

Information Management & Modelling Policy

1. Purpose

This policy sets out Taylor and Fraser's documented processes for the management, authorisation, approval, review, and exchange of information throughout the project lifecycle.

It demonstrates compliance with ISO 19650 (Parts 1 & 2) and satisfies the outlined requirements for Information Management and Information Modelling.

2. Scope

This policy applies to:

- All project information (graphical, non-graphical, models, drawings, documents, schedules, and data)
- All delivery stages (pre-construction, construction, handover, and close-out)
- All internal teams and external contributors

3. Information Management Principles

Taylor and Fraser Ltd align its information management approach with the principles of ISO 19650 – Organization and digitization of information about buildings and civil engineering works.

Key principles include:

- Appointment of clear Information Management roles
- Defined information requirements at project start
- Structured information delivery planning
- Use of a Common Data Environment (CDE) – Autodesk Construction Cloud (ACC)
- Controlled information states and status codes
- Auditability, traceability, and security of information

4. Roles and Responsibilities

4.1 Director

- Approves this policy and any subsequent revisions
- Ensures adequate resources are provided for effective information management
- Provides strategic oversight and compliance assurance

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4.2 BIM / Information Manager

- Implements and maintains information management processes
- Manages the CDE structure and permissions
- Ensures compliance with agreed standards and procedures

4.3 Project Manager

- Ensures project teams follow approved information processes
- Confirms correct authorisation and approval prior to information issue
- Coordinates information exchange with clients and stakeholders

4.4 Design, BIM and Delivery Teams

- Produce information in accordance with project standards
- Submit information for review and approval as defined
- Use only authorised and approved information

5. Documented Information Management Processes**5.1 Information Creation**

- Information is produced using approved software, templates, and naming conventions
- Project-specific requirements are defined at project start with all project stakeholders

5.2 Authorisation

- Information is checked by the originating discipline lead
- Compliance with project standards and scope is verified

5.3 Approval

- Information is formally approved by the Project Manager or delegated approver
- Approval status is recorded within the CDE

5.4 Information Exchange

- All exchanges occur via the CDE
- Information is shared in defined states (Work in Progress, Shared, Published, Archived) • Transmittals are recorded and auditable

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5.5 Revision Control

- All revisions are tracked using version control
- Superseded information is archived and removed from active use

6. Process Maps

6.1 ISO 19650 Information Management Flow

Client / Project Requirements → Information Production → Review → Approval → Issue → Use → Archive

1. Client and Project Information Requirements are established
2. Task Information Delivery Plans are agreed
3. Information is produced within Work In Progress (WIP)
4. Discipline Lead undertakes technical review
5. Information is Authorised for suitability
6. Project Manager Approves information for use
7. Information is issued via the CDE as Shared or Published
8. Information is used for construction and delivery
9. Final information is Archived at project completion

6.2 Change Management Process Map

1. Change Identified
2. Impact Assessed (Cost, Programme, Quality, Risk)
3. Information Updated
4. Re-authorisation and Approval
5. Controlled Re-issue via CDE

7. Delivery and Project Teams

Taylor and Fraser Ltd deliver projects using structured teams aligned with ISO 19650 role definitions.

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Typical project roles include:

- **Director** – Strategic oversight and governance
- **Project Manager** – Delivery, approvals, and coordination
- **Information Manager / BIM Manager** – Information standards, CDE management, compliance
- **Senior BIM Coordinator** – Model coordination and clash management
- **Design Coordinators** – Discipline-level information control
- **Designers / Engineers** – Information authors
- **Site & Delivery Teams** – Information users and feedback providers

Roles and responsibilities are confirmed at project start and recorded within the project execution documentation.

8. Common Data Environment (CDE)

- A secure CDE is used on all projects – Autodesk Construction Cloud (ACC)
- Access permissions are role-based
- ACC provides full audit trails for uploads, approvals, and revisions

9. Monitoring and Periodic Review

- This policy is formally reviewed annually and following any significant organisational or regulatory change
- Reviews assess compliance with ISO 19650 principles.
- Project audits, lessons learned, and client feedback are used to measure effectiveness
- Actions for improvement are recorded and implemented

10. Training and Awareness

- All Relevant staff receive information management and BIM training
- Project-specific briefings are provided at project commencement

11. Policy Approval and Review

This policy is reviewed annually to ensure it remains effective, current, and compliant with ISO 19650 requirements **Appendix A – Information Management & BIM Statement**

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Information Management & Modelling Policy

Taylor and Fraser operate a structured and proportionate approach to Information Management and Building Information Modelling (BIM) aligned with the principles of ISO 19650.

Information is managed throughout the project lifecycle to ensure it is accurate, authorised, approved, and suitable for use at each stage of delivery. Clear roles and responsibilities are defined at project commencement, including Director oversight, Project Management control, and delegated Information Management responsibilities.

All project information is produced in accordance with agreed standards, naming conventions, and formats, and is stored, reviewed, and exchanged using a secure Common Data Environment – Autodesk Construction Cloud (ACC). ACC enables controlled access, version control, audit trails, and clear information status definitions (Work in Progress, Shared, Published, and Archived).

Information undergoes a defined check, authorisation, and approval process prior to issue. Discipline leads are responsible for technical accuracy, while Project Managers confirm suitability for use before information is shared with clients, stakeholders, or delivery teams.

Changes to information are managed through a formal change control process, ensuring impacts on cost, programme, quality, and risk are assessed prior to re-issue. Superseded information is removed from active use and securely archived.

The effectiveness of Taylor and Fraser's Information Management and BIM arrangements is reviewed annually and informed by project audits, lessons learned, and client feedback. This ensures continuous improvement and ongoing compliance with ISO 19650.

This statement supports and should be read in conjunction with the Taylor and Fraser's Information Management & Information Modelling Policy.

Name: Andrew Norris

Position: Managing Director

Signed:



Date: 03/09/2026

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