GALLANT PROJECT SOLUTIONS LLC

Service-Disabled Veteran-Owned Small Business (SDVOSB) · Veteran-Owned Small Business (VOSB) · SBA Registered

SAMPLE

Requirements Intelligence Report™

BASELINE · REQUIREMENTS BASELINE ESTABLISHED

This is a sample Requirements Intelligence Report™ produced by Gallant Project Solutions LLC for demonstration purposes. The project — Heritage Health Campus / Northstar Ambulatory Care Clinic — is illustrative. The methodology, structure, register integrity, and analytical voice on every page that follows are exactly what Gallant produces on live client engagements.

Project name, organizations, and individuals have been replaced with generic references (Owner's PM, Architect of Record, CMAR, etc.) to protect the actual engagement. All other details — requirement counts, conflict counts, dollar figures, deadlines, regulatory citations, and the analytical structure of the report — are preserved exactly as Gallant produces them in live work.

Companion sample available. This Baseline sample shows the founding work of the engagement — the requirements baseline established at the outset. The companion Cycle 1 sample shows what six months of monthly engagement cleared, opened, and surfaced against it.

— Greg Tuite, PE PMP · Gallant Project Solutions LLC · July 2026

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SAMPLE

Requirements Intelligence Report™

BASELINE RUN · PROJECT INITIATION

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Read this sample for:

• What Gallant delivers at the start of a project, before design begins.

• How 70 requirements pulled from five founding documents — program criteria, lease, schedule, equipment list, regulatory summary — get organized into a single source of truth that owner, designer, contractor, and auditor can all read from.

• How conflicts and missing decisions get surfaced before they turn into design rework, with each one routed to a specific person and a specific deadline.

• How Gallant catches its own workbook and methodology issues with the same rigor applied to the project record. Clients should expect this kind of transparency in the reports they receive.

This sample shows what Gallant delivers at project initiation. The companion Cycle 1 sample shows what six months of monthly engagement clears. Reading both gives you the full picture: the founding work, then what the project looks like six months later. Most prospects find Cycle 1 more useful for understanding the value of a recurring engagement; this Baseline sample shows what's in the foundation. *— Greg Tuite, PE PMP · Gallant Project Solutions LLC · May 2026*

QUICK START GUIDE

How to read this report

This is a Requirements Intelligence Report™ — 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 the next design gate. It is produced by reading every project document into a single registered list, then analyzing the list. The report is the same regardless of who reads it; the sections are organized so different readers can find what matters to them quickly.

Read the front wrapper, the cover, and Section 2 (Executive Summary). That is the full picture at the level a sponsor or capital partner needs. Read Section 2, then Section 4.A (Owner Decision Register) for the actionable item list, then Section 5 for cost and schedule exposure. Section 9 (Cycle Comparison) shows what changed since the last report. All sections. Section 3 dashboard views, Section 4 priority items, Section 6 conflict register, and Section 7 document lineage are the working content. Appendix A documents Gallant's self-disclosed quality findings.

A requirement that is locked into the design basis. The design team is building to it. A requirement that is waiting on an owner action to lock. Until it closes, the design team cannot finalize that piece of the design. A requirement that is in conflict with another requirement. Both sides are documented; the conflict needs an owner-routed decision to resolve. Gallant's rating for any requirement where a change after design proceeds would force significant rework, schedule slip, or cost growth. Gallant considers a register healthy if no more than 30 percent of records carry this rating. How priority items are organized in Section 4. Tier 1 items must close before the next design gate. Tier 2 items need active management to prevent escalation. Tier 3 items are tracked but do not require executive attention this cycle.

A requirement record. Every binding requirement on the project carries one of these. The number is sequential in the order requirements were added to the register. A conflict record. Every conflict between two requirements carries one of these. A source document. The number is sequential in the order Gallant processed the document into the register. Section 7 lists every document. A Decision Closure Memo. Every time an owner decision closes, Gallant issues one of these to document the decision and the audit trail back to the source.

The owner-side project manager. The decision owner on most items in the Owner Decision Register. The lead architectural firm. Responsible for the overall design and for coordinating the design disciplines. The lead structural engineering firm. The lead MEP engineering firm. Some projects split this role across two or three firms. The general contractor under a CMAR delivery method, engaged during design to provide constructability input and pricing.

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REQUIREMENTS INTELLIGENCE REPORT

HERITAGE HEALTH CAMPUS

Northstar Ambulatory Care Clinic — Floors 1 & 2

	January 28, 2025
Run ID	HHC-REG-001
Register Version	v1.0 (Baseline)
Methodology Version	Gallant Methodology v1.3 (May 2026)
Engagement Type	Project Initiation — Baseline Setup
Prepared By	Gallant Project Solutions LLC — Greg Tuite, PE PMP
Distribution	Owner, Owner's Rep, A/E Lead, CMAR Preconstruction

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About this report. The Requirements Intelligence Report™ (RIR) is Gallant Project Solutions' primary client-facing deliverable under requirements-management engagements. It serves two functions simultaneously: data delivery — presenting the structured requirements register, status, conflicts, and document history in a readable form; and advisory output — applying Gallant's analytical methodology and Greg Tuite, PE PMP's consulting judgment to interpret the data and recommend specific actions. This Baseline Run RIR establishes the requirements baseline for Heritage Health Campus at the start of design.

Section 1 — Project Snapshot

Establishes the register version and document set this report reflects. Structured data only; no narrative.

The Requirements Register is the master list of the binding requirements the project must satisfy — program criteria, regulatory mandates, lease obligations, milestones, equipment specifications, and scope commitments, all in one place. Each entry carries a unique identifier (GR-XXXX), a source document, an owner, a criticality rating, and a verification status. The register is the single source of truth that owner, designer, contractor, and auditor can all read from. The other sections in this report draw from it.

Report Date	January 28, 2025
Register Version	v1.0 (matches Lineage Log Entry 5)
Project Name	Heritage Health Campus — Northstar Ambulatory Care Clinic
Project Phase	Pre-Schematic Design (entering SD; A/E NTP scheduled May 5, 2025)
Delivery Method	Hybrid — Base Building: CMAR (Cornerstone Construction); Tenant Improvement: A/E-led design with separate TI bid
Total Active Requirements	70 (54 GOVERNING + 16 DECISION-PENDING)
Total Documents Processed	5 (D1 TJC Reg · D2 OPC Rev. 2 · D3 Programming Doc · D4 Milestone Schedule · D5 Equipment Schedule)
Requirements Added This Cycle	70 (Baseline — all classifications NEW)
Active Conflicts	6 (CF-001 through CF-006)
Open DECISION-PENDING Items	16 (Target: 0 by 50% SD gate — July 11, 2025)
Identified Gaps	0 GAP-status records; 7 records carry SCOPE_GAP risk-driver flag
Cycle Period	Baseline established January 28, 2025

AT-A-GLANCE

PROJECT KPIs AT BASELINE

Five-second view of the project's risk profile entering Schematic Design.

All 16 must close before Design Development authorization.	Three numeric, two scope-boundary, one regulatory framework.
Critical-Impact Records 30% At the 30% ceiling Gallant considers healthy. No room above.	**Cost Variance 5.9%** Above the 5% Value Engineering trigger threshold.

	Next gate (50% SD review, July 11, 2025): at risk. Two overdue inputs (Geotechnical Report, AHJ Pre-Application) gate eight downstream records and the VE-01 cost recovery. Recoverable through immediate owner escalation; not recoverable if June 1 passes without movement.

First report — no prior cycle to compare against. Trend indicators apply from Cycle 1 onward.

Section 2 — Executive Summary

Where the project stands. This report establishes the requirements baseline for Heritage Health Campus at the start of design. Findings below are framed as the project's risk profile entering Schematic Design — not as cycle-over-cycle change. The owner's team should treat each finding as an action item that must be assigned and tracked through to the 50% SD gate on July 11, 2025.

Five findings warrant the owner's attention before the design team begins. **Ten risks are assessed at baseline and six rate HIGH** — concentrated in the open owner-decision backlog, the unresolved generator capacity basis, and two long-lead procurements that have not yet been engaged. This is the exposure picture the project starts from; each subsequent cycle reports what closed, what opened, and which ratings migrated. The full scored assessment — likelihood, impact on budget, schedule, and quality, response, owner, and trigger — is in Section 4.C. Each names a specific condition in the project record, the consequence if it is not addressed, and the action that closes it. Specific requirement and conflict identifiers are referenced throughout so the owner's PM can route each finding to the responsible party for resolution.

	The register carries sixteen DECISION-PENDING items as of baseline (View 8). These are not Gallant deliverables — they are owner actions that must close before the design team can finalize Schematic Design. Five require the owner to establish a value that is not yet in any source document (TBD-UNRESOLVED); nine are blocked by an upstream decision and will close in chain (CONDITIONAL); two require a vendor selection between two equally acceptable alternatives (EMBEDDED-CHOICE — Siemens vs. GE MRI). Two items are already overdue at baseline: the Geotechnical Report (GR-0020, due June 6, 2025) and the AHJ pre-application (GR-0021, due May 23, 2025). Per Gallant methodology, the open count must reach zero before the design team can be authorized to proceed into Design Development. With the project's most consequential records (those rated Critical for change impact) running at thirty percent of the register — the maximum concentration Gallant considers healthy — every additional week these decisions remain open compresses the design team's response window when answers do arrive. Two specific cascades are visible: the AHJ response unlocks corridor widths, occupancy, FGI edition, and egress for eight downstream records; the MRI vendor unlocks structural, RF shielding, equipment room, and procurement for four downstream records. Owner's PM and Tenant Facilities Lead jointly assign owners and deadlines to each of the sixteen items at the next coordination meeting. Section 4.A presents them as a structured action register grouped by decision type. Recommend a weekly decision-burndown review through the 50% SD gate.
	Equipment Schedule v1.0 lists both Siemens MAGNETOM Altea and GE SIGNA Creator as under active evaluation by Northstar Biomedical Engineering. The two options carry different magnet weights (7,700 lb vs. 8,100 lb — CF-004), different equipment-room footprints (200 NSF vs. 240 NSF — CF-002), different RF-shielding specifications, and different procurement lead times. The structural engineer (SER) is currently proceeding on the Siemens basis per kickoff agreement, but the structural narrative for 30% DD cannot be finalized without a written vendor confirmation. If the GE option is selected after structural narrative submission, the MRI room slab and foundation design require revision and the imaging suite floor plan loses 40 NSF that must be recovered elsewhere. RF shielding contractor engagement (GR-0023, due October 31, 2025) cannot proceed until the vendor is fixed. The MRI pre-enclosure construction sequence (GR-0024) is one of the project's irreversible critical-path events — if the magnet is not in place before wall enclosure, demolition is required, with severe schedule and cost consequences. Biomedical Engineering Lead issue written vendor confirmation to A/E and Gallant by June 13, 2025 (the SMR-002 deadline). If the decision will slip, formally adopt Siemens as the design basis and accept the rework risk in writing. Do not allow the design team to carry both options past 50% SD.
	OPC §4.2 estimates 150 kW for clinical EES loads. Programming Document §C provides for 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 NNN Lease Exhibit D is silent on the upsize cost allocation (CF-001, GR-0029). The cost delta is estimated at $180,000 to $260,000. Three downstream records — generator procurement (GR-0022), Category 1 EES (GR-0056), and the clinical ATS (GR-0067) — cannot be finalized until the upsize cost is assigned in writing. The Total Project Cost is currently estimated at $72M against a $68M Board-authorized ceiling (BCR-001 / GR-0027) — a 5.9% variance that already exceeds the BCR-004 VE 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 an unwelcome surprise. Generator lead time is 20 to 28 weeks; if procurement is not initiated by October 31, 2025, the unit cannot arrive for the construction energize milestone. Owner's PM and Tenant Facilities Lead execute a written scope-allocation memo (or NNN Lease side letter) before the 50% SD gate on July 11, 2025. Concurrently, BCR-004 VE-01 (foundation savings of $180K–$340K) requires the geotechnical report (GR-0020) — escalate that finding immediately as it is the most accessible offset to the variance.

	TJC Regulatory Summary RQ-002 requires the project to comply with the AHJ-adopted edition of FGI. No source document in the baseline set confirms whether NM Department of Health has adopted FGI 2022 or remains on FGI 2018 (CF-005). The A/E pre-application to NM DOH (GR-0021 / SMR-005) was due May 23, 2025. The response governs corridor widths (8-foot AHC vs. 44-inch Group B — GR-0035), AHC occupancy classification (GR-0044), egress travel distance and stair pressurization (GR-0046, GR-0061), FGI edition (GR-0043), imaging room classifications (GR-0048), and ICRA scope (GR-0019). 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 AHJ answer is real plan-revision risk if the answer arrives late and contradicts the planning assumption (FGI 2022 / AHC). Eight downstream records remain DECISION-PENDING or CONDITIONAL until the AHJ responds — a single document that unlocks the largest cluster of regulatory uncertainty in the register. Architect of Record (AOR) submit the pre-application to NM DOH this week if it has not already gone in, and copy Gallant on the receipt. Until response is received, design proceeds on the FGI 2022 / AHC planning basis. Recommend an AHJ-response watch item at every weekly coordination meeting.

	Northstar's Infection Preventionist owes the project an Infection Control Risk Assessment by June 27, 2025 (GR-0019 / SMR-003). The ICRA governs HVAC zone boundaries, negative-pressure extents, and clinical-sink placement (GR-0051). Without it, MEP Engineer of Record (MEP-EOR) cannot finalize the 50% SD HVAC narrative. The MS-022 milestone shows ICRA as Northstar's deliverable but it is not currently tracked on the same cadence as the MRI and AHJ decisions. TJC AHC accreditation requires ICRA at the programming stage; absence at SD is a survey-finding risk in addition to a design-blocker. Hand-washing sink locations, plumbing rough-in scope, and ventilation pressure relationships all chain to ICRA delivery. Late ICRA against a fixed 50% SD date creates compressed-design rework, not gate slip — which is the more expensive failure mode. Owner's Rep escalate ICRA delivery to Northstar Clinical leadership this week. Treat ICRA on the same priority tier as the MRI vendor and AHJ response in weekly status. If ICRA will slip past June 27, request a written interim decision from the Infection Preventionist on HVAC zone boundaries so the A/E can advance the SD HVAC narrative without it.

Section 3 — Requirements Readiness Dashboard

Eight required dashboard views. Each view is a different lens on the same register: status, type, discipline, criticality, phase readiness, risk drivers, coordination hotspots, and decision-pending items. Tables and counts dominate; the brief notes are limited to a single sentence per view. Where a view shows an item that needs executive attention, the item is cross-referenced to Section 4 (Top Priority Items) for the detailed treatment.

View 1. Status Distribution

Sixteen open owner decisions. All sixteen must close before Gallant can recommend the project move from Schematic Design into Design Development — these are the decisions the design team is waiting on.

GOVERNING (Active)	54	Verified / Complete	1	1%
DECISION-PENDING	16	In Progress (Pending)	13	19%
CONFLICT-PENDING (also tagged)	6	Not Started	56	80%
GAP / SUPERSEDED	0	Total Active	70	100%

View 2. Type Breakdown

Regulatory & Compliance is the largest category at 21% of the register — typical for a healthcare TI project subject to TJC AHC accreditation.

FR — Functional Requirements	8	OPC Rev. 2 (D2), TJC Reg Summary (D1)
PR — Performance Requirements	8	OPC Rev. 2, TJC Reg Summary, Equipment Schedule (D5)
SMR — Schedule & Milestone	10	Programming Doc (D3), Milestone Schedule (D4), Equipment Schedule (D5)
BCR — Budget & Cost	4	Programming Document (D3)
PIR — Physical & Interface	11	OPC Rev. 2 (D2), Equipment Schedule (D5)
RCR — Regulatory & Compliance	15	TJC Reg Summary (D1)
SER — Sustainability & Environmental	3	OPC Rev. 2 (D2), Programming Doc (D3)
SLR — Security & Life-Safety	5	OPC Rev. 2 (D2), TJC Reg Summary (D1)
OMR — Operational & Maintenance	6	OPC Rev. 2 (D2), Equipment Schedule (D5)
TOTAL	70	5 documents (Baseline)

View 3. Discipline Breakdown

Architecture and Mechanical lead the register; both face the largest verification load through Substantial Completion.

Architecture (incl. shared)	33	6	47%	Floor plans · MRI suite · PT · Egress · ICRA-driven
Mechanical / HVAC / Controls	10	2	14%	ASHRAE 170 · Isolation · MRI 24/7 cooling
Electrical / IT / Low-Voltage	11	3	16%	EES · UPS · ATS · Generator allocation
Structural	5	2	7%	MRI point load · PT slab · Acoustic assembly
Plumbing	6	1	9%	Hot water · Med gas · Floor drains · Sinks
Fire Protection	2	0	3%	NFPA 13 sprinkler · Egress
Cost Management	4	1	6%	TPC · TI · Generator · VE
Program Management / Regulatory	4	1	6%	OPC issuance · MRI · ICRA · AHJ
TOTAL ALLOCATIONS	75	16	Note: many records carry shared discipline ownership.	

View 4. Criticality Distribution

Critical Impact at 30.0 percent. 'Critical Impact' is Gallant's rating for any requirement where a change after design proceeds would force significant rework, schedule slip, or cost growth. Gallant considers a register healthy if no more than 30 percent of records are rated Critical — a higher concentration means the project carries too much risk in too few hands. The current register sits exactly at that 30 percent ceiling. Any new Critical records added in subsequent cycles will require explicit acknowledgment from the Owner's PM.

Critical	21	30.0%	At threshold (maximum 30%). PASS — but no further Critical adds without owner acknowledgment.
High	32	45.7%	Largest group. Concentrated in MEP, structural, and regulatory chains.
Moderate	14	20.0%	Primarily Architecture finishes, Plumbing, and Sustainability.
Low	3	4.3%	Closeout (O&M), Programming completion, Floor drain count.
TOTAL	70	100%	All records carry assigned ChangeImpactLevel.

View 5. Phase Readiness Indicator

Project enters SD with one Verified record (programming completion) and 16 open owner decisions; readiness is appropriate for entering SD but inappropriate for entering

DD without remediation.

Records with VerificationStatus = Verified	1 (1.4%)	GR-0017 (OPC issuance) confirmed Dec 10, 2024.
Records with VerificationStatus = In Progress / Pending	13 (18.6%)	Mostly DECISION-PENDING items in active owner workflows.
Records with VerificationStatus = Not Started	56 (80.0%)	Expected at baseline — verification activities are SD/DD/CD-phase scoped.
Open owner decisions	16	Target: 0 by 50% SD gate (July 11, 2025) — currently 16 weeks/22 working days remaining.
Active conflicts	6	Target: 0 conflicts unresolved at 50% SD gate. Two resolve in chain (CF-002, CF-004 close with MRI vendor decision).
Critical-impact open items	21 (30.0%)	At threshold ceiling. Sustained pressure to resolve through 50% SD.
Phase gate posture	ENTERING SD — APPROPRIATE	Register is in expected state for SD initiation. DECISION-PENDING and CONFLICT-PENDING counts must compress to zero before DD NTP recommendation.

View 6. Risk Driver Clusters

Five clusters carry three or more Critical/High records and are escalated to Section 4 Top Priority for owner attention.

Regulatory Approval / AHJ	23	5 / 14	ESCALATED — TJC, NFPA, FGI, ASHRAE, ADA. Section 4.
Life Safety	16	8 / 7	ESCALATED — Egress, EES, isolation, MRI zones. Section 4.
Multi-Discipline Coordination	19	5 / 11	ESCALATED — MRI cluster, AHU scope, OFE inputs. Section 4.
High-Cost Infrastructure	15	6 / 8	ESCALATED — Generator, MRI, EES, acoustic overlay. Section 4.
Long Lead	8	5 / 3	ESCALATED — Generator, MRI, RF shielding. Section 4.
AHJ Dependency (sub-cluster)	4	3 / 1	AHJ pre-application gates 8 downstream records.
Decision Required	16	10 / 6	All 16 DECISION-PENDING items. See Section 4.A.
Scope Gap (risk-driver flag)	7	3 / 4	Mainly contract-scope boundary issues. See Section 4.B.

View 7. Coordination Hotspots

MRI cluster is the dominant hotspot — five disciplines coordinating around a single equipment selection still pending. Clinical AHU scope boundary (CF-003) is the second hotspot, intersecting Mechanical and Cost.

Architecture × Structural	5	3	MRI suite (GR-0033, GR-0039), PT gym (GR-0034), acoustic assembly (GR-0050), imaging classification (GR-0048).
Architecture × Mechanical	4	1	AHU separation (GR-0036), maintenance access (GR-0069), HVAC zone (linked to ICRA), AHC corridor (GR-0035).
Mechanical × Electrical × Cost	4	3	Generator (GR-0022, GR-0029), Category 1 EES (GR-0056), ATS (GR-0067) — all linked to BCR-003.
Architecture × Electrical × Safety	3	2	MRI zones (GR-0049, GR-0063), workplace violence prevention (GR-0064).
Architecture × Acoustic	4	2	HIPAA acoustic (GR-0008), exam room STC (GR-0016), telemedicine (GR-0007), STC 60 assembly (GR-0050).
Plumbing × Architecture × ICRA	3	1	Hand-washing sinks (GR-0051), medical gas (GR-0038), fluid disposal (GR-0053) — ICRA-dependent placement.
IT × Electrical (Infrastructure)	4	0	PACS (GR-0068), UPS (GR-0014), security cameras (GR-0062), access control (GR-0060) — OFE/TI scope coordination.

View 8. DECISION-PENDING Status — NEW v1.3

Primary phase-gate compliance indicator. Open count must reach zero before DD NTP. Two items overdue at baseline are escalated to Section 4 Top Priority regardless of CriticalityCategory.

TBD-UNRESOLVED	5	2	Establish a value or document not yet present in any source. Owner must act to create it.
CONDITIONAL	9	0	Blocked by an upstream decision; resolves in chain when upstream item closes.
EMBEDDED-CHOICE	2	0	Source presents alternatives; owner must select one. Both Siemens vs. GE MRI items.
SHOULD-LANGUAGE	0	0	No preference-language items requiring upgrade in baseline.
TOTAL OPEN	16	2	Target: 0 by 50% SD gate (July 11, 2025). See Section 4.A for the structured Owner Decision Register.

All sixteen DECISION-PENDING items must reach DecisionStatus = Resolved before Gallant will recommend DD NTP. Two items (GR-0020 Geotechnical, GR-0021 AHJ Pre-Application) are overdue at the baseline report date and appear in Section 4 Top Priority Items regardless of CriticalityCategory.

Section 4 — Top Priority Items

Twenty-one ranked items. Each one needs executive attention because it meets at least one of the criteria Gallant uses to surface items: Critical change-impact rating with open verification, active conflict, owner decision required, scope gap, High change-impact rating with design-driver flag, or schedule sensitivity (long lead, AHJ dependency, multi-discipline coordination). Two items appear because they are past their decision deadline regardless of their original criticality rating.

1	GR-0042	TJC AHC accreditation framework — top-level driver	52 sub-requirements trace to this; Day 1 accreditation is a lease commencement condition.	Regulatory · Safety	Critical	Northstar Compliance assign accreditation readiness manager at SD entry. Mock TJC survey 60 days before Day 1 operations.	TJC Reg Summary
2	GR-0024	MRI magnet must be set before wall enclosure	Construction sequence is irreversible; if walls close before magnet delivery, demolition is	Schedule · Cost · Coordination	Critical	CMAR (Cornerstone) place MRI delivery window on master construction schedule	Equip Schedule

			required.			with field-report and photographic documentation requirement.	
3	GR-0018	MRI vendor confirmation — blocks 4 records	Siemens vs. GE selection drives structural, floor plan, RF shielding, equipment-room sizing simultaneously.	Schedule · Cost · Coordination	Critical	Biomedical Engineering Lead issue written vendor confirmation by June 13, 2025. CONFLICT-PENDING (CF-002, CF-004) closes with this decision.	Equip Schedule
4	GR-0002	MRI imaging service — vendor TBD	Functional service requirement carries vendor uncertainty into structural and architectural design.	Coordination · Schedule	Critical	Resolves with GR-0018. A/E flag in 50% SD area-compliance summary.	OPC Rev. 2
5	GR-0039	MRI structural point load — two vendor values	CF-004: Siemens 7,700 lb vs. GE 8,100 lb both shown in same source document.	Coordination · Cost	Critical	SER proceed on Siemens basis per kickoff. Structural narrative flag DECISION-PENDING. Revise at DD if GE selected.	Equip Schedule
6	GR-0029	Generator scope unresolved — EES design blocked	CF-001 / CF-003: 200 kW base building vs. 350 kW combined NFPA 99 — neither doc assigns cost.	Cost · Schedule · Regulatory	Critical	Heritage (Owner's PM) + Northstar (Tenant Facilities Lead) execute written scope-allocation memo before 50% SD gate (July 11, 2025).	Programming Doc
7	GR-0011	Isolation room negative pressure — life safety	12 ACH minimum + continuous negative pressure monitoring; failure = patient/staff safety risk.	Safety · Regulatory	Critical	MEP-EOR include in HVAC special systems narrative at 50% SD. Continuous pressure monitoring specified at DD.	TJC Reg Summary
8	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 Doc
9	GR-0045	NFPA 99 compliance — medical gas, EES, IPS	Non-compliance at commissioning is a TJC AHC 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
10	GR-0049	MRI siting per ACR Technical Standard	MRI zone safety / 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
11	GR-0056	Category 1 EES — conditional on BCR-003	Clinical floors cannot operate without Cat. 1 EES; generator allocation directly blocks design.	Safety · Cost · Regulatory	Critical	BCR-003 resolution (GR-0029) is prerequisite. Commissioning plan include EES functional test per NFPA 99.	TJC Reg Summary
12	GR-0004	TJC AHC accreditation — Day 1 lease condition	All RCR records trace here; non-compliance = no certificate of occupancy for clinical operations.	Regulatory · Operational	Critical	Northstar assign accreditation readiness manager. All 15 RCR records verified before TJC survey.	OPC Rev. 2
13	GR-0019	ICRA not received — HVAC zone boundaries blocked	Northstar Infection Preventionist has not delivered; A/E cannot finalize HVAC zones,	Schedule · Regulatory · Coordination	Critical	Hard deadline June 27, 2025. 50% SD gate blocker. Owner's Rep escalate to Northstar	TJC Reg Summary

			sink placement.			Clinical leadership this week.	
14	GR-0022	Generator procurement — 20–28 wk 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.	Equip Schedule
15	GR-0044	AHC occupancy not confirmed by AHJ	8-foot corridors are AHC requirement; reversal is costly if AHJ confirms Group B late.	Regulatory · Cost	Critical	A/E pre-application to NM DOH by May 23, 2025. Design proceeds on AHC basis. Flag if AHJ responds otherwise.	TJC Reg Summary
16	GR-0046	Egress — AHC life safety compliance	Shared egress stairs between clinical and residential; pressurization design pending.	Safety · Regulatory	Critical	DF-003: A/E confirm stair pressurization design at SD gate review. Coordinate with Heritage base building.	TJC Reg Summary
17	GR-0061	AHC egress — stair pressurization confirmation	DF-003 watch item; shared egress between clinical and residential occupancies.	Safety · Regulatory	Critical	A/E confirm stair pressurization configuration at SD gate review.	TJC Reg Summary
18	GR-0021	FGI edition / AHC occupancy — AHJ pre-app pending	DF-NEW-001: NM DOH may be on FGI 2018, not 2022; affects 8 downstream records. OVERDUE — escalated by Gallant rule for past-deadline items.	Regulatory · Schedule	Critical	OVERDUE — A/E (AOR Project Architect) submit NM DOH pre-application immediately. Design conditional on AHJ response.	Milestone Sched
19	GR-0028	$14.2M TI Allowance — binding NNN lease	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 Doc
20	GR-0035	8-foot patient corridors — AHC conditional	Designing to 8-foot AHC corridors costs floor-plan efficiency if Group B is later confirmed.	Coordination · Cost	Critical	Resolves with GR-0021 AHJ pre-application response.	TJC Reg Summary
21	GR-0047	NFPA 13 sprinkler — separate clinical riser	Single riser serving clinical and residential is a code violation.	Safety · Regulatory	Critical	A/E confirm separate riser design in SD drawings. Sprinkler contractor engaged at DD.	TJC Reg Summary
—	GR-0020	Geotechnical report — OVERDUE	OVERDUE June 6, 2025. VE-01 ($180K–$340K savings) unavailable until report received. Escalated by Gallant rule for past-deadline items.	Cost · Schedule · Coordination	High	Heritage (Owner's PM) escalate to Geotechnical Consultant this week. VE-01 evaluation contingent on Site Class confirmation.	Milestone Sched

Note. Items 1–21 meet Gallant's threshold for executive attention because they carry a Critical change-impact rating. GR-0020 and GR-0021 are included because they are past their decision deadlines — a separate Gallant rule that surfaces overdue items regardless of their original criticality rating.

4.A Owner Decision Register

The Owner Decision Register is the structured list of requirements currently waiting on an owner action to close. These are not Gallant deliverables — they are decisions the owner must make so the design team can finalize the design. Each entry is grouped by what kind of decision it is (a value the owner must establish, a choice between alternatives, or a downstream item waiting on something else to close), and each carries a named decision owner and a deadline. This register is the single most actionable page in the report — it is the place an owner's PM looks first to see what is on their plate this cycle.

GR-0020 (Geotechnical Report, due June 6, 2025) blocks foundation design and the BCR-004 VE-01 evaluation worth $180K–$340K. GR-0021 (AHJ Pre-Application, due May 23, 2025) gates eight downstream records covering FGI edition, AHC occupancy, corridor widths, and egress. Both require immediate owner escalation. Both also appear in Section 4 Top Priority Items.

Sixteen open DECISION-PENDING items presented in four groups by decision type. Each group carries its own owner instruction. Total count of 16 matches View 8 in Section 3 and the underlying workbook record count (note: a workbook header reports 0 in error; see Appendix A — Deviation Report DEV-001).

Group 1 — TBD-UNRESOLVED (5 items)

Owner instruction. The following items require you to establish a value or specification. The design team cannot proceed without them.

●	GR-0019	ICRA — infection control risk assessment	Completed ICRA document with HVAC zone, sink placement, neg-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	OVERDUE — June 6, 2025
●	GR-0021	AHJ pre-application to NM DOH	Written AHJ confirmation: applicable FGI edition + AHC occupancy + NM amendments	Architect of Record (AOR)	OVERDUE — May 23, 2025
●	GR-0029	Generator scope allocation (200kW vs. 350kW)	Written scope-allocation memo or NNN lease side letter assigning $180K–$260K cost delta	Owner's PM + Northstar Facilities	July 11, 2025 (50% SD)
●	GR-0038	Medical gas additional locations (OAI-004)	Northstar Clinical Director confirmation of additional med-gas outlet locations beyond minimum	Northstar Clinical Director	Prior to 50% SD

Group 2 — CONDITIONAL (9 items)

Owner instruction. The following items are blocked by an upstream decision. Resolving the upstream item first will unblock these.

●	GR-0022	Generator procurement initiation	GR-0029 (BCR-003 generator scope allocation)	BCR-003 resolved + PO authorized	No — requires PO action
●	GR-0023	RF shielding contractor engagement	GR-0018 (MRI vendor confirmation)	MRI vendor fixed + spec to shielding sub	No — requires contract action
●	GR-0033	MRI room dimensions (200/240 NSF)	GR-0018 (MRI vendor — Siemens vs. GE)	MRI vendor confirmation	Yes — area locks per vendor
●	GR-0035	8-ft 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 response)	AHJ written confirmation	Yes — design basis locks
●	GR-0044	AHC occupancy classification	GR-0021 (AHJ pre-application response)	AHJ written confirmation	Yes — classification locks
●	GR-0051	Hand-washing sink placement	GR-0019 (ICRA delivery)	ICRA received + reviewed	Yes — sink placement locks per ICRA
●	GR-0056	Category 1 EES — clinical ATS sizing	GR-0029 (BCR-003 generator scope)	Generator capacity confirmed (350 kW)	Yes — EES locks per generator size

Group 3 — EMBEDDED-CHOICE (2 items)

Owner instruction. The following items require you to select one option. Both options are acceptable — but you must choose one before SD proceeds.

●	GR-0002	MRI imaging modality vendor	1.5T closed bore · 200 NSF equip room · 7,700 lb magnet	1.5T closed bore · 240 NSF equip room · 8,100 lb magnet	Biomedical Engineering Lead · June 13, 2025
●	GR-0018	MRI model and vendor confirmation	Design basis 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 baseline register. All extracted requirements use mandatory language (shall / will / must) or clearly-flagged conditional language. This count is reported as a positive baseline finding.

Total open count across all four DecisionTypes (16) must reach zero before Gallant will recommend DD NTP. The two overdue items in Group 1 require escalation this week. The nine CONDITIONAL items will close in chain when their three upstream parents (GR-0018 MRI vendor, GR-0021 AHJ response, GR-0019 ICRA, GR-0029 generator scope) resolve — meaning four upstream resolutions close eleven downstream records.

4.B 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 / TI / OFE / A/E scope). These are not gaps in requirement coverage — they are gaps in the contract assignment of who does the work. Each is addressed below with a specific design-system impact.

GR-0020	Geotechnical report owed by Heritage under separate contract — overdue	Foundation system, structural narrative, VE-01 evaluation	Owner's PM escalate 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 + 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

4.C At-Risk Assessment

Each open conflict, pending decision, and long-lead exposure carried in Section 4 is scored for **likelihood** and for **impact assessed separately against budget, schedule, and quality/compliance**. Overall impact is the worst of the three; rating is likelihood × impact. First-pass scores are seeded from the register itself — likelihood from item status, impact from criticality and risk drivers — then refined with the project team. Scores are judgments made from the project record, not statistical forecasts.

Ten risks assessed at baseline. Six rate HIGH. This is the exposure picture the project starts from; subsequent cycles report what closed, what opened, and which ratings migrated.

ICRA not received — HVAC zoning and sink counts cannot be finalized; gate blocker	GR-0019	H	M	H	H	**HIGH**	Mitigate — escalate to Infection Preventionist; set a hard date. *Northstar IP*
Generator capacity basis unresolved (350 kW vs 500 kW) — drives pad, feeder, and procurement	GR-0022 / BCR-003	H	H	H	M	**HIGH**	Mitigate — close capacity decision before procurement window opens. *Owner's PM*
Elevator contractor not engaged — shaft dimensions unresolved; lead time on critical path	GR-0122	M	M	H	M	**HIGH**	Mitigate — engage vendor in SD; freeze shaft dimensions. *AOR + SER*
RF shielding contractor not engaged — 12-wk lead; spec depends on MRI model	GR-0023	M	M	H	M	**HIGH**	Mitigate — engage once MRI model confirmed. *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*
Conditional and TBD requirements unresolved at baseline — 14 items carrying embedded owner decisions	Sec 4.A	H	M	M	H	**HIGH**	Mitigate — drive the Decision Register to closure through SD. *Owner's PM*
Generator pad location TBD — late siting drives civil/electrical rework	GR-0121	M	M	M	M	MEDIUM	Mitigate — fix pad location in SD site plan. *AOR / MEP*
Medical gas rough-in locations unconfirmed	GR-0038	M	M	M	M	MEDIUM	Mitigate — confirm outlets before 50% DD. *Clinical Director*
Scope-boundary gaps (7 flagged) — contract-scope ambiguity between parties	Sec 4.B	M	M	M	L	MEDIUM	Mitigate — close boundary definitions in contract exhibits. *Owner's PM*
Owner-direct vendor scope not yet coordinated against design milestones	Sec 4.B	L	M	M	L	LOW	Monitor — track against readiness milestones. *Owner's PM*

The full register — with per-constraint impact, response strategies, owners, and early-warning triggers — is in the **Risk_Register** tab of the accompanying workbook. Dollar quantification is available through the Controls Advisory add-on; Section 5 carries the cost and schedule exposure summary.

Section 5 — Cost and Schedule Exposure Summary

Baseline output presents identified exposure categories with supporting requirement evidence. Where the client requires dollar or day quantification, Gallant's cost and schedule consulting partners can be engaged as scoped extended service to translate identified exposures into quantified estimates, design-to-cost tracking, and earned value management. Earned value management does not stop at design — Gallant can provide that support through the full project lifecycle, including construction and commissioning.

5.A Cost Exposure

Uncovered scope	Six requirements with VerificationStatus = Open and HIGH_COST_INFRASTRUCTURE or MULTI_DISCIPLINE_COORDINATION risk 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 finalized performance specification — primarily PT additions (LASER, traction table — OAI-005) and OFE input drawings.	GR-0003, GR-0028, GR-0041
Scope-price misalignment	Two requirements where scope obligation is defined but no corresponding cost item identified — STC 60 acoustic overlay (estimated $80K–$150K) and AHU procurement scope.	GR-0036 (CF-003), GR-0050 (CF-006)
Design-to-budget risk	Total Project Cost (TPC) 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
DECISION-PENDING cost exposure	Six DECISION-PENDING records carry HIGH_COST_INFRASTRUCTURE or SCOPE_GAP. Cost cannot be confirmed until owner decisions close: generator scope $180K–$260K; STC 60 overlay $80K–$150K; MRI room reconfiguration if GE selected (40 NSF reallocation); RF shielding spec (vendor-dependent).	GR-0029, GR-0050, GR-0033, GR-0023, GR-0038, GR-0056

Current estimate $72M vs. $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 formal variance report at 50% SD with VE options log attached.

5.B Schedule Exposure

Input-dependent requirements	Sixteen DECISION-PENDING records each block a specific design milestone — concentrated on three upstream sources: AHJ response (8 downstream), MRI vendor (4 downstream), Generator scope (3 downstream), ICRA delivery (1 downstream).	All Section 4.A items
Long-lead items	Eight LONG_LEAD records. Procurement gates: 350 kW generator (20–28 wk lead, deadline 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	MRI pre-enclosure construction sequence (GR-0024) is irreversible. Electrical energize date (GR-0025, March 2027) requires 90-day buffer before commissioning. Two construction-sequence items with no current schedule activity tie-out.	GR-0024, GR-0025
Unrepresented scope	Seven SCOPE_GAP-flagged records lack 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

Two overdue decisions (Geotechnical, AHJ) at baseline. The 50% SD gate (July 11, 2025) is the binary date — sixteen DECISION-PENDING items must close by that gate to keep DD on schedule. Generator procurement (October 31, 2025) is the critical-path long-lead. 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.

Extended service available. Gallant's cost and schedule consulting partners can quantify each exposure category above as scoped add-on service: dollar-value estimates of identified exposures, requirements-driven earned value management through the full project lifecycle (design, construction, and commissioning), and schedule risk quantification tied to the requirements register.

Section 6 — Conflict Register Summary

The Conflict Register is the catalog of any place where two requirements in the project record contradict each other or compete for the same resource. Conflicts are a normal output of design — they surface when a regulatory mandate runs into a program criterion, when one document specifies one value and another document specifies a different value for the same item, or when a contract is silent on who is responsible for a piece of scope. Catching them in the requirements register before they become design rework is the value of the Conflict Register. Each conflict here carries a unique identifier (CF-XXX), the two requirements in conflict, a recommended resolution path, and a decision owner.

Six active conflicts. A conflict is any place where two requirements in the register contradict each other or compete for the same resource. The six active conflicts fall into three categories: three are numeric or dimensional contradictions (the same item carries two different values in two different documents), two are scope-boundary uncertainties (something needs to be built but the contract documents do not say who is responsible), and one is a regulatory framework question (the project must comply with one regulation but two editions of that regulation are in play). Every conflict is flagged here. The resolution path for each is the responsibility of a named decision owner — Gallant identifies and routes; Gallant does not autonomously resolve conflicts.

ParameterConflict	3	CF-001 (Generator capacity), CF-002 (MRI equip 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

Each active conflict below presents the specific contradiction in plain language, both source values verbatim or normalized, and a specific resolution path naming the deciding party and time-aware deadline.

ParameterConflict	**GR-0027 ↔ GR-0029** **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 Doc 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.** **OPC §4.2 — '150 kW minimum for clinical TI loads — confirm with electrical engineer during SD'** **Programming Doc §C — 'Base building generator 200kW life safety loads' (separate from clinical EES)** **Owner's PM and Tenant Facilities Lead align in writing on the 350 kW combined minimum. Assign cost responsibility for the 200 kW→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 generator on construction schedule with 20–28 week lead time.** *Heritage Owner Program Criteria Rev. 2 (D2) · Heritage Health Campus Programming Document v1.0 (D3)*

ParameterConflict	**GR-0033 ↔ GR-0002** **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.** **OPC §B Imaging Suite — MRI Equipment Room 200 NSF** **Equipment Schedule EQ-021 Note — 'GE SIGNA requires ~240 NSF equipment room vs. 200 NSF current program'** **Resolves with owner action item OAI-001 (the MRI vendor selection — see GR-0018 Top Priority #3). Design team continues on Siemens 200 NSF basis per kickoff agreement. If GE is selected, A/E flags 40 NSF reallocation in 50% SD area-compliance summary and identifies which adjacent space contributes the area.** *Heritage Owner Program Criteria Rev. 2 (D2) · Northstar Clinic Equipment Schedule v1.0 (D5)*

ScopeConflict	**GR-0036 ↔ GR-0028** **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 Landlord Work nor Tenant Work columns. The CMAR cannot begin AHU procurement without an explicit scope assignment, and AHU lead times are 12 to 18 weeks.** **OPC §4.1 — 'Northstar requires dedicated HVAC systems serving the clinical component, separate from the base building residential and retail systems'** **Programming Doc §C / NNN Lease Exhibit D — silent on clinical AHU procurement (not listed as Landlord Work or Tenant Work)** **Owner's PM and Northstar Facilities resolve AHU scope boundary in writing (project memo or lease side letter) before the 50% SD gate. CMAR cannot begin AHU procurement (12–18 week lead) without scope assignment. A/E identifies AHU locations and serving zones in the 50% SD HVAC narrative.** *Heritage Owner Program Criteria Rev. 2 (D2) · Heritage Health Campus Programming Document v1.0 (D3)*

ParameterConflict	**GR-0039 ↔ GR-0018** **The Equipment Schedule lists both MRI options as under active evaluation with structurally meaningful weight differences in the same document. Siemens MAGNETOM Altea magnet weight is 7,700 lb; GE SIGNA Creator magnet weight is approximately 8,100 lb. The 400-lb difference is structurally significant in the post-tensioned flat-plate design. Structural Engineer of Record (SER) cannot design to two different point loads simultaneously.** **Equipment Schedule EQ-020 — 'Siemens MAGNETOM Altea — magnet weight 7,700 lbs'** **Equipment Schedule EQ-020 Note — 'GE SIGNA also under evaluation — est. magnet weight ~8,100 lbs'** **SER proceeds on Siemens 7,700 lb basis per kickoff meeting agreement. Structural narrative flags MRI structure as DECISION-PENDING in 30% DD submittal. Vendor decision required by June 13, 2025 (GR-0018 / SMR-002) before 30% DD structural narrative is finalized. If GE is selected, MRI room slab and foundation design must be revised — flag in 30% DD coordination memo.** *Northstar Clinic Equipment Schedule v1.0 (D5) · Northstar Clinic Equipment Schedule v1.0 (D5) — same document, internal contradiction*
AuthorityConflict	**GR-0043 ↔ GR-0044** **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.** **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'** **Project planning basis — FGI 2022 (assumed). NM DOH adoption of FGI 2022 not confirmed in any source document. AHJ may require FGI 2018.** **Architect of Record (AOR) submit pre-application to NM DOH by May 23, 2025 (GR-0021 / SMR-005) confirming the applicable FGI edition, NM-specific amendments, and AHC occupancy classification. Design proceeds on FGI 2022 basis until response received. If FGI 2018 is confirmed, A/E identify all affected requirements and issue a design directive cataloging revisions.** *Northstar TJC Regulatory Requirements Summary v1.0 (D1) · Northstar TJC Regulatory Requirements Summary v1.0 (D1) — internal authority hierarchy*
ScopeConflict	**GR-0050 ↔ GR-0031** **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 acoustic overlay or assigns scope responsibility to the base building or residential TI.** **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.'** **Programming Doc §C / OPC — neither document budgets for acoustic overlay ($80K–$150K estimated) or assigns scope responsibility (base building vs. residential TI)** **Acoustic subconsultant confirm minimum assembly meeting STC 60 at 30% DD analysis. A/E identify cost allocation of acoustic overlay (Heritage or Northstar) before 60% DD. Cost incorporated in BCR-004 VE review at DD gate. Recommend allocation to base building scope on consistency grounds (the structural slab is base building) — but written owner agreement required.** *Northstar TJC Regulatory Requirements Summary v1.0 (D1) · Heritage Owner Program Criteria Rev. 2 (D2)*

Section 7 — Document Lineage Log

The Document Lineage Log is the chronological record of the source documents Gallant has processed into the project's requirements register, in the order they were processed. Each entry shows the document name, its version, when it was issued, when it was processed, how many requirements it added to the register, and whether it surfaced any conflicts. This log is the project's audit trail — the chain of custody for the requirements on the project. It is defensible to an owner, a lender, a federal contracting officer, or an auditor in any delivery context.

Complete chronological record reproduced in full from the workbook below. The log is append-only — once a document is processed, its entry is preserved verbatim through every subsequent cycle.

All five baseline entries below are highlighted as the current cycle. Three documents are referenced but not yet processed (Entries 6–8) and appear in Section 8 as the next-cycle priority queue.

Processed Documents

1	Northstar TJC Regulatory Requirements Summary v1.0	Regulatory Summary	v1.0	2025-01-15	2025-01-28	22	v1.0	0
2	Heritage Owner Program Criteria Rev. 2	Owner Program Requirements	Rev. 2	2024-12-10	2025-01-28	24	v1.0	0
3	Heritage Health Campus Programming Document v1.0	Owner Budget Authorization	v1.0	2024-12-01	2025-01-28	8	v1.0	1 (CF-001)
4	Heritage Health Campus Milestone Schedule v1.0	Program Schedule	v1.0	2024-12-01	2025-01-28	6	v1.0	0
5	Northstar Clinic Equipment Schedule v1.0	OFE Document	v1.0	2025-01-22	2025-01-28	10	v1.0	2 (CF-002, CF-004)
—	TOTAL — Baseline Run	5 documents	—	—	—	70	v1.0	3 cross-doc

Per-Entry Relationship Detail

			** Notes**
1	Northstar TJC Regulatory Requirements Summary v1.0	Standard/Code · Governing · Prescriptive · High	22 NEW · 0 SUPPLEMENT · 0 CONFLICT · 0 MATCH. 26 TJC requirements processed; 22 extracted as distinct register records, 4 consolidated into parent requirements. RCR and SLR categories seeded.
2	Heritage Owner Program Criteria Rev. 2	OwnerCriteria · Owner-Directive · Prescriptive · High	24 NEW · 0 SUPPLEMENT · 0 CONFLICT · 0 MATCH. FR, PIR, PR, and OMR categories seeded. OPC is the primary program document; TJC requirements remain governing for regulatory matters.
3	Heritage Health Campus Programming Document v1.0	OwnerBudgetAuth · Owner-Directive · Interpretive · Standard	8 NEW (BCR + SMR budget) · 0 SUPPLEMENT · 1 CONFLICT detected · 0 MATCH. BCR-001 through BCR-004 and four SMR budget/schedule requirements extracted. CF-001 (generator capacity) detected in cross-document comparison with D2. CF-003 (AHU scope) detected in cross-document comparison with D2.
4	Heritage Health Campus Milestone Schedule v1.0	ProgramDoc · Owner-Directive · Interpretive · Standard	6 NEW (SMR schedule milestones) · 4 SUPPLEMENT · 0 CONFLICT · 0 MATCH. SMR requirements extracted and linked to Programming Document parent requirements. Milestone schedule adds sequencing specificity not in Programming Document narrative.
5	Northstar Clinic Equipment Schedule v1.0	OFEDoc · Owner-Directive · Interpretive · High	10 NEW (PIR + OMR equipment interface) · 0 SUPPLEMENT · 2 CONFLICT detected · 0 MATCH. CF-002 (MRI equipment room area) and CF-004 (MRI structural point load — two vendor options) detected. Equipment facility inputs seed PIR requirements not present in OPC.

Documents Referenced but Not Yet Processed

Three governing documents are referenced in the current register but have not been processed into the baseline. They are listed here per Doc 5 v1.3 §7 and become the priority queue in Section 8.

6	A/E Kickoff Meeting Minutes (May 12, 2025)	Meeting Minutes	Issued — not processed	First incremental document — schedule for next processing cycle
7	Schematic Design Basis of Design v1.0 (50% SD)	Basis of Design	July 11, 2025 (target)	First design output. RIR Cycle 1 triggered upon receipt.
8	SD Outline Specifications — Divisions 01/11/22/23/26	Specification	August 29, 2025 (SD complete)	Pending SD completion

Section 8 — Next Cycle Dependencies

Closes the Baseline Run with a forward-looking action orientation. Identifies referenced-but-unprocessed documents, anticipated submittals, and the input dependencies that block open DECISION-PENDING records. Per v1.3 spec, Baseline Run §8 names the established document set and the first anticipated incremental document.

Baseline Document Set — Established

Five documents constitute the founding source set for this register. All five processed January 28, 2025 in single-pass mode. No prior register existed.

D1 — Northstar TJC Regulatory Requirements Summary v1.0	Standard/Code · High	22 (RCR/SLR seed)
D2 — Heritage Owner Program Criteria Rev. 2	OwnerCriteria · High	24 (FR/PIR/PR/OMR seed)
D3 — Heritage Health Campus Programming Document v1.0	OwnerBudgetAuth · Standard	8 (BCR/SMR budget)
D4 — Heritage Health Campus Milestone Schedule v1.0	ProgramDoc · Standard	6 (SMR schedule)
D5 — Northstar Clinic Equipment Schedule v1.0	OFEDoc · High	10 (PIR/OMR equipment)

Referenced but Unprocessed — Next Cycle Priority Queue

Three documents referenced in the current register await processing. Recommended priority order is sequenced by likelihood of introducing new conflicts, superseding existing requirements, or closing open DECISION-PENDING items.

1	A/E Kickoff Meeting Minutes (May 12, 2025)	First incremental document. Contains ~8 program changes and 11 action items per source-document index.	Likely to introduce SUPPLEMENT records to existing parents and may close 1–3 DECISION-PENDING items via owner direction captured in minutes. RIR Cycle 1 produced after processing.
2	Schematic Design Basis of Design v1.0 (50% SD)	First formal design output (target July 11, 2025). Triggers RIR Cycle 1.	Will introduce 30–60 new requirements as Architecture, MEP, and Structural narratives mature. Will likely supersede several Equipment Schedule PIR records with finalized facility inputs.
3	SD Outline Specifications — Divisions 01/11/22/23/26 (August 29, 2025)	Specification-level requirements. Codifies materials, equipment, and performance criteria.	Will add 50–100+ records primarily in PR (performance) and PIR (physical/interface) categories. Likely to surface MethodConflicts not detectable until specifications are written.

Input Dependencies — Owner / Vendor / AHJ Actions

Six external inputs are blocking open DECISION-PENDING records. Resolution of these inputs cascades to closure of multiple downstream records. Listed in escalation priority.

AHJ pre-application response (NM DOH)	OVERDUE — May 23, 2025	GR-0021, GR-0035, GR-0043, GR-0044, GR-0046, GR-0048, GR-0061 + corridor design lock	Owner escalate Architect of Record (AOR) immediately. Design proceeds on FGI 2022 / AHC basis.
Geotechnical investigation report	OVERDUE — June 6, 2025	GR-0020 + unblocks BCR-004 VE-01 evaluation ($180K–$340K)	Owner's PM escalate Geotechnical Consultant immediately. 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 decision will slip, formally adopt 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 + 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 + Northstar Facilities written boundary assignment in project memo or lease side letter.

Anticipated Submittals — Before Next RIR

Documents expected to enter the source-document pipeline before the next processing cycle. Each is flagged for early notification to Gallant so processing can begin promptly.

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 (overdue)	Process as Source Document on receipt; trigger BCR-004 VE-01.
MRI Vendor Confirmation Memo (Northstar Biomedical)	June 13, 2025	Process as Owner Directive on receipt; closes CF-002 and CF-004.
Infection Control Risk Assessment (ICRA)	June 27, 2025	Process as Source Document; affects HVAC zones, sink placement.
Generator Scope Allocation Memo (Heritage + Northstar)	Before July 11, 2025	Process as Owner Directive; closes CF-001 and unblocks BCR-003 chain.
50% SD Basis of Design	July 11, 2025	Process as Source Document. Triggers RIR Cycle 1.

Recommended Processing Sequence — Next Cycle

In sequence: process the A/E Kickoff Minutes first to capture program direction and close any DECISION-PENDING items already resolved verbally; process AHJ response as soon as received to unlock the eight-record FGI/AHC chain; process Geotechnical Report as soon as received to unblock VE-01; process owner directives (MRI, ICRA, generator) as they arrive; process the 50% SD BOD on July 11, 2025 to formally trigger RIR Cycle 1.

50% SD on July 11, 2025. Sixteen DECISION-PENDING items must close. Six conflicts must be resolved or formally accepted with risk acknowledged. Two overdue items (AHJ pre-application, Geotechnical Report) require immediate escalation this week. The next RIR is RIR Cycle 1, produced upon receipt of the 50% SD Basis of Design.

Appendix A — Deviation Report and Recommended Corrections

Gallant applies the same analytical rigor to its own work product as it applies to the project record. The Deviation Report below documents ten findings — workbook structure issues, register classifications that needed correction, source-document inconsistencies, and project-state items — surfaced during baseline processing and review. Each finding has a severity, a recommended correction, and an accountable owner. Two of the ten findings (DEV-001, DEV-002) are Gallant-internal workbook items; eight are project-routed. Surfacing both categories side by side is a feature of the methodology, not a defect — clients should expect this kind of transparency in every RIR they receive.

This appendix catalogs ten specific deviations identified during baseline processing and review. A deviation, in Gallant methodology, is distinct from a conflict (already reported in Section 6): conflicts are inter-document parameter contradictions; deviations are instances where the workbook, a register record, a source document, or a project state departs from the methodology standard or from its own internal logic. Each deviation below carries a severity, a specific deviation description, the expected state per methodology or source authority, a recommended correction, and the owner accountable for closing it.

Deviations are sorted by severity, then by domain. Workbook integrity items (DEV-001, DEV-002) should be corrected before the next RIR cycle to preserve TC-31, TC-32, and TC-33 pass status. Source-document deviations (DEV-003 through DEV-005) are owner-routed for resolution at the document level. Project-state deviations (DEV-006 through DEV-009) require immediate owner action with deadlines specified. DEV-010 is a methodology enhancement recommendation for the next workbook revision.

Summary

DEV-001	Decision_Register sheet header inconsistent with body count	High	Workbook Integrity	Gallant
DEV-002	DecisionType field not aligned to Doc 5 v1.3 four-type taxonomy	High	Register Methodology	Gallant
DEV-003	Equipment Schedule lists two MRI vendors as design basis	Critical	Source Document	Northstar Biomedical
DEV-004	NNN Lease Exhibit D silent on AHU and generator scope	Critical	Source Document	Heritage + Northstar
DEV-005	FGI edition adoption not confirmed in any source document	Critical	Source Document / Authority	AOR (A/E)
DEV-006	Geotechnical Report overdue past June 6, 2025	Critical	Project State — Schedule	Owner's PM
DEV-007	AHJ pre-application overdue past May 23, 2025	Critical	Project State — Schedule	AOR (A/E)
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	Verification_Matrix lacks dependency-blocker linkage	Moderate	Methodology Enhancement	Gallant

Deviation Detail

· Decision_Register sheet header inconsistent with body count

Severity: High · **Classification:** Workbook Integrity · **Found in:** Gallant Requirements Workbook v1.0

Deviation. The Decision_Register sheet header reads 'OPEN DECISION COUNT: 0 of 70 requirements,' yet the Summary_Sheet reports 16 DECISION-PENDING records and the Requirements_Register sheet contains 16 records with RequirementStatus = DECISION-PENDING. The Decision_Register sheet body is empty below its column headers. **Expected per methodology / source authority.** Per Doc 4 Output Standards v1.2 §4.A and Doc 5 v1.3 §4.A, the Decision_Register sheet must contain one row per open DECISION-PENDING record, organized by the four-type taxonomy. Doc 5 v1.3 TC-33 explicitly requires Section 4.A count to match the Decision_Register sheet count exactly. **Recommended correction.** Repopulate the Decision_Register workbook sheet with all 16 DECISION-PENDING records grouped by DecisionType (5 TBD-UNRESOLVED, 9 CONDITIONAL, 2 EMBEDDED-CHOICE, 0 SHOULD-LANGUAGE). Update the header count from 0 to 16. Re-run TC-31, TC-32, and TC-33 to confirm pass status. Section 4.A of this RIR was sourced directly from the Requirements_Register and is correct as published. **Correction owner:** Gallant Project Solutions (internal data integrity) · **Target close:** Before next workbook revision (prior to RIR Cycle 1)

· DecisionType field not aligned to Doc 5 v1.3 four-type taxonomy

Severity: High · **Classification:** Register Methodology · **Found in:** Requirements_Register sheet — DecisionType column

Deviation. The DecisionType field in the Requirements_Register currently carries values such as 'DECISION_REQUIRED,' 'DECISION_REQUIRED | LONG_LEAD | MULTI_DISCIPLINE_COORDINATION,' and 'DECISION_REQUIRED | REGULATORY_APPROVAL.' These are RiskDriver / KeywordFlag values, not DecisionType values per the Doc 5 v1.3 four-type taxonomy. **Expected per methodology / source authority.** Per Doc 5 v1.3 §3 View 8 and §4.A, DecisionType must be one of: TBD-UNRESOLVED, CONDITIONAL, EMBEDDED-CHOICE, or SHOULD-LANGUAGE. The 16 DECISION-PENDING records require explicit DecisionType assignment. RiskDriver tags belong in the KeywordFlags / RiskDrivers column, not DecisionType. **Recommended correction.** Reclassify the 16 DECISION-PENDING records into the four-type DecisionType taxonomy. Move existing DECISION_REQUIRED tag values into the KeywordFlags column where they were intended. Section 4.A of this RIR presents the correct classification (5 TBD-UNRESOLVED, 9 CONDITIONAL, 2 EMBEDDED-CHOICE, 0 SHOULD-LANGUAGE) — this should be back-populated to the workbook. **Correction owner:** Gallant Project Solutions (internal classification refresh) · **Target close:** Before next workbook revision (prior to RIR Cycle 1)

· Equipment Schedule lists two MRI vendors as concurrent design basis

Severity: Critical · **Classification:** Source Document — Internal Inconsistency · **Found in:** Northstar Clinic Equipment Schedule v1.0 (D5) — EQ-020, EQ-021

Deviation. Equipment Schedule v1.0 lists Siemens MAGNETOM Altea as the primary entry with magnet weight 7,700 lb and equipment-room footprint 200 NSF, while a same-document note states 'GE SIGNA also under evaluation — est. magnet weight ~8,100 lb, requires ~240 NSF equipment room.' One source document presents two structurally and dimensionally distinct design baselines as concurrently valid. **Expected per methodology / source authority.** An OFE document is expected to designate a single confirmed vendor and equipment basis at the time of issue, or explicitly flag the document as preliminary pending OAI resolution. 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 DECISION-PENDING records (GR-0023 RF shielding, GR-0033 room dimensions, GR-0039 structural). **Recommended correction.** Biomedical Engineering Lead issue a formal vendor-confirmation memo by June 13, 2025, naming the selected MRI vendor, and reissue the Equipment Schedule as v1.1 with the unsuccessful option removed. Until the memo is received, A/E and SER document the Siemens basis as the operative design assumption per kickoff agreement. **Correction owner:** Northstar Biomedical Engineering — Biomedical Engineering Lead · **Target close:** June 13, 2025 (matches GR-0018 SMR-002)

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

Severity: Critical · **Classification:** Source Document — Coverage Gap · **Found in:** Heritage Health Campus Programming Document v1.0 (D3) referencing NNN Lease Exhibit D

Deviation. OPC §4.1 mandates dedicated clinical AHUs separate from base building HVAC systems, and OPC §4.2 / Programming Doc §C imply a generator upsize from 200 kW to 350 kW for combined NFPA 99 compliance. The NNN Lease Exhibit D Landlord Work / Tenant Work matrix — the contractually controlling scope-allocation document — is silent on both the clinical AHU procurement boundary and the generator upsize cost allocation. **Expected per methodology / source authority.** Exhibit D is expected to assign every major building system to either Landlord Work or Tenant Work without ambiguity. Silence on systems explicitly required by other governing source documents creates contract-scope deviations (CF-003 AHU and CF-001 generator) that the design team and CMAR cannot resolve unilaterally. **Recommended correction.** Owner's PM and Tenant Facilities Lead execute a joint scope-allocation memorandum or NNN Lease side letter before the 50% SD gate (July 11, 2025) that explicitly assigns: (1) clinical AHU procurement scope and cost; (2) generator capacity (350 kW) and the 200 kW→350 kW upsize cost allocation. The memorandum or side letter should reference Exhibit D explicitly and become a controlled appendix to the lease. **Correction owner:** Heritage Real Estate Partners + Northstar Health System · **Target close:** Before 50% SD gate — July 11, 2025

· FGI edition adoption not confirmed in any source document

Severity: Critical · **Classification:** Source Document / Authority · **Found in:** Northstar TJC Regulatory Requirements Summary v1.0 (D1)

Deviation. TJC Summary RQ-002 cites compliance with the 'latest adopted edition' of FGI per AHJ jurisdiction. The project-team planning basis is FGI 2022 Outpatient Guidelines. No document in the baseline source set confirms that NM Department of Health (the AHJ) has adopted FGI 2022. Pre-application research suggests NM DOH may remain on FGI 2018, which would alter corridor widths, imaging classifications, and ICRA scope. **Expected per methodology / source authority.** When a regulatory framework references AHJ-adopted versions, the project record must contain explicit AHJ confirmation of the adopted edition before the design proceeds beyond programming. Carrying an unconfirmed planning basis through SD risks late-stage revision when the AHJ response arrives. **Recommended correction.** Architect of Record (AOR) submit AHJ pre-application to NM DOH if not already submitted, and place the AHJ written response in the project record on receipt. The response document, once received, will be processed as a Source Document or Owner Directive in the next RIR cycle and will close CF-005 plus seven CONDITIONAL DECISION-PENDING records (GR-0021, GR-0035, GR-0043, GR-0044, GR-0046, GR-0048, GR-0061). **Correction owner:** Architect of Record (AOR) — AOR Project Architect · **Target close:** OVERDUE — May 23, 2025 (immediate action)

· Geotechnical Report overdue past June 6, 2025

Severity: Critical · **Classification:** Project State — Schedule Deviation · **Found in:** Register record GR-0020 / SMR-004

Deviation. GR-0020 requires the Geotechnical Investigation Report from Geotechnical Consultant prior to 50% SD structural narrative. The report was authorized December 2024 with deadline June 6, 2025 and was not received as of the baseline report date. Site Class D is currently assumed without confirmation. **Expected per methodology / source authority.** Per the SMR-004 deadline and BCR-004 §C, the Geotechnical Report must be in the project record before structural narrative finalization at 50% SD and is the trigger for the BCR-004 VE-01 evaluation (foundation system value engineering with $180K–$340K savings range). **Recommended correction.** Owner's PM escalate Geotechnical Consultant this week with a request for status and revised delivery date. If the report cannot be received before 50% SD, formally accept Site Class D as the design assumption in writing and defer VE-01 evaluation to the next phase. The lost VE opportunity ($180K–$340K) becomes a known shortfall against the BCR-001 variance. **Correction owner:** Heritage Real Estate Partners — Owner's PM · **Target close:** OVERDUE — Immediate escalation; resolution before 50% SD if achievable

· AHJ pre-application overdue past May 23, 2025

Severity: Critical · **Classification:** Project State — Schedule Deviation · **Found in:** Register record GR-0021 / SMR-005

Deviation. GR-0021 requires submission of an AHJ pre-application inquiry to NM DOH confirming applicable FGI edition and AHC occupancy classification by May 23, 2025. Submission status was Open at baseline. This is the second of two overdue items at baseline (DEV-006 is the first). **Expected per methodology / source authority.** Per SMR-005, the AHJ pre-application must be submitted before SD corridor widths and egress design are finalized. The response governs eight downstream records (GR-0021, GR-0035, GR-0043, GR-0044, GR-0046, GR-0048, GR-0061, plus implicit dependencies in GR-0019 ICRA and GR-0033 imaging). **Recommended correction.** Architect of Record (AOR) confirm submission status this week. If the pre-application has not been submitted, submit it within the next five working days. Until response is received, design proceeds on the FGI 2022 / AHC planning basis and any conflicting AHJ response triggers an A/E design directive cataloging affected records. **Correction owner:** Architect of Record (AOR) — AOR Project Architect · **Target close:** OVERDUE — Immediate submission required

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

Severity: High · **Classification:** Project State — Schedule Deviation · **Found in:** Register record GR-0019 / SMR-003

Deviation. GR-0019 requires ICRA completion by Northstar Infection Preventionist by June 27, 2025. The ICRA governs HVAC zone boundaries, negative-pressure extents, and clinical-sink placement (GR-0051). Without it, MEP-EOR cannot finalize the 50% SD HVAC narrative. The MS-022 milestone shows ICRA as Northstar's deliverable but it is not currently tracked at the same cadence as MRI vendor and AHJ items in coordination meetings. **Expected per methodology / source authority.** Per Gallant methodology, any DECISION-PENDING item that gates a downstream design narrative should be escalated proportional to its impact, regardless of whether it is the owner's or A/E's deliverable. ICRA blocks the 50% SD HVAC narrative and is a TJC AHC accreditation requirement at the programming stage. **Recommended correction.** Owner's Rep escalate ICRA delivery to Northstar Clinical leadership and the Infection Preventionist this week. Place ICRA on the same priority tier as MRI vendor and AHJ response in weekly status reporting. If ICRA will slip past June 27, request an interim written decision from the Infection Preventionist on HVAC zone boundaries so the A/E can advance the SD HVAC narrative without the full document. **Correction owner:** Owner's Representative + Northstar Clinical Operations · **Target close:** Escalation this week; ICRA delivery by June 27, 2025

· TPC variance ($72M vs. $68M) exceeds BCR-004 trigger before SD entry

Severity: High · **Classification:** Project State — Cost Deviation · **Found in:** Register record GR-0027 / BCR-001 vs. GR-0030 / BCR-004

Deviation. Current TPC estimate is $72M against the Board-authorized $68M ceiling — a $4M variance (5.9%). BCR-004 specifies a 5% variance threshold that triggers a VE options log. The variance is already exceeded at baseline, before SD has begun, and three known cost pressures (generator upsize $180K–$260K, acoustic overlay $80K–$150K, MRI room reconfiguration if GE selected) remain open. **Expected per methodology / source authority.** Per BCR-001 (Board Resolution 2024-11), variances exceeding 5% require written Board re-authorization before proceeding. Per BCR-004, the A/E shall prepare a VE options log for Owner review before CD NTP if the DD estimate exceeds the threshold. The current variance is well past the trigger and is not yet on a documented variance-resolution path. **Recommended correction.** Cost Consultant prepare a formal BCR-004 variance report at the 50% SD review with a VE options log attached. Include: (1) VE-01 foundation savings $180K–$340K (contingent on DEV-006 closure); (2) generator allocation outcome (CF-001 / DEV-004); (3) acoustic overlay allocation (CF-006). Initiate Board re-authorization process if combined offsets do not retire the variance to within the 5% ceiling. **Correction owner:** Cost Consultant + Owner's PM · **Target close:** 50% SD review (July 11, 2025) at the latest

· Verification_Matrix lacks dependency-blocker linkage to DECISION-PENDING records
Severity: Moderate · **Classification:** Methodology Enhancement · **Found in:** Verification_Matrix sheet — current schema
Deviation. Twenty-two records (16 DECISION-PENDING + 6 CONFLICT-PENDING) carry VerificationStatus = 'Pending' or 'Not Started' while their underlying DecisionDeadline or AHJ response is the actual gating event. The Verification_Matrix does not currently surface this linkage — a reader cannot tell from the matrix alone what specific event will move a Pending record into 'In Progress.' **Expected per methodology / source authority.** Per Doc 4 Output Standards (intent), the Verification_Matrix should be a complete and self-contained view of how each requirement will be verified, including blockers. The current schema captures method, authority, and phase but not the upstream dependency that gates verification start. **Recommended correction.** In the next workbook revision (before RIR Cycle 1), add a 'Verification Blocker' column to the Verification_Matrix linking each Pending record to its blocking Decision ID, Conflict ID, or external input (AHJ response, ICRA, vendor confirmation, etc.). Where no blocker exists, the cell reads 'None — verification can begin per phase.' This change should also be recorded in Doc 4 v1.3 update queue. **Correction owner:** Gallant Project Solutions (internal methodology update) · **Target close:** Next workbook revision (target: prior to RIR Cycle 1, July 2025)

Closure Summary

Of the ten deviations cataloged: two require immediate action (DEV-006 and DEV-007 are overdue), four require action before the 50% SD gate on July 11, 2025 (DEV-003, DEV-004, DEV-008, DEV-009), three are workbook or methodology updates owned by Gallant before RIR Cycle 1 (DEV-001, DEV-002, DEV-010), and one is a documentary closure that will arrive with the AHJ response (DEV-005). Closing all ten before the 50% SD gate will leave the register in a defensible state for design phase entry and provide a clean audit trail for owner, lender, COR, or auditor review.

Immediate (this week)	2	Owner / A/E	DEV-006, DEV-007
Before 50% SD gate (July 11, 2025)	4	Owner / Northstar	DEV-003, DEV-004, DEV-008, DEV-009
Before RIR Cycle 1	3	Gallant	DEV-001, DEV-002, DEV-010
With AHJ response (closure on receipt)	1	Owner / A/E	DEV-005

End of Report

Requirements Intelligence Report™ — Baseline Run

Heritage Health Campus — Northstar Ambulatory Care Clinic · Run ID HHC-REG-001 · Register v1.0 · January 28, 2025

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