TOOL A.1
DEVELOPING THE STRATEGIC BRIEF

1. BACKGROUND
Prime Contracting is intended to release all the skills of the construction industry, through the Prime Contractor and his key Supply Chain members, to develop the most appropriate design solution for the client and deliver that design at lowest cost. For the Prime Contractor to be able to do this, there must be no pre-determined design solution to which he has to work. While a cost baseline is essential at the commencement of the project, the only other requirement is a statement of the functional needs of the building. It is for the Prime Contractor, working with his key Supply Chain partners, the client and the people who will use the new building, to interrogate this statement of functional needs to develop design options from which the final choice of design can be made and the Project Brief developed.

The statement of functional needs is therefore a document critical to the successful outcome of the entire venture. Its preparation is the responsibility of the client and it is what we call the Strategic Brief.

2. PREPARING THE STRATEGIC BRIEF.
The Strategic Brief is the document which conveys to the Prime Contractor the purpose and functional requirements of the new building. It must contain sufficient information to allow the subsequent development of the Project Brief by the Prime Contractor and his team, but should be as brief as possible so as not to constrain the development of the optimal solution to the client’s needs. It must contain:

- a statement of purpose which sets out the client’s economic or strategic objectives that are to be met by the new project
- sufficient information to enable the Prime Contractor to form a view of the scale and complexity of the project
- data on the minimum acceptable performance standards of the building in use, such as ambient temperature ranges
- the number of people who will use the building, the activities that they will undertake, and the patterns of usage over a day and throughout the year
- any site-specific data that is relevant to the project
- the client’s Price Baseline, expressed as capital or through-life cost, which is the indicator to the Prime Contractor of any budgetary constraint that might exist.

In writing the Strategic Brief, the client should consult representatives of the users so that their views can contribute to the clear definition of patterns of usage and standards of building performance. The best way for this to be done is through the disciplines of Value Management workshops prior to the finalisation of the Strategic Brief.

The final Strategic Brief should be as short and succinct as possible, concentrating only on the information necessary to enable the Prime Contractor and his team to develop, again through the disciplines of value Management and with the full

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involvement of the client and representatives of the people who will use the building, the Project Brief which will define the final solution to the client’s requirements and the shape of the building in which the client’s objectives can be fulfilled.

3. DRAFT STRUCTURE OF A STRATEGIC BRIEF.

This is a suggested structure, to illustrate the basic contents of a Strategic Brief. The list is not exhaustive, but is intended to guide the writing of a functional, or output, specification.

Section 1. Client Details.

1.1. A description of the client’s business and processes to be carried out in the new building.
1.2. A directory listing the people responsible for the key business activities taking place in the new building and all those with responsibility for the management of the building
1.3. A Project Control Chart setting out the business relationships and lines of communication between the client’s key staff and the client’s nominated internal project management manager.

Section 2. Statement of Purpose.

2.1. A statement set out in concise terms the functional and business needs of the new project.

Section 3. Scope of Project.

3.1. The scope should be defined in terms of the functional activities which will take place in the new building.
3.2. Any special requirements, such as the ambient temperature regime in the building, or operational activities that will affect the use of parts of the building, such as the storage of hazardous materials, should be identified and listed.
3.3. Any requirements for time of delivery or special standards that might apply to the building, for example in terms of quality or size of rooms, must be stated.
3.4. The possible location of the building and any site access or other site constraints, such as planning considerations, must be listed.

Section 4. Baseline Price Issues.

The information which follows is to establish for the Prime Contractor the budgetary constraints which may limit the overall price which the client can justify economically and form the basis of Target Costing as a means of delivering the building for no more, and possibly less, than the Baseline Price:

- capital price
- through-life-cost
- method of calculating the through-life-cost in terms of:
- design life of the building
- requirement for a residual value
- discount rate
Further information on producing the Strategic Brief may be found in the Construction Industry Board’s publication “Briefing the Team - a Guide to Better Briefing for Clients”.

VIGNETTE

One of the two Building down Barriers pilots gave a good example of a Strategic Brief.

The section outlining the purpose of the new facility simply stated that, “The army needs to be able to train two regiments of soldiers on the Wattisham airfield site”. There was no mention of a new facility, just a statement of need.

The next section then went on to define what training would be involved, how many soldiers are in a regiment, how many of those would be women, how many soldiers would train each day (and hence how many would need showers and therefore how what changing facilities would be needed), what the ambient temperature should be in various parts of the building, what training equipment would be used, the size of each item and how often it would be used, and so on.

There was no mention even that a new building was required, so the Prime Contractor was able to assess the existing facility with a view to refurbishing it, and to compare that option with a new build and demolition of the old facility.

Nothing in the Strategic Brief constrained the Prime Contractor from considering (with the help of the Army staff who were responsible for training on the site) any sensible option in the effort to find the best possible solution to the client’s need to” train two regiments of soldiers”.

• through-life expenditure profile