



ISO 19650 (BIM) Certification Scheme (Part 2 – Accredited, Part 3, 4, 5 and 6 – Unaccredited)

About Simply Certification

Simply Certification are a third-party, independent certification body that carries out assessments against a range of standards.

Priding ourselves on providing a friendly and responsive service, our head office team and assessors ensure the assessment process runs smoothly.

Introduction

Simply Certification has developed this scheme for businesses operating Information Management using Building Information Modelling (BIM) that wish to have their compliance with a UKAS-accredited certification scheme for BIM to ISO 19650-2:2018 standard that is validated and verified by a UKAS-accredited third party.

The scheme is to assess the process of ISO 19650-2:2018 for organisations providing information management using BIM in the Built Environment. It covers information purchasers, client bodies in the UK, and information suppliers, typically organizations in the architecture, engineering, construction, and infrastructure industry that provide professional services and construction and infrastructure services and works.

The scheme aims to facilitate the organization's capability and capacity to ensure compliance with the information management function, a business process as a service.

For information suppliers, this certification scheme is part of the Capability and Capacity assessment standardisation for the three assurance model of 1st, 2nd and 3rd party to the Common Assessment Standard for Prequalification. The 3rd Party assessment prequalifies organizations bidding for works and services, providing a more streamlined, faster and cost-effective bidding process for clients and suppliers.

For information purchasers to conform to the Information Management Mandates. For example, in the UK, Annex B: Information Management Mandate of Transforming Infrastructure Performance: Roadmap to 2030



It also aims to support Information Management initiatives internationally, for example, in The Information Management Initiative and The Information Management Framework, formerly known as the UK BIM Framework.

The certification and auditing process runs alongside a business implementing information management, BIM, and broader business processes, including its management systems, such as quality management, through ISO 9001 conformance.

The certification also requires quality management through systems such as those covered by ISO 9001:2015 or ISO 99001:2022, as well as ICT and cyber security, as appropriate for the organizations and their requirements for sensitive assets. These requirements are critical for meeting objectives, integrating processes and activities, delivering the intended outputs, and planning and controls for the Information Management Process and Function.

It is for conformance to ISO 19650-2:2018 in the context of the ISO 19650 series Standards and the broader standards landscape referred to within them.

The scheme is developed to assist businesses with legal compliance and working with the Building Safety Act 2022, including on high-risk buildings and for duty-holder accountability.

- Driving efficiencies
- Protecting Reputation
- Risk Management
- Accountability and continuous improvement
- Embedding complex standards into simple procedures
- Aligning internal and external audits

The scheme follows the principles of ISO 17067 Type 6 Process certification schemes as it applies to processes and services. It follows the principles of the standard of Determination, Surveillance of the operation of the process, Management system audits and continuous improvement.

and activities for assessment of processes and services, including elements, such as its outputs, be they the information management resources or the information outputs themselves.

Please note that Simple Certification can also be assessed against ISO 19650 Parts 3, 4, 5 and 6; however, this scope will be unaccredited to the UKAS.

This document provides information relating to how to comply with the scheme, covering:



- Application
- Evaluation
- Non-Conformances
- Review
- Decision Making
- Certification
- Surveillance
- And more!

This document has been developed following:

- ISO 17067 that set out the fundamental requirements for the certification process.
- ISO 19650 Part 2:2018 for the specified requirements of this Certification
- ISO 19650 Parts 1, 3, 4, 5 and 6 and other related standards, which sets out the requirements for assessment.
- Regional and local applications of the ISO 19650 series, such as BS EN ISO 19650-2:2018 (2018 and 2021 publication), Uniclass, Omniclass, CESSM, NRM

Scope

This scheme provides ongoing, third-party certification of a business's processes to deliver information management services in accordance with the requirements of the following:
"Organization and digitization of information about buildings and civil engineering works, including building information modelling (BIM) -- Information management using building information modelling"

ISO 19650-2:2018 - Part 2: Delivery phase of the assets

Country-specific local requirements, including national annexes where applicable, shall also be addressed.

The scheme offers different choices for information management functions:

- Appointed party: Client or purchaser of information management services
- Lead appointed party: The information supplier undertaking the Information Management lead appointed party activities and not undertaking information production.
- Appointed party: Task team appointed party accountable for information production)

lead appointed parties often produce or generate information, so can be combined, therefore the choice of:

- Lead appointed party and task team: Lead Consultant, Lead Designer, Main Contractor



The scheme will be developed for third parties, such as information management consultants, employer agents, and project managers. Depending on procurement and project arrangement, these third parties can be either part of the information purchaser or information supplier

Impartiality

Impartiality is a fundamental requirement of the scheme. It is integral that impartiality is maintained throughout all certification activities, and any risks are brought to the attention of Simply Certification immediately so they can be addressed.

Please read the following information on our website for further information:

[Impartiality Statement - Simply Certification](#)

Application Process

All businesses are required to apply for certification. You can do this by using our online form found here:

[ISO 19650 - Application Form](#)

It is important to provide accurate information as it is used to calculate your assessment plan, including how many days are required for each stage of the certification process.

Once the plan has been created, a quote will be sent to you for your review and acceptance.

Once the quote has been accepted, an invoice will be sent to you for the first stage of assessment.

Once payment has been received, we will carry out an Application Review which includes a series of checks to ensure that certification can be provided to your business and identifies if any issues will arise that may need addresses, such as impartiality concerns.

Once your business has passed the application review process, the application is complete and you will be handed to the Assessment Team to arrange your assessments. Please note that if for some unforeseen reason, the Application Review failed, we would provide you with a full refund, minus the application review fee.

Changing Certification Bodies



If you are already certified for ISO 19650-2, you may be eligible for a certificate transfer, meaning that we can pick up your certification where you left off.

Please read the following information on our website for further information:

[Terms and conditions of contract - Simply Certification](#)

Gap Analysis

If this is your first time applying for ISO 19650-2 certification, or you are not confident in your current compliance with the standard, a gap analysis may be the best way to see how far you are in implementing your capability to deliver services to comply with ISO 19650-2.

The gap analysis is a remote, shorter, lighter assessment which provides a high-level overview of your readiness for certification and determines your readiness to progress to a formal assessment.

Please read the following information on our website for further information:

[Terms and conditions of contract - Simply Certification](#)

Assessment Process, Evidence Requirements and Sampling

It is important to ensure a robust and high-quality assessment by following our assessment process.

The assessment process overlays and integrates with the standard auditing process of Stage 1 and Stage 2 assessments for Quality Management systems (QMS). It does not assess your QMS but verifies what it includes concerning ISO 19650-2 compliance as ISO 19650-2 is a process standard, so it is a business process which is part of the QMS.

The domain-specific scope will be determined, including the scope of any quality management system, such as ISO 9001, the extent of services across the delivery phase, and projects.

The scheme's specified requirements are the mandatory considerations and recommendations defined in the information management process's tasks and activities of ISO 19650-2:2018. Parties are also reviewed for input into activities, and further information is in Appendix B.

The Stage 1 audits cover the potential adequacy of your Quality Management Systems, internal and external audits and their scope, and the organization's defined processes for



the information management process or function. Evidence is gathered from the organization's documented information.

The Stage 2 audits cover the application of the organisation-defined procedures. That is, the organization's procedures are applied to projects or jobs. Evidence will be gathered from the organization's output and production of their services through appointments.

Surveillance audits are yearly, and recertification audits are every three years.

The initial assessment will cover a 100% sample of the specified requirements, surveillances 25% and recertification assessments 50% to ensure a rolling 100% sample over the three-year certification cycle. For audits, the organization's output and production of its services through appointments are sampled based on the organizations risk profile.

Management system audits are inspected randomly to ensure the system is fulfilling its function of ensuring the effective operation of the information management function.

Please read the following information on our website for further information:

[Terms and conditions of contract - Simply Certification](#)

Conformance, Non-Conformance and Recommendations

During your assessments, your auditor will be looking for evidence of compliance to the requirements. Unfortunately, there may be occasions where areas of improvement or non-conformance may be found.

Please read the following information on our website for further information:

[Terms and conditions of contract - Simply Certification](#)

Surveillance

Once you have been certified, it is a requirement that you show ongoing compliance to us on a regular basis. This is done via surveillance audits.

Please read the following information on our website for further information:

[Terms and conditions of contract - Simply Certification](#)

Recertification



To renew your certification, it is a requirement that we reconfirm your compliance to the scheme. This is done via a recertification audit.

Please read the following information on our website for further information:

[Terms and conditions of contract - Simply Certification](#)

Terms and Conditions

To protect the integrity of the certification process, we have Terms and Conditions in place. You are required to agree to our Terms and Conditions before proceeding with certification. You will be asked to agree to them when you submit an application for certification.

Full details are available on our website. Please click this link to view:

[Terms and conditions of contract - Simply Certification](#)

Certification Agreement

We have a certification agreement in place to protect the integrity of the scheme which you must agree to when applying for certification.

Full details are available on our website. Please click this link to view:

[Terms and conditions of contract - Simply Certification](#)

Changes to Certification

Changes can be made to certification for a multitude of reasons from industry led changes to customer non-compliance. Changes can trigger an action, from reassessment to suspension, so it is important that you understand your obligation to any changes made.

Full details are available on our website. Please click this link to view:

[Terms and conditions of contract - Simply Certification](#)

Special Visits

We reserve the right to make additional assessments where and when required.

Full details are available on our website. Please click this link to view:



[Terms and conditions of contract - Simply Certification](#)

Complaints and Appeals

We hope that your experience with us is a please one, however sometimes things do go wrong. If you do wish to make a complaint about us, you can find full details on our website.

Full details are available on our website. Please click this link to view:

[Complaints Policy - Simply Certification - We Care](#)

Confidentiality

Confidentiality is of the utmost importance to us.

Full details are available on our website. Please click this link to view:

[Terms and conditions of contract - Simply Certification](#)

Data Protection/GDPR

The protection of your data is of the utmost importance to us.

Full details are available on our website. Please click this link to view:

[Privacy Policy - Simply Certification](#)

Branding

It is important that our certified businesses use only approved marks of registration such as certificates and logos to protect our brand identity.

Our general rules can be found on our website. Please click her for further information:

[Mark of Certification Application - Simply Certification](#)

The specific branding around BIM can be found by clicking this link:



ISO 19650 - MARKS
OF REGISTRATION.pd

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Terms and Definitions

General Terms

Certification Body – the body responsible for assessing your business against the requirements of the scheme. Referred to in this document as ‘Simply’, ‘us’, ‘we’, certification body, CB’.

Client – the business being assessed against the requirements of the scheme. Referred to in this document as ‘the business’, ‘you’, ‘your’.

UKAS - the National Accreditation Body for the United Kingdom. The government has appointed them to assess and accredit organisations that provide certification, testing, inspection, calibration, validation and verification services.

UKAS Accredited – A scheme that has been assessed and approved by UKAS’ assessment process.



Common Assessment Standard - The Common Assessment Standard is designed to standardise the prequalification process, helping clients and contractors improve supply chain efficiency, reduce supply chain risks, and find reliable business opportunities. <https://www.chas.co.uk/contractors/common-assessment-standard/>.

Terms as Defined in ISO 19650 – Part 1

Equivalent UK terms for terms used in ISO 19650

Appointed Party – Supplier.

Appointing Party – Client (project), asset owner/operator (asset).

Appointment – Contract, professional services agreement.

Exchange Information Requirements – Employers information requirements.

Federation Strategy or Information Container Breakdown Structure – Volume strategy (identifying separately produced information deliverables brought together for review, for issue or for storage).

Level of Information Need – Level of definition (as the aggregate of level of detail and level of information).

Note - this is from the UK adoption for Information Management using BIM.

General Terms

framework which defines the extent and granularity of information

Responsibility Matrix – Chart that describes the participation by various functions in completing tasks of deliverables. (ISO 19650-1:2018(en), 3.1.1)

Note – In terms of ISO 19650-2, these are the High-level Responsibility Matrix and the Detailed Responsibility Matrix

Responsibility assignment matrix - documented structure that shows the allocation of delegated work responsibilities designated for the delivery of a scope or benefits (ISO 21506:2024(en), 3.75)

Note – In terms of ISO 19650-2, this refers to the Information management assignment matrix in Annex A (informative)



Space – Limited three-dimensional extent defined physically or notionally.
(ISO 12006-2:2015(en), 3.1.8)

Space - area or volume bounded actually or theoretically (ISO 6707-1:2020(en), 3.2.1.1)

Terms Related to Assets and Projects

Actor – Person, organisation or organisational unit involved in a construction process. (ISO 19650-1:2018(en), 3.2.1)

Appointment – Agreed instruction for the provision of information concerning works, goods or services. (ISO 19650-1:2018(en), 3.2.2)

Appointed Party – Provider of information concerning works, goods or services.

Appointing Party – Receiver of information concerning works, goods or services from a lead appointed party.

Client – Actor responsible for initiating a project and approving the brief. (ISO 19650-1:2018(en), 3.2.5)

Project Team - appointing party and all delivery teams (ISO 19650-2:2018(en), 3.1.2.1)

Delivery team – Lead appointed Party and their appointed parties.

Task Team – Individuals assembled to perform a specific task.

Asset – Item, thing or entity that has a potential or actual value to an organisation. ISO 6707-4:2021(en), 3.1.2

Project Information – Information produced for, or utilized in, a particular project. (ISO 6707-2:2017(en), 3.2.3)

Life Cycle – Life of the asset from the definition of its requirements to the termination of its use, covering its conception, development, operation, maintenance support and disposal.
(ISO 19650-1:2018(en), 3.2.10)

Delivery Phase - part of the life cycle (3.2.10), during which an asset (3.2.8) is designed, constructed and commissioned (ISO 19650-1:2018(en), 3.2.11)

Operational Phase – Part of the life cycle, during which an asset is used, operated and maintained. (ISO 19650-1:2018(en), 3.2.12)



Trigger Event – Planned or unplanned event that changes an asset or its status during its life cycle, which results in information exchange.

Key Decision Point – Point in time during the life cycle when a decision crucial to the direction or viability of the asset is made.

Information Delivery Point

Terms Related to Information Management

Information – Reinterpretable representation of data in a formalised manner suitable for communication, interpretation or processing.

Information Requirement – Specification for what, when, how and for whom information is to be produced.

Organisational Information Requirements (OIR) – Information requirements in relation to organisational objectives.

Asset Information Requirements (AIR) – Information requirements in relation to the operation of the asset.

Project Information Requirements (PIR) – Information requirements in relation to the delivery of an asset.

Exchange Information Requirements (EIR) – Information requirements in relation to an appointment.

Information Exchange – Act of satisfying an information requirements or part thereof.

Information Model – Set of structured and unstructured information containers.

Asset Information Model (AIM) – Information model relating to the operational phase.

Project Information Model (PIM) – Information model relating to the delivery phase.

Federation – Creation of a composite information model from separate information containers.

Information Container – Named persistent set of information retrievable from within a file, system or application storage hierarchy.



Status Code – Meta-data describing the suitability of the content of an information container.

Building Information Modelling (BIM) – Use of a shared digital representation of built asset to facilitate design, construction and operation processes to form a reliable basis for decisions.

Common Data Environment (CDE) – Agreed source of information for any given project or asset, for collecting, managing and disseminating each information container through a managed process.

Level of Information Need – Framework which defines the extent and granularity of information.

Capability – Measure of ability to perform and function.

Capacity – Resources available to perform and function.

Terms as Defined in ISO 19650 – Part 2

General Terms

Acceptance Criteria – Evidence required for considering that requirements have been fulfilled.

Terms Related to Assets and Projects

Project Team – Appointing part and all delivery teams.

Plan of Work – Document that details principal stages in the design, construction work and maintenance of a project and identified the main tasks and people.

Terms Related to Information Management

BIM Execution Plan – Plan that explains how the information management aspects of the appointment will be carried out by the delivery team.

Information Delivery Milestone – Scheduled event for a predefined information exchange.

Master Information Delivery Plan – Plan incorporating all relevant information delivery plans.

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Task Information Delivery – Schedule of information containers and delivery dates, for a specific task team.

Terms as Defined in ISO 19650 – Part 3

Asset Management – Coordinated activity of an organisation to realise value from assets.

Facility Management – Organisational function which integrated people, place and process within the built environment with the purpose of improving the quality of life and the productivity of the core business.

Symbols for process diagrams –



Terms as Defined in ISO 19650 – Part 4

Terms Related to Phases

Stage – Distinct period in a project used as a management tool.

Terms Related to Activities

Information Provider – Actor who provides information in an information container.

Information Receiver – Actor who receives information in an information container.

Information Reviewer – Actor who reviews information and its information container.

Terms as Defined in ISO 19650 – Part 5

Asset – Item, thing or entity that has potential or actual value to an organisation.

Crowded Place – Location or environment to which members of the public have access that can be considered more at risk from a terrorist attack by virtue of its crowd density or the nature of the site.

Metadata – Data about data.



Need-to-Know – Legitimate requirement of a prospective recipient of information to know, to access, or to possess sensitive information.

Risk Appetite – Amount and type of risk that an organisation is willing to pursue or retain.

Safety – State of relative freedom from threat or harm caused by random, unintentional acts or events.

Security – State of relative freedom from threat or harm caused by deliberate, unwanted, hostile or malicious acts.

Security Breach – Infraction or violation of security.

Security Incident – Suspicious act or circumstance threatening security.

Security Minded – Understanding and routinely applying appropriate and proportionate security measures in any business situation so as to deter and/or disrupt hostile, malicious, fraudulent and criminal behaviours or activities.

Sensitive Information - Information, the loss, misuse or modification of which, or unauthorised access to, can:

- Adversely affect the privacy, security or safety of an individual or individuals
- Compromise intellectual property or trade secrets of an organisation
- Cause commercial or economic harm to an organisation or country and/or
- Jeopardise the security, internal and foreign affairs of a nation

Residual Risk – Risk that remains after controls have been implemented.

Threat – Potential cause of an incident which may result in harm.

Top Management – Person or group of people which directs and controls an organisation at the highest level.

Vulnerability – Weakness that can be exploited to cause harm.

Terms as Defined in ISO 19650 – Part 6



Health and Safety Information – Information relating to health and safety risks across the project and asset life cycle.

Risk Treatment – Action to lessen risk.

Generalization – Act of removing or modifying details to make information suitable for wider publication and re-use.

Hazard – Source of potential harm.

Level of Risk – Risk priority, risk level, magnitude of risk or combination of risks.

Normative References

ISO 19650-1

None.

ISO 19650-2

ISO 19650-1:2018 – Organization of information about construction works – Information management using building information modelling – Part 1: Concepts and Principles.

ISO 12006-2 - Building construction – Organization of information about construction works – Part 2: Framework for classification.

ISO 19650-3

ISO 12006-2 - Building construction – Organization of information about construction works – Part 2: Framework for classification.

ISO 19650-1:2018 – Organization and digitization of information about buildings and civil engineering works, including building information modelling (BIM) – Information management using building information modelling – Part 1: Concepts and principles.

ISO 19650-2:2018 – Organization and digitization of information about buildings and civil engineering works, including building information modelling (BIM) – Information management using building information modelling – Part 2: Delivery phase of the assets.

ISO 19650-5 – Organization and digitization of information about buildings and civil engineering works, including building information modelling (BIM) – Information



management using building information modelling – Part 5: Security-minded approach to information management.

ISO 19650-4

ISO 19650-1:2018 – Organization and digitization of information about buildings and civil engineering works, including building information modelling (BIM) – Information management using building information modelling – Part 1: Concepts and principles.

ISO 19650-2:2018 – Organization and digitization of information about buildings and civil engineering works, including building information modelling (BIM) – Information management using building information modelling – Part 2: Delivery phase of the assets.

ISO 19650-3:2020 – Organization and digitization of information about buildings and civil engineering works, including building information modelling (BIM) – Information management using building information modelling – Part 3: Operational phase of the assets.

ISO 19650-5:2020 – Organization and digitization of information about buildings and civil engineering works, including building information modelling (BIM) – Information management using building information modelling – Part 5: Security-minded approach to information management.

ISO 19650-5

ISO 19650-2:2018 – Organization and digitization of information about buildings and civil engineering works, including building information modelling (BIM) – Information management using building information modelling – Part 2: Delivery phase of the assets.

ISO 19650-3:2020 – Organization and digitization of information about buildings and civil engineering works, including building information modelling (BIM) – Information management using building information modelling – Part 3: Operational phase of the assets.

ISO 19650-6

ISO 19650-1:2018 – Organization and digitization of information about buildings and civil engineering works, including building information modelling (BIM) – Information management using building information modelling – Part 1: Concepts and principles.



ISO 19650-2:2018 – Organization and digitization of information about buildings and civil engineering works, including building information modelling (BIM) – Information management using building information modelling – Part 2: Delivery phase of the assets.

ISO 19650-3:2020 – Organization and digitization of information about buildings and civil engineering works, including building information modelling (BIM) – Information management using building information modelling – Part 3: Operational phase of the assets.

ISO 19650-4:2022 – Organization and digitization of information about buildings and civil engineer works, including building information modelling (BIM) – Information management using building information modelling – Part 5: Security-minded approach to information management.

ISO 19650-5:2020 – Organization and digitization of information about buildings and civil engineering works, including building information modelling (BIM) – Information management using building information modelling – Part 5: Security-minded approach to information management.

ISO 31000 – Risk management – Guidelines.

ISO 45001 – Occupational health and safety management systems – Requirements with guidance for use.



Glossary

Appendix B – Specified Requirements: Business (Information Management) Process and Resources Output for Projects in the Delivery Phase

Key:

PRIMARY PROCEDURE, SUB-PROCEDURE (ACTIVITY), PROCEDURE OR WORK INSTRUCTION (TASKS)

M = Mandatory activity, **C** = Consideration of activity, **F** = Following an activity, **R** = Recommended activity, **I** = Inputting to an activity

AP = Appointing Party (Client), **LAP** = Lead Appointed Party, **TT** = Task Team (Appointed Party)

Standard and clause	Information Management Procedures and Services (Specified Requirements)	Purchaser	Supplier	
		AP	LAP	TT
ISO 19650-2, 5 ISO 9001, 5.1.1 c)	INFORMATION MANAGEMENT PROCEDURE	M	M	M
ISO 19650-2, 5.1, 5.1.9	ASSESSMENT AND NEED STAGE PROCEDURE	M	M	M
ISO 19650-2, 5.1.1	ASSIGNMENT OF INFORMATION MANAGEMENT FUNCTION	M		
ISO 19650-2, 5.1.2	ESTABLISHING AND MANAGING THE APPOINTING PARTY'S PROJECT'S INFORMATION REQUIREMENTS (PIR)	M		
ISO 19650-2, 5.1.3	ESTABLISHING THE DELIVERY PHASE SCHEDULE (INFO DELIVERY MILESTONES KEY DECISION POINTS)	M	I	
ISO 19650-2, 5.1.4	ESTABLISHING & MANAGING THE PROJECT'S INFORMATION STANDARD	M	C	C
ISO 19650-2, 5.1.5	ESTABLISHING & MANAGING THE PROJECT'S INFORMATION PRODUCTION METHODS AND PROCEDURE	M	C	C
ISO 19650-2, 5.1.5 a)	ESTABLISHING CAPTURE OF EXISTING ASSET INFORMATION	M	C	C
ISO 19650-2, 5.1.5 b)	ESTABLISHING GENERATION, REVIEW AND APPROVAL OF INFORMATION	M	M	M

Standard and clause	Information Management Procedures and Services (Specified Requirements)	Purchaser	Supplier	
		AP	LAP	TT
ISO 19650-2, 5.1.5 c)	ESTABLISHING SECURE DISTRIBUTION OF INFORMATION	M	M	M
ISO 19650-2, 5.1.5 d)	INFORMATION DELIVERY TO APPOINTING PARTY	M	M	C
ISO 19650-2, 5.1.6	ESTABLISHING THE REFERENCE INFORMATION AND SHARED RESOURCES	M		
ISO 19650-2, 5.1.6 a)	CAPTURING EXISTING ASSET INFORMATION	C		
ISO 19650-2, 5.1.6 b)	ESTABLISHING AND MANAGING SHARED RESOURCES	C		
ISO 19650-2, 5.1.6 c)	ESTABLISHING AND MANAGING OBJECT LIBRARY	C		
ISO 19650-2, 5.1.7	ESTABLISHING AND MANAGING THE PROJECT COMMON DATA ENVIRONMENT (CDE)	M		
ISO 19650-2, 5.1.8	LEGAL INTEGRATION FOR INFORMATION DELIVERY	M		
ISO 19650-2, 5.2, 5.2.5	INVITATION TO TENDER STAGE PROCEDURE	M		
ISO 19650-2, 5.2.1, 5.2.1 a)	ESTABLISHING THE APPOINTING PARTY'S EXCHANGE INFORMATION REQUIREMENTS (EIR)	M		
ISO 19650-2, 5.2.1 b)	ESTABLISHING LEVEL OF INFORMATION NEED SPECIFICATION	M		
ISO 19650-2, 5.2.1 c)	ESTABLISHING ACCEPTANCE CRITERIA PROCEDURE	M		
ISO 19650-2, 5.2.1 d)	ESTABLISHING SUPPORTING INFORMATION	M		
ISO 19650-2, 5.2.1 e)	ESTABLISH DATES FOR MEETING INFORMATION REQUIREMENTS	M		
ISO 19650-2, 5.2.2	ASSEMBLING THE REFERENCE INFORMATION AND SHARE RESOURCES	M		
ISO 19650-2, 5.2.3	ESTABLISHING TENDER REQUIREMENTS	M		
ISO 19650-2, 5.2.4	COMPILING INFORMATION FOR THE ITT PROCEDURE	M		
ISO 19650-1, 8.2	ESTABLISHING THE DELIVERY TEAMS' CAPABILITY AND CAPACITY REVIEW AND SCOPE	C		
ISO 19650-2, 5.3, 5.3.8	TENDER RESPONSE STAGE PROCEDURE	M	M	M

Standard and clause	Information Management Procedures and Services (Specified Requirements)	Purchaser	Supplier	
		AP	LAP	TT
ISO 19650-2, 5.3.1	NOMINATING INFORMATION MANAGEMENT FUNCTION PROCEDURE		M	
ISO 19650-2, 5.3.2	ESTABLISHING THE DELIVERY TEAMS (PRE-APPOINTMENT) BEP		M	W
ISO 19650-2, 5.3.2 a)	RECORD OF NAMES OF ACTORS UNDERTAKING THE INFORMATION MANAGEMENT FUNCTION		C	W
ISO 19650-2, 5.3.2 b)	ESTABLISHING (AND MANAGING) THE INFORMATION DELIVERY STRATEGY		M	I
ISO 19650-2, 5.3.2 c)	ESTABLISHING (AND MANAGING) THE FEDERATION STRATEGY		C	I
ISO 19650-2, 5.3.2 d)	ESTABLISHING & MANAGING THE HIGH-LEVEL RESPONSIBILITY MATRIX (DELIVERY TEAM or 3 rd PARTY)	M	M	
ISO 19650-2, 5.3.2 e)	PROPOSE UPDATE STO THE PROJECT INFORMATION PRODUCTION METHODS AND PROCEDURES		M	I
ISO 19650-2, 5.3.2 f)	PROPOSE UPDATES TO THE PROJECT INFORMATION STANDARDS		M	I
ISO 19650-2, 5.3.3	ASSESSMENT OF BIM AND IT CAPABILITY PROCEDURE			M
ISO 19650-2, 5.3.4	AGGREGATING THE DELIVERY TEAM CAPABILITY AND CAPACITY PROCEDURE		M	
ISO 19650-2, 5.3.5	ESTABLISHING THE MOBILIZATION PLAN	M		
9001	INTEGRATING INFORMATION DELIVERY RISKS INTO PROJECT RISK MANAGEMENT	C		
ISO 19650-2, 5.3.6	ESTABLISHING THE DELIVERY TEAM'S RISK REGISTER		M	I
ISO 19650-2, 5.3.7	COMPILING THE TENDER RESPONSE		M	I
ISO 19650-2, 5.4, 5.4.8	APPOINTMENT STAGE PROCEDURE	M	M	M
ISO 19650-2, 5.4.1	ESTABLISHING THE DELIVERY TEAM'S BEP PROCEDURE		M	I
ISO 19650-2, 5.4.2	ESTABLISHING THE DETAILED RESPONSIBILITY MATRIX		M	I
ISO 19650-2, 5.4.3	ESTABLISHING AND MANAGING THE LAP'S (EIR) PROCEDURE	I	M	
ISO 19650-2, 5.4.4	ESTABLISHING AND MAINTAINING THE TASK INFORMATION DELIVERY PLAN (TIDP)		I	M

Standard and clause	Information Management Procedures and Services (Specified Requirements)	Purchaser	Supplier	
		AP	LAP	TT
ISO 19650-2, 5.4.5	ESTABLISHING AND MAINTAINING THE MASTER INFORMATION DELIVERY PLAN (MIDP)		M	I
ISO 19650-2, 5.4.6	APPOINTING PARTY'S ASSEMBLY OF APPOINTMENT DOCUMENTS	M		
ISO 19650-2, 5.4.7	LEAD APPOINTING PARTY'S ASSEMBLY OF APPOINTMENT DOCUMENTS	I	M	I
ISO 19650-1, 10.1	ESTABLISHING THE INFORMATION MANAGEMENT SOLUTION (DISTRIBUTED CDE)	C	I	
ISO 19650-1, 10.1	REVIEWING THE INFORMATION MANAGEMENT SOLUTION (DISTRIBUTED CDE)		C	
ISO 19650-1, 8.2	APPOINTED PARTY'S REVIEW OF THE DELIVERY TEAM'S CAPABILITY AND CAPACITY			
ISO 19650-2, 5.5, 5.5.4	MOBILIZATION STAGE PROCEDURE	C	M	I
ISO 19650-2, 5.5.1	MOBILIZATION OF RESOURCES PROCEDURE		M	I
ISO 19650-2, 5.5.2	MOBILIZATION OF IT PROCEDURE		M	I
ISO 19650-2, 5.5.3	TESTING THE PROJECT'S INFORMATION PRODUCTION METHODS AND PROCEDURES		M	I
ISO 19650-1, 10.1	REVIEW OF THE INFORMATION MANAGEMENT SOLUTION (DISTRIBUTED CDE)	C	C	
ISO 19650-2, 5.6, 5.6.6	COLLABORATIVE PRODUCTION OF INFORMATION STAGE PROCEDURE	I	M	M
ISO 19650-2, 5.6.1	CHECKING REFERENCE INFORMATION AND SHARED RESOURCES	C	C	M
ISO 19650-2, 5.6.2	GENERATING INFORMATION PROCEDURE	C	C	M
ISO 19650-2, 5.6.3	QUALITY ASSURANCE CHECK FOR SHARING INFORMATION	C	C	M
ISO 19650-2, 5.6.4	REVIEWING AND APPROVING INFORMATION BE SHARED	C	C	M
ISO 19650-2, 5.6.5	INFORMATION MODEL REVIEW	C	M	M
ISO 19650-2, 5.7, 5.7.5	INFORMATION DELIVERY STAGE PROCEDURE	M	M	M
ISO 19650-2, 5.7.1	SHARING INFORMATION MODEL	C	I	M



Standard and clause	Information Management Procedures and Services (Specified Requirements)	Purchaser	Supplier	
		AP	LAP	TT
ISO 19650-2, 5.7.2	AUTHORIZATION REVIEW FOR INFORMATION MODEL	C	M	I
ISO 19650-2, 5.7.3	PUBLISHING INFORMATION MODEL	C	M	I
ISO 19650-2, 5.7.4	ACCEPTANCE AND REVIEW OF THE INFORMATION MODEL	M	I	
ISO 19650-2, 5.8, 5.8.3	PROJECT CLOSE-OUT STAGE PROCEDURE	M	C	
ISO 19650-2, 5.8.1	ARCHIVING INFORMATION MODEL	M	I	
ISO 19650-2, 5.8.2	MANAGEMENT OF LESSONS LEARNED	M	I	
ISO 19650-2, 5.8.3	CAPTURING OF LESSONS LEARNED	M	I	
	POST OCCUPANCY EVALUATION	C		



Appendix B – Specified Requirements: Information Management Processes for Projects in the Delivery Phase

Key: **M** = Mandatory activity, **C** = Consideration of activity, **F** = Following an activity, **R** = Recommended activity, **I** = Inputting to an activity

Standard and clause	Information Management Procedures and Services (Specified Requirements)	Purchaser	Supplier	
		AP*	LAP*	TT*
ISO 19650-2, 5 ISO 9001, 5.1.1 c)	INFORMATION MANAGEMENT PROCEDURE	M	M	M
ISO 19650-2, 5.1, 5.1.9	ASSESSMENT AND NEED STAGE PROCEDURE (ACTIVITY)	M	M	M
ISO 19650-2, 5.1.1	Assignment of information management function	M	I	F
ISO 19650-2, 5.1.2	Establishing and managing the appointing party's project information requirements (PIR)	M	F	F
ISO 19650-2, 5.1.3	Establishing the delivery phase schedule (info delivery milestones key decision points)	M	F	F
ISO 19650-2, 5.1.4	Establishing and managing the project's information standard	M	C	C
ISO 19650-2, 5.1.5	Establishing and managing the project's information production methods and procedures	M	C	C
ISO 19650-2, 5.1.5 a)	Establishing capture of existing asset information	M	C	C
ISO 19650-2, 5.1.5 b)	Establishing generation, review and approval of information	M	M	M
ISO 19650-2, 5.1.5 c)	Establishing secure distribution of information	M	M	M
ISO 19650-2, 5.1.5 d)	Information delivery to the appointing party	M	M	C
ISO 19650-2, 5.1.6	Establishing the reference information and shared resources	M		
ISO 19650-2, 5.1.6 a)	Capturing existing asset information	C		
ISO 19650-2, 5.1.6 b)	Establishing and managing shared resources	C	F	F
ISO 19650-2, 5.1.6 c)	Establishing and managing the object library	C	F	F
ISO 19650-2, 5.1.7	Establishing and managing the project Common Data Environment (CDE)	M	F	F

Standard and clause	Information Management Procedures and Services (Specified Requirements)	Purchaser	Supplier	
		AP*	LAP*	TT*
ISO 19650-2, 5.1.8	Legal integration for information delivery	M	F	F
ISO 19650-2, 5.2, 5.2.5	INVITATION TO TENDER STAGE PROCEDURE	M	M	M
ISO 19650-2, 5.2.1, 5.2.1 a)	Establishing the appointing party's exchange information requirements (EIR)	M	F	F
ISO 19650-2, 5.2.1 b)	Establishing the level of information need specification	M	F	F
ISO 19650-2, 5.2.1 c)	Establishing acceptance criteria procedure	M	F	F
ISO 19650-2, 5.2.1 d)	Establishing supporting information	M		
ISO 19650-2, 5.2.1 e)	Establish dates for meeting information requirements	M		
ISO 19650-2, 5.2.2	Assembling the reference information and shared resources	M		
ISO 19650-2, 5.2.3	Establishing tender requirements	M		
ISO 19650-2, 5.2.4	Compiling information for the ITT procedure	M		
ISO 19650-1, 8.2	Establishing the delivery teams' capability and capacity review and scope	C		
ISO 19650-2, 5.3, 5.3.8	TENDER RESPONSE STAGE PROCEDURE	M	M	M
ISO 19650-2, 5.3.1	Nominating information management function procedure		M	
ISO 19650-2, 5.3.2	Establishing the delivery teams (pre-appointment) BEP		M	F
ISO 19650-2, 5.3.2 a)	Record of names of actors undertaking the information management function		C	F
ISO 19650-2, 5.3.2 b)	Establishing (and managing) the information delivery strategy		M	I
ISO 19650-2, 5.3.2 c)	Establishing (and managing) the federation strategy		C	I
ISO 19650-2, 5.3.2 d)	Establishing and managing the high-level responsibility matrix (delivery team or third party)	M	M	
ISO 19650-2, 5.3.2 e)	propose updates to the project information production methods and procedures		M	I
ISO 19650-2, 5.3.2 f)	propose updates to the project information standards		M	I

Standard and clause	Information Management Procedures and Services (Specified Requirements)	Purchaser	Supplier	
		AP*	LAP*	TT*
ISO 19650-2, 5.3.3	Assessment of BIM and IT capability procedure			M
ISO 19650-2, 5.3.4	Aggregating the delivery team capability and capacity procedure		M	
ISO 19650-2, 5.3.5	Establishing the Mobilization plan	M		
9001	Integrating information delivery risks into project risk management	C		
ISO 19650-2, 5.3.6	Establishing the delivery team's risk register		M	I
ISO 19650-2, 5.3.7	Compiling the tender response		M	I
ISO 19650-2, 5.4, 5.4.8	APPOINTMENT STAGE PROCEDURE	M	M	M
ISO 19650-2, 5.4.1	Establishing the delivery team's BEP procedure		M	I
ISO 19650-2, 5.4.2	Establishing the detailed responsibility matrix		M	I
ISO 19650-2, 5.4.3	Establishing and managing the lap's (EIR) procedure	I	M	
ISO 19650-2, 5.4.4	Establishing and maintaining the task information delivery plan (TIDP)		I	M
ISO 19650-2, 5.4.5	Establishing and maintaining the master information delivery plan (MIDP)		M	I
ISO 19650-2, 5.4.6	Appointing Party's assembly of appointment documents	M		
ISO 19650-2, 5.4.7	Lead appointing party's assembly of appointing party's appointment documents.	I	M	I
ISO 19650-1, 10.1	Establishing the information management solution (distributed CDE)	C	I	
ISO 19650-1, 10.1	Reviewing the information management solution (distributed CDE solutions and workflows)		C	
ISO 19650-1, 8.2	The appointed party's review of the delivery team's capability and capacity	C		
ISO 19650-2, 5.5, 5.5.4	MOBILIZATION STAGE PROCEDURE	C	M	I
ISO 19650-2, 5.5.1	Mobilization of resources procedure		M	I
ISO 19650-2, 5.5.2	mobilization of IT procedure		M	I

Standard and clause	Information Management Procedures and Services (Specified Requirements)	Purchaser	Supplier	
		AP*	LAP*	TT*
ISO 19650-2, 5.5.3	testing the project's information production methods and procedures		M	I
ISO 19650-1, 10.1	Review of the information management solution (distributed CDE)	C	C	
ISO 19650-2, 5.6, 5.6.6	COLLABORATIVE PRODUCTION OF INFORMATION STAGE PROCEDURE	I	M	M
ISO 19650- 1, 6.3.3 ISO 19650-2, 5.6.1	Information verification and validation at the beginning of project stages	C	M	M
ISO 19650-2, 5.6.1	Checking reference information and shared resources	C	C	M
ISO 19650-2, 5.6.2	Generating information procedure	C	C	M
ISO 19650-2, 5.6.3	Quality assurance check for sharing information	C	C	M
ISO 19650-2, 5.6.4	Reviewing and approving information to be shared	C	C	M
ISO 19650-2, 5.6.5	Information model review	C	M	M
ISO 19650-2, 5.7, 5.7.5	INFORMATION DELIVERY STAGE PROCEDURE	M	M	M
ISO 19650-2, 5.7.1	Sharing information model	C	I	M
ISO 19650-2, 5.7.2	Authorization review for information model	C	M	
ISO 19650-2, 5.7.3	Publishing information model	C	M	I
ISO 19650- 1, 6.3.3 ISO 19650-2, 5.7.3	Information verification and validation at the end of project stages	M	M	I
ISO 19650-2, 5.7.4	Acceptance and review of the information model	M	I	
ISO 19650-2, 5.8, 5.8.3	PROJECT CLOSE-OUT STAGE PROCEDURE	M	C	
ISO 19650-2, 5.8.1	Archiving information model	M	I	
ISO 19650-2, 5.8.2	Management of lessons learned	M	I	
ISO 19650-2, 5.8.3	Capturing of lessons learned	M	I	

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Standard and clause	Information Management Procedures and Services (Specified Requirements)	Purchaser	Supplier	
		AP*	LAP*	TT*
	Post occupancy evaluation	C		

*AP = Appointing Party (Client), LAP = Lead Appointed Party, TT = Task Team (Appointed Party)



Appendix C – Specified Requirements: Information Management outputs and inputs for processes in the Delivery Phase

Key: M = Mandatory resource, C = Consideration of resource, F = Following a resource, I = Inputting to a resource – M/C The Auditee should consider legal advice regarding whether these considerations are mandatory under the Building Safety Act.

Standard, clause.	Information Management Resources (Specified Requirements and Determining Criterion) <i>Resource (Document, Template and/or output, or database)</i>	Purchaser	Supplier	
		AP"	LAP"	TT"
Common Assessment Standard	Information management and BIM policy	C	C	C
ISO 9001	Information management and BIM roadmap	C	C	C
ISO 17067	Published offering of information management services and scope	M	M	M
ISO 9001:2015, 9.2.1 ISO 17067: 5.3.8	Management systems audit plan	M	M	M
ISO 19650-1, 8.2	The capability and capacity review scope	M	C	C
ISO 19650-1, 8.2	Capability and capacity assessment templates (HR, ICT and IM function)	C	C	C
ISO 19650-2, 4	Work instruction template for the information management function	M	C	
ISO 19650-2, 5.1.1	Appointing party's third-party information management scope of services	M		
ISO 19650-2, 5.1.1	Lead Appointed Party's information management scope of services	M	C	
ISO 19650-2, 5.1.1	The Information management assignment matrix template	C	C	C
ISO 19650-1, 5.1, 5.5, 6.3.1	Schedule of information requirements	C		
ISO 19650-2, 5.1.2	Project Information Requirements (PIR) template/document	M	M	
ISO 19650-2, 5.1.3	Delivery phase schedule (Project/Design Programme)	C		
ISO 19650-2, 5.1.4	Project Information Standards (PIS)	M	C	C
ISO 19650-2, 5.1.4 a)	List of standards for the exchange of information	M	C	C
ISO 19650-2, 5.1.4 b)	List of standards structuring and classification information	M	C	C



Standard, clause.	Information Management Resources (Specified Requirements and Determining Criterion) <i>Resource (Document, Template and/or output, or database)</i>	Purchaser	Supplier	
		AP"	LAP"	TT"
ISO 19650-2, 5.1.4 c)	List of standards for the level of information need	M	C	C
ISO 19650-2, 5.1.4 d)	List of standards information used in the operational stage	M	C	C
ISO 19650-2, 5.1.5	Project Information production methods and procedures	M	C	C
ISO 19650-2, 5.1.6, 5.2.2	Resources Library (Reference information and shared resources)	M	C	C
ISO 19650-2, 5.1.7	CDE functional specification	M	C	C
ISO 19650-2, 5.1.7	The Project CDE	M	C	C
ISO 19650-2, 5.1.8	Project information protocol	M	C	C
ISO 19650-2, 5.2.1	Appointing party exchange information requirements (EIR)	M	C	
ISO 19650-2, 5.2.1 a)	Organisational Information Requirements (OIR)	C		
ISO 19650-2, 5.2.1 a)	Asset information requirements (AIR)	C	C	C
ISO 19650-2, 5.2.1 b)	The level of information need specification	M	C	
ISO 19650-2, 5.2.1 c)	Appointing party acceptance criteria	M	C	
ISO 19650-2, 5.2.1 d)	Appointing party's supporting information	M	C	
ISO 19650-2, 5.2.1	Appointed party information management scope of services	M	C	
ISO 19650-2, 5.2.1	Lead Appointing Party's third-party information management scope of services.	M		
ISO 19650-1, 8.2, 9 ISO 19650-2, 5.2.3	Appointing Party's invitation to tender (ITT) response requirements	M	C	
ISO 19650-2, 5.2.4	Appointing Party's ITT package	M	C	
ISO 19650-2, 5.3.1	Lead Appointing Party's third-party information management scope of services.		C	
ISO 19650-2, 5.3.1	Appointed parties' information management scope of services		M	C



Standard, clause.	Information Management Resources (Specified Requirements and Determining Criterion) <i>Resource (Document, Template and/or output, or database)</i>	Purchaser	Supplier	
		AP"	LAP"	TT"
ISO 19650-2, 5.3.2	LAP's (pre-appointment) BEP template	C	M	I
ISO 19650-2, 5.3.2 a)	List of delivery team's CVs (resumes)		M	
ISO 19650-2, 5.3.2 a)	List of task team's CVs (resumes)			M
ISO 19650-2, 5.3.2 b)	Delivery team's information delivery strategy	I	M	I
ISO 19650-2, 5.3.2 c)	Delivery team's federation strategy	I	M	I
ISO 19650-2, 5.3.2 d)	Delivery team's high-level responsibility matrix	M	M	C
ISO 19650-2, 5.3.2 e)	Organisational project information standards	C	C	C
ISO 19650-2, 5.3.2 f)	Organisational project information production methods and procedures	C	C	C
ISO 19650-2, 5.3.2 g)	Delivery team's schedule of software (IT schedule including hardware and IT infrastructure)		M	M
ISO 19650-2, 5.3.3	Task team capability and capacity assessment	C	C	M
ISO 19650-2, 5.3.4	Supply Chain Capability Summary (SCCS)		C	I
ISO 19650-2, 5.3.4	Project Implementation Plan (PIP)			
ISO 19650-2, 5.3.5	Task team's training plan (including training and experience records)		I	M
ISO 19650-2, 5.3.5 ISO 19650-2, 5.5.1, 5.5.2, 5.5.3	The delivery team's mobilization plan		M	
ISO 19650-2, 5.3.6	The delivery team's information delivery risk register		M	C
ISO 19650-2, 5.4.1	Delivery team's BEP		M	C
ISO 19650-2, 5.4.2	Delivery team's detailed responsibility matrix		M	C
ISO 19650-2, 5.4.3	Lead Appointed Party's EIR.		M	
ISO 19650-1, 5.1, 5.5	Schedule of information requirements	C	C	
ISO 19650-2, 5.4.4	Task information delivery plan (TIDP)	C	C	M



Standard, clause.	Information Management Resources (Specified Requirements and Determining Criterion) <i>Resource (Document, Template and/or output, or database)</i>	Purchaser	Supplier	
		AP"	LAP"	TT"
ISO 19650-2, 5.4.5	Master information delivery plan (MIDP)	C	M	
ISO 19650-2, 5.4.6	LAP's appointment	M	C	
ISO 19650-2, 5.4.7	LAP's appointment		M	C
ISO 19650-2, 5.6.2	Information (Model) Deliverables			M
ISO 19650-2, 5.6.3	QA Check documentation/data			M
ISO 19650-2, 5.6.4	Review feedback documentation/data.			M/C
ISO 19650-2, 5.6.5	Delivery Team's Information Model review record		M/C	M/C
ISO 19650-2, 5.7.2	LAP's Information Model authorization record		M/C	
ISO 19650-2, 5.7.4	Appointing Party's Information Model acceptance record		M	
ISO 19650-2, 5.8.2	Lessons learned record	M	I	I

AP = Appointing Party (Client), LAP = Lead Appointed Party, TT = Task Team (Appointed Party)