**Invitation to Tender (ITT)**

**CLIENT PROJECT INFORMATION MANAGER**

**SCOPE OF SERVICES**

**[Insert Project Name]**

**[Insert Organisation]**

**[Insert Date]**

**Notes for User of Template** (Delete upon issue)

**Context on the role**

This Invitation to Tender (ITT) outlines the scope of services for the delivery of client project information manager services during the project delivery phase to support the Client body.

This Client Project Information Management role can be delivered as part of an existing appointment and incorporated within the Design Team Leader or the Project Management Lead. The skill set required for this commission is focused on management disciplines – there is no design responsibility. Alternatively, this commission could be a stand-alone appointment to a BIM consultant.

This scope of service does not cover BIM Co-ordinator, who typically undertakes coordination and clash detection in connection with models. Coordination and clash detection is part of the design coordination activities undertaken by the design team lead and is excluded from the scope of the role of the Information Manager.

The following scope of services should be reviewed against the project BIM Protocol to ensure alignment. Where an organisation has specific templates, these can be referred to within section 6.0. This template document assumes that all text in Blue italics are guidance and should be deleted from the final ITT. All red text are to be populated by the user in the development of the ITT.

**BIM Readiness Prior to Appointment of Client Project Information Manager**

Please note that this Client Project Information Manage scope of services, has been developed on the assumption that the contracting authority has already developed a BIM strategy and associated BIM documents. A summary of the key documents and outputs required are listed in the table below and have been classified into two parts:-

1. Mandatory – These are mandatory BIM documents and outputs required prior to project commencement. They are fundamental to deliver BIM within a project.
2. Optional – These are more organisational focused deliverables and to deliver best practice, and derive the full benefits of BIM, should be implemented.

|  |  |  |  |
| --- | --- | --- | --- |
|  | **BIM Tools, processes, procedures and technology** | **Project** **Level****Mandatory** | **Organisational****Level** **Optional** |
| Information | File Naming Convention  | Checkmark |  |
| Asset Classification  | Checkmark |  |
| Data Standard | Checkmark |  |
| Modelling Standard | Checkmark |  |
| Information Strategy  | Checkmark |  |
| Organisational Information Requirements – OIR  |  | Checkmark |
| Asset Information Requirements – AIR  |  | Checkmark |
| Project Information Requirements - | Checkmark |  |
| EIR template/ populated EIR for the project  | Checkmark |  |
| Support implementing the BIM protocol & MPDT  | Checkmark |  |
| Process | Key decisions mapped  | Checkmark |  |
| Information types and it’s input – and output mapped  | Checkmark |  |
| Security requirements around the information Level of Detail mapped  | Checkmark |  |
| RACI matrix developed (for Strategic, Project and Asset) | Checkmark |  |
| BIM Grading Tool Assessment | Checkmark |  |
| Technology | Technology strategy  | Checkmark |  |
| Departmental CDE strategy |  | Checkmark |
| Common Data Environment | Checkmark |  |
| People & Mobilisation | Skill gaps analysis  |  | Checkmark |
| Upskilling & Training strategy  |  | Checkmark |
| Updated job descriptions & recruitment profiles  |  | Checkmark |
| Organisational Readiness assessment  |  | Checkmark |
| BIM business case  | Checkmark |  |
| BIM communication plan  |  | Checkmark |
| BIM engagement workshops – to raise awareness  |  | Checkmark |
| Value & benefits management and realisation mapped |  | Checkmark |
| BIM road map & implementation strategy in place  |  | Checkmark |

The mandatory documents and outputs listed within Table 1 above should be in place prior to project commencement and appointment of a Client Project Information Manager. Where they are still to be developed, the contracting authority can refer to the companion document “Template ITT for BIM Consultancy Service”. A summary of these documents and the key deliverables are summarised below:-



**1.0 Introduction**

This Invitation to Tender outlines the scope of works for the provision of Client Project Information Management services for the [Insert Project Name] on behalf of [insert organisations name]

Scottish Government is committed to embedding and realising the recommendations of the “Review of Scottish Public Sector Procurement in Construction”. The review committed that:-

*“BIM will be introduced in central government with a view to encouraging adoption across the public sector. The objective should be that, where appropriate, projects across the public sector adopt BIM level 2 by April 2017.”*

This invitation to tender (ITT) seeks advisory support in order to provide Client Project **Information Management services** for the [insert project name] project. The services are required to be aligned to Level 2 BIM standards and working practices, details of which can be found via the SFT BIM Guidance Portal: <https://bimportal.scottishfuturestrust.org.uk/>

**2.0 Submission of ITT Responses**

Tenderers must submit their tender responses no later than XX on XXX electronically to XXXX. Any tender response not received in full by this deadline may be rejected. [Insert Organisation Name] may at its own discretion extend this closing date and the time for receipt of tender responses. Any extension granted under this paragraph will apply to all Tenderers.

Tender responses should remain open for acceptance for a period of XXX days from the deadline for receipt of responses specified above. A tender response valid for a shorter period may be rejected.

**3.0 Project Data & Definitions**

**3.1 Project Data**

|  |
| --- |
| Project Data |
| Project Name | Insert name of project |
| Project Description | Text description taken from NPR |
| Project Address | Name, Address and Postcode |
| Correspondence Address | Name, Address and Postcode |
| Project Value | £ (value) – note also if this is net or gross |
| Contract Type | E.g. NEC3 |
| Plan of Works | E.g. RIBA 2013, GRIP etc. |
| Relevant project stage(s)  | E.g. RIBA Stage 2,3 |
| Procurement Timetable, Key Dates and MeetingsThe planned timescales for this information management procurement exercise are as follows: |
| Issue of Request for Pricing |  |
| Confirm intention to quote |  |
| Last date for queries |  |
| Submission date |  |
| Evaluation and select supplier |  |
| Initial meeting with selected supplier |  |
| Commission commences |  |
| Commission completed |  |
| [Insert any regular meetings that the supplier should attend and frequency / location of same] |  |
|  [If CDE hosting services are required then the other additional key dates should also be established such as informing the archive period for the stored data] |  |
| Named contact for this procurement is |
| Name |  |
| Address |  |
| Telephone |  |
| E-Mail |  |

**3.2 Definitions**

**BIM Level 2:** A series of domain and collaborative federated models. The models, consisting of both 3D geometrical and non-graphical data, are prepared by different parties during the project life-cycle within the context of a common data environment.This requires an information exchange process which is specific to that project and co-ordinated between various systems and project participants. This provides the platform to improve the co-ordination of the design and provide validate outputs via digital transactions in a structured and reusable form.

**Client Project Information manager**: a representative appointed by the employer or asset owner, who is responsible for establishing governance and assuring data and information flow to and from the common data environment (CDE) during the design, construction, operation and maintenance, and disposal or decommissioning of a built asset.

**Employers Information Requirements (EIR):** a pre-tender document setting out the information to be delivered, and the standards and processes to be adopted by the supplier as part of the project delivery process [from BS 1192-4]

**Information management:** tasks and procedures applied to inputting, processing and generation activities to ensure accuracy and integrity of information [from PAS 1192-2]

Policies, processes, procedures and tasks applied to inputting, processing and generation activities to ensure accuracy, authenticity, confidentiality and integrity of information [from PAS 1192-5]

**Asset information data** or information relating to the specification, design, construction or acquisition, operation and maintenance, and disposal or decommissioning of an item, thing or entity that has potential or actual value to an organization [from BS 1992-5]

**Organisational information requirements** (OIR) data and information required to achieve the organization’s objectives [from PAS 1992-3]

**Master information delivery plan** (MIDP): primary plan for when project information is to be prepared, by whom and using what protocols and procedures, incorporating all relevant task information delivery plans [from PAS 1192-2]

**Common data environment (CDE):** single source of information for any given project, used to collect, manage and disseminate all relevant approved project documents for multi-disciplinary teams in a managed process [from PAS 1192-2]

**4.0 ITT for Defining Client Project Information Management Requirements**

**4.1 Overview**

The [insert organisation name] is seeking to implement BIM Level 2 at [insert project name] project. As part of this process we are seeking a consultant to provide client project information management services during the creation of the project information model (PIM).

Client Project Information Management is a key activity in the implementation of the Building Information Modelling (BIM) new ways of working. This ITT seeks the appointment of a party to deliver Client Project Information Management Services consistent with the requirements for the management of project information in accordance with PAS 1192-2:2013: Specification for information management for any phase of construction projects using building information modelling.

The Client Project Information Management consultant will provide a suitably trained Information Manager for the project who will be responsible for the project level configuration of the client’s Common Data Environment which is used to exchange all project information, not just Building Information Models. This role has XXXX principal components: [Delete as appropriate]

* Managing the Common Data Environment (CDE)
* Project information management
* Collaborative working, information exchange and project team management

**4.2 BIM tools made available to the Client Project Information Manager by [insert organisation name]**

The [insert organisation name] has already started with implementing BIM standards, processes and technology at an organisational level to prepare for implementing BIM on our projects.

The table below, presents the BIM tools, templates, processes and procedures which are available to the Client Project Information Management supplier. This BIM toolkit must be used for the benefit of this [insert project name] project, suggestions for continuous improvement shared with the client. And the approach to project BIM implementation and information management, shall reflect and be in line with latest industry standards and best practice.

*[Delete ticks as appropriate for documents or outputs not in place and include available documents as an appendix and the associated reference]*

|  |  |  |  |
| --- | --- | --- | --- |
|  | **BIM Tools, processes, procedures and technology** | **Project** **Level** | **Appendix Ref** |
| Information | File Naming Convention  | Checkmark |  |
| Asset Classification  | Checkmark |  |
| Data Standard | Checkmark |  |
| Modelling Standard | Checkmark |  |
| Information Strategy  | Checkmark |  |
| Organisational Information Requirements – OIR  | Checkmark |  |
| Asset Information Requirements – AIR  | Checkmark |  |
| Project Information Requirements - | Checkmark |  |
| EIR template/ populated EIR for the project  | Checkmark |  |
| Support implementing the BIM protocol & MPDT  | Checkmark |  |
| Process | Key decisions mapped  | Checkmark |  |
| Information types and it’s input – and output mapped  | Checkmark |  |
| Security requirements around the information Level of Detail mapped  | Checkmark |  |
| RACI matrix developed (for Strategic, Project and Asset) | Checkmark |  |
| BIM Grading Tool Assessment | Checkmark |  |
| Technology | Technology strategy  | Checkmark |  |
| Departmental CDE strategy | Checkmark |  |
| Common Data Environment | Checkmark |  |
| People & Mobilisation | Skill gaps analysis  | Checkmark |  |
| Upskilling & Training strategy  | Checkmark |  |
| Updated job descriptions & recruitment profiles  | Checkmark |  |
| Organisational Readiness assessment  | Checkmark |  |
| BIM business case  | Checkmark |  |
| BIM communication plan  | Checkmark |  |
| BIM engagement workshops – to raise awareness  | Checkmark |  |
| Value & benefits management and realisation mapped | Checkmark |  |
| BIM road map & implementation strategy in place  | Checkmark |  |

**4.3 Managing the Common Data Environment (CDE)**

The successful bidder shall:

1. Configure/Review the client’s Common Data Environment for the project to reflect, where appropriate, specific workflows, processes and specific roles to enable reliable information exchanges between Project Team Members, the Employer and other parties. This will support the successful delivery of the data exchanges established in the Master Information Delivery Plan (MIDP).
2. Establish, agree and implement the information structure and maintenance standards for the Information Model. This will include establishing a project data breakdown structure, classifications and naming conventions. This should be developed in liason with the FM team, who will be responsible for operation and maintenance of the asset.
3. Receive information into the Information Model in compliance with agreed processes and procedures. Validate compliance with EIR, information requirements and standards and advise on noncompliance.
4. Maintain the Information Model to meet integrity and security standards in compliance with the employer’s information requirement (EIR) for example PAS1192-5.
5. Manage the Common Data Environment processes, RACI and procedures, validate compliance with them and advise on noncompliance.
6. This production of associated overview documentation and flowcharts for dissemination to users of the CDE and other related data suppliers to ensure they understand the proposed processes, RACI s and data standards.

**4.4 Project Information Management**

The successful bidder shall:

1. Initiate, agree and implement the Project Information Plan and Asset Information Plan, as part of the Project Execution Plan covering and considering as a minimum
2. The client’s products, which are made available to the supplier – refer to the table under 4.2
3. Level of detail of information required for specific Project Outputs e.g. Planning, Procurement, FM Procurement
4. The client’s Information and FM Strategy & Information Requirements
5. The client’s organisational governance
6. Information structure across roles e.g. software platforms (all levels of supply chain) appropriate to meet the Employer Requirements and Project Team resources
7. The process for incorporating as constructed, testing, validation and commissioning information
8. What info can currently be processed & and what is suitable for BIM Level 2 and the future beyond BIM Level 2.
9. Enable integration of information within the Project Team and co-ordination of information by the Design Lead through CDE
10. Agree formats for Project Outputs that support delivery of the MIDP
11. Assist Project Team Members in assembling information for Project Outputs Collaborative working, information exchange and project team management
12. Verify the Level of Definition on data provided by the suppliers against the BIM Execution Plan (BEP) and MIDP aligned with the project EIR
13. Final review of information to validate that the information received is aligned with the MIDP and is suitable for transfer to the Asset Information Model
14. These services will be required from (Insert stage and date) to (Insert stage and date)

**4.5 Collaborative working, information exchange and project team management**

The successful bidder shall:

1. Support the implementation of the project MIDP, using the templates provided by the client.
2. Liaise with and co-operate with Project Team Members and the Employer in support of a collaborative working culture
3. Assist the Project Team Members in establishing information exchange processes and RACI, including:

Define and agree procedures for convening, chairing, attendance and responsibility for recording “information exchange process meetings”

1. Participate in and comply with project team management procedures and processes including:
* risk and value management
* performance management and measurement procedures
* change management procedures including adjustments to budgets and programme
* attendance at project and design team meetings as required agree and implement record keeping, archiving and audit trail for Information
1. **Deliverables for Appointment**
2. Managing the Common Data Environment (CDE)
3. Project Information Management
4. Collaborative working, information exchange and project team management

**6.0 Required Templates**

When delivering these services, the bidder for [Insert Project Name] should adopt the following template documents:-

* [Attached your (project) Employers Information Requirements (EIR) to this ITT, or as a minimum attach your EIR template]
* [Insert name and link to any other template documents, developed by the BIM consultant like; ensure alignment with list of documents in table 4.2 ]
* …………..

**7.0 Quotation Submission Requirements & Evaluation Criteria**

*[The contracting authority can define submission requirements and evaluation criteria in line with their own tender process and best practice. The following sections offers indicative criteria for consideration]*

The submission requirements are as follows:

**Consultants methodology, understanding, tools and techniques used to deliver the outputs. (**Maximum 4 pages**)**

1. Outline your approach to the commission and how you would propose to deliver the services set out within the scope of this document,
2. Organisational experience of applying similar Client Project Information Management services to achieve BIM Level 2 maturity in projects.
3. Please provide 2 client references, who can be contacted to verify,

**Consultants personnel & experience and availability (**Maximum 4 pages**)**

1. CVs / personnel profiles for the Client Project Information Management personnel you are proposing to undertake the commission outlining relevant skills and experience of similar BIM and Information Management consultancy commissions including relevant qualifications and training,
2. Statement of availability for key personnel proposed for commission detailing other significant commitments during this timeframe,

**Consultants personnel & experience and availability (**Maximum 2 pages**)**

1. Develop an indicative delivery programme and (risk register and proposed mitigation measures,)
2. Proposed resource allocation against key activities.
3. Fee (as per pricing requirements below),

The submission should be a maximum of (?) pages excluded any appendices if required.

**Evaluation Criteria:**

|  |
| --- |
| **Technical** |
| Evaluation**: 70% weighting**  |
| The technical submission **must not** exceed **10** sides of A4 (Font size Arial 12), excluding CV’s.  |
| **Evaluation Criteria**  | **Weighting** |
| 1 | **Consultants methodology, understanding, tools and techniques used to deliver the outputs.**  | **30%** |
| 2 | **Consultants personnel & experience and availability** | **30%** |
| 3 | **Consultants programme & risk register** | **10%** |
| **Commercial** |
| Evaluation**: 30%** **weighting** |
|  |

**8.0 Fee Proposal**

All fees and rates must be submitted net of VAT.

**Hourly Rates**

An hourly rate for each staff member must be provided. This will be the basis of payment for any instructions agreed for any additional work activities out with the scope of the tender.

|  |
| --- |
| Hourly Rate (£) |
| Client Project Information Management | Role | Name | Rate (£) |
| Director/Partner |  |  |  |
| Associate |  |  |  |
| Senior |  |  |  |
| Other |  |  |  |

**Fixed Price**

|  |
| --- |
| Fee (Fixed Price) for services allied to services for Information Management (£) |
| Managing the Common Data Environment (CDE) |  |
| * Configure a Common Data Environment for the project
 |  |
| * Establish, agree and implement the information structure and maintenance standards
 |  |
| * Receive information into the Information Model in compliance with agreed processes and procedures. Validate compliance with information requirements and advise on noncompliance
 |  |
| * Maintain the Information Model to meet integrity and security standards
 |  |
| * Manage the Common Data Environment processes and procedures, validate compliance with them and advise on noncompliance.
 |  |
| * Production of associated overview documentation and flowcharts
 |  |
| Project Information Management |  |
| * Initiate, agree and implement the Project Information Plan and Asset Information Plan
 |  |
| * Enable integration of information within the Project Team and co-ordination of information by the Design Lead
 |  |
| * Agree formats for Project Outputs that support delivery of the MIDP
 |  |
| * Assist Project Team Members in assembling information for Project Outputs Collaborative working, information exchange and project team management
 |  |
| * Verify the Level of Definition on data provided by the suppliers against the BEP and MIDP
 |  |
| * Final review of information to validate that the information received is aligned with the MIDP and is suitable for transfer to the Asset Information Model
 |  |
| Collaborative working, information exchange and project team management |  |
| * Support the implementation of the project MIDP & continue to ensure compliance with the MIDP
 |  |
| * Liaise with and co-operate with Project Team Members and the Employer in support of a collaborative working culture
 |  |
| * Assist the Project Team Members in establishing information exchange processes
 |  |
| * Participate in and comply with project team management procedures and processes
 |  |
| * Attend (weekly) co-ordination meetings
 |  |

|  |
| --- |
| Total Lump Sum Submission Price (£) |
| Lump sum fee | £ |