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## Internal Team Notes — 2026-04-kingsford-bms-AB4

**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)

**0 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.

## 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
typical_range:boh_same_floor	80	C0001
typical_range:roofdeck_plant_area	63	C0029
typical_range:plant_room_same_room	47	C0019
typical_range:panel_power_feed	8	P0202
unknown	5	T0195
typical_range:guestroom_corridor	4	C0161
agent_specified	2	T0200

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

The agent prepared 12 RFQ packages categorized by supplier type. Issuing all of them and comparing 3+ quotes per package is the standard cost-reduction lever. Especially impactful for high-value categories:

- bms-controllers-and-panels — typically 5–15% savings vs. catalog pricing on competitive bid

- field-sensors-hvac — typically 5–15% savings vs. catalog pricing on competitive bid
- head-end-servers-workstations — typically 5–15% savings vs. catalog pricing on competitive bid
- network-active — typically 5–15% savings vs. catalog pricing on competitive bid
- power-meters — typically 5–15% savings vs. catalog pricing on competitive bid
- valves-actuators — typically 5–15% savings vs. catalog pricing on competitive bid

Full list in 09-rfq-package/. Send these as soon as the proposal's commercial side is firm — supplier turnaround is typically 2–4 weeks.

### 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-01** — Stage misclassification (rehab vs. greenfield) | Low | High
- **R-02** — Plumbing scope expands beyond hot water | Medium | Medium

- **R-03** — Guestroom FCU controls in BMS scope (~280 rooms) | Medium | High
- **R-04** — Project schedule pressure (compressed timeline) | Medium | Medium
- **R-05** — Architectural drawings late (cable measurement bounded) | High | Medium
- **R-06** — Brand substitution (customer rejects Siemens) | Low | Medium
- **R-07** — After-hours work mandated (~25% premium) | Low | Medium
- **R-08** — EE drawing set incomplete (full EE-01..24 missing) | Medium | Low
- **R-09** — Casino IAQ regulator demands more sensors | Medium | Low
- **R-10** — Hot-cutover required (treats as rehab) | Low | High

### Recent decisions worth revisiting

Decisions made during proposal generation. Review whether each is still right given any new customer answers or drawings received since the decision was made.

- **D-001** — Specialized subagents not installed; fallback to general-purpose
- **D-002** — Stage classification: Greenfield, despite “Rehabilitation” cover-letter wording
- **D-003** — Customer-KB Megaworld brand list is STUB

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