

Overview

It is about analysing the project brief and developing an outline programme. You will also need to present an outline programme to the stakeholders and agree it with them. It is about ascertaining stakeholders' requirements, exploring the constraints and risks and agreeing deliverables to meet the various demands and needs. You must have a detailed knowledge of the stakeholders' areas of operation and future aspirations. You will need to negotiate and reach agreement on the brief to enable work to start on the next stage of the project.

Performance criteria

You must be able to:

Prepare and present proposals for project briefs

- 1 identify and agree the stakeholders' requirements opinions and aspirations and prepare a project proposal
- 2 define and agree with the stakeholders the information required to make effective decisions about the project
- 3 check any relevant investigations which have already been made, identify information which is not valid, and obtain additional valid information which is needed
- 4 select data which is relevant and valid, analyse it and qualify its status
- 5 estimate and confirm the cost and timescale of the project
- 6 prepare a draft brief clearly, accurately, unambiguously and within the time agreed, and present the brief to stakeholders
- 7 explain and discuss any significant constraints, framework opportunities and areas of uncertainty
- 8 modify the draft to reflect the discussion and relevant points which have been raised
- 9 negotiate a clear and mutually acceptable agreement on the brief which is in sufficient detail to allow work to start on the next stage of the project
- 10 discuss the ways in which the brief can be developed, explain the implications of doing so, and keep an accurate record of any decisions

Prepare programmes which meet the requirements of the project brief

- 11 check and confirm with stakeholders that the information in the brief is adequate, accurate and clearly states the project development requirements
- 12 analyse the requirements of the brief and check and clarify initial assumptions about the project programme with stakeholders
- 13 develop a realistic outline programme for the project stages which takes account of identified constraints
- 14 discuss the outline programme with stakeholders and agree any necessary modifications to the brief, outline programme, or constraints
- 15 prepare, present and agree a programme which meets the requirements of the brief and the expectations of stakeholders

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Knowledge and understanding

You need to know and understand:

Prepare and present proposals for project briefs

- 1 what to identify as the stakeholders' requirements opinions and aspirations (understanding)
- 2 how and why to agree the stakeholders' requirements opinions and aspirations (evaluation)
- 3 how and why to prepare a project proposal (synthesis)
- 4 how and why to define with the stakeholders the information required to make effective decisions about the project (evaluation)
- 5 how and why to agree with the stakeholders the information required to make effective decisions about the project (evaluation)
- 6 how to check any relevant investigations which have already been made (application)
- 7 what to identify as information which is not valid (understanding)
- 8 how to obtain additional information which is needed (application)
- 9 how and why to select data which is relevant and valid (evaluation)
- 10 how and why to analyse data and qualify its status (analysis)
- 11 how and why to estimate the cost and timescale of the project (analysis)
- 12 how to confirm the cost and timescale of the project (application)
- 13 how and why to prepare a draft brief clearly, accurately, unambiguously and within the time agreed (synthesis)
- 14 how to present the brief to stakeholders (application)
- 15 how to explain any significant constraints, framework opportunities and areas of uncertainty (application)
- 16 how and why to discuss any significant constraints, framework opportunities and areas of uncertainty (synthesis)
- 17 how to modify the draft to reflect the discussion and relevant points which have been raised (application)
- 18 how and why to negotiate a clear and mutually acceptable agreement on the brief which is in sufficient detail to allow work to start on the next stage of the project (synthesis)
- 19 how and why to discuss the ways in which the brief can be developed explaining the implications of doing so (synthesis)
- 20 how to keep an accurate record of any decisions (application)

Prepare programmes which meet the requirements of the project brief

21 how to check with stakeholders that the information in the brief is adequate and accurate and that the project development requirements are clearly stated (application)

22 how to confirm with stakeholders that the information in the brief is adequate and accurate and that the project development requirements are clearly stated (application)

23 how and why to analyse the requirements of the brief (analysis)

24 how to check and clarify the initial assumptions about the project programme with stakeholders (application)

25 how to clarify the initial assumptions about the project programme with stakeholders (application)

26 how and why to develop a realistic outline programme for the project stages which takes account of the identified constraints (synthesis)

27 how to discuss the outline programme with stakeholders (application)

28 how and why to agree any necessary modifications to the brief, outline programme, or constraints (evaluation)

29 how and why to prepare and present a programme which meets the requirements of the brief and the expectations of stakeholders (synthesis)

30 how to present a programme which meets the requirements of the brief and the expectations of stakeholders (application)

31 how and why to agree a programme which meets the requirements of the brief and the expectations of stakeholders (evaluation)

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Scope/range

Prepare and present proposals for project briefs

1 Stakeholders:

- 1.1 the client
- 1.2 the client's financial advisers
- 1.3 design consultants
- 1.4 statutory authorities
- 1.5 CDM co-ordinators (or recognised body under CDM Regulations)
- 1.6 potential contractors
- 1.7 potential subcontractors and suppliers
- 1.8 potential investors
- 1.9 funding agencies
- 1.10 independent client adviser
- 1.11 user groups
- 1.12 community groups
- 1.13 facilities/asset managers

2 Project proposal - will include:

- 2.1 the client requirements
- 2.2 project stage information requirements
- 2.3 user requirements
- 2.4 design quality requirements
- 2.5 ergonomic requirements
- 2.6 community requirements
- 2.7 procurement requirements
- 2.8 physical requirements
- 2.9 resource requirements
- 2.10 construction requirements
- 2.11 regulatory requirements
- 2.12 cost requirements
- 2.13 business opportunities and objectives
- 2.14 risk factors
- 2.15 health, safety and welfare requirements
- 2.16 environmental requirements, benefits and sustainability
- 2.17 current and future needs
- 2.18 functional requirements
- 2.19 energy, water and natural resource management
- 2.20 reduce emissions
- 2.21 low carbon use
- 2.22 compliance with local, regional national development strategies

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2.23 Building Information Modelling

2.24 insurance risks/opportunities associated with new technologies

2.25 adaptation and mitigation

2.26 demolition strategies

3 Select - data:

3.1 critical design parameters

3.2 the scale and sensitivity of the project

3.3 validity of data in any subsequent process of evaluation or appeal

4 Analyse:

4.1 comparison with similar projects

4.2 standard checklists

4.3 reference to relevant comparative research

4.4 benchmarking tools

5 Present:

5.1 orally

5.2 in writing

5.3 graphically

5.4 electronically

5.5 using physical models

5.6 preparing exhibitions

Prepare programmes which meet the requirements of the project brief

6 Stakeholders:

6.1 the client

6.2 the client's financial advisers

6.3 design consultants

6.4 statutory authorities

6.5 CDM co-ordinators (or recognised body under CDM Regulations)

6.6 potential contractors

6.7 potential subcontractors and suppliers

6.8 potential investors

6.9 funding agencies

6.10 independent client adviser

6.11 user groups

6.12 community groups

6.13 facilities/asset managers

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7 Information:

- 7.1 client requirements
- 7.2 information requirements
- 7.3 user requirements
- 7.4 ergonomic requirements
- 7.5 community requirements
- 7.6 procurement requirements
- 7.7 physical requirements
- 7.8 resource requirements
- 7.9 construction requirements
- 7.10 regulatory requirements
- 7.11 health, safety and welfare
- 7.12 environmental requirements
- 7.13 operational requirements
- 7.14 maintenance requirements
- 7.15 cost requirements
- 7.16 risk and value

8 Programme:

- 8.1 timetable
- 8.2 phasing
- 8.3 integration of data
- 8.4 interaction between design consultants
- 8.5 critical path
- 8.6 key project stages/gate management plan
- 8.7 interface between design, procurement, construction, operation and end use
- 8.8 interaction with design approval stages
- 8.9 interaction with construction programme
- 8.10 concurrent design and construction

9 Project stages:

- 9.1 Stage 0 (Strategy)
- 9.2 Stage 1 (Brief)
- 9.3 Stage 2 (Concept)
- 9.4 Stage 3 (Definition)
- 9.5 Stage 4 (Design)
- 9.6 Stage 5 (Build and Commission)
- 9.7 Stage 6 (Handover and Closeout)

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10 Constraints:

- 10.1 work content
- 10.2 time duration/sequencing
- 10.3 resources available
- 10.4 contingencies
- 10.5 budget
- 10.6 site
- 10.7 risk and valuation
- 10.8 regulations

11 Present:

- 11.1 orally
- 11.2 in writing
- 11.3 graphically
- 11.4 electronically

12 Expectations:

- 12.1 design quality
- 12.2 consultation
- 12.3 timetable
- 12.4 phasing of design development
- 12.5 best value

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