



NEW ZEALAND
GOVERNMENT PROCUREMENT

Project Brief

Construction Procurement Guidelines

October 2019

v1.0



**MINISTRY OF BUSINESS,
INNOVATION & EMPLOYMENT**
HĪKINA WHAKATUTUKI

Construction Procurement Guidelines

The purpose of the Construction Procurement Guidelines is to provide government agencies with guidance on the government's standards of good practice for the development of their construction procurement strategy. The Guidelines are intended to support government agencies to improve the quality and consistency of their construction procurement practices.

The Guidelines consist of a suite of sections, each covering a subject matter area. They are considered to be live documents which we may update and add to, from time to time, to ensure they remain current and relevant. You can download the latest version of each section, along with any accompanying tools and templates, from www.procurement.govt.nz.

To provide feedback on the Guidelines, email procurement@mbie.govt.nz.

Major infrastructure project guidance

Major infrastructure projects by their very nature are large scale and complex – they have bespoke issues, risks and challenges that may require more sophisticated project planning, management, procurement and governance approaches. The New Zealand Infrastructure Commission - Te Waihanga, publishes major infrastructure guidance for projects with a total cost of ownership of greater than \$50m.

For more information about major infrastructure project guidance and the support provided by the Infrastructure Commission, see www.infracom.govt.nz or contact the Infrastructure Commission at info@infracom.govt.nz.

Disclaimer

The information presented in this guideline is intended for general use only. It should not be construed as legal advice, and should be read in conjunction with any relevant policy, legislation and regulations. While every effort has been made to ensure the accuracy, currency and completeness of this guide, the Ministry of Business, Innovation and Employment (MBIE) cannot accept any liability for the accuracy, currency or completeness of material contained herein. MBIE cannot be held responsible for, and makes no warranties as to: the suitability of the information in this guideline for your specific circumstances; or any actions taken by third parties as a result of you relying on information contained in this guideline.

Version 1.0 released October 2019

ISBN 978-1-99-000436-0 (Online)

New Zealand Government

New Zealand Government Procurement

PO Box 1473 | Wellington 6140 | New Zealand

www.procurement.govt.nz | procurement@mbie.govt.nz



Unless otherwise indicated for specific items or collections of content, this work is licenced under the Creative Commons Attribution 4.0 International License. In essence, you are free to copy, distribute and adapt the material, as long as you attribute it to Ministry of Business, Innovation and Employment and abide by the other terms of the licence.

The permission to reproduce material in this work does not extend to any material that is identified as being protected by copyright owned by a third party. This includes material on websites you may access via links from, or footnotes to, this work. We cannot grant permission to reproduce such material: you must obtain permission directly from the copyright owner(s).

Please note that this licence does not apply to any logos, emblems, trade marks, photography and imagery in this work. These specific items may not be re-used without express permission. If you wish to reproduce any images in this work, please contact us at info@mbie.govt.nz.

Project Brief

Overview

Creating a project brief is one of your most important responsibilities as a client. A good project brief ensures clarity for the stakeholders, design team, other consultants and contractors and creates a sound foundation for the successful delivery of your project.

A project brief formally defines the design scope of your project. It clearly sets out your requirements, objectives and expectations for the project, in sufficient detail to enable the proposed asset to be designed and specified.

The project brief is developed over time, starting as a statement of need, which develops into a strategic brief, and finally, into the project brief. The project brief is a live document that should be referred to throughout the project. It provides a benchmark against which project delivery and success can be measured.



Agencies must produce a project brief to ensure that stakeholders and the project team understand what is required.

Relationship between project brief and business case

The project brief is separate from the business case and procurement strategy, but is developed in parallel to it and is both informed by and informs the development of the business case. The objective of the business case is to enable decision makers to make smart investment decisions.

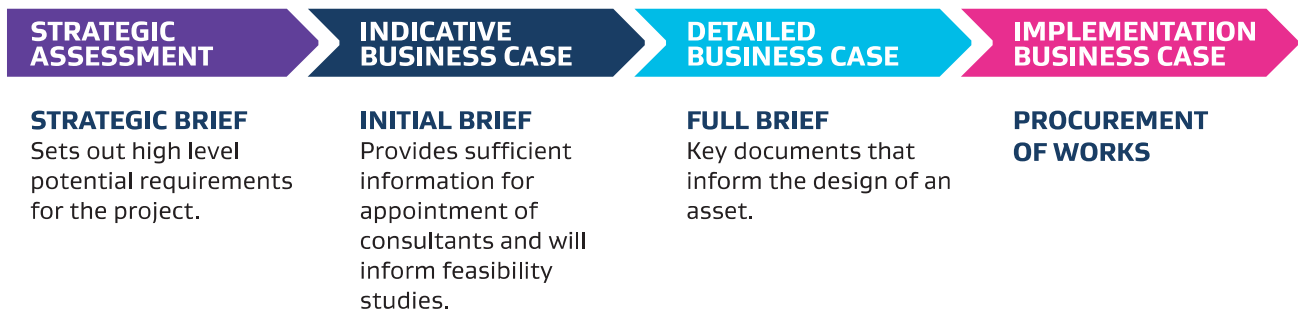


Early project definition and brief development take time and should not be rushed, as they are an essential investment in the assurance of successful project delivery.

There are [three stages to the creation of the project brief](#) - these are shown below and coincide loosely with the four stages of the development of the business case. The relationship between the development of the project brief and the evolution of the business case will vary according to the complexity and scale of your project.

The figure below illustrates the typical relationship when developing both the project brief and business case.

Relationship between project brief and the Better Business Case process



Consequences of not having a project brief

There are consequences of not having a clearly-documented project brief.

No single point of reference for intended outcomes

There'll be no single point of reference for what the intended outcomes are for your project and how these are to be translated into project outputs.

That means it will be difficult for the design team and stakeholders to understand what is required, which can lead to multiple interpretations of project requirements as it develops.

Having them clearly documented at each stage of the process early on gives the project team and stakeholders the opportunity to work together, using their collective expertise to develop, test, review and agree on the requirements. They should be based on the desired outcomes and time, quality and cost parameters for the project.

Risk of requirement for significant changes

There'll be a risk that significant changes will be required later down the track as you realise the output of the design doesn't meet your requirements.

That is not to say changes can't occur; there'll always be some small points of detail that are not determined fully at design stage, such as confirmation of colours and textures of finishes. However, lack of clarity around the way an asset is intended to operate, for example, occupancy levels, operating hours, security, and maintenance requirements, can lead to serious consequences for the design in terms of structural loadings, electrical requirements, ventilation, fire safety, and specifications of components. Time spent up front carefully considering how an asset will be operated can provide certainty for the design which will avoid expensive rework later down the track.

Responsibility for development

The brief, regardless of stage, belongs to you as the client and is the specific responsibility of the project sponsor. It is likely that the project sponsor will be assisted in this work by the client adviser and the design team as they come on board. However, it is imperative that the brief sets out the client's actual requirements, and not the design team or client adviser's interpretation of them.



Agencies must include the input of all relevant stakeholders when developing the project brief, eg end users, funders, operators and those tasked with maintaining the asset.

Scale

While the process of developing the brief is important, it must be proportionate to the scale and complexity of the project.

Some small, low risk, low value projects won't require the same degree of briefing as others. In these cases, a brief may be based on an established design or performance specifications.

For major and more complex construction projects, the briefing process is likely to be more detailed and will be developed and tested through various iterations until it is finalised.

Three stages to project brief creation

Strategic brief

The strategic brief or statement of need/requirement is the first stage in the development of the project brief, although at this stage there may not actually be a project which has been formally approved. It provides sufficient information to assist the appointment of your early team and to obtain agreement and buy-in from key stakeholders, including end users. It is developed loosely in parallel with the strategic assessment stage of the business case process.

It may include the following key pieces of information:

- a description of the need identified by you
- how the need contributes to your corporate strategy
- high level options for satisfying the need
- specific requirements
- a description of you and your business
- how the need relates to existing and future provision
- assumed budgets
- assumed programme
- likelihood of change.

Initial brief

The initial brief takes the briefing process a step further, building on the strategic brief and beginning to shape the detail of exactly what the project will deliver and how it will be delivered. It will involve wide engagement of stakeholders, research of similar projects, and relevant lessons learned. It will include an analysis of the options available, unless a separate options appraisal is to be undertaken.

The following sets out some of the areas which the strategic brief may cover (these are indicative rather than definitive):

- | | |
|--|--|
| <ul style="list-style-type: none"> • Your organisation and the context, vision and aims of the project • Related projects • Project philosophy including quality standards and management • Stakeholders and relationships • Existing facilities • Information about the site(s) or options • Design approach • Functional requirements • Technical requirements • Statutory requirements • Relevant policy statements and guidance • Sizes, outline room data and adjacencies • Broader outcomes | <ul style="list-style-type: none"> • Building information modelling (BIM), quality standards and design quality indicators • Environmental and sustainability standards • Known constraints including physical, operational and planning ones • Budgets • Whole-life costing and management • Procurement strategy assumptions • Security and information handling • Health and safety • Transport planning • Programme plan including phasing, milestones and critical activities • Project management procedures. • Evaluation |
|--|--|

What is included will depend on the project. It won't necessarily be the case that all this information will be available at once. Therefore, it is likely that each brief will be built up in layers. It is important that the brief identifies all areas where you and your design advisors want to set the standards of performance, appearance and design quality or specify particular items which must be provided.

Full brief

This is the final iteration.

The full project brief may cover the following areas as appropriate (these are indicative rather than definitive, and not comprehensive):

- **The client** - organisational and project management structures, vision, mission and purpose, relevant policies, other allied projects and programmes, assurance and audit, client requirements such as sustainability, design quality, and principles etc.
- **Site information** - any constraints or requirements associated with the site.
- **Functional requirements** - adjacencies, accommodation schedules, user numbers and breakdown, and specialist areas.
- **Technical requirements** - flexibility, information and communication technology (ICT), building services (power, water, HVAC, telecommunications), performance, whole-life management, facilities management, security, sustainability and energy use targets, and waste and water management.
- **Project requirements** - information handling and security, project execution, procurement strategy, consultation, budget, risk, programme, change control, commissioning, quality control and inspection, construction administration, construction observation or resident engineers, handover, and post-occupancy evaluation.

The project brief should be frozen at the end of the concept design stage as the brief is then used by the design team to develop the detailed design. While the project brief can be revised as appropriate, revision should be minimised and a change control system introduced to prevent unjustified change without authorisation.