SIMP for Minor Projects Task Matrix

Task Ref	Workbook Sections		Key responsibility [Picklist]	TASK	0 Strategic Definition	1 Preparation and Briefing	2 Concept Design	3 Spatial Coordination	4 Technical Design	5 Manufacturing and Construction	6 Handover
				RIBA STAGE							
				Other project stages	x	x	x	x	x	x	x
				Guidance information boxes are located throughout the workbook, identifiable by an ' i ' symbol. These boxes can be hidden or remain visible once the guidance has been reviewed and relevant tasks actioned. Workbook task boxes are colour coded according to the assigned project roles. A roles picklist is listed at the bottom of this table.							
1	0.0 - Cover & Contents	**Project Particulars**	CLIENT - PM	> Populate the names of the primary project lead stakeholders (client, lead consultant, cost consultant, contractor). The lead and cost consultant will be added first, then the Contractor, once appointed. The cell values are used to auto populate part of the section '1.0 Project Information' cells.		when lead and cost consultants are agreed			when the contractor is agreed		
2	0.0 - Cover & Contents	**Contents**	CLIENT - PM	> Review the contents section and ensure sheet reference 2.0 is populated with project specific requirements. > Adopt the template resources. Review and adjust to suit the project requirements, and store in a central location for project users to access via downloadable links added to section 5.2.							
3	0.0 - Cover & Contents	**Project document control**	CLIENT - PM	> Review and populate all yellow coloured cells for the initial and subsequent workbook revisions. Additional revision record rows can be added if required. > The Status Code is a drop down value sourced from the Ref 02-Picklists tab. > Confirm the Uniclass table versions being adopted on this project. > Confirm the central client master asset list version being adopted on this project. Ensure it is used to initially populate appendix A2.		for release to the lead consultant			updated for release to the contractor		
4	1.0 - Project Information	**Project Information**	CLIENT - PM	> Populate the Project Information [yellow] cells. Some values are auto-filled from the Project Particulars content.							
5	1.0 - Project Information	**Project stages & key decision points**	CLIENT - PM	> Establish the Key Decision Points for the project aligned to the corresponding RIBA project delivery stages. Known Key Decision Point dates should to be inputted at the project outset, and updated or added when the project design and construction programmes are confirmed. Inputted dates are automatically used to populate row 6 in sheet A1-EIR.		when the project delivery programme is established			when the construction programme is established		
6	2.0 - Document Scope & Purpose	**2.1 - Applicable standards & guidance**	CLIENT - PM	> Add links in section 5.2 to resources or client's documentation needed to assist in the adoption and use of this project workbook.							
7	2.0 - Document Scope & Purpose	**2.2 - Project Information Protocol**	CLIENT - PM	> Confirm whether a standalone Project Information Protocol is being used, or if these requirements are embedded directly into each delivery team's appointment and contractual documentation.		when developing the project delivery team SoD's and contracts			when developing the contractors T&C's and contract		
8	2.0 - Document Scope & Purpose	**2.3 - Roles & Responsibilities**	CLIENT - PM	> The information deliverables in Appendix A1 – EIR should be reviewed or populated before the initial workbook is issued to the lead consultants, then reviewed and updated again prior to issue to the principal contractor. The lead consultant can provide support during the contractor-focused update. > Ensure Information management roles, tasks, and responsibilities are embedded within the consultant's schedule of duties and the contractor's terms and conditions. These should be reviewed and updated before appointments are finalised. A reference list of BS EN ISO 19650-2 information management tasks is provided in sheet Ref 02 – Picklists		when developing the project delivery team SoD's and contracts			when developing the contractors T&C's and contract		
9	3.0 - Project Information Standard	**3.1 - Naming conventions**	CLIENT - PM	> Adoption of the client's project naming conventions is mandatory on all projects. Naming convention guidance documentation should be managed by the client's [xxxxx] team, with links to the relevant guidance located in section 5.2. > Ensure the project naming conventions for space/rooms, assets, and documents are made available to the project delivery team, and the requirement to adopt them are included within their schedule of duties and/ or terms and conditions.		when developing the project delivery team SoD's and contracts			when developing the contractors T&C's and contract		
10	3.0 - Project Information Standard	**3.1 - Naming conventions**	ASSET/ DOC MNGT TEAM	> Regular test exchanges should be completed between the client and project delivery team's document management platforms to identify and resolve any sharing issues ahead of each project stage and key decision point outlined in section 1.0. > Adequate checks must be in place to verify correct adoption of the client's and project naming conventions, particularly in the lead-up to project completion and handover.							
11	3.0 - Project Information Standard	**3.2 - Classification assignment**	CLIENT - PM	> Adoption of the Uniclass classification system is mandatory on all projects. Review the client's guidance on adopting and assigning classification values, with links to relevant documentation in section 5.2. Where guidance is not yet available, the client should develop and agree this before the project delivery team is appointed. > The requirement to adopt Uniclass must be included within the project delivery team's schedule of duties and/or terms and conditions.							
12	3.0 - Project Information Standard	**3.3 - Project co-ordinates**	LEAD CONSULTANT	> The lead design consultant is responsible for establishing the project coordinates and populating the green-coloured cells, applying N/A to any unknown values or to all cells if not applicable to the project type. Where values are known prior to the lead consultant's appointment, the client should populate these directly.			review and update as necessary				
13	3.0 - Project Information Standard	**3.4 - Health & safety information**	CLIENT - PM	> Review the guidance text on developing a project risk management strategy, which can be developed with support from the lead consultant and/or principal designer. > Confirm the appointed principal designer's details and ensure all health and safety information requirements are added and assigned within Appendix A1.		with PD support if required					

14		**3.5 - Asset information requirements**	**CLIENT - PM**	> Review the guidance text on specifying project asset information requirements, including the default asset grading criteria and associated requirements, adjusting as necessary to suit any project-specific needs. > All asset information requirements must be added and assigned within Appendix A1, and all project assets added and detailed within Appendix A2. The asset information requirements should be reviewed and updated before issuing to the contractor, with the lead consultant providing support during the contractor-focused update.		when developing the project delivery team SoD's and contracts			when developing the contractors T&C's and contract		
15		**3.6 - Information security**	**CLIENT - PM**	> Review the guidance text and default security classification value for the overall project and information requirements. > Any requirement with a classification higher than the project default should be recorded separately in both a project security management plan and the Appendix A1 – EIR schedule.							
16		**3.7 - CDE and collaboration**	**CLIENT - PM**	> Determine and record the document hosting and management strategy for all project stages, including the post-handover operations phase. > Record the common data environment (CDE) and/or document management system(s) being adopted for each stage in the provided table. > The project team's and contractor's relevant responsibilities must be included within their schedule of duties and appointment documentation.		pre lead consultant appointment					
17	**4.0 - Project Information Production Methods and Procedures**	**4.1 - Information coordination and exchange**	**CLIENT - PM**	> Populate the table in accordance with the guidance text, ensuring the information exchange formats support the client's and project requirements and intended end use. > Once the lead consultant is appointed, coordinate with them to review and update the table as necessary.		pre lead consultant appointment	review and update as necessary		review and update as necessary		
18		**4.2 - Information handover strategy**	**CLIENT - PM**	> Review the guidance text and ensure the project information handover strategy has been completed and agreed. The project delivery team's responsibilities must be included within their schedule of duties and appointment documentation. > Ensure adequate resources are in place for the following: 1. Checking of the draft and final project handover information. 2. Transfer of the final handover information into the client's CDE (refer to section 3.7). 3. Transfer of the final asset register and data into the client's asset management system.		when developing the project delivery team SoD's and contracts			when developing the contractors T&C's and contract		
19			**ASSET/ DOC MNGT TEAM**	Populate the table to identify the asset management platforms currently adopted by the client organisation and in use on this project.		pre lead consultant appointment					
20	**5.0 Project Reference Information and Shared Resources**	**5.1 - Existing project information**	**CLIENT - PM**	> List any existing project-related information to be provided to the project delivery team to support the development of their information requirements. Document naming and central storage locations must align with workbook sections 3.1 and 3.7 respectively.		pre lead consultant appointment					
21		**5.2 - Shared resources**	**CLIENT - PM**	> List any shared resources to be provided to the project delivery team to support the development of their information requirements. Document naming and central storage locations must align with workbook sections 3.1 and 3.7 respectively.		pre lead consultant appointment					
22			**ASSET/ DOC MNGT TEAM**			pre lead consultant appointment					
23	**A1 - Exchange Information Requirements**		**CLIENT - PM**	> Review the baseline list of information requirements and adjust to reflect any additional or unnecessary items. The list should be further reviewed and updated at the end of each project design stage, with support from the lead and cost consultants as required. > Before issuing the workbook, ensure each information requirement has been assigned to a responsible project delivery team member using the available drop-down cells. > The Uniclass PM table version noted in the Content 1.0–2.0, Project Document Control section can be used to verify the correct use of PM codes and descriptions in column E.		pre lead consultant appointment	review and update as necessary	review and update as necessary	when developing the contractors T&C's and contract		
24	**A2 - Master Asset List**		**CLIENT - PM**	> This table outlines the client's master asset list, used as an initial reference for developing a project-specific asset list. The list can include default asset codes linked to the client's FM/CAFM systems. > The table should be reviewed and updated by the client at the contractor pre-tender stage, with lead consultant support, and further updated to reflect the as-constructed/installed asset list prepared by the contractor at project completion and handover. > Each asset has been assigned a grade value corresponding to prescribed document and data deliverables in sheets 'A1 – EIR' and 'Ref 01 – Asset Information Grades' within this workbook. > Where no asset code exists for a known project asset, consult the client's asset management team to request a new code for the lead consultant or contractor to assign. > The client's master asset list must be updated to reflect any new or revised asset coding and re-issued to the central location noted in section 2.1.		pre lead consultant appointment	review and update as necessary	review and update as necessary	when developing the contractors T&C's and contract		
25	**A3 - Project Asset Register**		**LEAD CONSULTANT**	> This template is adopted by the lead consultant to register data for maintainable assets within the final project design. The data captured can be used to populate the client's CAFM system, and the template additionally serves as a checklist to track the delivery of documentation as defined in Reference 01 – Asset Information Grades. The completed register should be issued to the contractor for further updates.							
26			**PRINCIPAL CONTRACTOR**	> This template is adopted by the principal contractor to register final data for maintainable assets installed within the facility. The data captured can be used to populate the client's CAFM system, and the template additionally serves as a checklist to track the delivery of documentation as defined in Reference 01 – Asset Information Grades. The completed register must be submitted to the client at project handover.							
27	**Reference 01 - Asset Information Grades**		**ASSET/ DOC MNGT TEAM**	> Review the seven asset grade definitions, each representing a common type of client asset that typically requires consistent handover information and data for operation and maintenance. > Review the provided default requirements, which can be adapted to suit project-specific needs using the drop-down values: 'Y' if required, 'N' if not required. > Asset grade values should been pre-assigned to the default project assets listed in Appendix A2 – Master Asset List. Any new project asset without a pre-assigned grade value must be given a temporary 'TBC' value and reviewed with the client and/ or asset management team to agree a suitable grade.		pre lead consultant appointment					

	Reference 02- Picklists											
	Template 2 - Client information container / folder arrangement		**CLIENT - PM**	> Review and adjust the template to suit any project-specific requirements. The template folder structure should match the project folder setup in the client's CDE/document management system.								
	Template 3 - Project handover checklist		**CLIENT - PM & CONTRACTOR**	> The client should review and adjust the template to suit any project-specific requirements. The template is then adopted by the principal contractor to check off project completion requirements and handover deliverables.								
	Template 4 - Project document issue register		**LEAD CONSULTANT**	> This template is adopted by the lead consultant to develop and maintain a document issue register for key stage deliverables. A central copy should be stored in the client's CDE/document management system.								
			PRINCIPAL CONTRACTOR	> This template is adopted by the principal contractor to develop and maintain a document issue register for key stage deliverables and handover. A central copy should be stored in the client's CDE/document management system.								

CLIENT - PM	Client - PM review/ task
ALL	All Party review/ task
LEAD CONSULTANT	Lead Consultant review/ task
PRINCIPAL CONTRACTOR	Contractor review/ task
CLIENT - PM & CONTRACTOR	Client - PM & Contractor review/ task
ASSET/ DOC MNGT TEAM	Asset / document management team task