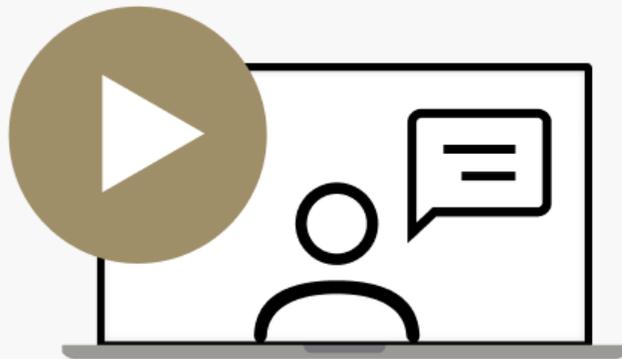


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**LESSON 3 : Win ISO 19650 Tenders**

*Effective Response Strategies*

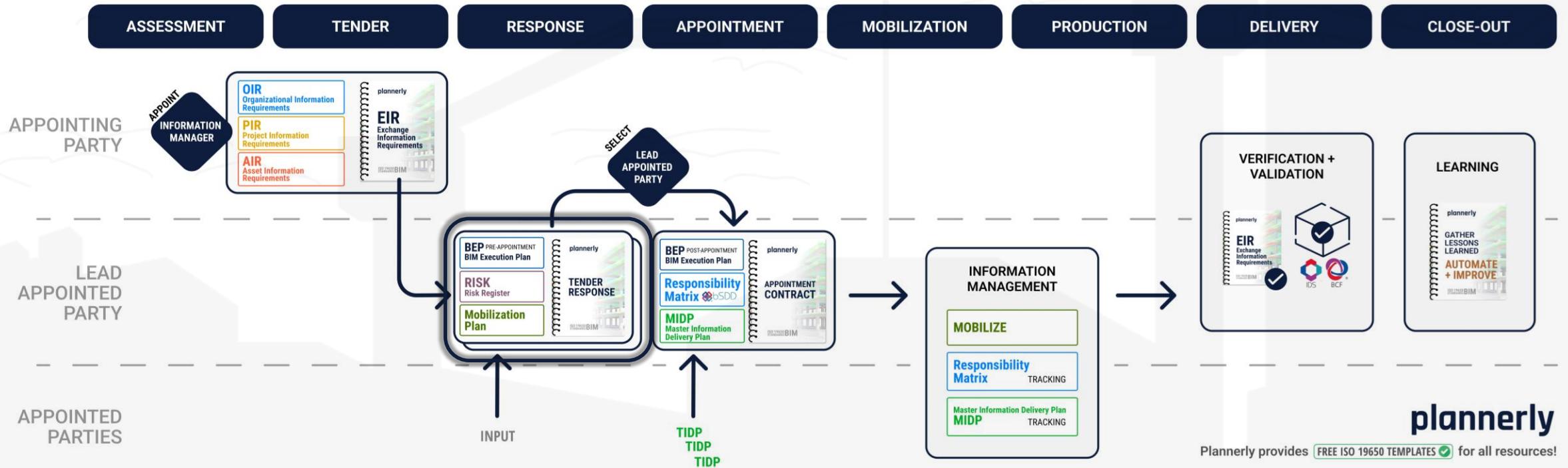


*Tender  
Response*

# ISO 19650 Workflow

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## More Simple Than You Think!



# Tender Response

More Simple Than You Think!

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# Challenges

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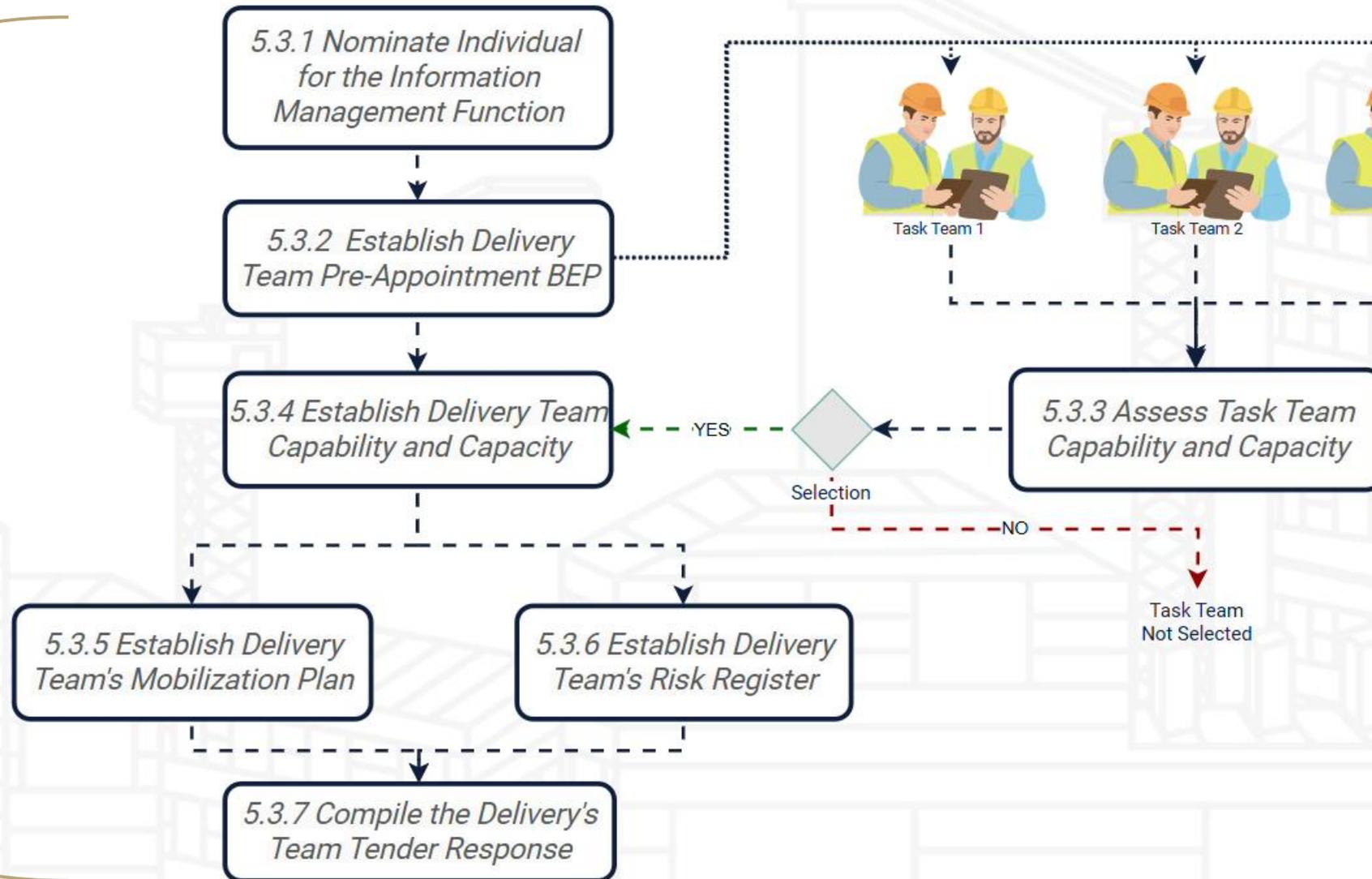
- ✗ Misaligned deliverables
- ✗ Delays in resource planning
- ✗ Unidentified risks

# Clause 5.3 – Tender Response

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Lead Appointed Party



# ISO 19650 CHECKLIST

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5.3.1 Nominate individuals to undertake the information management function

Unassigned LEAP

### Description

Appoint qualified individuals to undertake the information management function, ensuring they have the required skills and authority to manage information effectively and without conflicts of interest.

ISO 19650-2 Clause 5.3.1

### Checklist

- Identify individuals responsible for the information management function based on their skills and experience.
- Define the scope of responsibilities for each nominated individual to clarify their role within the project.
- Define specific tasks within the scope of services to clarify each individual's responsibilities.
- Ensure nominated individuals meet competency requirements related to information management standards.
- Confirm that each individual has the authority needed to make decisions and enforce compliance.
- Provide access to necessary resources and tools to support information management activities.
- Identify potential conflicts of interest and establish probity arrangements if applicable.

+ INFORMATION REQUIREMENTS

+ ATTACHMENTS

### Activity

Comment or @mention

Delete Task

#### Tracking:

MILESTONE  
Information Management Tasks

STATUS  
● Proposed

DATES  
None



5.3.2 Establish the delivery team's (pre-appointment) BIM Execution Plan

Unassigned LEAP

### Description

The prospective lead appointed party is responsible for developing a pre-appointment BEP to ensure alignment with the appointing party's requirements and the collaborative approach needed with appointed parties.

ISO 19650-2 Clause 5.3.2

### Checklist

- Define the information management function by nominating individuals for roles (collaborate with appointed parties as needed to ensure clarity).
- Develop the information delivery strategy to outline how the delivery team will meet the appointing party's information requirements.
- Create a high-level responsibility matrix to specify who is accountable for each element in the information model.
- Draft the federation strategy for model integration to ensure consistency across team contributions.

#### Tracking:

MILESTONE  
Information Management Tasks

STATUS  
● Proposed

DATES  
None



5.3.3 Assess each task team capability and capacity

Unassigned APP

### Description

Each task team must evaluate their capability and capacity to meet the project's information delivery requirements, in alignment with the appointing party's standards and the delivery team's (pre-appointment) BIM Execution Plan.

ISO 19650-2 Clause 5.3.3

### Checklist

- Evaluate the task team's capability to manage information, based on experience with similar standards and strategies.
- Assess the team's capacity for information production, considering personnel resources and expertise in required methodologies.
- Verify the availability of suitable IT infrastructure (software, hardware, and support agreements) to

#### Tracking:

MILESTONE  
Information Management Tasks

STATUS  
● Proposed

DATES  
None



5.3.4 Establish the delivery team's capability and capacity

Unassigned LEAP

### Description

The lead appointed party should aggregate assessments from all task teams to evaluate the delivery team's overall capability and capacity to meet project information requirements

ISO 19650-2 Clause 5.3.4

### Checklist

- Collect and aggregate capability assessments from all task teams, covering information management skills, experience, and qualifications.
- Review task team capacity to produce information, ensuring that human resources and IT support align with project demands.
- Compile a summary of capability and capacity, presenting an overview of the delivery team's collective resources.
- Confirm with appointed parties any additional support or training needed to address identified capability gaps.
- Document the findings and submit the capability summary to the appointing party, ensuring it reflects both strengths and any mitigation steps for potential limitations.

+ INFORMATION REQUIREMENTS

+ ATTACHMENTS

### Activity

Comment or @mention

bharathi changed the status of Establish the delivery team's capability and capacity to Proposed

Delete Task

#### Tracking:

MILESTONE  
Information Management Tasks

STATUS  
● Proposed

DATES  
None

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