Exchange Information Requirements

Employer's requirements

January 2026

Contents

Summary

This document is the Exchange Information Requirements for use on all DfE delivered schemes using the DfE Construction Framework 2025 (CF25)[1]. The completed Exchange Information Requirements forms part of the DfE's information management requirements for schemes and shall be read in conjunction with:

- Project's Information Protocol
- Detailed Exchange Information Requirements
- Project's Information Production Methods and Procedures
- Project's Information Standard

Review date

This document shall normally be reviewed at 12-month intervals however, DfE reserve the right to update it at any time[2].

Who this publication is for?

This resource is for:

- local authorities (for community, voluntary-controlled schools, foundation schools and maintained nursery schools)
- academy trusts (for academies and free schools)
- governing bodies (for voluntary-aided schools)
- school/college leaders, staff and governing bodies in; further education colleges and designated institutions, sixth form colleges, maintained schools, academies and free schools, pupil referral units, City Technology Colleges, non-maintained special schools and maintained nursery schools
- technical professionals involved in the design, construction and maintenance of school and college premises.

Academy trusts with a religious character and the responsible bodies for voluntary-aided and voluntary controlled schools should engage with the land/site trustees for their land and buildings and the relevant religious body, most often their Diocese.

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[1] When not using the DfE Construction Framework 2025, seek appropriate advice on how the DfE's Employer's Requirements can be incorporated into the relevant Contract(s).

[2] Where this document has been incorporated into a Scheme Contract, the version which is incorporated at the date of that Scheme Contract shall apply under the terms of that Scheme Contract, unless varied in accordance with the terms of the relevant Scheme Contract.

Document history

This table lists the key changes in each update

Revision code	Status code	Date	Amendment
C01	A	2026-01-12	GOV.UK publication

The DfE and its agents and advisers accept no liability whatsoever for any expense, liability, loss, claim or proceedings arising from reliance placed upon this resource.

Abbreviations

For the list of commonly used abbreviations in the context of DfE's information management requirements, refer to the Project's Information Standard.

References

A number of documents and files, in whole or in part, are referenced in this resource. Where a date is referenced, the edition cited applies. Where a date is not referenced the latest edition of the referenced resource, document or file (including any amendments) applies.

1 Introduction

1.1 DfE's vision and objectives

The Technical Advisor (on behalf of the Department for Education (DfE)), Contractor and their delivery team shall comply with principles of the UK BIM Framework (described further in 1.2 The UK BIM Framework and the BS EN ISO 19650 series) in order to:

- drive consistently better design and build quality and performance in education buildings and their outdoor environments
- create appropriate and accurate information for the DfE and Responsible Body to utilise during both the delivery phase and operational phase of asset(s) which is also required to satisfy the Golden Thread of Information obligations under the Building Safety Act 2022
- support better information management throughout the life of projects for DfE, Contractor and their associated supply chain
- generate a smooth transition from design and construction through to commissioning, handover and operation, and
- comply with The Construction Playbook and Annex B: Information Management Mandate of the Transforming Infrastructure Performance: Roadmap to 2030

1.2 The UK BIM Framework and the BS EN ISO 19650 series

The UK BIM Framework is coordinated by the British Standards Institution (BSI) and nima (formerly known as the UK BIM Alliance). The UK BIM Framework website can be found here: https://ukbimframework.org/

The UK BIM Framework sets out the overarching approach for implementing BIM (Building Information Modelling) in the UK using the framework for managing information provided by the ISO 19650 series. It includes:

- the published standards called upon to implement BIM in the UK
- UK BIM Framework guidance
- useful links to other resources

The development of this Exchange Information Requirements document is aligned to the processes set out in the BS EN ISO 19650 series and with the current published guidance available. It is likely that the guidance will be updated during the life of this framework and where possible the use of current best practice is encouraged.

1.3 DfE's Information Management Requirements

DfE's approach to information management aligns to the requirements of the BS EN ISO 19650 series including establishing the resources required by these standards. The

resources have been developed at a DfE framework level but also, where appropriate, allow for modification for specific project/scheme requirements.

The following resources have been prepared by DfE:

- Exchange Information Requirements (including the information management function and information delivery milestones) – this resource
- Detailed Exchange Information Requirements (template where information requirements can be adjusted for each project as appropriate)
- Project's Information Standard (template allowing for appropriate modification for the project by the Technical Advisor (green items) and with any additions or amendments proposed as part of the Contractor's (pre-appointment) BIM Execution Plan (orange items) and subsequently as part of the Contractor's BIM Execution Plan (red items)). Refer to B1 Project's Information Standard for more information
- Project's Information Production Methods and Procedures (template allowing for appropriate modification for the project by the Technical Advisor (green items) and with any additions or amendments proposed as part of the Contractor's (pre-appointment) BIM Execution Plan (orange items) and subsequently as part of the Contractor's BIM Execution Plan (red items)). Refer to B2 Project's Information Production Methods and Procedures for more information
- Project's Information Protocol[3] (with completed information particulars once the Contractor is appointed). Refer to B3 Project's Information Protocol for more information

Where there is any inconsistency between the resources forming the Information Managements Requirements, this shall be dealt with in accordance with the Scheme Contract.

1.4 DfE's Exchange Information Requirements

DfE have set out their exchange information requirements in accordance with BS EN ISO 19650-2 clause 5.2.1.

This resource shall be read in conjunction with the Detailed Exchange Information Requirements which set out more detail that is not appropriate for inclusion in this resource format.

This resource shall be read in conjunction with all other documentation produced to support the ISO 19650 process.

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[3] This is referred to as the 'BIM Protocol' in Contract.

1.5 DfE Construction Framework 2025

The Exchange Information Requirements and the Detailed Exchange Information Requirements set out clearly the information requirements of the DfE. Compliance with the full suite of the DfE's Information Management Requirements (which includes the Project's Information Standard, Project's Information Production Methods and Procedures and Project's Information Protocol) is required across both the high and low value bands[4].

1.6 Expression of Interest (EoI) / Preliminary Invitation to Tender (PITT) / Invitation to Tender (ITT) / Invitation to Submit Proposal (ISP) information

This section is developed in accordance with BS EN ISO 19650-2 clauses 5.2.4.

The following information shall be provided by DfE as part of the Expression of Interest (EoI) and subsequent Preliminary Invitation to Tender (PITT) or Invitation to Tender (ITT) or Invitation to Submit Proposal (ISP)[5] package:

- the Exchange Information Requirements
- the Detailed Exchange Information Requirements
- the Project Programme which includes the information delivery milestones
- the Task Information Delivery Plan prepared by the Technical Advisor
- the Project's Information Standard
- the Project's Information Production Methods and Procedures, and
- the Project's Information Protocol (with completed information particulars)

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[4] The Detailed Exchange Information Requirements includes a 'ISO 19650 decision model' to determine whether BS EN ISO 19650 is implemented at an information management document level only (i.e., excludes models).

[5] The information exchange point for providing this information will vary by value band. Refer to the Detailed Exchange Information Requirements for details.

2 Information requirements

This section is developed in accordance with BS EN ISO 19650-2 clause 5.2.1 a).

These information requirements have been established to be served during appointment, and in doing so have considered:

- the Organisational Information Requirements
- the Asset Information Requirements (operational), and
- the Project Information Requirements (delivery)

The information requirements identified at these different levels are fully incorporated into the Exchange Information Requirements and the Detailed Exchange Information Requirements.

2.1 Information deliverables (documentation)

The Detailed Exchange Information Requirements set out the precise information (deliverables) required to be delivered to the DfE for each stage of the project and shall be read in conjunction with this resource.

The Detailed Exchange Information Requirements include the information required as part of the tender response phase as well as the information requirements to be satisfied for the specific project at each RIBA Plan of Work stage.

The detailed information requirements include the following:

- REQ – confirmation that this information requirement (deliverable) is required to be provided for the project. The Technical Advisor is responsible for ensuring this is project specific
- ID – a unique reference number to identify each information requirement
- Name – this is the name of the information deliverable required by DfE
- Content requirements – the level of information needed to satisfy the information requirement. This shall be delivered in conjunction with the other level of information need requirements for the deliverable e.g. scale, format etc
- Structure[6] – sets out whether the information is 'structured' or 'unstructured'
- Form of information – the form of information that the information requirement shall be provided in
- Exchange format(s) – the format(s) that DfE require the information requirement to be provided in. Other formats may be required to be exchanged between the

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[6] The definition of 'structured' versus 'unstructured' information varies. For the purposes of this resource, structured information shall mean 'information structured in accordance with a recognised national or international industry schema'.

Contractor and their delivery team. These shall be identified in the Contractor's own exchange information requirements

- Scale – the required scale for when information is provided in a 'drawing' form
- Shared resources – column describes whether a template is available to create the information requirement. Where this is the case, the template shall be used unless otherwise agreed
- Receiving party – sets out the primary party receiving the information requirement
- Delivering party – sets out the accountable party for the delivery of the information requirement. Note: Responsibility can be further allocated in a detailed responsibility matrix as required by the delivery team
- Information classification – this information shall be used to identify the information requirement on the task/master information delivery plans, within the project's common data environment and for the Category field of the COBie Documents tab. This utilises level 3 of the Uniclass PM Project Management table
- Information Exchange Code – sets out the information exchange code for when the deliverable is required
- Information Exchange Code and Title – sets out the information exchange code and title for when the deliverable is required
- IE001 – sets out if the information requirement is required for delivery during RIBA Stage 0 (Outline Brief)
- IE101 and IE102 – sets out if the information requirement is required for delivery during RIBA Stage 1 (Feasibility 1.1 and 1.2)
- IE201 – sets out if the information requirement is required for delivery during RIBA Stage 2 (Stage submission - Feasibility 2)
- IE202 – sets out if the information requirement is required for delivery during the Expression of Interest (EoI) phase
- IE211 – sets out if the information requirement is required for delivery during the Engagement Based Selection Route (EBSR) Preliminary Invitation to Tender (PITT) phase
- IE212 – sets out if the information requirement is required for delivery during the Engagement Based Selection Route (EBSR) Preliminary Invitation to Tender (PITT) response phase
- IE213 and IE221 – sets out if the information requirement is required for delivery during the Engagement Based Selection Route (EBSR) and Submission Based Selection Route (SBSR) Invitation to Tender (ITT) phase
- IE214 and IE222 – sets out if the information requirement is required for delivery during the Engagement Based Selection Route (EBSR) and Submission Based Selection Route (SBSR) Invitation to Tender (ITT) response phase
- IE231 – sets out if the information requirement is required for delivery during the Direct Allocation and Future Schemes Invitation to Submit Proposal (ISP) phase
- IE232 – sets out if the information requirement is required for delivery during the Direct Allocation and Future Schemes Invitation to Submit Proposal response phase

- IE241 – sets out if the information requirement is required for delivery during the Appointment (Pre-Construction Services Agreement) phase
- IE301 - sets out if the information requirement is required for delivery during RIBA Stage 3 (Planning submission for review)
- IE311 – sets out if the information requirement is required for delivery during RIBA Stage 3 (Remaining stage submission)
- IE401 – sets out if the information requirement is required for delivery during RIBA Stage 4 (Stage submission)
- IE501 – sets out if the information requirement is required generally for delivery during RIBA Stage 5 (General)
- IE511 – sets out if the information requirement is required for delivery during RIBA Stage 5 (Design Submission Procedure). Previously referred to as Reviewable Design Data (RDD)
- IE521 – sets out if the information requirement is required for delivery during RIBA Stage 5 (Pre-Handover)
- IE601 – sets out if the information requirement is required for delivery at the beginning of RIBA Stage 6 (Handover)
- IE611 – sets out if the information requirement is required for delivery at the end of RIBA Stage 6 (End of Rectification Period)
- Discipline Code – sets out the discipline code typically associated with the information requirement
- Discipline Code and Title– sets out the discipline code and title typically associated with the information requirement

2.1.1 Exchange format(s)

The information exchange format(s) required by DfE are set out in the Detailed Exchange Information Requirements.

The following is noted against the formats identified:

- IFC-SPF – IFC-SPF files shall be provided in accordance with either buildingSMART International's IFC2x3 TC1 (PAS/ISO 16739:2005) schema or IFC4 ADD2 TC1 (ISO 16739-1:2018) schema
- JPG – Required for images and photographs
- MPEG – Required for animations and movies/videos
- Native – Where native files are listed these shall be provided in their specific native format. The precise format for information exchanges shall be listed on the Task/Master Information Delivery Plan
- PDF – No older than version 7.0. PDFs shall be indexed where documents are of substantial length i.e., over 50 pages
- XLSX – Spreadsheet(s) in Office Open XML workbook format
- XLSM – Macro-enabled spreadsheet(s) in Office Open XML workbook format

2.1.2 File sizes

No limit on file size is prescribed by DfE but consideration for efficient exchange between software platforms shall be considered by the Contractor and the delivery team. For example, on a small project it may be effective to share a single building services model rendition (i.e., IFC-SPF file) but on larger projects it may be more effective to consider sharing a series of model renditions (e.g., Electrical, Mechanical and Public Health). The exchange of information shall be considered as part of the federation strategy to be provided in the BIM Execution Plan.

2.2 Geometrical information

This section shall be read in conjunction with the Detailed Exchange Information Requirements.

Geometrical requirements are set out against entities as set out in PAS/ISO 16739:2005 (IFC2x3 TC1), with a corresponding description.

2.3 Alphanumerical information

2.3.1 Alphanumerical information requirements - COBie sheets

This section shall be read in conjunction with the Detailed Exchange Information Requirements.

The information sets out all the sheets available within COBie along with a description. The table also sets out which sheets are required and optional along with the type of information that each sheet satisfies (i.e., asset, operational or supplementary).

The information delivery milestones confirm when the sheet is required. Only sheets that state 'YES' shall have information completed within the COBie deliverable although all sheets including the 'PickList' sheet shall be included.

Sheets that have 'n/a' for all information delivery milestones are deemed not required.

The COBie sheets requirement shall be read in conjunction with 2.3.2 Alphanumerical information requirements - COBie fields.

2.3.2 Alphanumerical information requirements - COBie fields

This section shall be read in conjunction with the Detailed Exchange Information Requirements.

COBie fields: The information provided sets out all standard COBie fields and some additional user defined fields. Sheets, definitions, examples and placeholder values are provided alongside these fields.

Purposes: The purposes for why information is required are set out in detail in the Detailed Exchange Information Requirements.

Delivery mechanism: As a minimum all information listed as required shall be provided in the required COBie output for each asset. Where possible information shall also be provided in the native model(s) and within IFC-SPF format model(s) aligned to the IFC2x3 TC1 (PAS/ISO 16739:2005) schema. Producing information within native models for compliant IFC-SPF export allows both native and IFC-SPF models to be checked using automated rule-based checking.

Information delivery milestones: Each COBie field shown as 'YES' shall be provided for the required RIBA Stage. Where 'YES (PL)' is shown the information should be a compliant placeholder value e.g., 'n/a' or the actual value.

COBie shall be provided at the following RIBA stages:

- RIBA Stage 3: Spatial Coordination
- RIBA Stage 4: Technical Design
- RIBA Stage 5: Manufacturing and Construction
- RIBA Stage 6: Handover

2.3.3 Alphanumerical information requirements - Objects

This section shall be read in conjunction with the Detailed Exchange Information Requirements.

Objects are listed using the entities set out in the IFC2x3 TC1 (PAS/ISO 16739:2005) schema, with each entity provided with a corresponding description.

The listed entities are then identified as to whether they are required for Planned Preventive Maintenance (PPM) and therefore are required for inclusion with the required COBie deliverable. Only entities that state 'YES' shall be included within the COBie deliverable.

Each asset then has the data that is required for the corresponding object type, occurrence (referred to as Component in COBie) and system.

The key for the table provided in the Detailed Exchange Information Requirements is as follows:

- 3 - Required initially at the completion of RIBA Stage 3 and then Stages 4, 5 & 6
- 4 - Required initially at the completion of RIBA Stage 4 and then Stages 5 & 6

- 5 - Required initially at the completion of RIBA Stage 5 and then Stage 6
- 6 - Required at RIBA Stage 6 only
- PL - Valid placeholder only required for inclusion with the COBie deliverable
- R – Reference to other information within COBie

2.4 Information exchange milestones

The formal process of exchanging information between DfE, Technical Advisor, and Contractor is referred to as an 'information exchange'. An information exchange can be bi-directional (e.g., from the Technical Advisor to the Contractor and from the Contractor to the Technical Advisor) depending upon the stage of the project. Formal information exchanges are required in order to support key decision points and/or delivery milestones in the project.

There may be a number of information exchanges within a defined stage; these are annotated number+n. The information requirement provides scope/context for each information exchange; they do not determine the nature of information exchange content.

The Contractor is required to submit information in accordance with the delivery milestones. The information delivery milestones have been developed in accordance with BS EN ISO 19650-2 clause 5.1.3.

DfE have established the project's information delivery milestones in accordance with the project's plan of work (i.e., RIBA Plan of Work 2020).

In doing this, DfE have considered:

- DfE's key decision points and delivery obligations (if any)
- the nature and substance of information to be delivered at each key decision point, and
- the date(s) relative to each key decision point that the information model is to be delivered

Information exchange milestone	Engagement Based Selection Route (EBSR)	Submission Based Selection Route (SBSR)	Direct Allocation and Future Schemes (ISP)
RIBA Stage 0: Strategic Definition	-	-	-
IE001: Outline Brief	n/a	n/a	n/a
RIBA Stage 1: Preparation and Briefing	-	-	-
IE101: Feasibility 1.1	n/a	n/a	n/a
IE102: Feasibility 1.2	n/a	n/a	n/a
RIBA Stage 2: Concept Design	-	-	-
IE201: Stage submission (Feasibility 2)	n/a	n/a	n/a
IE202: Expression of Interest (EoI)	Minimum 4 weeks prior to PITT	Minimum 4 weeks prior to PITT	n/a
IE211: Preliminary Invitation to Tender (PITT)	Week 0	n/a	n/a
IE212: Preliminary Invitation to Tender (PITT) Response	Week 1	n/a	n/a
IE213/IE221/IE231: Invitation to Tender (ITT) / Invitation to Submit Proposal (ISP)	Week 3	Week 0	Week 0
IE214/IE222/IE232: Invitation to Tender (ITT) / Invitation to Submit Proposal (ISP) Response	Week 11	Week 3	Week 3 (No ESI) / Week 2 (With ESI)
IE241: Appointment (Selected Panel Member)	Weeks 15 -16	Weeks 7 - 8	Weeks 7 - 8 (No ESI) / Weeks 3 - 4 (With ESI)
RIBA Stage 3: Spatial Coordination	-	-	-

Information exchange milestone	Engagement Based Selection Route (EBSR)	Submission Based Selection Route (SBSR)	Direct Allocation and Future Schemes (ISP)
IE301: Planning submission for review	Week 23	Week 22	Week 22 (No ESI) / Week 18 (With ESI)
IE311: Remaining stage submission[1]	Week 26	Week 25	Week 25 (No ESI) / Week 21 (With ESI)
RIBA Stage 4: Technical Design	-	-	-
IE401: Stage submission[2] (Contractor's Proposals)	Week 37	Week 36	Week 36 (No ESI) / Week 32 (With ESI)
RIBA Stage 5: Manufacturing and Construction	-	-	-
IE501: General	As required	As required	As required
IE511: Design Submission Procedure (DSP)	In line with Schedule 1 of Contract	In line with Schedule 1 of Contract	In line with Schedule 1 of Contract
IE521: Stage submission (Pre-Handover)	3 weeks prior to Construction completion	3 weeks prior to Construction completion	3 weeks prior to Construction completion
RIBA Stage 6: Handover	-	-	-
IE601: Post-Handover	First week of RIBA Stage 6	First week of RIBA Stage 6	First week of RIBA Stage 6
IE611: Stage submission (End of Rectification Period)	4 weeks prior to end of Rectification Period	4 weeks prior to end of Rectification Period	4 weeks prior to end of Rectification Period

[1] PCSA payment milestone 2 shall be dependent upon stage approval

[2] PCSA payment milestone 5 shall be dependent upon stage approval

2.4.1 DfE's information delivery obligations

In order to complete the successful information exchange for RIBA Stage 5 (Manufacturing and Construction) and RIBA Stage 6 (Handover) it will be necessary for the DfE/School/College to confirm the final required room numbering for each space. This shall be completed by either marking up a set of GA floor plans or completing a schedule (i.e., RoomTag field for the COBie Space workbook). The DfE/School/College shall provide this information to the Contractor in sufficient time ahead of ordering final signage to allow the Contractor to install the required signage. The Contractor shall be responsible for confirming with the DfE/School/College when this information is required.

3 Level of information need

This section is developed in accordance with BS EN ISO 19650-2 clause 5.2.1 b) and the principles set out in BS EN ISO 7817-1:2024 Building Information Modelling. Level of Information Need – Concepts and principles.

Level of information need is broken down into three areas for this project:

- documentation
- geometrical
- alphanumerical

The level of information need is set out against each information requirement within the Detailed Exchange Information Requirements.

4 Acceptance criteria

This section is developed in accordance with BS EN ISO 19650-2 clause 5.2.1 c).

For the DfE/Technical Advisor to accept information the following shall be used as a measure of compliance for each information requirement:

- the level of information need (as set out in 3 Level of information need and in the Detailed Exchange Information Requirements)
- the Project's Information Standard (including any agreed additions and amendments provided by the Contractor and their associated delivery team)
- the Project's Information Production Methods and Procedures (including any agreed additions and amendments provided by the Contractor and their associated delivery team), and
- the use of reference information and shared resources

4.1 Key Performance Indicators

Key Performance Indicators (KPI) and Management Information (MI)/Management Information Requirements (MIR) will be collected and measured throughout the life cycle of DfE Frameworks. The framework management team will collate the scores and comments to arrive at an overall KPI score and ranking within each lot/value band.

For DfE Construction Framework 2025 (CF25) KPI/MIR templates will be sent to Contractors. The templates are then required to be completed and returned by the date indicated.

5 Supporting information

This section is developed in accordance with BS EN ISO 19650-2 clause 5.2.1 d).

Available supporting information is set out in the Detailed Exchange Information Requirements under the various procurement stages e.g., Expression of Interest (EoI), Preliminary Invitation to Tender (PITT), Invitation to Tender (ITT) and Invitation to Submit Proposal (ISP).[7]

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[7] DfE templates and shared resources will be made available to all DfE Construction Framework 2025 panel members.

6 Security-minded approach to information management

6.1 Security triage process

A security triage process shall be undertaken in accordance with BS EN ISO 19650-5 for each project. The responsibility for ensuring the security triage process is carried out sits with the Technical Advisor. The outcome of the security triage process shall be documented in the Project's Information Standard in accordance with BS EN ISO 19650-5 clause 4.8.

Where the Technical Advisor identifies that a security minded approach is required (i.e., ST1, ST2 or ST3) they shall discuss with the DfE's Project Manager the course of action to be taken. This may involve the appointment of a specialist Security Consultant and the preparation of a Security Management Plan.

Appendix A – Information management function

A1 Information management function – DfE

DfE will have regard to the effective management of information throughout the project, and this will reflect the long-term asset information strategy of the DfE and Responsible Body, as described in BS EN ISO 19650-1 clause 5.3.

DfE shall be accountable and responsible for completing the Contractor's appointment documents for each project, ensuring that the documentation associated with information management is included.

In accordance with BS EN ISO 19650-2 clause 5.1.1, DfE have nominated the Technical Advisor[8] to undertake part of the information management function on behalf of DfE. In accordance with the standard, DfE have established a scope of services for the information management function which is provided in A2 Information management function – Technical Advisor.

A2 Information management function – Technical Advisor

In accordance with BS EN ISO 19650-2 clause 5.1.1, DfE have nominated the Technical Advisor to undertake part of the information management function on behalf of the DfE.

The Technical Advisor shall be responsible for the following activities/tasks on behalf of the DfE:

RIBA Stage 1: Preparation and Briefing

- ensure that the Project Programme includes the information delivery milestones that are identified in the Exchange Information Requirements and Detailed Exchange Information Requirements
- ensure lessons learned workshops are included in the Project Programme
- carry out the security triage process to determine whether a security minded approach to information management is required for the project and document the outcome in Section 7.1 of the Project's Information Standard. Note: Where a security minded approach is required, a security specialist may need to be appointed
- produce a Task Information Delivery Plan of the proposed information deliverables for the project

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[8] The Technical Advisor is responsible for ensuring the tasks required are fulfilled, but this role may be carried out by different individuals or by individuals from another organisation appointed by the Technical Advisor. The name of the organisation and name(s)/email address(es) of the individual(s) performing the information management function shall be documented under Section 5.1.3 of the Project's Information Standard.

- update the Project's Information Standard to include any project specific requirements; as a minimum this shall include (updating all items in green):
  - updated file name and revision of the file
  - updated 'Project code', 'Project name' and date on the front page
  - updated 'Document history - Project specific' table on page 7
  - 4.5.1 Asset classification – updated to ensure latest versions of Uniclass tables are referenced
  - 5.1.3 Originator codes – addition of the organisation name and code for the Technical Advisor and any other organisations (e.g., survey organisations) involved in the early stages of the project before Contractor appointment
  - 5.1.4 Functional breakdown codes – addition of project specific Building/Block Description(s)/Name(s)
  - 5.1.10 File naming examples – updated examples to include agreed project code
  - 5.2.1 Project nomenclature – completion of all fields with project specific data
  - 5.2.2 Site nomenclature – completion of all fields with project specific data
  - 5.2.3 Building(s) nomenclature – completion of all fields with project specific data
  - 6.1 Information sharing at tender phase – ensure platform is correctly identified
  - 6.3 Distributed common data environments – selection/addition of appropriate text to suit contract option
  - 7.1 Outcome of the security triage process – record the outcome of the security triage process, and
  - 7.3 Disclosure of information – selection/addition of appropriate text to suit contract option
- update the Project's Information Production Methods and Procedures to include any project specific requirements; as a minimum this shall include (updating all items in green):
  - updated file name and revision of the file
  - updated 'Project code', 'Project name' and date on the front page
  - updated 'Document history - Project specific' table on page 6
  - 3 Capture of existing asset information – selection and amendment of appropriate text/table together with any additional text to suit the specifics of the project
- produce a schedule of the project's reference information and shared resources that the DfE intends to share with the Contractor during the tender process or appointment. The schedule shall include the suitability for which the information can be used by the Contractor once appointed
- ensure any information being created or shared by appointed parties is in accordance with the Project's Information Standard

RIBA Stage 2: Concept Design

- review and update the Detailed Exchange Information Requirements and determine which items are not applicable to the project[9]. Prior to tender, ensure the project-specific Detailed Exchange Information Requirements file is password protected using the methodology agreed with the DfE
- assemble the reference information and shared resources intended to be provided to the Contractor during the tender process and/or appointment and upload to the agreed EDMS (as documented in the Project's Information Standard). In doing this, the Technical Advisor's Information Manager shall consider:
  - o reference information or shared resources identified during project initiation
  - o information generated during previous stages of the project, and
  - o ensure any information being created or shared by appointed parties is in accordance with the Project's Information Standard

At tender response phase for the Contractor (note: timescales may vary depending on value band), the Technical Advisor shall review the:

- (pre-appointment) BIM Execution Plan
- Capability and Capacity Assessment Summary
- Mobilisation Plan and Risk Register all against the evaluation criteria documented in Appendix C – Tender response requirements and evaluation criteria, and
- provide a report on the tender response of each prospective Contractor for inclusion within the Technical Advisor's Tender Response Report

In advance of PCSA signature/Contractor appointment, the Technical Advisor shall:

- complete the Information particulars within the Project's Information Protocol
- ensure that the Contractor has provided the following documentation in line with the Exchange Information Requirements and Detailed Exchange Information Requirements during the appointment phase:
  - o BIM Execution Plan
  - o Master Information Delivery Plan
  - o Detailed Responsibility Matrix
- update the Project's Information Standard to incorporate agreed additions and amendments proposed by the Contractor in their (pre-appointment) BIM Execution Plan and BIM Execution Plan; as a minimum this shall include (updating all items in orange and red):

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[9] The Detailed Exchange Information Requirements contains a 'REQ' column, the purpose of which is to identify whether a particular deliverable is required for the project. Deliverables that are not applicable to the project shall have their value changed to 'NO' using the PickList. Deliverables shall then be hidden from view using the 'REQ' column filter and deselecting 'NO', rather than hiding the individual row, which can lead to issues when columns are unfiltered. It is important to note that no requirements shall be deleted from the spreadsheet, only hidden using the method above, if not required.

- 2.2.11 Coordinates (if available) – completion of all fields with project specific data
- 3.1 Exchange formats – updated to show agreed exchange formats between software solutions
- 5.1.3 Originator codes – addition of the organisation name and code for the Contractor and their delivery team
- 5.1.4 Functional breakdown codes – additional codes as proposed by the Contractor
- 5.2.4 Building storey (Floor) nomenclature – completion of all fields with project specific data
- update the Project's Information Production Methods and Procedures to incorporate agreed additions and amendments proposed by the Contractor in their (pre-appointment) BIM Execution Plan and BIM Execution Plan; as a minimum this shall include (updating all items in orange and red):
  - 4.4 Generating native models – Software specific – addition of project specific information
  - 4.6 Generating IFC-SPF files – Software specific – addition of project specific information
  - 4.7.1 Generating federated coordination models – addition of project specific information
  - 4.7.2 Generating federated information models – addition of project specific information
  - 4.8 Generating COBie – addition of project specific information
  - 5.3.1 Native model review – addition of project specific information
  - 5.3.2 IFC-SPF file review – addition of project specific information
  - 5.3.3 Federated model(s) review – addition of project specific information
  - 6.5 COBie review – addition of project specific information
  - 8.1 Project's common data environment – addition of project specific information
  - 8.2 Distributed common data environment(s) – addition of project specific information
  - 9.5 Acceptance workflow – addition of project specific information
- ensure that the Contractor has established the project's common data environment in accordance with the Exchange Information Requirements

RIBA Stage 3: Spatial Coordination

- review and accept the information model on behalf of the DfE/School/College in accordance with BS EN ISO 19650-2:2018 clause 5.7.4 at the completion of RIBA Stage 3
- download two archives from the project's common data environment, one capturing the review outcome (e.g., S5-Pnn with watermark), the other capturing published deliverables (e.g., A4-Cnn) and upload to the DfE's Electronic Data Management System (EDMS)

- produce an Information Management Report (see [E2 Information management reports (Technical Advisor)](#) for contents) at the end of RIBA Stage 3
- arrange and chair a lessons learned workshop, in accordance with BS EN ISO 19650-2 clause 5.8.2, at the end of RIBA Stage 3 with the Contractor and delivery team to review and document lessons learned
- complete the Lessons Learned Register and upload to the project's common data environment

RIBA Stage 4: Technical Design

- review and accept the information model on behalf of the DfE/School/College in accordance with BS EN ISO 19650-2 clause 5.7.4 at the completion of RIBA Stage 4
- download two archives from the project's common data environment, one capturing the review outcome (e.g., S5-Pnn with watermark), the other capturing published deliverables (e.g., A4-Cnn) and upload to the DfE's Electronic Data Management System (EDMS)
- produce an Information Management Report (see [E2 Information management reports (Technical Advisor)](#) for contents) at the end of RIBA Stage 4
- arrange and chair a lessons learned workshop, in accordance with BS EN ISO 19650-2 clause 5.8.2, at the end of RIBA Stage 4 with the Contractor and delivery team to review and document lessons learned
- update the Lessons Learned Register and upload to the project's common data environment

RIBA Stage 5: Manufacturing and Construction

- review and accept the information model on behalf of the DfE/School/College in accordance with BS EN ISO 19650-2 clause 5.7.4 at the completion of RIBA Stage 5
- download two archives from the project's common data environment, one capturing the review outcome (e.g., S5-Pnn with watermark), the other capturing published deliverables (e.g., A4-Cnn) and upload to the DfE's Electronic Data Management System (EDMS)
- produce an Information Management Report (see [E2 Information management reports (Technical Advisor)](#) for contents) at the end of RIBA Stage 5
- arrange and chair a lessons learned workshop, in accordance with BS EN ISO 19650-2 clause 5.8.2, at the end of RIBA Stage 5 with the Contractor and delivery team to review and document lessons learned
- update the Lessons Learned Register and upload to the project's common data environment

RIBA Stage 6: Handover

- review and accept the information model on behalf of the DfE/School/College in accordance with BS EN ISO 19650-2 clause 5.7.4 at the completion of RIBA Stage 6
- download two archives from the project's common data environment, one capturing the review outcome (e.g., S5-Pnn with watermark), the other capturing published deliverables (e.g., A4-Cnn) and upload to the DfE's Electronic Data Management System (EDMS)
- produce an Information Management Report (see E2 Information management reports (Technical Advisor) for contents) during RIBA Stage 6
- arrange and chair a lessons learned workshop, in accordance with BS EN ISO 19650-2 clause 5.8.2, at the end of RIBA Stage 6 with the Contractor and delivery team to review and document lessons learned
- update the Lessons Learned Register and upload to the project's common data environment

This section shall be read in conjunction with the Information Management Assignment Matrix (see A4 Information Management Assignment Matrix) which covers the assignment of responsibility for the activities/tasks as documented in BS EN ISO 19650 series. The section shall be read in conjunction with the Project's Information Production Methods and Procedures which provides greater explanation of these processes.

A3 Information management function – Contractor

In accordance with BS EN ISO 19650-2 clause 5.3.1, the Contractor is required to confirm the individuals who will be performing the information management function on their behalf. The names and professional resumes shall be provided as part of the (pre-appointment) BIM Execution Plan which forms part of the tender response phase and as part of the BIM Execution Plan which forms part of the appointment phase. This information may be provided as a separate resource if preferred but shall be clearly referenced in the BIM Execution Plan.

Where a Contractor appoints a prospective appointed party or third party to undertake all or part of the information management function, the Contractor shall establish a scope of services. The scope of services shall consider the Information Management Assignment Matrix which is described in A4 Information Management Assignment Matrix.

DfE note that under BS EN ISO 19650-2 the DfE are accountable for establishing the project's common data environment. However, in accordance with BS EN ISO 19650-2, DfE require the Contractor to take on the responsibility for establishing and managing the project's common data environment throughout the duration of the project, with access to the digital information provided for a period of 12 years following the completion of RIBA Stage 6 (Handover).

A4 Information management assignment matrix

The Information Management Assignment Matrix has been developed from Table A.1 of BS EN ISO 19650-2 to be appropriate for use for DfE projects.

The Information Management Assignment Matrix sets out both the responsibilities of the DfE, Technical Advisor and the Contractor. The Contractor may wish to further allocate the responsibility for completing activities/tasks to their Appointed Parties or to a third party(s), however the Accountability for completing tasks shall remain with the Contractor and only the Responsibility can be further delegated.

Key:

- R – Responsible for undertaking activity/task
- A – Accountable for activity/task completion
- C – Consulted during activity/task
- I – Informed following activity/task completion

Index	Activity/task	Source	DfE	Technical Advisor	Contractor	Contractor Third Party	Appointed Party
1	Information management process – Assessment and Need	-	-	-	-	-	-
1.1.	Appoint individuals to undertake the information management function	-	-	-	-	-	-
1.1.1	Appoint individuals to undertake the information management function (i.e., Technical Advisor Framework)	ISO 19650-2; 5.1.1	A/R	-	-	-	-
1.1.2	Establish a scope of services for the information management function – covered in the EIR	ISO 19650-2; 5.1.1	A/R	-	-	-	-
1.1.3	Establish the tasks to be provided as part of the scope of services – covered in the EIR	ISO 19650-2; 5.1.1	A/R	-	-	-	-
1.1.4	Establish the authority that the DfE will delegate to the Technical Advisor – covered in the EIR	ISO 19650-2; 5.1.1	A/R	-	-	-	-
1.1.5	Establish the competency (knowledge or skills) that the individuals undertaking the function will need (Technical Advisor Framework)	ISO 19650-2; 5.1.1	A/R	-	-	-	-
1.2	Establishing the need for a security-minded approach	-	-	-	-	-	-

Index	Activity/task	Source	DfE	Technical Advisor	Contractor	Contractor Third Party	Appointed Party
1.2.1	Determine the range of security risks that arise through greater availability of information, integration of services and systems, and the increased dependency on technology-based systems	ISO 19650-5; 4.2	A	R	-	-	-
1.2.2	Undertake the security triage process and record the outcome	ISO 19650-5; 4.7 and 4.8	A	R	-	-	-
1.2.3	If applicable, develop and maintain a security strategy	ISO 19650-5; 6	A	R	-	-	-
1.2.4	If applicable, develop and maintain a security management plan	ISO 19650-5; 7	A	R	-	-	-
1.3	Establish the project's information requirements	-	-	-	-	-	-
1.3.1	Establish the project's information requirements by adjusting the Detailed Exchange Information Requirements to suit the specific project	ISO 19650-2; 5.1.2	A	R	-	-	-
1.4	Establish the project's information delivery milestones	-	-	-	-	-	-
1.4.1	Ensure that the project's information delivery milestones are included within the project programme	ISO 19650-2; 5.1.3	A	R	-	-	-

Index	Activity/task	Source	DfE	Technical Advisor	Contractor	Contractor Third Party	Appointed Party
1.5	Establish the Project's Information Standard	-	-	-	-	-	-
1.5.1	Establish the Project's Information Standard (framework template) and (if applicable) review the Security Management Plan	ISO 19650-2; 5.1.4	A	R	-	-	-
1.6	Establish the Project's Information Production Methods and Procedures	-	-	-	-	-	-
1.6.1	Establish the Project's Information Production Methods and Procedures (framework template) and (if applicable) and review the Security Management Plan	ISO 19650-2; 5.1.5	A	R	-	-	-
1.7	Establish the project's reference information and shared resources	-	-	-	-	-	-
1.7.1	Establish the project's reference information and shared resources	ISO 19650-2; 5.1.6	A	R	-	-	-
1.8	Establish the project's common data environment	-	-	-	-	-	-
1.8.1	Consider the Security Management Plan (if applicable) in the context of the project's common data environment	ISO 19650-5	A	I	R	-	-

Index	Activity/task	Source	DfE	Technical Advisor	Contractor	Contractor Third Party	Appointed Party
1.8.2	Implement the project's common data environment	ISO 19650-2; 5.1.7	A	I	R	-	-
1.8.3	Configure the project's common data environment for the project	ISO 19650-2; 5.1.7	A	I	R	-	-
1.8.4	Provide support for the project's common data environment	ISO 19650-2; 5.1.7	A	I	R	-	-
1.8.5	Host the project's common data environment	ISO 19650-2; 5.1.7	A	-	R	-	-
1.8.6	Manage the project's common data environment	ISO 19650-2; 5.1.7	A	I	R	-	-
1.8.7	Provide training for the project's common data environment	n/a	A	I	R	-	-
1.9	Establish the Project's Information Protocol	-	-	-	-	-	-
1.9.1	Establish the Project's Information Protocol (framework resource)	ISO 19650-2, 5.1.8	A	R	-	-	-
1.9.2	Complete the Information Particulars for the Project's Information Protocol (for the specific project)	Information Protocol supporting BS EN ISO 19650-2	A	R	-	-	-
2	Information management process - Invitation to tender	-	-	-	-	-	-

Index	Activity/task	Source	DfE	Technical Advisor	Contractor	Contractor Third Party	Appointed Party
2.1	Establish the Exchange Information Requirements	-	-	-	-	-	-
2.1.1	Establish the Exchange Information Requirements (from the framework resource) and (if applicable) review the Security Management Plan	ISO 19650-2; 5.2.1	A	R	-	-	-
2.1.2	Establish the Detailed Exchange Information Requirements to be served during the appointment	n/a	A	R	-	-	-
2.2	Assemble reference information and shared resources	-	-	-	-	-	-
2.2.1	Assemble the reference information or shared resources that the DfE intends to provide to the prospective contractors during the tender process or appointment	ISO 19650-2; 5.2.2	A	R	-	-	-
2.2.2	Establish the suitability for which the information can be used by the prospective contractors, by assigning appropriate status codes to all reference information and shared resources to indicate how they can be used	ISO 19650-2; 5.2.2	A	R	-	-	-

Index	Activity/task	Source	DfE	Technical Advisor	Contractor	Contractor Third Party	Appointed Party
2.2.3	Make reference information and shared resources available to tendering organisations in a secure environment, such as the project's common data environment	ISO 19650-2; 5.2.2	A	R	-	-	-
2.3	Establish tender response requirements and evaluation criteria	-	-	-	-	-	-
2.3.1	Establish the tender response requirements with an information sharing agreement (as applicable)	ISO 19650-2; 5.2.3	A/R	-	-	-	-
2.3.2	Establish the evaluation criteria to be used to assess the tender response	ISO 19650-2; 5.2.3	A/R	-	-	-	-
2.4	Compile invitation to tender information	-	-	-	-	-	-
2.4.1	Compile the information to be included within the invitation to tender package, including:	ISO 19650-2; 5.2.4	A	R	-	-	-
2.4.2	Ensure that the Exchange Information Requirements are included within the invitation to tender package	ISO 19650-2; 5.2.4	A/R	-	-	-	-

Index	Activity/task	Source	DfE	Technical Advisor	Contractor	Contractor Third Party	Appointed Party
2.4.3	Ensure that the Detailed Exchange Information Requirements are included within the invitation to tender package	n/a	A/R	-	-	-	-
2.4.4	Ensure that the relevant reference information and shared resources (within the project's common data environment) are included within the invitation to tender package	ISO 19650-2; 5.2.4	A/R	-	-	-	-
2.4.5	Ensure that the tender response requirements are included within the invitation to tender package	ISO 19650-2; 5.2.4	A/R	-	-	-	-
2.4.6	Ensure that the project's information delivery milestones are included within the invitation to tender package	ISO 19650-2; 5.2.4	A/R	-	-	-	-
2.4.7	Ensure that the Project's Information Standard is included within the invitation to tender package	ISO 19650-2; 5.2.4	A/R	-	-	-	-
2.4.8	Ensure that the Project's Information Production Methods and Procedures is included within the invitation to tender package	ISO 19650-2; 5.2.4	A/R	-	-	-	-

Index	Activity/task	Source	DfE	Technical Advisor	Contractor	Contractor Third Party	Appointed Party
2.4.9	Ensure that the Project's Information Protocol is included within the invitation to tender package	ISO 19650-2; 5.2.4	A/R	-	-	-	-
2.4.10	Ensure that any other information required for the invitation to tender package is included	n/a	A/R	C	-	-	-
3	Information management process - Tender response (PITT or ITT depending on Scheme procurement)	-	-	-	-	-	-
3.1	Nominate individuals to undertake the information management function	-	-	-	-	-	-
3.1.1	Appoint individuals to undertake the information management function	ISO 19650-2; 5.3.1	-	-	A/R	-	-
3.1.2	Establish a scope of services for the information management function (if appointing a prospective appointed party or third party)	ISO 19650-2; 5.3.1	-	-	A/R	-	-
3.1.3	Establish the tasks to be provided as part of the scope of services (if appointing a prospective appointed party or third party)	ISO 19650-2; 5.3.1	-	-	A/R	-	-

Index	Activity/task	Source	DfE	Technical Advisor	Contractor	Contractor Third Party	Appointed Party
3.1.4	Establish the authority that the Contractor will delegate to the prospective appointed party or third party (if appointing a prospective appointed party or third party)	ISO 19650-2; 5.3.1	-	-	A/R	-	-
3.1.5	Establish the competency (knowledge or skills) that the individuals undertaking the function will need (applicable whether delegating or not)	ISO 19650-2; 5.3.1	-	-	A/R	-	-
3.1.6	Establish probity arrangements if potential conflicts of interest may arise (if appointing a prospective appointed party or third party where probity may be an issue)	ISO 19650-2; 5.3.1	-	-	A/R	-	-
3.2	Establish the delivery team's (pre-appointment) BIM execution plan	-	-	-	-	-	-
3.2.1	Establish the delivery team's (pre-appointment) BIM Execution Plan, including:	ISO 19650-2; 5.3.2	-	-	A/R	-	-
3.3	Assess task team capability and capacity	-	-	-	-	-	-

Index	Activity/task	Source	DfE	Technical Advisor	Contractor	Contractor Third Party	Appointed Party
3.3.1	Undertake an assessment of capability and capacity to deliver information in accordance with the Exchange Information Requirements and the delivery team's proposed (pre-appointment) BIM Execution Plan	ISO 19650-2; 5.3.3	-	-	A/R	-	-
3.4	Establish the delivery team's capability and capacity	-	-	-	-	-	-
3.4.1	Establish the delivery team's capability and capacity by aggregating the assessments undertaken by each task team to produce a summary of the delivery team's capability to manage and produce information and its capacity for timely delivery of the information	ISO 19650-2; 5.3.4	-	-	A/R	-	-
3.5	Establish the delivery team's mobilisation plan	-	-	-	-	-	-
3.5.1	Establish the delivery team's proposed Mobilisation Plan that will be initiated and implemented during mobilisation	ISO 19650-2; 5.3.5	-	-	A/R	-	-
3.6	Establish the delivery team's risk register	-	-	-	-	-	-

Index	Activity/task	Source	DfE	Technical Advisor	Contractor	Contractor Third Party	Appointed Party
3.6.1	Establish the delivery team's Risk Register containing the risks associated with the timely delivery of information, in accordance with the appointing party's Exchange Information Requirements, and how the delivery team intends to manage these risks	ISO 19650-2; 5.3.6	-	-	A/R	-	-
3.7	Compile the delivery team's tender response	-	-	-	-	-	-
3.7.1	Ensure the (pre-appointment) BIM Execution Plan is included within the delivery team's tender response	ISO 19650-2; 5.3.7	-	-	A/R	-	-
3.7.2	Ensure the Capability and Capacity Assessment Summary is included within the delivery team's tender response	ISO 19650-2; 5.3.7	-	-	A/R	-	-
3.7.3	Ensure the proposed Mobilisation Plan is included within the delivery team's tender response	ISO 19650-2; 5.3.7	-	-	A/R	-	-
3.7.4	Ensure the delivery risk assessment is included within the delivery team's tender response	ISO 19650-2; 5.3.7	-	-	A/R	-	-
3.8	Carry out tender assessment of the delivery team's tender response	-	-	-	-	-	-

Index	Activity/task	Source	DfE	Technical Advisor	Contractor	Contractor Third Party	Appointed Party
3.8.1	Check the requested tender response information has been fully provided	n/a	A/R	R	-	-	-
3.8.2	Evaluate the delivery team's tender response(s) against the tender evaluation criteria	n/a	A	R	-	-	-
3.8.3	Inform delivery team(s) of the outcome of the tender assessment	n/a	A	R	-	-	-
4	Information management process - Appointment	-	-	-	-	-	-
4.1	Confirm the delivery team's BIM execution plan	-	-	-	-	-	-
4.1.1	Develop the delivery team's BIM Execution Plan in agreement with the supply chain, including:	ISO 19650-2; 5.4.1	-	I	A/R	-	C
4.1.2	Confirm the names of the individual(s) who will undertake the information management function	ISO 19650-2; 5.4.1 a)	-	I	A/R	-	C
4.1.3	Update the delivery team's information delivery strategy (as required)	ISO 19650-2; 5.4.1 b)	-	I	A/R	-	C

Index	Activity/task	Source	DfE	Technical Advisor	Contractor	Contractor Third Party	Appointed Party
4.1.4	Update the delivery team's high-level responsibility matrix (as required)	ISO 19650-2; 5.4.1 c)	-	I	A/R	-	C
4.1.5	Confirm and document the delivery team's proposed information production methods and procedures	ISO 19650-2; 5.4.1 d)	-	I	A/R	-	C
4.1.6	Agree with the DfE's Technical Advisor any additions or amendments to the Project's Information Standard	ISO 19650-2; 5.4.1 e)	-	I	A/R	-	C
4.1.7	Confirm the schedule of software, hardware and IT infrastructure the delivery team will use	ISO 19650-2; 5.4.1 f)	-	I	A/R	-	C
4.2	Establish the delivery team's Detailed Responsibility Matrix	-	-	-	-	-	-
4.2.1	Refine the high-level responsibility matrix to establish the Detailed Responsibility Matrix	ISO 19650-2; 5.4.2	-	I	A/R	-	C
4.2.2	Share the Detailed Responsibility Matrix for supply chain review and comment	n/a	-	I	A/R	-	C
4.3	Establish the Contractor's Exchange Information Requirements	-	-	-	-	-	-

Index	Activity/task	Source	DfE	Technical Advisor	Contractor	Contractor Third Party	Appointed Party
4.3.1	Establish the Contractor's Exchange Information Requirements	ISO 19650-2; 5.4.3	-	I	A/R	-	I
4.3.2	Define each information requirement	ISO 19650-2; 5.4.3 a)	-	-	A/R	-	I
4.3.3	Establish the level of information need required to meet each information requirement	ISO 19650-2; 5.4.3 b)	-	-	A/R	-	I
4.3.4	Establish the acceptance criteria for each information requirement	ISO 19650-2; 5.4.3 c)	-	-	A/R	-	I
4.3.5	Establish the dates relative to the project's information delivery milestones	ISO 19650-2; 5.4.3 d)	-	-	A/R	-	I
4.3.6	Establish the supporting information that the appointed party might need, to fully understand or evaluate each information requirement or its acceptance criteria	ISO 19650-2; 5.4.3 e)	-	-	A/R	-	I
4.4	Establish the Task Information Delivery Plan(s)	-	-	-	-	-	-
4.4.1	Establish a Task Information Delivery Plan template (if not provided by the DfE within any shared resources)	n/a	-	-	A/R	-	-

Index	Activity/task	Source	DfE	Technical Advisor	Contractor	Contractor Third Party	Appointed Party
4.4.2	Establish and maintain a Task Information Delivery Plan throughout the appointment	ISO 19650-2; 5.4.4	-	R	I	-	A/R
4.5	Establish the Master Information Delivery Plan	-	-	-	-	-	-
4.5.1	Aggregate task information delivery plans from each task team to establish the delivery team's Master Information Delivery Plan	ISO 19650-2; 5.4.5	-	I	A/R	-	I
4.5.2	Baseline deliverables and dates within the Master Information Delivery Plan	ISO 19650-2; 5.4.5	-	-	A/R	-	I
4.5.3	Inform each task team and notify if any changes are required to the Task Information Delivery Plan	ISO 19650-2; 5.4.5	-	-	A/R	-	I
4.5.4	Inform the DfE of any risks or issues which could impact on the project information delivery milestones	ISO 19650-2; 5.4.5	-	I	A/R	-	C
4.6	Updated shared resources	-	-	-	-	-	-

Index	Activity/task	Source	DfE	Technical Advisor	Contractor	Contractor Third Party	Appointed Party
4.6.1	Update the Project's Information Standard with agreed additions or amendments proposed by lead appointed parties within their (pre-appointment) BIM execution plans and subsequently throughout their appointment (including any updates required by the Security Management Plan)	n/a	A	R	I	-	I
4.6.2	Update the Project's Information Production Methods and Procedures with agreed additions or amendments proposed by lead appointed parties within their (pre-appointment) BIM execution plans and subsequently throughout their appointment (including any updates required by the Security Management Plan)	n/a	A	R	I	-	I
4.7	Complete Contractor's appointment documents	-	-	-	-	-	-
4.7.1	Complete Contractor's appointment documents	ISO 19650-2; 5.4.6	A/R	C	I	-	-

Index	Activity/task	Source	DfE	Technical Advisor	Contractor	Contractor Third Party	Appointed Party
4.7.2	Ensure the Exchange Information Requirements and Detailed Exchange Information Requirements are included in the appointment	ISO 19650-2; 5.4.6	A/R	C	I	-	-
4.7.3	Ensure the Project's Information Standard is included in the appointment with any agreed additions or amendments	ISO 19650-2; 5.4.6	A/R	C	I	-	-
4.7.4	Ensure the Project's Information Production Methods and Procedures is included in the appointment with any agreed additions or amendments	ISO 19650-2; 5.4.6	A/R	C	I	-	-
4.7.5	Ensure the delivery team's BIM Execution Plan is included in the appointment	ISO 19650-2; 5.4.6	A/R	C	I	-	-
4.7.6	Ensure the delivery team's Master Information Delivery Plan is included in the appointment	ISO 19650-2; 5.4.6	A/R	C	I	-	-
4.7.7	Ensure the Project's Information Protocol is included within the appointment	n/a	A/R	C	I	-	-
4.7.8	Manage change control process associated to lead appointed party(s) appointment documentation	n/a	A/R	C	I	-	-

Index	Activity/task	Source	DfE	Technical Advisor	Contractor	Contractor Third Party	Appointed Party
4.8	Complete appointed party's appointment documents	-	-	-	-	-	-
4.8.1	Complete appointed party's appointment documents for agreement with each appointed party	ISO 19650-2; 5.4.7	-	-	A/R	-	I
4.8.2	Ensure the Contractor's Exchange Information Requirements are included in the appointment	ISO 19650-2; 5.4.7	-	-	A/R	-	I
4.8.3	Ensure the Project's Information Standard is included in the appointment with any agreed additions or amendments	ISO 19650-2; 5.4.7	-	-	A/R	-	I
4.8.4	Ensure the Project's Information Production Methods and Procedures is included in the appointment with any agreed additions or amendments	ISO 19650-2; 5.4.7	-	-	A/R	-	I
4.8.5	Ensure the delivery team's BIM Execution Plan is included in the appointment	ISO 19650-2; 5.4.7	-	-	A/R	-	I
4.8.6	Ensure the agreed Task Information Delivery Plan is included in the appointment	ISO 19650-2; 5.4.7	-	-	A/R	-	I

Index	Activity/task	Source	DfE	Technical Advisor	Contractor	Contractor Third Party	Appointed Party
4.8.7	Ensure the Project's Information Protocol is included within the appointment	n/a	-	-	A/R	-	I
4.8.8	Manage change control process associated to appointed party(s) appointment documentation	n/a	-	-	A/R	-	I
5	Information management process - Mobilisation	-	-	-	-	-	-
5.1	Mobilise resources	-	-	-	-	-	-
5.1.1	Mobilise resources, including:	ISO 19650-2; 5.5.1	-	-	A/R	-	I
5.1.2	Confirm the resource availability of each task team	ISO 19650-2; 5.5.1	-	-	A/R	-	I
5.1.3	Develop and deliver education on topics such as the project's scope, Exchange Information Requirements and delivery milestones (knowledge required) to delivery team members	ISO 19650-2; 5.5.1	-	-	A/R	-	I
5.1.4	Develop and deliver training (skills required) to the delivery team members	ISO 19650-2; 5.5.1	-	-	A/R	-	I
5.2	Mobilise information technology	-	-	-	-	-	-

Index	Activity/task	Source	DfE	Technical Advisor	Contractor	Contractor Third Party	Appointed Party
5.2.1	Mobilise information technology, including:	ISO 19650-2; 5.5.2	-	-	A/R	-	I
5.2.2	Procure, implement, configure and test software, hardware and IT infrastructure (as required)	ISO 19650-2; 5.5.2	-	-	A/R	-	I
5.2.3	Configure and test the project's common data environment	ISO 19650-2; 5.5.2	-	-	A/R	-	I
5.2.4	Configure and test the delivery team's (distributed) common data environment and its connectivity to the project common data environment (if applicable)	ISO 19650-2; 5.5.2	-	-	A/R	-	I
5.2.5	Test the information exchange between task teams	ISO 19650-2; 5.5.2	-	-	A/R	-	I
5.2.6	Test the information delivery to the DfE	ISO 19650-2; 5.5.2	-	I	A/R	-	I
5.3	Test the Project's Information Production Methods and Procedures	-	-	-	-	-	-
5.3.1	Test and document the Project's Information Production Methods and Procedures	ISO 19650-2; 5.5.3	-	-	A/R	-	I

Index	Activity/task	Source	DfE	Technical Advisor	Contractor	Contractor Third Party	Appointed Party
5.3.2	Refine and verify the proposed information container breakdown structure is workable	ISO 19650-2; 5.5.3	-	-	A/R	-	I
5.3.3	Develop shared resources to be used by the delivery team	ISO 19650-2; 5.5.3	-	-	A/R	-	I
5.3.4	Communicate the Project's Information Production Methods and Procedures to all task teams	ISO 19650-2; 5.5.3	-	-	A/R	-	I
6	Information management process - Collaborative production of information	-	-	-	-	-	-
6.1	Check availability of reference information and shared resources	-	-	-	-	-	-
6.1.1	Check that relevant reference information and shared resources is available within the project's common data environment	ISO 19650-2; 5.6.1	-	-	-	-	A/R
6.1.2	Inform the Contractor and assess what impact not having access to reference information and shared resources could have on the Task Information Delivery Plan	ISO 19650-2; 5.6.1	-	-	I	-	A/R
6.2	Generate information	-	-	-	-	-	-

Index	Activity/task	Source	DfE	Technical Advisor	Contractor	Contractor Third Party	Appointed Party
6.2.1	Generate information in accordance with respective Task Information Delivery Plan	ISO 19650-2; 5.6.2 a)	-	-	I	-	A/R
6.2.2	Coordinate and cross-reference all information with information shared within the project's common data environment, in accordance with the Project's Information Production Methods and Procedures	ISO 19650-2; 5.6.2 c)	-	-	I	-	A/R
6.2.3	Spatially coordinate geometrical models with other geometrical models shared with the appropriate suitability, residing within the project's common data environment	ISO 19650-2; 5.6.2 d)	-	-	I	-	A/R
6.3	Undertake quality assurance check	-	-	-	-	-	-
6.3.1	Undertake a quality assurance check of each information container, in accordance with the Project's Information Production Methods and Procedures, prior to undertaking a review of the information within it	ISO 19650-2; 5.6.3	-	-	I	-	A/R
6.4	Review information and approve for sharing	-	-	-	-	-	-

Index	Activity/task	Source	DfE	Technical Advisor	Contractor	Contractor Third Party	Appointed Party
6.4.1	Undertake a review of the information within the information container, in accordance with the Project's Information Production Methods and Procedures, prior to sharing within the project's common data environment	ISO 19650-2; 5.6.4	-	-	I	-	A/R
6.5	Information model review	-	-	-	-	-	-
6.5.1	Undertake a review of the information model, in accordance with the Project's Information Production Methods and Procedures, to facilitate the continuous coordination of information across each element of the information model	ISO 19650-2; 5.6.5	-	-	I	-	A/R
7	Information management process - Information model delivery	-	-	-	-	-	-
7.1	Submit information model for Contractor authorisation	-	-	-	-	-	-
7.1.1	Submit information to the Contractor for authorisation within the project's common data environment	ISO 19650-2; 5.7.1	-	-	I	-	A/R
7.2	Review and authorise the information model	-	-	-	-	-	-

Index	Activity/task	Source	DfE	Technical Advisor	Contractor	Contractor Third Party	Appointed Party
7.2.1	Review the information model in accordance with the Project's Information Production Methods and Procedures	ISO 19650-2; 5.7.2	-	-	A/R	-	I
7.3	Submit information model for DfE acceptance	-	-	-	-	-	-
7.3.1	Submit information for DfE review and acceptance within the project's common data environment	ISO 19650-2; 5.7.3	I	I	-	-	A/R
7.4	Review and accept the information model	-	-	-	-	-	-
7.4.1	Review the information model in accordance with the Project's Information Production Methods and Procedures	ISO 19650-2; 5.7.4	A	R	-	-	I
7.4.2	Produce a report at each information exchange of the information model review carried out	n/a	A	R	I	-	I
8	Information management process - Project close-out	-	-	-	-	-	-
8.1	Archive the project information model	-	-	-	-	-	-

Index	Activity/task	Source	DfE	Technical Advisor	Contractor	Contractor Third Party	Appointed Party
8.1.1	Archive the information containers within the project's common data environment in accordance with the Project's Information Production Methods and Procedures	ISO 19650-2; 5.8.1	A	I	R	-	-
8.2	Capture lessons learned for future projects	-	-	-	-	-	-
8.2.1	Arrange and chair lessons learned workshops in accordance with workshops identified on the project programme	n/a	A	R	C	-	C
8.2.2	Capture lessons learned (using the lessons learned template) during the project. The lessons learned register shall be maintained throughout the project and uploaded to the project's common data environment	ISO 19650-2; 5.8.2	A	R	C	-	C

Appendix B – DfE's Information Management Requirements

B1 Project's Information Standard

The Project's Information Standard has been developed in accordance with BS EN ISO 19650-2 clause 5.1.4 by DfE.

The Project's Information Standard is provided under separate cover.

The Technical Advisor shall update the Project's Information Standard as appropriate to suit the specific project. This primarily involves completing all green items provided in the available template, and when complete ensuring all green text is changed to black. The resource shall be provided to prospective Contractors at Tender phase.

The Contractor shall provide proposed additions and amendments to the Project's Information Standard as part of their (pre-appointment) BIM Execution Plan during the Tender response phase. The updated version shall form part of the information included within the Contractor's appointment with DfE.

Agreed updates to the Project's Information Standard are to be carried out by the Technical Advisor as part of the appointment phase. This primarily involves updating all orange items (provided in the (pre-appointment) BIM Execution Plan) and red items (provided in the BIM Execution Plan) and any other agreed acceptable changes proposed by the Contractor. Where inserting additional sections into the Project's Information Standard, the Technical Advisor shall not change any existing section numbering to avoid issues with cross referencing. When complete the Technical Advisor shall change all orange/red text to black.

Further changes to the Project's Information Standard during the project delivery phase shall be carried out using the agreed formal change control/derogations process.

B2 Project's Information Production Methods and Procedures

The Project's Information Production Methods and Procedures has been developed in accordance with BS EN ISO 19650-2 clause 5.1.5 by DfE.

The Project's Information Production Methods and Procedures is provided under separate cover.

The Technical Advisor shall adjust the Project's Information Production Methods and Procedures as appropriate to suit the specific project. This primarily involves completing all green items provided in the available template, and when complete ensuring all green text is changed to black. The resource shall be provided to prospective Contractors at Tender phase.

The Contractor shall provide proposed additions and amendments to the Project's Information Production Methods and Procedures as part of their (pre-appointment) BIM Execution Plan during the Tender response phase. The updated version shall form part of the information included within the Contractor's appointment with DfE.

Agreed updates to the Project's Information Production Methods and Procedures are to be carried out by the Technical Advisor as part of the appointment phase. This primarily involves updating all orange items (provided in the (pre-appointment) BIM Execution Plan) and red items (provided in the BIM Execution Plan) and any other agreed acceptable changes proposed by the Contractor. Where inserting additional sections into the Project's Information Production Methods and Procedures, the Technical Advisor shall not change any existing section numbering to avoid issues with cross referencing. When complete the Technical Advisor shall change all orange/red text to black.

Further changes to the Project's Information Production Methods and Procedures during the project delivery phase shall be carried out using the agreed formal change control/derogations process.

B3 Project's Information Protocol

This section is developed in accordance with BS EN ISO 19650-2 clause 5.1.8.

The Project's Information Protocol is provided under separate cover.

DfE have established the Project's Information Protocol, as defined below, including any associated license agreements, which shall, subsequently and appropriately, be incorporated into all appointments.

In doing this, DfE have considered:

- specific obligations of the DfE, prospective Contractors and prospective appointed parties relating to the management or production of information, including the use of the project's common data environment
- any warranties or liabilities associated to the project information model
- background and foreground intellectual property rights of information
- the use of existing asset information
- the use of shared resources
- the use of information during the project, including any associated licensing terms, and
- the re-use of information following the appointment or in the event of termination

The Technical Advisor shall adjust the Project's Information Protocol, specifically the Information particulars table, as appropriate to suit the specific project. This primarily involves completing all green items provided in the available template, and when

complete ensuring all green text is changed to black. The resource shall be provided to prospective Contractors at Tender phase.

The Contractor shall provide confirmation of file names for the following resources as part of their (pre-appointment) BIM Execution Plan during the Tender response phase for inclusion in the Information particulars of the Project's Information Protocol:

- BIM Execution Plan
- Master Information Delivery Plan
- Risk Register
- Detailed Responsibility Matrix
- Mobilisation Plan

The updated version shall form part of the information included within the Contractor's appointment with DfE.

Agreed updates to the Project's Information Protocol are to be carried out by the Technical Advisor as part of the appointment phase. This primarily involves updating all orange items (provided in the (pre-appointment) BIM Execution Plan). When complete ensuring all orange text is changed to black.

B4 Security Management Plan (optional)

The Security Management Plan will be required where a project has determined that a security-minded approach to information management is required as a result of carrying out the security triage process identified by BS EN ISO 19650-5.

Where a Security Management Plan is required, it would be prepared by either the DfE or a specialist Security Consultant.

B5 Reference information and shared resources

A complete list of reference information and shared resources to be provided to the Contractor shall be produced by the Technical Advisor. This shall match the information uploaded to the technology solution used to share information at the tender phase of the project.

Appendix C – Tender response requirements and evaluation criteria

This section is developed in accordance with BS EN ISO 19650-2 clause 5.2.3.

The tender response information[10] will vary in terms of when it is required dependent on the applicable value band and framework. The timing for when this information shall be provided is set out in the Detailed Exchange Information Requirements.

C1 Tender response resource requirements - Contractor

The following information shall be provided as a tender response to the DfE's tender package for projects:

1 (pre-appointment) BIM Execution Plan (in accordance with BS EN ISO 19650-2 clause 5.3.2), to include:

- proposed names and professional résumés of the individuals who will undertake the information management function on behalf of the delivery team
- information delivery strategy
- federation strategy (including all native, IFC-SPF and federated models to be produced)
- high-level responsibility matrix
- proposed additions or amendments to the Project's Information Standard, which shall include as a minimum (i.e., all items in orange):
  - o 3.1 Exchange formats – provision of the software solutions to be used by the Contractor and the delivery team and the formats required to exchange information between solutions (note: information is to be provided in the same format as set out in the Project's Information Standard), and
  - o 5.1.3 Originator codes – provision of the Contractor and delivery team's organisation names and associated codes (note: information is to be provided in the same format as set out in the Project's Information Standard)
- proposed additions or amendments to the Project's Information Production Methods and Procedures, which shall include as a minimum (i.e., all items in orange):
  - o 4.4 Generating native models – Software specific
  - o 4.6 Generating IFC-SPF files – Software specific
  - o 4.7 Generating federated models (4.7.1 and 4.7.2) – to include the responsibility for producing the federated model(s), the file formats required

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[10] DfE have not developed templates for the requirements listed in this section as it is assumed that each Contractor (or third party) will utilise their own. The content listed however, is an Employer's Requirement and shall be provided.

for federation, the frequency of model federation and any other requirements for federating models
- o 4.8 Generating COBie – provide process(es) for generating COBie outputs
- o 5.3.1 Native model review – provide proposed process(es)
- o 5.3.2 IFC-SPF file review – provide proposed process(es)
- o 5.3.3 Federated model(s) review – provide proposed process(es) including clash detection and issue management
- o 6.5 COBie review – provide proposed process(es)
- o 8.1 Project's common data environment – details of the proposed common data environment (note: information is to be provided in the same format as set out in the Project's Information Production Methods and Procedures)
- o 8.2 Distributed common data environment(s) – details of any other common data environments to be utilised for the project, and
- o 9.5 Acceptance workflow – provide proposed process(es)
- proposed schedule of software (including versions), hardware and IT infrastructure (including the proposed project's common data environment)
- provide confirmation of file names for the following resources:
  - o BIM Execution Plan
  - o Master Information Delivery Plan
  - o Risk Register
  - o Mobilisation Plan

2 Capability and Capacity Assessment Summary[11] (in accordance with BS EN ISO 19650-2 clause 5.3.4), to include (as a minimum):

- the task team's capability and capacity to manage information, in response to the following questions:
  - o can you (the proposed team) confirm you have read and understood the Exchange Information Requirements and the Detailed Exchange Information Requirements and that you are able to deliver information in accordance with these requirements?
  - o can you (the proposed team) confirm you have read and understood the Project's Information Standard and the Project's Information Production Methods and Procedures and that you are able to deliver information in accordance with these requirements?
  - o do you (the proposed team) have experience of the proposed project's common data environment?
  - o do you (the proposed team) have experience of using other common data environments?
  - o do you (the proposed team) check documents before exchanging with other parties?

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[11] A DfE standard template is available.

- o do you (the proposed team) check geometrical information before exchanging with other parties?
- o do you (the proposed team) check alphanumerical information before exchanging with other parties?
- the task team's capability and capacity to produce information, in response to the following questions:
  - o do you (the proposed team) have experience of delivering IFC-SPF (Industry Foundation Classes) and are therefore, able to deliver this requirement?
  - o do you (the proposed team) have experience of delivering the information required for COBie (Construction-Operations Building information exchange) and are therefore, able to deliver this requirement?
  - o do you (the proposed team) have experience of using classifications and are therefore, able to deliver this requirement?
  - o do you (the proposed team) have sufficient capacity to deliver DfE's information management requirements?
  - o do you (the proposed team) need to employ a third party(s) to assist with the delivery of DfE's information management requirements?
  - o do you (the proposed team) require education and training to deliver DfE's information management requirements?
- the availability of information technology (IT) within the task team, in response to the following questions:
  - o do you (the proposed team) currently have the required hardware and software in place to deliver projects?
  - o do you (the proposed team) have software covered by appropriate service level agreements?
  - o can you (the proposed team) confirm your understanding of information security and management, including secured IT systems with updated anti-virus protection and no file exchange through unsecured systems?

3 Mobilisation Plan (in accordance with BS EN ISO 19650-2 clause 5.3.5), to include:

- testing and documenting the proposed information production methods and procedures
- testing the information exchanges between task teams
- testing the information delivery to the DfE
- configuring and testing the project's common data environment
- procuring, implementing, configuring and testing additional software, hardware and IT infrastructure
- developing additional shared resources to be used by the delivery team
- developing and delivering education (knowledge required) to delivery team members
- developing and delivering training (skills required) to the delivery team members

- recruiting additional members of the delivery team to achieve the required capacity, and
- supporting individuals and organisations that join the delivery team during the appointment

4 Risk Register (in accordance with BS EN ISO 19650-2 clause 5.3.6), to include:

- information delivery risk assessment identifying risks associated to the timely delivery of information, in accordance with the Exchange Information Requirements, and
- how the delivery team intends to manage the risks identified

The submitted information delivery risk assessment shall be a filtered or standalone risk register derived from the main/project Risk Register.

C2 Tender evaluation criteria - Contractor

The tender information provided by prospective Contractors shall be reviewed by the Technical Advisor.

The Technical Advisor shall review each submission against the requirements of the DfE's Information Management Requirements in conjunction with the Tender question(s) using the following:

- the contents of the delivery team's (pre-appointment) BIM Execution Plan
- the competency of the prospective individuals undertaking the information management function on behalf of the delivery team
- the prospective Contractor's assessment of their delivery team's capability and capacity
- the delivery team's proposed Mobilisation Plan, and
- the delivery team's information delivery risk assessment

Appendix D – Appointment resources

This section is developed in accordance with BS EN ISO 19650-2 clauses 5.4.6 and 5.4.7.

D1 Contractor's appointment resources

DfE shall be responsible for ensuring the correct resources are incorporated within the Contractor's appointment.

The following resources are deemed to be included within the appointment between the DfE and the Contractor:

- the Exchange Information Requirements
- the Detailed Exchange Information Requirements
- the Project's Information Standard (including any agreed additions or amendments)
- the Project's Information Production Methods and Procedures (including any agreed additions or amendments)
- the Project's Information Protocol (with completed Information particulars)
- the Security Management Plan (if applicable)
- the delivery team's BIM Execution Plan. Refer to D3 BIM Execution Plan, and
- the delivery team's Master Information Delivery Plan. Refer to D4 Master Information Delivery Plan

This documentation shall be incorporated into the Employer's Requirements and the Contractor's Proposals forming part of the Proposed Contract Documents.

Changes shall be managed by a change control or derogations schedule throughout the duration of the appointment. The Technical Advisor shall be responsible for managing the change control/derogations process for changes that affect the Contractor's appointment.

D2 Contractor's supply chain appointment resources

The Contractor shall be responsible for ensuring the correct resources are incorporated within their supply chain appointments.

The following resources would be expected to be included in appointments between the Contractor and their delivery team:

- the Contractor's Exchange Information Requirements. Refer to D5 Contractor's Exchange Information Requirements
- the Project's Information Standard (including any agreed additions or amendments)

- the Project's Information Production Methods and Procedures (including any agreed additions or amendments)
- the Project's Information Protocol (with completed Information particulars)
- the Security Management Plan (if applicable)
- the delivery team's BIM Execution Plan, and
- the agreed Task Information Delivery Plan(s)

Changes shall be managed by change control throughout the duration of the appointment.

D3 BIM Execution Plan

A BIM Execution Plan shall be produced by the Contractor in accordance with BS EN ISO 19650-2 clause 5.4.1. It is therefore expected to have the following content as a minimum (note: some of this content is simply updated and developed from the (pre-appointment) BIM Execution Plan):

- proposed names and professional résumés of the individuals who will undertake the information management function on behalf of the delivery team
- information delivery strategy
- federation strategy (including all native, IFC-SPF and federated models to be produced)
- high-level responsibility matrix (aligned to the Detailed Responsibility Matrix)
- proposed schedule of software (including versions), hardware and IT infrastructure (including the project's common data environment)

The following information shall be provided as an Appendix to the BIM Execution Plan to allow this information to be transposed into DfE's information management requirements by the Technical Advisor. The Appendix shall be deleted once incorporated.

- additional information for incorporation into the Project's Information Standard, which shall include as a minimum (i.e., all items in red):
  - 2.2.11 Coordinates – coordinates for the building(s) (note: information is to be provided in the same format as set out in the Project's Information Standard)
  - 5.1.4 Functional breakdown codes – confirmation of proposed functional breakdown codes for the project (note: information is to be provided in the same format as set out in the Project's Information Standard), and
  - 5.2.4 Building storey (Floor) nomenclature – provision of building storey (floor) levels with associated Elevation and Height information and definitions (note: information is to be provided in the same format as set out in the Project's Information Standard)
- additional information for incorporation into the Project's Information Production Methods and Procedures, which shall include as a minimum (i.e., all items in red):
  - 2.4 Master Information Delivery Plan – confirm file name

This document shall be produced during the appointment phase of the Contractor to allow the Contractor's appointment documentation to be completed by the DfE.

Once the agreed information in the Appendix has been transposed into the Project's Information Standard and Project's Information Production Methods and Procedures, the Appendix shall be removed before the BIM Execution Plan is incorporated into the Contract. Further changes to any of these resources shall be managed through the agreed change control/derogations process.

D4 Master Information Delivery Plan

The Master Information Delivery Plan is the primary plan for when and what project information is to be prepared by the Contractor and their delivery team. The Master Information Delivery Plan is a response to the information listed in the Detailed Exchange Information Requirements. It should be noted that this covers all information to be produced for the project, not just models.

A Master Information Delivery Plan shall be produced by the Contractor in accordance with BS EN ISO 19650-2 clause 5.4.5.

The Master Information Delivery Plan shall be produced during the Appointment phase of the Contractor to allow the Contractor's appointment documentation to be completed by the DfE.

D5 Contractor's Exchange Information Requirements

The Contractor is responsible for producing their own Exchange Information Requirements. This is expected to align with the Exchange Information Requirements and Detailed Exchange Information Requirements produced by the DfE but may include additional exchange information requirements that the Contractor requires their delivery team to meet.

It is expected that the Contractor's Exchange Information Requirements shall be developed to align with the requirements of BS EN ISO 19650-2 clause 5.4.3.

D6 Detailed Responsibility Matrix

Whilst not required by BS EN ISO 19650 for inclusion in appointments, the Contractor shall produce a Detailed Responsibility Matrix for the delivery team in accordance with BS EN ISO 19650-2 clause 5.4.2. This shall be developed from the high-level responsibility matrix provided in the BIM Execution Plan.

Appendix E – Information model delivery resources

E1 Information management reports (Contractor)

Information management reports are required to be produced by the Contractor at the completion of RIBA Stages 3, 4, 5 and 6. These may be a separate report or form a contribution to a wider Contractor report, if appropriate. The following content shall be covered as a minimum at each stage:

- documentation – reporting on the compliance of documentation within the Detailed Exchange Information Requirements
- geometrical – reporting on the geometry of the model including duplication, clash detection[12]
- alphanumerical – reporting against the IFC-SPF model checking requirements set out in the Detailed Exchange Information Requirements and by referencing or including the COBie Quality Control (QC) Report(s)

E2 Information management reports (Technical Advisor)

Information management reports are required to be produced by the Technical Advisor at the completion of RIBA Stages 3, 4, 5 and 6. These may be a separate report or form a contribution to a wider Technical Advisor report, if appropriate. The following content shall be covered as a minimum at each stage:

- project resources – report of any significant updates incorporated during the project stage regarding the following resources:
  - Project's Information Standard
  - Project's Information Production Methods and Procedures
  - Project's Information Protocol
- appointment resources – report on the following contractor resources:
  - BIM Execution Plan – report on compliance against the requirements set out in D3 BIM Execution Plan
  - Master Information Delivery Plan – report on compliance against the requirements set out in D4 Master Information Delivery Plan
  - Contractor's Exchange Information Requirements – report on compliance against the requirements set out in D5 Contractor's Exchange Information Requirements
  - Detailed Responsibility Matrix – report on compliance against the requirements set out in D6 Detailed Responsibility Matrix

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[12] Where a cloud-based issue management tool is utilised for the project it is acceptable for the report to identify the location of the issues provided the Technical Advisor is given access. A high-level overview shall be provided within the report.

- information model delivery resources – report against any concerns with the Contractor's information management reports in terms of content and/or detail
- Common Data Environment (CDE) – report on the project's common data environment in compliance with the Project's Information Standard including correct use of information container identification, codification, classification and metadata (i.e., revision and status codes)
- exchange information – report on the following information:
  - documents – report on the provision of documents in accordance with the Information Management Requirements
  - drawings – report on the provision of drawings in accordance with the Information Management Requirements
  - native models – report on the provision of native models as set out in the BIM Execution Plan
  - federated models – report on the provision of federated models as set out in the BIM Execution Plan
  - IFC-SPF models – report on the provision of IFC-SPF models as set out in the BIM Execution Plan and on their compliance with the Detailed Exchange Information Requirements
  - COBie – report on the provision of COBie file(s) and on compliance with the Detailed Exchange Information Requirements
  - COBie quality control (QC) report – report on the provision of COBie quality control (QC) report(s) and on the status of the error reporting
- Security of information (if appropriate) – report of any significant updates required to the Security Management Plan.

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