Publish Date

ORGANIZATIONAL INFORMATION REQUIREMENTS

Company Name

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| 8068-ORG-XX-XX-SP-X-5120 |

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| Company Name | Company Name |
| Company Address | Company Address |
| Originator Code | ORG |
| Client Name | Client Name |

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# **Organizational & Asset Information Management**

## OM & FM Management Systems

The Operational Management and Facilities Management system used will be FM System Name here cloud-based digital tool; further information on the system can be found on the following link: Hyperlink.

## Asset Information Requirements (AIR)

The Asset Information Requirements (AIR) sets out the management, commercial and technical requirements for producing asset information for the project lifecycle.

Asset information management should be involved in all stages of project delivery, and functions must be assigned during the project and asset lifecycle.

Information provided beyond the minimum requirements is considered a waste under "building information modelling (BIM) according to the ISO 19650 series". It is essential that all information produced during the project lifecycle is relevant and qualitative to the benefit of the project; therefore, only serviceable, and maintainable assets required for Facilities Management will need to be delivered to the Level of Information need at RIBA stage 5. In line with the Digital Plan of Work included in BIM Execution Plan (BEP), The requirements shall be in line with BS EN 17412-1: 2020 Building Information Modelling — Level of Information Need Part 1: Concepts and principles and the NBS Toolkit <https://toolkit.thenbs.com/Definitions> Level of detail 5 (LOD 5) and Level of Information 5 (LOI 5).

# Organizational Information Requirements

Table 1 - Specific asset management activities

|  |  |  |  |
| --- | --- | --- | --- |
|  | Client | Service Provider | Construction Contractor |
| Asset accounting, activity costing, forecasting |  |  |  |
| Planning and budgeting |  |  |  |
| Demand management and customer expectation policy |  |  |  |
| Capital investment and life cycle costing |  |  |  |
| Innovation and change management |  |  |  |
| Interfacing with regulatory bodies; |  |  |  |
| Asset operation or utilization; |  |  |  |
| Asset modifications, refurbishment, replacement, |  |  |  |
| Spares, materials and purchasing; |  |  |  |
| Data, information, and knowledge management; |  |  |  |
| Contractor and supplier management; |  |  |  |
| Human resources, skills development, and competencies; |  |  |  |
| Maintenance, inspection, condition, and performance |  |  |  |
| Contingency planning and emergencies; |  |  |  |
| Energy efficiency and environmental aspects, e.g. Renewable resources, recycling, waste management, air purity, hygiene; |  |  |  |
| Risk assessment and management; |  |  |  |
| Safety, health, and environmental management. |  |  |  |
| Optimizing the asset management strategy and optimizing/prioritizing its asset management plan(s); |  |  |  |
| Assessing the financial benefits of planned improvement activities; |  |  |  |
| Modelling the asset to support operational decision-making; |  |  |  |
| Determining the operational and financial impact of asset unavailability or failure; |  |  |  |
| Making life cycle cost comparisons of alternative capital investments; identifying expiry of warranty periods; |  |  |  |
| Determining the end of an asset's economic life, e.g. When the asset-related expenditure exceeds the associated income; |  |  |  |
| Determining the cost of specific activities (activity-based costing), e.g. The total cost of maintaining a particular asset(s)asset system |  |  |  |
| Obtaining/calculating asset replacement values |  |  |  |
| Undertaking financial analysis of planned income and expenditure; |  |  |  |
| Obtaining/calculating the financial and resource |  |  |  |
| Impact of deviating from plans that might result in a change in asset availability or performance (e.g. What is the financial impact of deferring the maintenance of a specific generator by six months? |  |  |  |
| Assessing its overall financial performance; |  |  |  |
| Undertaking the ongoing identification, assessment, and control of asset-related risks |  |  |  |
| Optimizing the asset management strategy and optimizing/prioritizing its asset management plan(s) |  |  |  |
| Assessing the financial benefits of planned improvement activities; |  |  |  |
| Modelling the asset to support operational decision-making; |  |  |  |
| Determining the operational and financial impact of asset unavailability or failure; |  |  |  |
| Making life cycle cost comparisons of alternative capital investments; |  |  |  |
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| Obtaining/calculating asset replacement values; |  |  |  |
| Undertaking financial analysis of planned income and expenditure; |  |  |  |
| Obtaining/calculating the financial and resource |  |  |  |
| Impact of deviating from plans that might result in a change in asset availability or performance (e.g. What is the financial impact of deferring the maintenance of a specific generator by six months?); |  |  |  |
| Assessing its overall financial performance; |  |  |  |
| Undertaking the ongoing identification, assessment, and control of asset-related risks. |  |  |  |

## Acceptance Criteria

Information issued via the CDE must comply with Project Information Requirements (PIR) to form part of project deliverables. As such, information circulated via the CDE needs to comply with the following:

BIM Execution Plan

Project Information Standards

Information Production Methods and Procedures

Use of shared resources

Exchange Information Requirements

Compliance Plan (required for defined project decision points)

Any information circulated in noncompliance with the acceptance criteria will be rejected at the initial QA/QC stage.

## Supporting Information

Supporting information must be used where applicable and relevant to understand and evaluate information requirements or acceptance criteria fully. Supporting information includes but is not limited to the following:

Existing site surveys

Existing information containers (Shell & Core)

Existing Asset Information (if any)

Shared resources (refer to Reference Information and Shared Resources)

# **Project Delivery and Information Planning**

## Project Information Delivery Date Management

Project dates relative to the project information delivery milestones and key decision points are to be managed by ORG through Task Information Delivery Plans (TIDP).

TIDP are to be generated and maintained by any party or team member on the project producing an information container for the entirety of their contribution to the project lifecycle. TIDP are to be issued in advance of project submissions for ORG to review and comment on; the programme will be reviewed and commented on to ensure compliance with the following:

Project Programme.

Functions and responsibilities (i.e. contract deliverables).

The time needed for ORG to review and accept information.

The time required for ORG internal assurance procedur.es (i.e. Compass Gate of PCP)

Alignment with relevant QA/QC procedure related to Key Decision Points.

The use of TIDP will ensure coordination between predecessors and dependants is analysed, ensuring compliance with the above documents. It also ensures alignment of all information containers, i.e. reports, schedules etc., as opposed to 2D production drawings only.

## Master Information Delivery Plan

Specific responsibilities for information container exchange delivery should be recorded through a Master Information Delivery Plan (MIDP). The lead appointed party shall collate individual project TIDP from each task team to produce the delivery team's Master Information Delivery Plan (MIDP). The MIDP shall incorporate or consider the following:

* Assigned responsibilities within the responsibility matrix and design responsibility matrix.
* Information predecessors and dependencies, particularly for information between task teams.
* The review time the lead appointed party will require to review and authorize the information model.
* The review time ORG will need to review and accept the information model.

Following the production of the MIDP, the lead appointed party shall ensure the following:

* Deliverables and dates are baselined within the MIPD.
* Inform each task team of the MIDP production.
* Notify the task team if any changes are required to their TIDP.
* Inform ORG of any risks or issues which could impact the project information delivery milestones.

## Federation Strategy & Information Breakdown

The purpose of the federation strategy and the Information Container (model) breakdown structure is to help plan the production of information by separate task teams to the appropriate Level of Information Need at each project stage.

The breakdown of information containers relevant to their disciplines should be outlined and defined in the BEP. The breakdown of these information models should consider possible further splitting of the models (due to size or package) at later stages and should be planned for.

Identifying and breaking the information into packages/ zones early will ensure the models' stability and size.

## Handover Information Requirements

It is required that construction information will consider 'as built' conditions on-site within the handover. As 2D drawings are solely derived from 3D Project Information Model(s), models are to consider relevant as-built aspects.

Site verification will also ensure any tolerances or deviations on site are captured in project information models, which will transition into asset information models; this will be coordinated through the project Cloud-Based Issue Tracker: Dalux.

# **Information Management Systems**

## CDE Management

The project Common Data Environment (CDE) software platform for the project is Name of Common Data Environment (CDE).

The Common Data Environment (CDE) enables multidisciplinary design teams to collaborate and share information in a managed environment in which the accrual and development of information follow the design, construction, and operation sequence.

Refer to the project CDE Protocol, which outlines the CDE for the project lifecycle; the protocol is aligned with the definition and use of a CDE as part of the ISO 19650 suite of documents. In addition, revisions and status codes defined in ISO 19650-2:2018 (Incorporating corrigendum February 2021) need to be implemented as drawing information and metadata.

## Information Container Identification

The unique ID for information containers shall comply with the project CDE Protocol developed to align with the ISO 19650-2:2018 (Incorporating corrigendum February 2021) National Annex standard. Naming conventions for Information Containers shall be strictly adhered to. Any information issued within the CDE in noncompliance with the Information Container Identification protocol shall be rejected as part of QA/QC compliance.

## Information Exchange Formats

All project Information Containers will need to be exchanged using an IFC file type and rvt format for models.