

# INFORMATION MANAGEMENT STRATEGY FOR Example Secondary School

Date: 01 July 2020

## 1.0 KEY PROJECT DATA

<b>Contracting Authority</b>	Local Authority	<b>Current Design Stage</b>	3 Spatial Co-ordination
<b>Project Name</b>	Example Secondary School	<b>Project Description</b>	The new school will provide a leading educational facility for 1200 pupils and new community facilities including a library for the local community.
<b>Sector</b>	Education		
<b>Project Value</b>	£20,000,000		
<b>Type of works</b>	New Build		
<b>Construction Start</b>	01 July 2021		
<b>Construction Completion</b>	01 December 2021		
<b>Funding Model</b>	Capital		
<b>Procurement Route/Framework</b>	D&B - Retain design team (i.e. no novation)		

**BIM POLICY** Assess if this project requires to implement BIM.

Scottish Government and relevant bodies in scope of the Scottish Public Finance Manual must assess their projects for BIM for projects above £2,000,000. Refer to BIM Policy & Grading Tool. [Link](#)

## 2.0 PROJECT STAGE INFORMATION

2.1 Does your organisation have template BIM requirements? (EIR)	No
2.2 Have a list of Project Information Requirements (Questions) been developed?	No
2.3 Does the organisation have a standard folder structure for information?	No
2.4 Does the organisation have a classification system for information?	No
2.5 Has the organisation prepared a BIM protocol to cover legal & contractual issues?	No

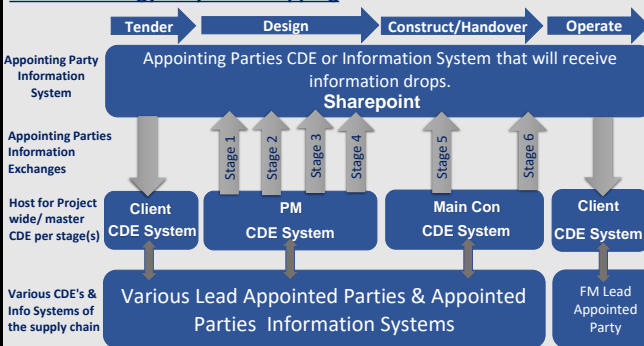
## 3.0 OPERATIONAL STAGE INFORMATION

3.1 Does your organisation have a computer aided facilities management system?	Yes
3.2 If yes to above, is there a data format/input sheet for the CAFM system?	No
3.3 Do you have a standard list of maintainable assets?	No
3.4 Do you have a standard format for O&M manuals?	Yes
3.5 Do you have a standard format for the asset register?	No

## 4.0 COMMON DATA ENVIRONMENT

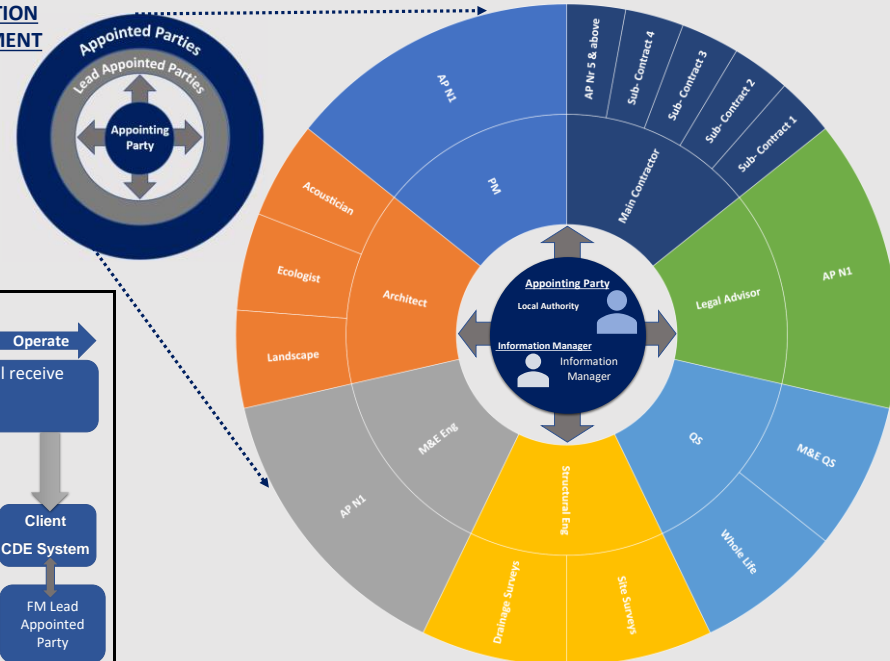
4.1 Does the Client (Appointing Party) have an organisational CDE?	No	Sharepoint
4.2 Who will host the project-wide CDE for multiple delivery teams at tender stage?	Client	CDE System
4.3 Who will host project-wide CDE for multiple delivery teams at the design stage?	PM	CDE System
4.4 Who will host project-wide CDE for multiple delivery teams at the construction stage?	Main Con	CDE System
4.5 Who will host project-wide CDE for multiple delivery teams at the operational stage?	Client	CDE System

## CDE Technology & System Mapping



## 6.0 INFORMATION MANAGEMENT BY PARTIES

### INFORMATION MANAGEMENT PARTIES



## 5.0 INFORMATION PARTIES BY STAGES

### Appointing Party Information Requirements

### Procurement Strategy

D&B - Retain design team (i.e. no novation)

Nr	Appointing Party	Role	Project Start	Project End	Stages						Organisational Template	
					Stage 0	Stage 1	Stage 2	Stage 3	Stage 4	Stage 5		Stage 6
	Local Authority	Client		6	1	1	1	1	1	1	1	No

### Lead Appointed Party Information Requirements

Nr	Lead Appointed Party Information Requirements	Role	Est Nr of Appointed Parties	Appt Start	Appt End	Stages						Appointed Made	Use of Project Wide CDE System	
						Stage 0	Stage 1	Stage 2	Stage 3	Stage 4	Stage 5			Stage 6
1	Supplier Name	PM	1		6	1	1	1	1	1	1	1	No	Yes
2	Supplier Name	Architect	3		6	1	1	1	1	1	1	1	No	Yes
3	Supplier Name	M&E Eng	1	1	6	1	1	1	1	1	1	1	No	Yes
4	Supplier Name	Structural Eng	2	1	6	1	1	1	1	1	1	1	No	Yes
5	Supplier Name	QS	2	1	6	1	1	1	1	1	1	1	No	Yes
6	Supplier Name	Legal Advisor	1	1	6	1	1	1	1	1	1	1	No	No
7	Supplier Name	Main Contractor	5	4	6	1	1	1	1	1	1	1	No	Yes
8														
9														
10														

Projects plan or works

RIBA POW  
SCIM POW

## 7.0 Recommended Templates & Workbooks

Based on the responses, we would recommend the adoption and review of the templates listed below:-

Ref	Description	Adopt	Consider/Review	Link
	Master Information Management Workbook	✓		<a href="#">Link</a>
	Information Manager Scope of Service/ITT	✓		<a href="#">Link</a>
T1	Project Information Protocol		✓	<a href="#">Link</a>
T2	AP Information Container Hierarchy	✓		<a href="#">Link</a>
T3	O&M Manuals (incl H&S file)		✓	<a href="#">Link</a>
T4	FM system data mapping	✓		<a href="#">Link</a>
T5	Asset Register	✓		<a href="#">Link</a>
T6	Task information delivery plan		✓	<a href="#">Link</a>
T7	Master information delivery plan		✓	<a href="#">Link</a>

## 8.0 GUIDANCE & USEFUL LINKS



Scottish Government Policy



SFT BIM Guidance Portal



SFT Standard Information Management Plan



UK BIM Alliance Standards & Guidance

# Information Management Strategy Dashboard

Purpose - To summarise the information parties and a high level approach to information management at the outset of the project in accordance with ISO 19650.

**SFT Disclaimer**  
The Information Management Dashboard was developed by Scottish Futures Trust ("SFT"). The dashboard is to support the development of construction projects by providing a tool to develop, assess, report, understand and refine whole life outcomes within construction projects. The dashboard is not intended, and should not be used as the sole basis for developing an information management strategy for a project. As between any user of the Information Management Dashboard and the Authors, the Authors accept no duty of care for the contents of the Information Management Dashboard or its use. Accordingly, regardless of the form of action, whether in contract, dialogue or otherwise, and to the extent permitted by applicable law, the Authors accept no liability of any kind and disclaim all responsibility for the consequences of any such user acting or refraining to act in reliance of the Information Management Dashboard. The user should seek suitable professional advice when interpreting the outputs of the dashboard and implementing wider information management processes and requirements within a project.

Please populate all cells highlighted in yellow.

If there are any queries in relation to the information management dashboard, please do not hesitate to contact the BIM Delivery Group [bimdeliverygroup@scottishfuturestrust.org.uk](mailto:bimdeliverygroup@scottishfuturestrust.org.uk).

Nr	Question	Answer	Notes & Recommendations							
<b>SUMMARY OF APPOINTING PARTY/CLIENT</b>										
<b>1.0 PROJECT SUMMARY</b>										
1.1	Who are you?	Mr Smith								
1.2	Date	01/07/2020								
1.3	What is your e-mail address	-								
1.4	Name of your organisation	Local Authority								
1.5	Has a Client information manager been appointed	No								
1.6	Name of Client Side Information Manager	Information Manager								
1.7	What is the name of the project	Example Secondary School								
1.8	Sector	Education								
1.9	Start on site?	01/07/2021								
1.10	Completion date	01/12/2021								
1.11	Is the authority a Non Departmental Public Body	Yes	<a href="#">Link to Non Departmental Public Bodies - LINK</a>							
1.12	What is the estimated construction cost.	£20,000,000								
1.13	Type of works	New Build								
1.14	How will the project be funded?	Capital								
1.15	What is the form of procurement? (Include novation approach is applicable)	D&B - Retain design team (i.e. no novation)								
1.16	What plan of works will be adopted Nr 1	RIBA POW	List plan of works for project including design, organisational and or business case processes.							
1.17	What plan of works will be adopted Nr 2	SCIM POW	List plan of works for project including design, organisational and or business case processes.							
1.18	What plan of works will be adopted Nr 3		List plan of works for project including design, organisational and or business case processes.							
1.19	What design stage is the project currently at?	3 Spatial Co-ordination	<a href="#">RIBA Plan of Works</a> .							
1.2	Project Description (Size, location, key stakeholders)	The new school will provide a leading educational facility for 1200 pupils and new community facilities including a library for the local community.								
<b>2.0 DESIGN &amp; CONSTRUCTION STAGE</b>										
2.1	Does your organisation have template BIM requirements? (EIR)	No								
2.2	Have a list of Project Information Requirements (Questions) been developed?	No								
2.3	Does the organisation have a standard folder structure for information?	No								
2.4	Does the organisation have a classification system for information?	No								
2.5	Has the organisation prepared a BIM protocol to cover legal & contractual issues?	No								
<b>3.0 OPERATIONAL STAGE</b>										
3.1	Does your organisation have a computer aided facilities management system?	Yes								
3.2	If yes to above, is there a data format/input sheet for the CAFM system?	No								
3.3	Where does the organisation store digital O&M information?	Combined soft and hard copies								
3.4	Do you have a standard list of maintainable assets?	No								
3.5	Do you have a standard format for O&M manuals?	Yes								
3.6	Do you have a standard format for the asset register?	No								
<b>4.0 COMMON DATA ENVIRONMENT - TECHNOLOGY SOLUTION</b>										
4.1	Does the Client (Appointing Party) have an organisational CDE?	No	Where will the information generated by the supply chain be transferred too?							
4.2	What client system will the information be transferred too at each milestone drop?	Sharepoint								
4.3	Who will host the project-wide CDE for multiple delivery teams at tender stage?	Client	Ensure requirements for the provision of CDE is included within appointment.							
4.4	Please state name of technology system if known.	CDE System								
4.4	Who will host project-wide CDE for multiple delivery teams at the design stage?	PM	Ensure requirements for the provision of CDE is included within appointment.							
4.5	Please state name of technology system if known.	CDE System								
4.6	Who will host project-wide CDE for multiple delivery teams at the construction stage?	Main Con	Ensure requirements for the provision of CDE is included within appointment.							
4.7	Please state name of technology system if known.	CDE System								
4.8	Who will host project-wide CDE for multiple delivery teams at the operational stage?	Client	Ensure requirements for the provision of CDE is included within appointment.							
4.9	Please state name of technology system if known.	CDE System								
<b>SUMMARY OF LEAD APPOINTED PARTIES</b>										
Parties appointed direct by the public body and who are responsible for co-ordinating information between themselves and their delivery team. Referenced as 'lead appointed party' in the context of the ISO 19650 series.										
<b>Lead Appointed Parties</b>										
	Nr 1	Nr 2	Nr 3	Nr 4	Nr 5	Nr 6	Nr 7	Nr 8	Nr 9	Nr 10
7.1	Name of appointed party if known	Supplier Name	Supplier Name	Supplier Name	Supplier Name	Supplier Name	Supplier Name	Supplier Name		
7.2	What is the role of this party who the client will appoint direct?	PM	Architect	M&E Eng	Structural Eng	QS	Legal Advisor	Main Contractor		
7.3	How many sub-consultants/appointed parties will there be for this appointment?	1	3	1	2	2	1	5		
7.4	Stage at appointment begins - RIBA Reference	0	0	1	1	1	1	4		
7.5	Stage appointment finishes - RIBA Reference	6	6	6	6	6	6	6		
7.6	Has the appointment already been made?	No	No	No	No	No	No	No		
7.7	Will the Lead Appointed Party utilise the project wide CDE Technology system	Yes	Yes	Yes	Yes	Yes	No	Yes		
<b>SUMMARY OF APPOINTED PARTIES</b>										
Provider of information concerning works, goods or services.										
8.1	Are any of the appointed parties known (sub-contractors/sub-consultants)	AP N1	Acoustician	AP N1	Drainage Surveys	Whole Life	AP N1	Sub-Contract 1	AP N1	AP N1
	Appointed Party 1	AP N2	Ecologist	AP N2	Site Surveys	M&E QS	AP N2	Sub-Contract 2	AP N2	AP N2
	Appointed Party 2	AP N3	Landscape	AP N3	AP N3	AP N3	AP N3	Sub-Contract 3	AP N3	AP N3
	Appointed Party 3	AP N4	as	AP N4	AP N4	AP N4	AP N4	Sub-Contract 4	AP N4	AP N4
	Appointed Party 4									

Note:- to include names of appointed parties within dashboard ensure correct number of AP's is selected in question 7.3.