

ORGANISATIONAL INFORMATION REQUIREMENTS (OIR) – HERITAGE (HIR_OIR_V1)

An overview of data requirements for the application of digital data management and building information modelling (BIM) for heritage asset management.

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Organisational Information Requirements – Heritage

Guidance Notes

How to use this document

This document provides a framework and guidance in establishing Organisational Information Requirements (OIR) specifically for application in a heritage context and, heritage asset management.

Guidance is aligned with PAS1192-3:2014 *Specification for information management for the operational phase of assets using building information modelling* but pays particular attention to conservation practice and UK consent procedures.

The document is intended to be generic, for use by the whole heritage sector, and to be modified to meet the specific requirements of individual projects or organisations.

The document template provides a framework for completing your own OIR and guidance for completing each section is given as a commentary in ‘red’ text. This should be removed once you have completed your document.

An OIR document may take any number of forms, there is no prescribed way to complete the document. The document should suit the specific requirements of the organisation or project and the form and content developed as such.

Before using this document the Historic England Guidance document – *BIM for Heritage: Developing an Asset Information Model (AIM)* should be read.

Organisational Information Requirements Explained

Organisational Information Requirements (OIR) are - *the data and information required to achieve the organisation’s objectives.* (PAS1192-3:2014)

In adopting digital data management workflows and building information modelling standards, an organisation should at the outset, develop an overarching Organisational Information Requirements (OIR) document that defines the information required to meet the needs of the asset management system and other organisational functions.

Each organisation may have different information requirements, it is therefore important to begin this process early and communicate with all departments or stakeholders who have a responsibility for strategic decision making concerning the asset or estate. BIM processes promote collaborative working practices. The development of an OIR provides an opportunity to collaborate and is intended to integrate information requirements at an organisational-wide level.

The defined organisational information requirements should be used to develop more specific asset information requirements (AIR) – see document HIR_AIR_V1.

The development of an OIR should be an ongoing process. Continued discussions with departments and stakeholders should assess if the data being collected is suitable and how this can be improved.

Organisational Information Requirements – Heritage

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1.0 Scope

This document sets out the Organisational Information Requirements (OIR) of xxxxxxxxxxxxxx in line with PAS1192-3:2014 and project reference xxxxxxxxxxxxxx.

The name of the organisation and the project reference (if applicable) should be completed.

The document should be read in conjunction with the full suite of documents including:

AIR xxxxxxxxxxxxxx

EIR xxxxxxxxxxxxxx

PLQ xxxxxxxxxxxxxx

Document references should be completed above.

The Organisational Information Requirements (OIR) defines the information required to meet the needs of the xxxxxxxxxxxxxx asset management system and other organisational functions.

The organisation or name of the asset management system should be completed.

2.0 Strategic Objectives

An introduction to the organisation's asset management strategy should be provided here. A general example has been provided but this should be amended to suit the individual organisation or project.

*The overall strategy for the management of **asset or organisation name** is underpinned by the xxxxxx asset management plan (*provide document reference*). At the heart of this strategy is the promotion of innovation and development in asset management including the use of digital data management workflows, the development of structured data sets and building information modelling (BIM) standards to facilitate rational decision making.*

The use of digital data management workflows and building information modelling supports the overall goal of heritage asset management, including the development of asset information models of existing heritage assets to inform the ongoing process of conservation, repair and maintenance.

xxxxxxxxxxx strategic objectives are outlined as follows:

Enter the name of the organisation and outline the strategic objectives.

*Examples provided below are taken from the **English Heritage Asset Management Plan 2011-2015** and the **Historic Environment Scotland Asset Management Plan for the Properties in the Care of Scottish Ministers 2018**. These should be amended to reflect the strategic objectives of your own asset management plan.*

- To ensure scarce financial resources are directed to preserve assets in the most need*
- To manage delivery of property services to deliver continuous performance improvement*

- *To raise awareness of asset management and provide clear decision making over its management and use*
- *Deliver conservation improvement and infrastructure*
- *Maintain and enhance visitor experience*
- *Understand and perpetuate cultural significance*
- *Delivery wider benefits and opportunities*

3.0 Information Requirements

In order to meet organisational strategic objectives, xxxxxxxxxx has identified a range of activities and states how the information that is collected and processed is to be used. These are developed from PAS1192-3:2014 Annex 2 and xxxxxxxxxx own asset management activities.

- To optimize the asset management strategy and optimize / prioritize the asset management plan
- To promote consistent national standards
- To form part of the organisational information resource – a corporate asset
- To develop a digital asset model to support operational decision making
- To support informed and justified decision making for conservation, repair and maintenance activities
- To improve efficiency when compiling consent applications
- To develop a common data environment in which asset information can be accessed by all departments / stakeholders
- To validate legacy data and identify knowledge gaps
- Produce data where gaps exist, such as survey data
- Assess the value of defect liabilities for funding and budgeting purposes
- Assess priorities for the forward planning of conservation, repair and maintenance activities
- To undertake on-going identification, assessment and mitigation of risks to cultural significance and historic fabric
- To reduce the duplication of work and produced information, make information available to a wider audience, promote collaboration and improve efficiencies
- To provide a visual / graphical summary of asset related data
- To facilitate the production of data driven reports for a range of uses / stakeholders
- To facilitate detailed, component level data management
- To meet statutory and regulatory obligations
- To support quality assurance and performance management activities
- To support H&S management including CDM 2015 and pre-construction information

The above information requirements are suggestions that might be deemed applicable for heritage organisations and for the application of building information modelling in a heritage context. These should be reviewed, deleted, amended and added to according to individual cases.

4.0 Other Sources of Information

The following documents should be read before using this document:

BIM for Heritage: Developing a Historic Building Information Model

BIM for Heritage: Developing an Asset Information Model (AIM)

It should be used in conjunction with the full suite of HBIM Information Requirements (HIRs) templates:

Asset Information Requirements (AIR) – Heritage (HIR_AIR_V1)

Employers Information Requirements (EIR) – Heritage (HIR_EIR_V1)

Plain Language Questions (PLQ) – Heritage (HIR_PLQ_V1)

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