

Organisational Information Requirements

Template

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1 Introduction

This document has been developed to assist an organisation in defining and capturing its organisational information requirements (OIR).

The ISO 19650 series recommends that an organisation should consider the information it needs to support the organisation's and/or interested party's strategic objectives, setting out clear information requirements for those involved in the delivery or operation of an asset.

These information requirements define the information to be delivered to help support business operations and wider strategic goals. It is likely that these objectives are already in place within your organisation; however, they may not have been structured in a manner that enables the information that they are dependent upon to be specified. This guidance document is intended to assist by highlighting specific items for consideration when adopting the ISO 19650 series and structuring these organisational information requirements. Collating/referencing existing information management processes and objectives into the organisational information requirements (OIR) template enables an organisation to evaluate its collective information needs.

Figure 1.1: Hierarchy of information requirements, source: ISO 19650–1:2018) below illustrates the hierarchy of the scope of the organisational information requirements (OIR) and how this influences the subsequent information requirements and project information deliverables of the delivery phase of an asset, as stated in ISO 19650–1:2018.

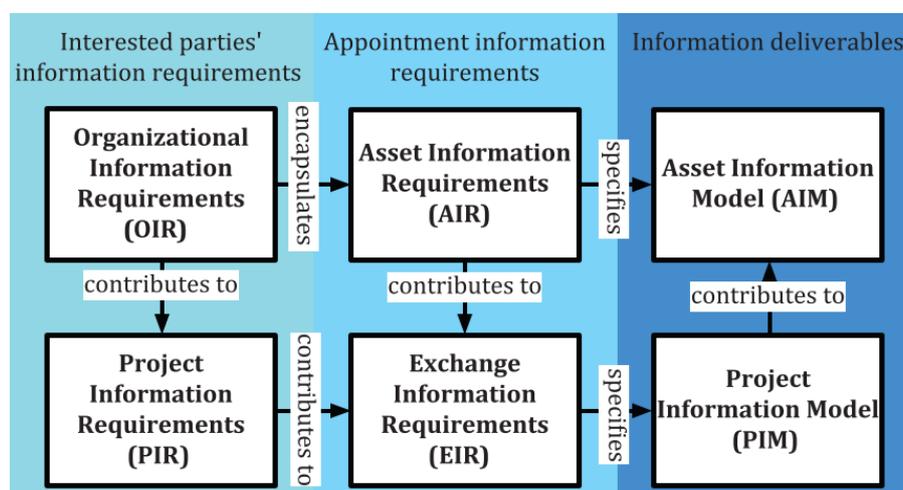


Figure 1.1: Hierarchy of information requirements, source: ISO 19650–1:2018

This guidance document has been developed to assist users in the completion of the organisational information requirements (OIR) template.

2 Goals and policies

Define your organisation's goals/purpose for capturing, maintaining and using information-related to assets.

Ensure that you include wider business needs, and not just project procurement, if applicable.

The aim is to communicate the high-level information management ambition, which will be obtained through the adoption of ISO 19650 standard series principles through day-to-day activities.

The following organisational objectives provide a high-level overview of the collective purpose for requiring asset-related information.

These strategic operational drivers, for improved information management, are derived from a combination of internal and external policies.

<The example below is of an organisation's goals, followed by a section outlining both the external and internal policies that determine/influence these goals and their associated objectives. This includes references to regulatory standards that may be regional.

This should be modified/replaced by your organisation's goals that determine the strategic needs for capturing, maintaining and using information related to assets. This could be a reference to an existing mission statement or vision that sets measurable goals. The focus could include or be aligned with wider organisational requirements.

Often it is helpful to structure goals and associated objectives within an overarching framework. Examples include:

- Strategic, tactical, operational;
- Managerial, technical, legal, commercial, financial;
- People, planet, profit;
- [UN Sustainable Development Goals](#); or
- [Five Capitals of sustainability](#).>

{Client name} is committed to achieving its goals of:

- Achieving net zero carbon by 2030;
- Reducing construction costs by 20% by 2025;
- Reducing reactive maintenance activities by 5% per asset by 2025; and
- Improving site safety, reducing accidents by 45% by 2030.

2.1 Relevant policies and external influences

<The example below (Table 2.1: Goals, strategic policies and influences) demonstrates the existing internal and external influences (such as standards and regulations) that require information in order to

be fulfilled. These could relate to the delivery and/or operation phase of an asset. They establish the information needed to monitor and verify the achievement of the above goals.

Grouping by category, stakeholder or department could assist with clarity. Consideration should be given to any security restrictions.>

The policies and external influences below have been identified and collated as part of {client name}'s organisation-wide information management strategy and should be considered when any information requirements are being developed. This should include how these information requirements may need to be structured as part of the project's information standards, as well as its information production methods and procedures.

Table 2.1: Goals, strategic policies and influences

Goals	Objectives	Policy or influencer	
		Internal	External
Carbon-neutral	<ul style="list-style-type: none"> • Reduce energy usage in owned/rented facilities • Specify products with low/no embodied energy • Explore carbon-positive innovations • Obtain BREEAM excellence on all new-build projects 	Environmental policy	BREEAM The Carbon Neutral Protocol: 2020
Reduce construction cost	<ul style="list-style-type: none"> • Revise design to reduce total construction waste • Segregate waste to consider recycling and cradle-to-cradle usage • Explore cause of defects and liabilities and develop policies to mitigate them 	Site waste policy Offsite manufacturing/DMFA policy Planning and budget policy	
Reduce reactive maintenance		Asset management policy Strategic asset management plan	ISO 5500 standard series
Site safety		Health and safety policy	CDM 2015 regulations

3 Information requirements and activities

Define the information required by your organisation to support its organisational objectives, the purpose for which the information is required.

Ensure that you include wider business needs, and not just project procurement, if applicable.

The aim is to communicate the high-level information management ambition, which will be obtained through adoption of the ISO 19650 series principles through day-to-day activities.

The following organisational information requirements (OIR) specify information, and its associated acceptance criteria, to support {client name}'s organisational objectives.

These strategic operational requirements and systems, for improved information management, are derived from a combination of internal and external policies.

<The example below (Table 3.1: Information requirements schedule) demonstrates the requirements for each of the organisational objectives and the anticipated deliverables.

If this table is adopted, ensure that the column headings reflect the areas that are most important to your organisation's information requirements (OIR).

Ensure that you outline the activities that utilise information generated from the delivery or operation of an asset throughout its life cycle, integrating with business planning and management cycles. Ideally, this section should provide more detail of the objectives and policies identified in the previous section. If the table is not to be adopted, below is a list of asset management activities (based on the ISO 55000 series) that you may want to adopt:

- Asset accounting, activity costing, forecasting
- Planning and budgeting
- Customer expectation policy
- Capital investment and life-cycle costing
- Interfacing and regulatory bodies
- Asset operation and optimisation
- Asset modification, redeployment and disposal
- Maintenance: spares, materials and purchasing
- Contingency planning and emergencies
- Energy efficiency and environmental aspects
- Health and safety
- Assessing overall financial performance

Outline the high-level activities and the relevant requirements of the organisation's asset management goals and objectives, which could include any new initiatives that are to be deployed.>

Table 3.1: Information requirements schedule

Goals	Objectives	Policy or influencer (if applicable)	Information requirements	Information containers	Group/ department	Project stage/information delivery milestone
Carbon-neutral	Obtain BREEAM excellence on all new-build projects	BREEAM (UK New Construction 2018)	Information relating to energy demand and consumption: <ul style="list-style-type: none"> • Building floor area (m²) • Notional building energy demand (mJ/m²) • Actual building energy demand (mJ/m²) • Notional building energy consumption (kWh/m²) • Actual building energy consumption (kWh/m²) • Target emission rate (kgCO₂/m²) • Building emission rate (kgCO₂/m²) 	- Provide within a spreadsheet using the units shown (.xls)	Team 1 – Sustainability group	Project stages 02–05
		• Ene 01 – Reduction in energy use and carbon emissions				
		The Carbon Neutral Protocol: 2020				
Reduce construction cost		Site waste policy				
		Offsite manufacturing/DMFA policy				
		Planning and budget policy				
Reduce reactive maintenance		Asset management policy				
		Strategic asset management plan				
		ISO 5500 standard series				
Site safety		CDM 2015 regulations				
		Health and safety policy				

4 Structure and responsibilities

Provide a high-level understanding of the existing or proposed organisational structure. This could include both internal and external stakeholders. This is to support the understanding of the different teams/departments associated with the information requirements in the above section.

Both internal and external functions should be understood in their entirety, outlining the relevant areas of the organisation responsible. This will allow optimisation of current and future information requirements.

<As this document is intended for internal use only, the organisation's structure is to assist those who may be involved with the delivery stage of an asset to develop a better understanding of the wider organisation's framework and subsequent needs. This should help to inform the information requirements and subsequent information deliverables of a project.

The example below (as the template) has been divided into subsections to highlight specific groups/departments that may influence the information deliverables at each stage of a project.>

4.1 Organisational structure

Outline the structure of your organisation, focusing on the teams/departments that are involved with information management activities, especially of the policies mentioned above.

This should, if applicable, include external stakeholders.

In order to optimise the information management processes, it is important to understand those who are involved.

This section provides a brief overview of the organisation's key stakeholders.

<Outline the organisational structure for information management processes; it should identify internal departments, associated processes/policies and any required interaction with external stakeholders. This could include both existing and proposed partnerships.

This could be kept as a high-level description but ideally would include departments/teams across the organisation, such as human resources, information technology, finance, facilities management and operations. This could include references or links to existing explanations/organograms of the organisational structures, including teams, groups and departments.

The example below has been divided further into subsections that may be adopted to provide clarity.>

4.1.1 Internal organisational groups

<This section could be used to provide a description of the organisation’s internal departments, as identified above, providing a context for why they may require information; see Table 4.1: Internal organisational groups.

More detailed information could also be provided within a linear responsibility matrix, such as a RACI (responsible, accountable, consulted and informed) matrix.>

Table 4.1: Internal organisational groups

Group	Department	Activity/relationship
Team 1	Planning	<ul style="list-style-type: none"> - Provide information to support decision-making - Develop annual budget
Team 2	Community liaison	<ul style="list-style-type: none"> - Gathering and sharing information externally - Engaging with the community, via meetings and presentations

4.1.2 External organisational groups

<This section could be used to provide a description of the organisation’s external departments, as identified above, providing an explanation of the associated asset information management functions; see Table 4.2: External organisational groups.

More detailed information could also be provided within a linear responsibility matrix, such as a RACI (responsible, accountable, consulted and informed) matrix.>

Table 4.2: External organisational groups

Group	Department	Activity/relationship
Client representative	Investment	<ul style="list-style-type: none"> - Decide contribution/budget
Insurers	Insurance	<ul style="list-style-type: none"> - Risk management

5 Governance

Either reference or explain the existing or proposed change management processes, which could be an annual 'lessons learnt' workshop, where the objectives and subsequent policies and requirements are reviewed, updated and improved.

To drive continuous improvement associated with the asset information management processes, the following change management protocol should be adhered to.

<Specify when lessons learnt/information requirement reviews should occur and how the feedback should be adopted and deployed throughout the organisation. The focus should be to ensure that the organisational information requirements (OIR) reflect the true current needs of the organisation, which could be an update to objectives and/or policy updates.>

To ensure that the information requirements are fit for purpose, it is important to obtain feedback and review the current organisational needs. This will take place during annual lessons learnt reviews that should include those involved with asset information management.