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Performance standards in building — Checklist for briefing — Contents of brief for building design

*Normes de performance dans le bâtiment — Liste de contrôle consultative
— Contenu d'un programme de conception dans l'industrie du bâtiment*



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Foreword

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International Standard ISO 9699 was prepared by Technical Committee ISO/TC 59, *Building construction*, Subcommittee SC 3, *Functional/user requirements and performance in building construction*.

Annexes A, B, C and D of this International Standard are for information only.

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Performance standards in building — Checklist for briefing — Contents of brief for building design

1 Scope

1.1 This International Standard describes the content of a brief for building design.

1.2 It can be used from the time when the client first considers the possible need for a building project. It should be of value when the client and others are attempting, in consultation with any necessary consultants, to document their needs, aims, resources and the context of the project, and any other problems arising, in the form of a "brief".

This International Standard applies to all kinds and sizes of design project. It can also apply whatever the chosen function or purpose of the brief, for example instructing, promoting discussion, recording, as a basis for evaluation or in a formal competition to select consultants.

It can be used by all those taking part in the preparation of the brief, for example clients, consultants, users and any others who are authoritative, informed or likely to be affected. However, it has particular relevance for the client who, as initiator and purchaser of the works, will retain the responsibility for the project and its general management, including the choice of a designer, the preparation of the brief and the evaluation of any response to it.

2 Definitions

For the purposes of this International Standard, the following definitions apply.

2.1 brief: Working document which specifies at any point in time the relevant needs and aims, resources of the client and user, the context of the project and any appropriate design requirements within which all subsequent briefing (when needed) and designing can take place.

NOTE 1 A brief may use the headings set out in the checklist given in annexes A to C.

2.2 briefing: Process of

- identifying and analysing the needs, aims and constraints (the resources and the context) of the client and the relevant parties, and of
- formulating any resulting problems that the designer is required to solve.

2.3 author of the brief: Individual, group or organization in charge of the preparation of a brief. The author of the brief may be the client, a briefing consultant, the user(s), the designer, or a team selected from these.

3 Building design brief

The written brief should express the interests of all participants. The purpose of the checklist (annexes A to C) is to provide a standard framework for the presentation of this written brief which can be adapted for use with all sizes of building projects.

The checklist allows the original brief to be reviewed step-by-step and modified in response to solutions or new priorities which emerge as part of the design process. The development of the brief should be related to the dynamic process whereby creativity and systematic analysis combine to resolve conflicts in the original brief.

The checklist is therefore in three sections which reflect the logical sequence and methodology of decision making. Annexes A to C and their main subclauses are listed below to provide an overview of the structure of the checklist.

Annex A: Project identification

- A.1** Identity of the project
- A.2** Purpose of the project
- A.3** Scope of the project
- A.4** Identity of the participants
- A.5** Identity of other related groups

Annex B: Context, aims and resources

- B.1** Project management
- B.2** Laws, standards and codes
- B.3** Financial and time constraints
- B.4** Background and historical influences
- B.5** Influence of site and surroundings
- B.6** Client's future enterprise
- B.7** Intended occupancy in detail
- B.8** Intended effects of the project

Annex C: Design and performance

- C.1** Site and surroundings
- C.2** The building as a whole
- C.3** Building fabric performance
- C.4** Grouping of spaces
- C.5** Spaces in detail
- C.6** Plant, equipment and furnishings

Although not exhaustive, the checklist is a reasonably comprehensive framework. In each part of the checklist, the items in the left-hand column are supplemented with examples where appropriate. Further explanation and commentary are provided in the Notes column on the right-hand side.

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Annex A

(informative)

Briefing checklist A: Project identification

Annex A represents a preliminary stage in the preparation of the brief and is intended to establish a very general outline of the type of project and those people likely to participate.

Checklist and examples		Notes
A.1 Identity of the project		
A.1.1	Project, name/title/reference number	
A.1.2	Location/address	
A.1.3	Building category/type of use	
A.2 Purpose of the project		
A.2.1	Main reason for the project	A.2.1 and A.2.2: These general statements will be expanded in sections B.4 and B.6. A.2.3: See subclause 1.2.
A.2.2	Main aims of the project	
A.2.3	Tasks of the brief	
A.3 Scope of the project		
A.3.1	Size	A.3: This section should express the client's needs in the broadest terms. The statements are expanded in B.3 and B.6.
A.3.2	Quality	
A.3.3	Financial frame	
A.3.4	Timeframe	
A.3.5	Current stage of project planning	
A.3.6	Future changes	
A.4 Identity of participants		
A.4.1	Client	A.4 and A.5: In order to facilitate initial contacts, names, addresses, telephone numbers, telex and facsimile (fax) numbers should be provided for all organizations and individuals likely to participate in the project. The name of any official representative of an organization should also be given here. Further detailed information is provided in B.1.
A.4.2	Occupiers/users	
A.4.3	General manager/administrator	
A.4.4	Briefing consultants	
A.4.5	Designer	
A.4.6	Other consultants	
A.4.7	Builder	
A.5 Identity of other related groups		A.5: In addition to the participants and those paid by the client to carry out the project, there will be related groups concerned with some aspects of the project. It is important that the participants should have information about the roles and organization of such bodies.
A.5.1	Central government	
A.5.2	National/international agencies	
A.5.3	Local government	
A.5.4	Town planning/building authorities	
A.5.5	Financiers	
A.5.6	Groups/persons with special interest	
A.5.7	Site owners/tenants	
A.5.8	Neighbours and their consultants	
A.5.9	Media	
A.5.10	Insurers	

Annex B

(informative)

Briefing checklist B: Context, aims and resources

By concentrating on the context, aims and resources of the client and users, annex B should provide an understanding for the design team which will result in collective decisions which make full use of the available resources to achieve the aims within the context.

The data should not be expressed in terms of design requirements. Annex C is reserved for such information.

Checklist and examples		Notes
B.1 Project management		
B.1.1	Participants client occupiers/users general manager briefing consultant designer builder	B.1: For each participant, authority, responsibility, roles and skills should be stated, organizational diagrams prepared and relationships defined. The procedure and timescale for the selection of consultants not yet appointed should be stated. See also B.3.4. The organizational framework is to be given some priority because certain parts of it must be clearly established before later parts of the brief can be considered.
B.1.2	Related groups organization	The overall management of the project in its initial stages is vital in order to achieve the comprehensive and authoritative definition of the needs and aims of the client. This task is essential for good communications, for motivation, coordination and for effective control of time, cost and quality. Overall management is the responsibility of the client and should only be delegated for exceptional reasons and then only with great care.
B.1.3	Design evaluation procedures	
B.1.4	Quality control communication methods control of time/cost construction	
B.2 Laws, standards and codes		
B.2.1	Town planning national/regional/local plans zoning	B.2: For convenience, all laws, regulations, standards, codes and other relevant external influences are all grouped under this heading whether they concern the site, occupancy, environment or other aspect of the project.
B.2.2	Legal restrictions on the site or buildings covenants rights of way	B.2.4: This subheading should be reserved for financial regulations. Details of the budgets and other matters directly related to the project should be noted under B.3.
B.2.3	Occupancy laws health/safety employment	
B.2.4	Finance grants/subsidies import/export regulations taxation	

Checklist and examples	Notes
B.2.5 Building/design regulation/codes international/national/local B.2.6 Environmental/pollution regulations air/water/noise/energy/waste disposal B.2.7 Political/administrative political approval procedures national/local political interest B.2.8 Social/cultural hearings/tribunals organized interest groups other influences/groups/media	
B.3 Financial and time constraints	
B.3.1 Financing the project grants/subsidies interest rates taxation time limits on finance loan interest rates/payback cash flow/phasing of project risk B.3.2 Budgets design/planning construction site building plant/furniture priorities B.3.3 Costs in use running cost maintenance cost life-cycle costs B.3.4 Target dates site availability finance availability consultant(s) appointments briefing/designing approvals/coordinating reviews construction/building phases occupation	B.3.1 to B.3.3: Finance is distinct from budgets or costs. Budgets are the financial allocation made to cover predicted costs. Costs are the consequence of decisions made during the briefing and design process. Although predicted costs are not included in the checklist, they should be reviewed at frequent and agreed intervals for comparison with budgets and available finance. Most actual costs will only be incurred once construction starts. Actual costs should also be monitored and recorded. B.3.4: For complex projects, planning the sequence of events by critical path analysis will be necessary in order to identify priorities. Information on building phasing should include the sequence and size of the accommodation needed both as part of the current project and for any future planned changes (see B.3.5).

Checklist and examples	Notes
B.3.5 Life expectancy structure finishes occupancy adaptability leases B.3.6 Financial and time risk penalties/bonuses acceptable limits	
B.4 Background and historical influences	
B.4.1 Project history history of the client's enterprise local events political attitudes research studies/reports decisions B.4.2 Current situation client/user activities existing sites/facilities/buildings on-going investigations B.4.3 Reason for current action market forces legislation other pressures/opportunities B.4.4 Commitments organizational social contractual	B.4: This section allows participants to be aware of the detailed matters which may have influenced the purpose of the project set out in A.2. For comparison, the details of the client's intended future enterprise, the intended occupancy and the intended effects of the project are to be given in B.6 to B.8.
B.5 Influences of site and surroundings	
B.5.1 Site availability ownership/previous use rental/purchase legal conditions boundaries access to the site availability of surveys	B.5: This section will provide the basis for preliminary studies prior to the selection of a site/building or for assessing the suitability of an existing site/building owned by the client. Future changes which may affect the matters listed in this section are likely to be outside the control of the client. Each matter should be considered in relation to both the site and the surroundings.

Checklist and examples		Notes
B.5.2	Commercial and social catchment areas hinterland neighbourhood population users public/private obligations amenities/disadvantages	B.5.2: Both trends and existing characteristics should be considered.
B.5.3	Environmental data microclimate local climate hydrological seismic acoustic	
B.5.4	Infrastructure facilities utility services	B.5.4: The existing transport and services infrastructure is an important criterion which may need consideration at both site and regional levels. Consider both trends and existing characteristics.
B.5.5	Geophysical data geographical topographical extent/area orientation landscape/vegetation	
B.5.6	Ground characteristics soil composition bearing capacity soil contamination water table	
B.5.7	Existing buildings use area form of construction state of repair adaptability availability of a structural survey protected status	
B.6 Client's future enterprise		
B.6.1	Purpose company profile strategic aims priorities image new areas of activity	B.6: This section is intended to record information/decisions concerning the client's future activity. The activities of the client are what is intended to be done in contrast to the next section on intended occupancy which addresses how these activities are performed

Checklist and examples	Notes
B.6.2 Size - relative to other enterprises - market share/turnover - number of employees B.6.3 Context - national/local trends - social - commercial - technological - availability of resources B.6.4 Future changes - expansion/contraction	B.6.4: Reasons for change should be stated.
B.7 Intended occupancy in detail	
B.7.1 Activities/processes schedule - nature and purpose - frequency/duration/permanence - sensitivity to disruption B.7.2 Users - nature and numbers - overall organization B.7.3 Relationships - similarity of activities - communications/transport - goods - people - information - organizational connections B.7.4 Schedule of items to be housed B.7.5 Special inputs - raw materials - energy/gas/electricity - water - information technology B.7.6 By-products - waste material - heat	B.7: In this section the activities of the future client and user occupancy are given a more detailed analysis by describing the individual activities to be performed and the necessary equipment which needs to be housed. The information begins to form the link between the client's future enterprise (see B.6) and subsequent design and performance requirements in annex C. Information under this heading should not, however, specify design requirements as this may unnecessarily restrict design options. B.7.4: The client should provide detailed information about items of specialist equipment, furnishings and plant. B.7.5: Quantities and capacities should be stated. B.7.6 and B.7.7: The opportunity for the recovery of by-products and the necessary precautions should be stated.

Checklist and examples		Notes
B.7.7	Safety and health risks accident stability vibration/noise fire/explosion contamination radiation	
B.8 Intended effects of the project		
B.8.1	Effects on the client's enterprise financial social cultural political image continuity of operations	B.8: This section concerns quality and strategic matters of project priorities and value for money. Ultimately the building project will be judged in terms of the effects it produces on the client's enterprise, the occupancy and the public. Therefore the statement of the required effects that any future building is required to have must constitute the aims of the project. When specifying the intended effects, the degrees of precision appropriate or possible will vary from item to item. The general nature of the effects may make specification difficult in some cases, particularly as many of the desired levels of required effects (or acceptable limits of adverse effects) can only be stated in qualitative, non-technical terms. Nevertheless, every effort should be made to be explicit as this will help the designer to understand client and user expectations and thus help to avoid abortive work, frustration, delay and disappointment with the final result.
B.8.2	Effects on users/the public convenience of spaces convenience of systems communications security maintenance escape levels of beneficial effects comfort cleanliness health safety aesthetic appearance atmosphere	
B.8.3	Effects on the environment ecology	
B.8.4	Control of undesirable effects disturbances nuisances pollution	B.8.4: The extent to which undesirable effects must be reduced by the design should be stated.
B.8.5	Priorities value for money time cost quality	B.8.5: Conflicts may arise, for example between image and security or among the interests of the client, user and the public, or on matters of cost, time and quality. Hence there is a need to consider here the overall project priorities as distinct from those under individual sections. In some cases, it may be difficult or even impossible to agree on these in the early stages without having a design proposal to hand. However, stating the conflicts explicitly helps to make the designer aware and helps to resolve the issues.

Annex C

(informative)

Briefing checklist C: Design and performance requirements

This annex transforms the content of the previous annexes into individual design decisions on the physical aspects of the site and building(s).

Decisions in annex C should not be confused with the design process as they are made individually and in isolation, whereas the subsequent process of designing involves the understanding of the totality simultaneously with its parts and forms the latter into an indivisible whole.

These individual decisions may be left to the designer, but even the inexperienced client may have ideas about the design means of meeting his requirements.

As far as possible, the decisions in annex C should be stated in performance terms. The decisions should take account of relevant matters such as cost of energy and materials, technical and organizational matters, site constraints, forms of construction, and the adaptability and durability of the design.

Checklist and examples		Notes
C.1	Sites and surroundings	
C.1.1	Special relationships surroundings other buildings(s) other site features	C.1: Most projects involve work outside the site boundaries and this may be extensive and vital in undeveloped areas. This section will start to resolve any conflicts revealed in B.5 and further assist in selecting a suitable site.
C.1.2	Protection flooding weather erosion	
C.1.3	Access pedestrians bicycles vehicles emergency vehicles goods vehicles public transport trains buses aircraft waterborne parking road layouts through traffic traffic calming accidents	C.1.3: For each category of access, the special needs of visitors, handicapped persons, users and employees should be considered and resolved.

Checklist and examples		Notes	
C.1.4	Security	C.1.4: Security from unauthorized entry and absence of unsupervised or unlit areas should be considered.	
C.1.5	Site zoning		
C.1.6	Environmental control		
	landscape		
	visual barriers		
	wind shelter		
	planting		
	recontouring		
	works of art		
	signposting		
	furniture		
C.1.7	Utilities	C.1.7	The need for and the capacity and method of distribution should be stated for each utility service, together with any necessary emergency supply in the event of failure.
	source/distribution	and	
C.1.8	Waste disposal	C.1.8:	
C.1.9	Maintenance		
C.2 The building as a whole			
C.2.1	Physical characteristics	C.2:	Decisions generally applicable to the building as a whole should be made first, leaving exceptions which call for local variation to be considered and dealt with later. This section can usefully answer the requirements listed in B.8
	dimensions		
	volumes		
	number of storeys		
	building phasing		
	loading		
	energy		
	flexibility for future uses		
C.2.2	Circulation/access		
	vertical/horizontal		
	pedestrian/mechanized		
	goods/people		
	handicapped people		
	signposting		
C.2.3	Safety		
	structural		
	construction		
	fire		
	safety in use		
C.2.4	Environmental		
	hygrothermal		
	sunlight		
	air movement		
	visual/acoustic/tactile		
	vibration		
	ventilation		

Checklist and examples	Notes
C.2.5 Communications telephone staff call video/computer C.2.6 Security access control/barriers personal security alarms C.2.7 Appearance building forms/symbolic/functional proportions material colours finishes C.2.8 Works of art murals sculpture C.2.9 Operation cleaning repair maintenance	
C.3 Building fabric performance	
C.3.1 Structure foundations carcass C.3.2 External envelope envelope below ground envelope above ground C.3.3 Spatial dividers outside the envelope external vertical dividers balustrades grilles external horizontal dividers balcony floors external staircases C.3.4 Spatial dividers within the envelope internal vertical dividers partitions internal horizontal dividers floors internal staircases	C.3: This subsection uses the headings from ISO 6241:1984, table 3. Reference to that International Standard will provide further examples of the components and assemblies included under each heading. Other authoritative lists exist and may be substituted for this list if more appropriate. More detailed performance advice will be available on aspects of the building fabric by referring to the documents listed in annex D.

Checklist and examples		Notes
C.3.5	Services water distribution and disposal heating and ventilation gas distribution electrical telecommunications/computing mechanical/electro-mechanical transport pneumatic and gravity transport safety lightning fire protection alarms	
C.4 Grouping of spaces		
C.4.1	Zoning security acoustic sterile	
C.4.2	Spatial relationships	
C.4.3	Physical characteristics	
C.5 Spaces in detail		
C.5.1	Physical characteristics	
C.5.2	Related activities	
C.5.3	Relationship to other spaces	
C.5.4	Building services	
C.6 Plant, equipment and furnishings		
C.6.1	Items listed by category sanitary appliances storage	C.6: This subsection should schedule all the required items not fully specified by the client under B.7.4.
C.6.2	Location/area of use room zone outdoors	
C.6.3	Installation fixed/loose/mobile service connections assembly	
C.6.4	Appearance materials colours	

Checklist and examples		Notes
C.6.5	Maintenance life-span cleaning maintenance control handbook	

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