its design-blocker impact

Severity: High · Project State — Schedule · Found in: GR-0019 / SMR-003. ICRA is due June 27, 2025 from the Northstar Infection Preventionist and governs HVAC zones, negative-pressure extents, and sink placement. Without it the MEP-EOR cannot finalize the HVAC narrative. Milestone MS-022 shows it as a deliverable but it is not tracked at the same priority as the MRI and AHJ items. **Correction:** Owner's Rep escalates to Northstar clinical leadership this week and places ICRA on the same priority tier as the MRI vendor and AHJ response. **Owner: Owner's Rep / Northstar Clinical. Target: June 27, 2025.**

DEV-009 · TPC variance exceeds BCR-004 trigger

Severity: High · Project State — Cost · Found in: GR-0027, GR-0028, GR-0030. Total Project Cost of \$72M against the \$68M ceiling is a 5.9% variance, above the 5% Value Engineering trigger, before design has started. **Correction:** Cost consultant attends the 50% SD review with a formal variance report and VE options log. The three named offsets — VE-01, generator allocation, acoustic overlay — are all gated on owner decisions and their combined recoverable range is \$440K–\$750K. **Owner: Cost Consultant. Target: 50% SD.**

DEV-010 · Critical concentration at the ceiling before design begins

Severity: Medium · Register Health · Found in: Section 3 View 4. Twenty-one of seventy records rate Critical — 30.0 percent, exactly the ceiling. This is disclosed rather than reassessed downward. A register that starts at the ceiling has no room to absorb the Critical records that design normally adds. **Any Critical record added in Cycle 1 requires explicit owner**

acknowledgment, and the analyst review at Cycle 1 will re-examine whether the baseline Critical population held up once design decisions began closing. **Owner: Gallant, with Owner's PM acknowledgment. Target: Cycle 1.**

End of Report · Requirements Intelligence Report™ — Baseline · Register v1.0 · Run ID HHC-REG-000

GALLANT PROJECT SOLUTIONS LLC · Gregory A. Tuite, PE, PMP — Principal Service-Disabled Veteran-Owned Small Business · Veteran-Owned Small Business