

Briefing

Who should read this fact sheet ?

First-time or occasional clients with a basic to intermediate knowledge of the construction industry will find this fact sheet useful. More experienced clients and construction industry professionals could find some information of interest.

What is briefing ?

Briefing is the process by which client requirements are investigated, developed and communicated to the construction industry. Briefing of some kind always occurs during a project, though the quality can vary considerably. Good briefing is not easy to achieve, yet a number of studies have suggested that improvements to briefing lead to clients getting better buildings.

The benefits of good briefing

Buildings are expensive and long-lasting acquisitions. For the organisations which occupy them, good buildings can result in high productivity, a positive working environment and high staff morale, with the reverse being true of poorly-performing buildings. However, the costs of disposing of a poorly performing building and obtaining a satisfactory replacement can be high and sometimes prohibitive.

Good designers will do their best to give clients the buildings they want. However, if they are unable to determine what clients really need their task is difficult, if not impossible. This is where good briefing comes in. It seeks to minimise the likelihood of a client receiving an unsatisfactory building by ensuring that project requirements are fully explored and communicated as clearly as possible.

Whilst good briefing cannot guarantee that a building will be perfectly suited to its occupants, it can help avoid serious mistakes.

The briefing process

Briefing is often regarded as an early stage in the construction process during which the client's requirements are written down in a formal document called the brief. The brief then provides a fixed reference for the subsequent design of the building.

This traditional view of briefing is highly constraining in many ways. The client, particularly the inexperienced client, cannot be expected to know everything that will

be required of the building at the outset of the project. Requirements are only developed in detail as the project progresses. This means the client cannot sit back after the initial brief has been written and expect a satisfactory design to emerge without further effort. Full participation throughout the project is important.

Whilst a clear initial brief can be a great asset, it is not the end of the story. The important thing is to make decisions appropriate to the particular stage of project development.

- Strategic decisions will need to be made early on and the detail left until a later stage.
- The client should not withdraw from the process once an initial brief has been drawn up.

There is no simple formula that will automatically produce good briefing. However, there are a number of issues that affect the quality of briefing and should be given careful consideration by the client:

1. Establish the need to build

Construction projects are undertaken because some underlying need has been identified in the client organisation – perhaps antiquated existing premises or the need to expand capacity to respond to new markets. However, it is possible to jump to the conclusion that a new building is the answer to this need without proper investigation. It may be more satisfactory and cheaper to change management practices or adapt existing premises than to build something new.

It is important to ensure that a proper business case for the project has been established. Also ensure that this business case is understood by the construction team – this will help them understand the real reasons for the project.

2. Commit Adequate Resources

Briefing requires the client to provide adequate resources because buildings are major purchases. Clients are sometimes tempted to devote too little time and effort to briefing because it may take key personnel away from the core business. This can be a false economy as an unsatisfactory building can result in serious and expensive long-term problems. It is particularly important to have full client involvement in the early stages of the project when major decisions about the form and function of the building are being

Briefing

taken. Once the design has been developed, major changes are likely to cause serious delays and extra expense. Early attention to briefing can reduce the need for major changes.

3. Manage the Process

The briefing process should be carefully managed. Within the client organisation there should be a clear method of reaching consensus decisions about client requirements. Decisions might be taken by a single responsible individual, a committee or a user group, depending upon the nature of the organisation and the project.

However, the decision making process in the client organisation should be transparent so that the designers can be sure of the validity of the information they are using. It is almost impossible to design effectively if conflicting requirements are received.

A commonly used approach is for the client to appoint a representative – *project owner* - who will be the authoritative source of information about client needs for the construction team. The project owner should normally report to a *project sponsor*, who is responsible for funding. The sponsor could be a board level committee. If such an approach is adopted, it is important that the representative be given adequate time and resources to carry out the task effectively - for a major project this can amount to a full time job.

Also, the representative should have a clearly stated role and range of responsibilities that are recognised at all levels of management. If a client representative's decisions are over-ruled by senior management at a later stage, there can be serious consequences for the project.

4. Encourage Good Teamwork

Good briefing requires good teamwork and this, in turn, depends upon good interpersonal relationships. Client and construction industry teams must feel they can trust and respect each other. Good communications, essential to briefing, will flow from this. The selection of the construction team is therefore very important.

Clients should ensure the philosophy and approach of consultants and companies they work with are in harmony with their own and that they feel happy and can communicate freely with the individuals who make up the project team.

5. Ensure Clear Communication

The inexperienced client may find working with the construction industry a daunting prospect. It has its own convoluted procedures and jargon that may be difficult to follow. It is important not to be overawed by the industry and to demand an explanation of anything that is not clear.

Good consultants will take time and trouble to explain things to the client and use appropriate media for this purpose. The client should not normally be expected to read engineering drawings for example. It should also be remembered that the client's business may also have its own methods and language that the construction team may find obscure. Time spent in explanation will reduce ambiguity and hence the potential for costly mistakes.

6. Adopt An Approach Appropriate to the Project

Briefing should be tailored to meet the needs of an individual client organisation and project. Briefing methods appropriate to a small house extension would not be appropriate to a major hospital and vice versa.

It is important to take stock of the characteristics of the particular project and to design an appropriate approach to briefing. Complex projects may require considerable effort to get the brief right. There may be a large amount of information to gather and various formal methods may be adopted to do this. It may be worth considering using a specialist briefing consultant to undertake the work.

The working methods of some organisations may be naturally better adapted to briefing than others. An organisation that carries out its core business through setting up temporary project teams should find briefing relatively easy. An organisation that relies on a formal hierarchy and reporting structure will have to devote more effort into setting up appropriate systems for briefing because the temporary project team structure used for most construction team projects will be outside its usual range of experience.

7. Involve the End Users

The client who undertakes briefing for a building is often not the end user of that building. A distinction is sometimes drawn between 'paying' clients and 'user' clients to highlight this. This can sometimes lead to

Briefing

problems.

End users often have a much better understanding of the detailed requirements for a building than senior management who may not even be the potential occupants of the building. After all, the users have first hand experience of what makes a building successful or otherwise. Failure to consult with them will result in useful knowledge being denied to the construction team.

Consultation with users may take a variety of forms, including informal discussions, formal focus groups and surveys of workplace practice.

The appropriate form of consultation will depend on the nature of the project and the client organisation.

8. Use Formal Information Gathering Methods Where Appropriate

For certain types of project it may be appropriate to employ formal methods of information gathering during briefing, particularly at the detailed stage. For example, a pro-forma can be used to draw up a schedule of accommodation, listing information such as room sizes, layout, environmental conditions, service requirements and so on. This kind of approach can be invaluable on complex projects such as health service buildings. However, it is important to use these techniques at the appropriate stage of the project.

Do not rush into detailed level of planning before strategic decisions about general requirements have been made.

Briefing Checklist

Key issues to consider when embarking on a construction project include:

- establish objectives and/or business case
- examine other means of achieving objectives before deciding to build
- define what is required, when and for how long - changes later are expensive
- establish budget and/or time limitations
- prioritise time, cost and quality
- take care to choose the people to represent, advise and work for you – they should be qualified, experienced and able to work well with you and each other

- understand the risks involved, quantify them and confirm your budget
- identify the cost of the project over the period you intend to use it – see the Fact Sheet on Whole Life Costing
- identify the options
- compare the costs and benefits of each option on a common financial basis
- ensure the financial and management resources are available – be willing to demonstrate your ability to pay
- know the obligations imposed on you by Statute – see the Fact Sheet on Health & Safety
- monitor progress and performance and be ready to deal with the unexpected.

Useful Further Reading

Briefing Your Architect (second edition). Frank Salisbury. Butterworth-Heinemann, 1997. ISBN 0 7506 3642 4.

CIB Working Group 1 Briefing the Team – Thomas Telford ISBN 0 7277 2541 6

CIB Working Group 4 Selecting Consultants for the Team: Balancing Quality and Price. Thomas Telford ISBN 0 7277 2534 2

Procurement Factsheet
Constructing Excellence - Free Publication

Better Construction Briefing. P Barrett, C Stanley
Blackwell Science Ltd ISBN 0 6320 5102 7