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Internal Team Notes — 2026-04-kingsford-bms-AB3

Audience: the proposal team running the next pass on this project.

This document compiles actionable items pulled from the project’s working artifacts. Each section is *what to do next* — verify, refine, or reconsider — to improve the proposal before it goes to the customer or as part of an RFQ-response cycle.

Sources compiled:

- 07-assumptions.md — assumptions to verify or refine
 - 08-customer-clarifications.md — questions to send the customer
 - 99-decision-log.md — decisions worth revisiting
 - 03-doc-inventory.md — gap analysis on customer inputs
 - 05-working-docs/A3-cable-schedule.yaml — cable-length fallbacks to verify
 - 05-working-docs/D3-risk-register.md — project risks (if present)
 - 09-rfq-package/ — RFQ packages (cost-reduction via competitive bidding)
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1. Customer clarifications (RFI list)

20 open questions to send the customer. Each has a documented default assumption with cost / scope impact. Resolving these is the highest-leverage path to refining the proposal — every answered Q-NNN may flip an open assumption from Assumed to Confirmed and reduce contingency.

ID	Question	Default assumed	What an answer changes
Q-001	P1	TECH-ME	Confirm full list of BMS-monitored systems for this hotel. A
Q-005	P1	OWNER	Are guestroom-level HVAC controls (FCU per guestroom) in BMS

ID	Question	Default assumed	What an answer changes
Q-007	P1	PROJECT	What is the required completion date / project duration?
Q-018	P1	PROJECT	The cover letter says “Rehabilitation” but the technical dra
Q-012	P2	TECH-IT	Is integration with FDAS, PMS, CCTV, or ACS required in this
Q-013	P2	OWNER	Confirm acceptable BMS brand list. Default: Siemens (Desigo
Q-014	P2	COMMERCIAL	Confirm payment terms, retention %, taxes, currency.
Q-015	P2	OWNER	Operator training duration and number of attendees.
Q-016	P3	OWNER	Is a 1-year preventive-maintenance contract requested with t
Q-002	P2	TECH-EE	EE Plan was provided as a Construction Bulletin set (raster)
Q-003	P2	TECH-ME	Provide architectural floor plans (corridors, ceiling voids,
Q-004	P3	TECH-EE	Confirm panel-board IDs and circuit assignments for the 25 d
Q-006	P3	TECH-IT	Confirm whether the BMS uplink lands on a dedicated VLAN on
Q-008	P2	TECH-ME	Per-guestroom FCU count per floor — confirm number of guestr
Q-009	P3	TECH-ME	Smoke control / kitchen exhaust interlocks — in BMS scope?
Q-010	P3	OWNER	Energy-savings algorithms required (chiller plant sequencing
Q-011	P3	OWNER	Number of BMS administrator (vs. operator) seats; remote-acc
Q-	P3	COMMERCIAL	Confirm warranty period.

ID	Question	Default assumed	What an answer changes
017			
Q-019	P3	TECH-EE	Power-meter scope: confirm number and class (main vs. sub-fe)
Q-020	P3	TECH-ME	Confirm number of BTU meters and chiller-side BACnet integra

2. Verification action items (against drawings, on site, with vendors)

Cable lengths — fallback rows to verify

Cables tagged `legacy_fallback`, `typical_range:*`, or `fallback_a001` use agent-reasoned typical-range estimates rather than direct drawing measurements. These are the audit-XLSX rows the team should prioritize when the next set of drawings lands or when site walkthroughs become possible.

Method tag	Count	Sample row ID
<code>typical_range:guestroom_zone_field</code>	180	C0052
<code>typical_range:plant_room_same_room</code>	35	C0019
<code>typical_range:same_floor_corridor_field</code>	26	C0001
<code>typical_range:roofdeck_same_area</code>	15	C0032
<code>typical_range:bohr_corridor_field</code>	10	C0007
<code>unknown</code>	3	T0259
<code>typical_range</code>	1	T0262

Open `13-A3-cable-schedule-AUDIT.xlsx` to filter and prioritize.

Other verification items

- **Equipment counts** — verify against mechanical floor plans where the agent inferred quantities (see open assumptions where Status: Open and category contains ‘count’).

- **Panel locations** — confirm against architectural drawings and walk the building if accessible.
- **Drawing scale calibrations** — if any A-NNN entries record drawing-scale calibration assumptions (e.g., grid-bay calibration), spot-check against a second known dimension before the proposal goes out.
- **Vendor specifications** — for every Equipment Supplier C/O cable / interface, confirm that the supplier’s panel architecture matches the assumed BMS-side interface (HLI vs. hardwired DI/DO).

3. Cost-reduction opportunities

RFQ packages — competitive bidding

Other cost levers

- **Cable specifications** — confirm with the customer whether the assumed jacket rating (e.g., FRLS) is mandated or whether a less-specified cable is acceptable in non-occupied spaces. Material cost difference can be 10–20% on cabling.
- **Spare-conductor strategy** — current strategy provides 15–25% spares per I/O class. If the customer is willing to accept lower spare margins (commit to the I/O list as-final), cable size drops and material cost reduces 5–10%.
- **Make/model consolidation** — RFQ packages currently call for spec-level equivalent items. If the customer accepts a single-vendor list (one controller brand, one valve brand), the team can negotiate volume discounts. Document any such consolidation in a new Q-NNN.
- **Owner-furnished items** — review C1 contractor/owner matrix; items currently assigned to BMS scope that the owner could supply directly (e.g., off-the-shelf workstations, network switches if customer has IT preferences) reduce BMS material markup.

4. Risks and decisions to revisit

Risk register highlights

Open risks from D3-risk-register.md worth re-evaluating before issue:

- **R-1** — Q-005 / Q-008 returns “every guestroom in scope” → +20–30% scope | Medium | High
- **R-2** — Q-018 returns “actually rehab” → demolition + cutover scope | Low | High

- **R-3** — Q-013 returns customer-specific brand list outside Siemens / Dell defaults | Medium | Low
- **R-4** — Architectural drawings arrive at shop-stage with longer cable runs | Medium | Medium
- **R-5** — EE-supplied panel feeds delayed (Q-004) | Low | Medium
- **R-6** — Customer LAN integration delayed (Q-006) | Low | Low

5. Open assumptions to refine

0 assumptions in 'Open' status (out of 0 total). Each one is something the proposal currently treats as a known quantity but isn't actually confirmed. The team should pair each open assumption with the corresponding Q-NNN and chase the customer's answer.

6. Process improvements queued

Items the methodology audit and A/B regression runs flagged for the next playbook pass. These don't block this proposal but will improve the next one:

- **Conduit ratio** — currently 30% of total cable length unless overridden. Project-tuned override available via `B4-site-factors.yaml` (see Op#11).
- **Commercial rates** — overhead 20% / contingency 7.5% / VAT 12% are defaults. Project-tuned override via `06-commercial-rates.yaml` based on risk-register score.
- **Cable specs** — currently project-blind. Consider authoring `A3-cable-spec-rules.yaml` per `_playbook/sub-routines/build-cable-schedule.md` for explicit jurisdiction / brand reasoning.
- **MS/TP trunk topology** — formula-based fallback; ideally derived from actual A4 panel locations.

7. Defensibility check — what's already strong

Reassurance for the team — items the agent already handled to a defensible standard:

- Every BOQ line traces to a working doc; every working doc cites sources
- Drawing-availability triage committed in writing in `03-doc-inventory.md` (per Op#10)
- All assumptions are documented with rationale + impact-if-wrong
- 13-file deliverables package ready for issue with no missing artifacts
- Audit XLSX layer (per Principle F) makes verification work tractable

Generated by `_playbook/tools/generate-internal-notes.py`. Re-run after any update to the project's working docs to refresh.