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Introduction to Brief Writing

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The Design Commission for Wales (DCFW Ltd) is the national advisory body for the promotion of design excellence across Wales' built environment, set up by the Welsh Government to help make Wales a better place for everyone. DCFW works with government to develop policy, and with public and private sector developers and built environment professionals to deliver high quality design and placemaking through client support, training & CPD, design review, policy development, and academic research & links.

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Registered office:

4th Floor, Cambrian Buildings, Mount Stuart Square, Cardiff CF10 5FL.

T: + 44 (0) 20 2045 1964

E: connect@dcfw.org

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Foreword

Preparing a project brief is one of the key stages in the design process that can set the course for design quality and good placemaking. At the Design Commission for Wales (DCFW) it is frequently our experience that a good project brief sets a development project up for success at the earliest stages, whereas the roots of a struggling project can often be traced back to a poor brief that failed to define the problem to be addressed, led to the appointment of an unsuitable design team, or lacked clarity on what was needed.

This guide is aimed at anyone involved in preparing a project brief for any project related to the built environment. It covers steps involved in preparing material for the brief as well as presenting it clearly, all of which will contribute to the success of the brief as part of the design process and should lead to better design outcomes.

The guide is general to cover any built environment project, however public sector clients are a particular focus to support the delivery of public value as a result of publicly funded projects. DCFW offer client support services including assisting in the development of a project brief. Please contact us at connect@dcfw.org if you would like any further information.

1 Introduction

Writing a good project brief is an essential early step in delivering successful, well-designed projects and creating great places. This short guide provides a series of prompts and key considerations for clients to help develop good project briefs. It is not an exhaustive exploration of the topic, but rather a summary of the key issues and techniques to make project briefs inspirational, informative and useful.

Clients prepare project briefs for many project types, including strategy development and feasibility studies, regeneration initiatives, public realm and building development projects for public, private and third-sector organisations. This guide provides general guidance applicable to any of these project types. It focuses on the essential common themes and considerations to be addressed in all project briefs. This guide will ensure that it contains everything necessary to set the project on a path towards a successful outcome.

In summary, a good project brief will:

- Clearly describe the client's needs.
- Include a description of end users' requirements.
- Summarise stakeholders' needs.
- Set the conditions for the right design team to be appointed.
- Inspire the design of an elegant and appropriate solution to the client's needs.
- Ensure that the project fully addresses all the client's needs.
- Inspire and inform innovative solutions to new problems.
- Avoid wasted effort, resources and budgets.
- Save time during the lifetime of the project.
- Appropriately allocate resources for the most impactful outcomes.
- Provide reference project data for objective and subjective project review and audit at key design stages.

Ensure the brief contains everything necessary to set the project on a path towards a successful outcome

2 About Project Briefs

This section briefly discusses the purpose of project briefs and why they are essential to delivering successful projects.

Fig 1: The Change Process



■ The project brief is a key stage in the change process. It is the essential link between the articulation of project needs and the discovery of planning and design strategies leading to project implementation and use.

The various project types mentioned in the introduction all share a common requirement to deliver purposeful change in some form. The essential requirement of all project briefs is to specify the change required and the constraints within which the project is to be realised. The project brief is the preliminary stage of a **change process** that links the project need to the project planning and implementation stages. This change process, linking needs with delivery, can also be described as a design process.

2.1 What is a Project Brief?

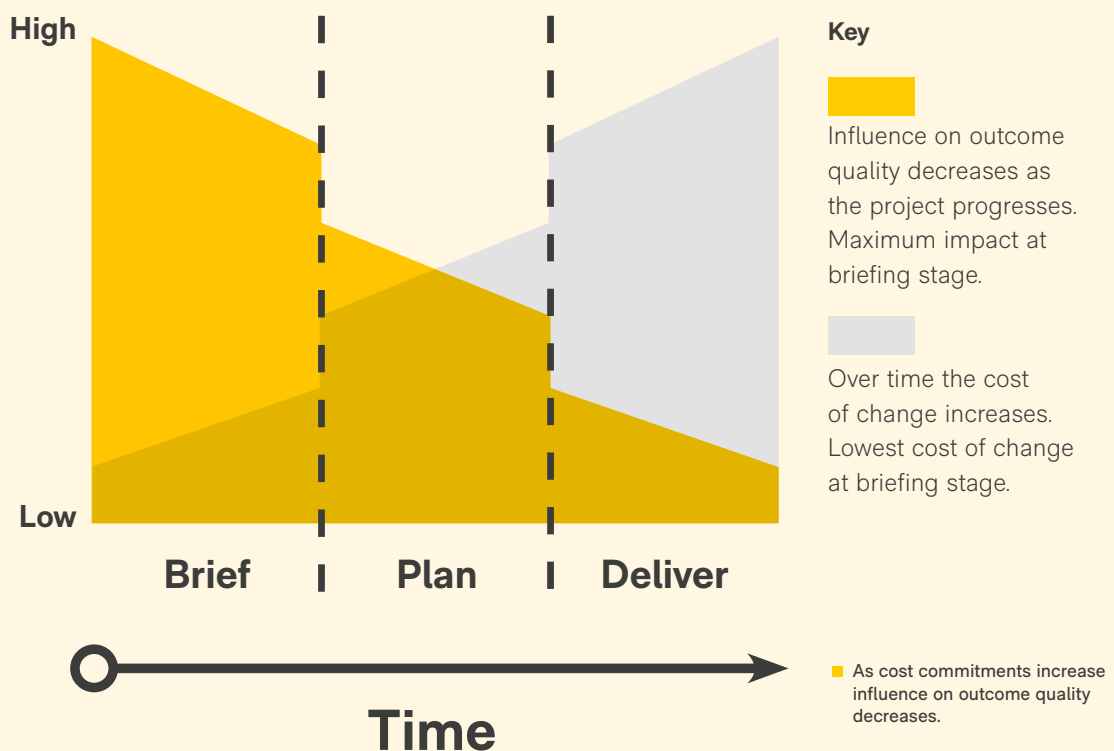
The project brief should provide an inspirational starting point for design and a key reference document for assessing the relevance and appeal of options and proposals as they are generated during the design process.

Once the need for some form of change has been established, the brief frames what that intervention will consist of, its parameters and who needs to do what to bring about the change. The project brief provides a common understanding of what is needed for all project participants and stakeholders.

2.2 Why is a Project Brief Important?

The preparation of a thorough, inspirational project brief is an essential first step to realise a successful project. The brief development stage offers the greatest opportunity to impact the quality of a project at the lowest cost. As the project develops, the opportunity for improving the quality of the outcome will diminish as the project progresses from planning to delivery and project costs increase.

Fig 2: Impact of Change Over Time



Often, poor-quality project outcomes can be traced back to issues with the brief. Perhaps the need was poorly defined in the first place, so the wrong question was asked of the design team, or maybe the client requirements were not set out sufficiently clearly, resulting in additional work being required and the budget being exceeded, or maybe it was not clear who was responsible for decision making which caused project delays. These issues and many other project delivery failures can be overcome by spending sufficient time preparing a good project brief.

Many projects, particularly those in the built environment, are complex and demand the fulfilment of multiple economic, social and environmental goals. They affect many people for long periods, consume large quantities of scarce resources and require substantial private and public investment funding. Without sufficient attention being given to the questions asked of design teams as set out in the project brief, it is unlikely that the project vision and objectives will be met.

Project quality can be defined as achieving the appropriate balance between:

- **Efficiency** – making the best use of all resources.
- **Effectiveness** – delivering a project outcome that elegantly fulfils all the client's requirements.
- **Expression** – delivering a project that appropriately expresses the client's values, culture and the project's purpose.

Preparing a thorough project brief allows for early consideration to be given to these issues to ensure that they are adequately addressed during the subsequent design and project delivery stages.

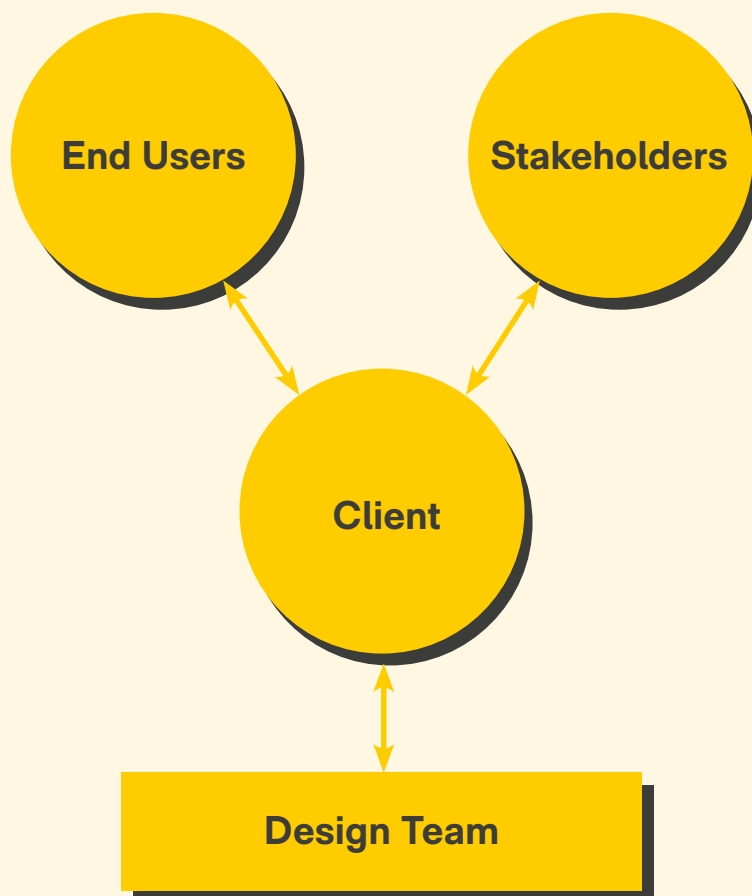
Project briefing is particularly important in response to legislation in Wales, not least the Well-being of Future Generation Act, which explicitly requires design projects to be innovative and provide tangible environmental, economic, social and cultural benefits for future generations. New thinking enshrined in innovative project briefs is essential to achieving these farsighted outcomes.

A well-prepared brief will clearly articulate the client's project requirements and, by explicitly stating the requirements for a successful project outcome, provide a framework for assessing the design options as they are developed through the design process.

3 Clients

This section describes the roles and relationships between the project client, project end-users, and project stakeholders, all of whom will contribute content for inclusion in the project brief.

Fig 3: Client Role



- Clients hold a pivotal roll in the brief writing process articulating the needs of project end users and stakeholders and ensuring that their requirements are fully met by the project design team.

3.1 Role of the Project Client

Great projects rely on well-organised and well-informed clients who lead all aspects of the project from commencement to completion. In some instances, this will be an individual, but more often, there is a client team comprising several members of an organisation. The client or client team (herein referred to as the client) will need to coordinate and incorporate the inputs from several people, resolve conflicting demands, and ultimately take full ownership of the final project brief.

An effective client team should have the following skills:

- Problem identification and definition.
- Strategy formulation.
- Communication with a range of audiences.
- Management of a diverse team of professionals.
- Financial management.
- Project management.
- Contract management (although this may involve the help of specialist advisors).

In fulfilling these challenging roles, clients may utilise the services of project managers, architects, engineers, surveyors, and other professionals. Regardless of how diverse and skilled these supporting professionals may be, their role is to assist clients in managing the project. Leadership, however, rests with the project client. The project brief serves as a crucial reference document for the client's management and leadership of projects.

**Great projects rely on well-organised
and well-informed clients**

3.2 End users

Clients are rarely the end users of the places, environments and buildings they create. The project brief should fully consider the end user's needs that the project must accommodate. Understanding these needs may require early and ongoing engagement with end users, learning from previous projects and more detailed research.

3.3 Stakeholders

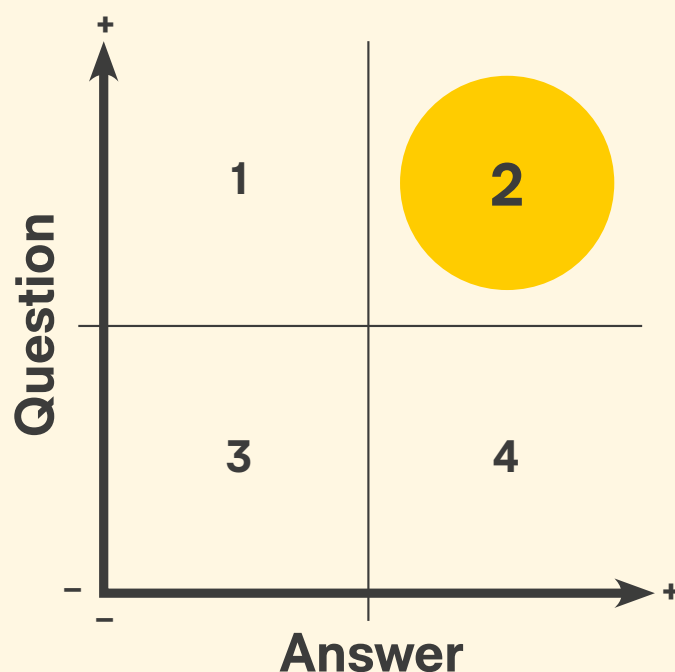
The term 'stakeholder' is a catch-all term for a diverse group beyond the client team and end users impacted by the project. The larger the project, the more extensive and complex this group becomes. A method for learning from stakeholders and engaging them in the process should form part of the brief development as the start of an ongoing engagement process throughout the project. The project brief should summarise the stakeholder requirements determined during early consultation.

'The briefing process is fundamental in defining Client needs and expectations, and requires sufficient time to be completed in collaboration with all relevant parties.' Get it Right Initiative

4 Project Brief Preparation

This section outlines the preliminary work required before commencing project brief writing.

Fig 4: Q&A



Results

- | | |
|---|--|
| 1 | Wrong answer
right question |
| 2 | Right answer
right question |
| 3 | Wrong answer
wrong question |
| 4 | Right answer
wrong question |

■ All projects should aim to deliver the right answer to the right question. In the absence of a clearly articulated right question, it is unlikely that the right answer will be found.

4.1 Defining the problem

Before drafting the project brief, it is important to spend sufficient time clearly defining the needs that the project must satisfy, the problem that the project seeks to address, the question it should answer, or the change it aims to bring about.

If the wrong question is asked in the brief, despite investing time, creative talent and resources, the result will inevitably be the delivery of the wrong solution. The preparation of a robust project brief will ensure that the planning and delivery process results in finding the **right** answer to the **right** question.

A full exploration of the issue at hand, in collaboration with stakeholders, will help to reveal the

question that may not be immediately obvious. Consideration should also be given to whether multiple problems could be addressed through the project

4.2 Research to Inform the Brief

The client must understand what they want at the end of the project. Rarely is a project precisely the same as one previously realised, and research is therefore important to inform the project brief. Where there are gaps in the client's understanding of their project, these should be addressed through research as part of the project brief writing process. Research may include reviews of precedent projects, feedback from previous project consultants and clients, stakeholder and end-user engagement, or bespoke commissioned research.

Reviewing relevant precedent projects, buildings, or places will help inform the client's understanding of their project requirements. Precedent projects should ideally be visited and discussed with project clients or design teams. Precedents may be cited in the brief, but it should be made clear which aspects of the precedent project are being relevantly highlighted.

All research undertaken in the brief development should feed into the project brief preparation.

4.3 Stakeholder Engagement

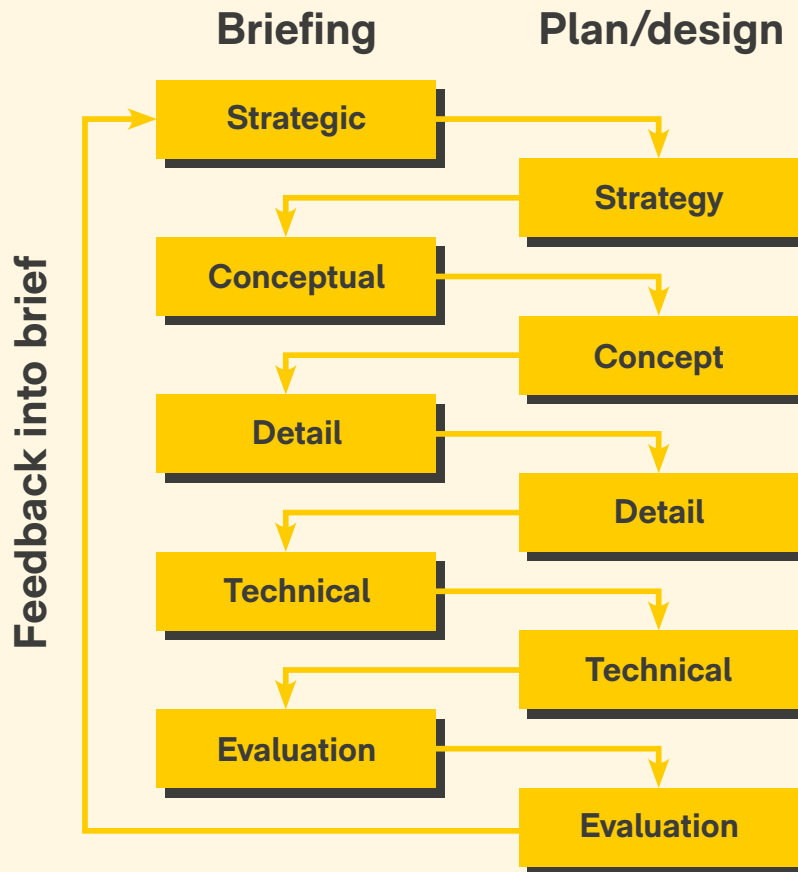
Stakeholder engagement is an essential feature of almost all projects. The extent of stakeholder engagement required for individual projects will depend on the scale of the project and its potential to impact individuals and groups beyond the immediate project boundary.

Generally, engagement will follow three key stages:

- i. Engagement during brief development – including with stakeholders and end users to inform the brief.
- ii. Initial project engagement to understand the existing situation, needs, and opportunities.
- iii. Design development engagement – to gain feedback on proposals as they are developed. There may be several rounds of engagement during this project stage.

Best practice community engagement and involvement should be followed but is not covered in detail here. Most projects will require a detailed consultation process to be established early when planning a project. The process must be meaningful and structured to inform the planning, design, delivery and project outcome. The quality of communication, discussion and events should go beyond mere consultation to illicit community engagement with the project. A thorough engagement process will ensure open and accurate communication about the project, align conflicts and, potentially, minimise objections by ensuring that the project meets user needs and stakeholder expectations. At its best, the consultation process will engage stakeholders in the co-creation of the design outcome. The extent of project co-creation that is possible will vary depending on the nature of the project.

Fig 5: Briefing Stages



■ Complex projects rarely have all aspects of the brief fully defined at inception. Briefing then proceeds as a sequential creative dialogue between client and planning/design team as the project progresses. Documentation and sign off of the process at each stage is essential to project success.

4.4 Sequential Briefing Process

Few clients can provide the design team with every technical detail of their project requirements at the beginning of the design process. The process normally proceeds as an active, creative dialogue between the client and the consultant design team, with alternating periods of design development and options being considered, followed by the development of additional, more detailed, technical and functional briefing. Understanding where a project is in the process will help inform what level of briefing detail is required at each stage. The project may proceed as a continuous process where the brief evolves in dialogue with a single design team. Alternatively, the project may be divided into several discrete work stages, each with a different brief and potentially different design teams at each stage. Whatever the process, the project brief must be fully endorsed and signed off by the client before the commencement of each stage in the project process.

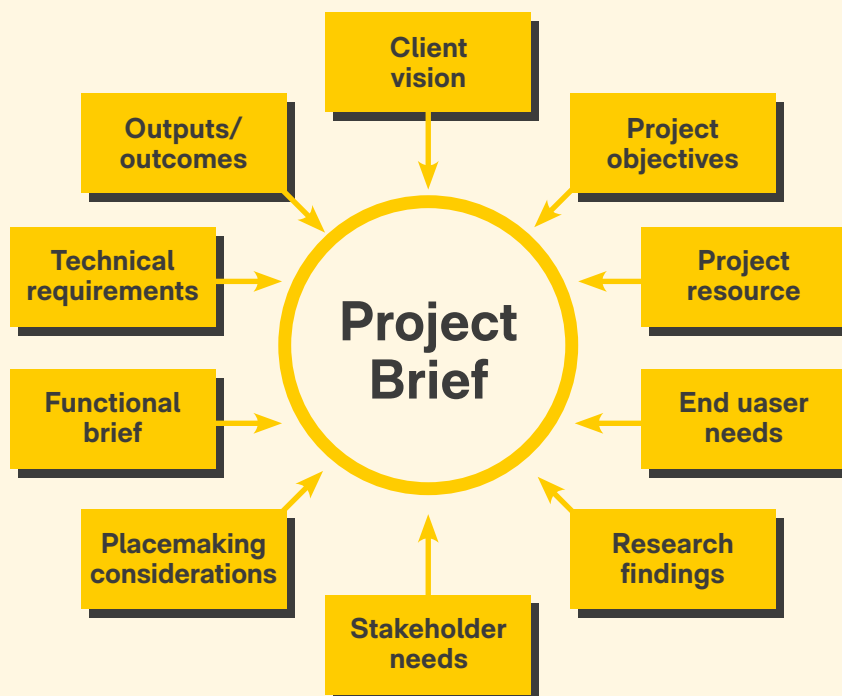
5 Project Brief Writing

This section describes the brief writing process and summarises the main content elements of a successful project brief.

5.1 Collate and Review Information

Information gathered from the client team, early engagement with stakeholders and end-users, and research should be collated and reviewed. The raw information gathered from these engagements will require interpretation to get to the heart of the problem the project seeks to solve, navigate any conflicting opinions, and clearly define client requirements. The relevant background information should be succinctly summarised and included as reference material accompanying the brief.

Fig 6: Brief Components



■ The project brief is a collation of all aspects of the project requirement that the planning/design team need to respond to in formulating proposals for change. It also provides a point of reference for assessing proposals as they are developed in stages through the change process.

5.2 Prepare and Populate Document Structure

The content of a brief will vary depending on the type of project and the project's aims. However, there are some common elements that most project briefs should cover. The client should identify the relevant sections of the document and provide succinct but comprehensive content for each section. The following list can be used as a starting point, but should be tailored to fit the project.

A. Summary

- A summary describing the project to all stakeholders and assisting consultant teams to quickly determine their suitability to participate in the project.

B. Vision

- A statement of the high-level ambitions that the project is required to deliver.

C. Objectives

- A statement of the project objectives.
- Business plan requirements.
- Economic, social, environmental and cultural objectives.

D. Parameters, Resources and Constraints

A summary statement of major project constraints, including:

- Project budget.
- Key project deadlines.
- Funding sources and requirements.
- Known constraints arising from the site and its location.
- Resources the client will deploy to deliver the project.
- Expected project stages, client meetings and sign-off process.

E. Placemaking considerations

- Refer to the Placemaking Wales Charter principles.
- An overview of the economic and cultural context to which the project will respond.
- A summary overview of the project location, the site and its setting.
- Project constraints due to site context
- A summary review of the relationship of the project with the surrounding community.
- Historical site analysis describing how the site and setting have developed over time.

-
- Consideration of temporary uses of the site and any built structures that may be considered during an interim stage before the main development is realised.

Where this information is not known or unavailable, the requirement to provide it should be included in the brief.

F. End User and Stakeholder Requirements

- Statement of end-user needs.
- Summary of end-user research findings.
- Summary findings from stakeholder consultation.
- Reference to full findings from the stakeholder consultation process.
- Requirement for periodic updates of stakeholder requirements arising from more detailed stakeholder engagement during the design and development process.

G. Research Findings

Complex, innovative projects may require research, such as into precedent projects, to form part of the brief writing process. The project brief should include:

- A summary of the research findings.
- References to the full research documentation.

H. Functional Brief

Statement of functional needs to be accommodated by the project. These will vary according to the project type but may include:

- Statement of need.
- Floor areas and functions.
- Efficiency targets.
- Requirement for future flexibility and change.
- Headcount targets.
- Visitor attraction targets.
- Logistics and servicing.
- Security.
- Specialist access.
- Maintenance.
- Regulatory compliance.
- Technical standards to be achieved.
- Independently verified standards to be followed and minimum levels of compliance to be achieved.

I. Cost Quality Brief

All projects require a balance to be struck between the quality of design and construction outcome and the resources available to meet these quality standards. As custodian of the project budget, only the project client can make the appropriate judgment of where the correct balance should be between these competing project demands. The consultant team may advise on options; however, the final option selection remains with the client. The project brief should include a commentary about how the client intends to negotiate the balance between quality and cost.

J. Measuring success

The brief will define the project outcomes and provide a statement of the metrics to be used in assessing the success of the project outcome. These may include:

- Delivery of space standards.
- Achievement of cost quality balance as defined by the brief.
- Delivery (or surpassing) of technical standards.
- Social outcomes.
- Economic outcomes.
- Environmental outcomes.
- Cultural outcomes.

5.3 Consultant Briefing

Sections K, L and M of the project brief may either be included within the main body of the document or prepared as a discrete second section. For simple projects, a single document is sufficient. Large complex projects may require separate technical and performance briefs for each consultant team member. For these types of projects, a two-part project brief, with Part One describing the overall project scope, and Part Two describing the consultant services required is recommended.

K. Technical Brief

Statement of Technical performance criteria to be achieved by the project, including:

- Consultant research required.
- Project constraint identification and analysis required.
- Environmental standards.
- Policies to comply with.
- Durability and design life.
- Energy performance.
- Nature conservation constraints and targets.
- Construction brief requirements.

L. Outputs/Outcomes

- Summary of expected outputs from the consultant commission such as documents, reports, drawings, comms, consultation materials etc.

M. Tender Requirements

A full description of consultant team tender responses including:

- Key project team requirements including specific skills, for example cost consultant, engagement specialist, landscape architect.
- The requirement for consultant team leadership.
- Team organisation and structure.
- Deadline for response.
- Information required in the submission.
- Fee available for the project.

If there is a procurement department involved in the process, this is a key area for engagement with the relevant officer.

Investment in graphic design can help to present briefing information clearly and accurately.

5.4 Review and Present the Brief

As part of the brief drafting process, it is essential to circulate early drafts to the client team members and other key stakeholders for review to ensure the accuracy and thoroughness of information and that it is easy to read and understand.

If a budget is available, investment in graphic design can help to present briefing information clearly and accurately. The clearer the brief, the more likely it is to attract a high number of well-qualified design team bidders and for them to respond appropriately.

Fig 7: Role of the Brief



■ Preparing the project brief is a creative process requiring research and careful analysis to clearly articulate users needs and define the required project outcomes to be met through planning and design.

6 Appointing a Consultant Team

Having prepared the project brief, the next step in delivering a successful project is the careful selection and appointment of a consultant team to assist the client with the design and project implementation. The project brief preparation process should assist in clarifying the type and scope of consultant support required.

It is important to emphasise the differences between the project brief and the consultant appointment brief. The project brief should focus on succinctly describing all aspects of the client's project, including the items discussed above. The consultant appointment brief should clearly describe the services required from the consultant advisor in realising the objectives and outcomes of the project brief.

In addition to the project brief, the client will require consultant briefs to be prepared detailing the contractual relationship between the client and each consultant team member. The project brief and consultant brief(s) should be prepared as separate but related documents..

6.1 Marketing the Opportunity

The preparation of the Project Brief will give the client a clear understating of all aspects of the project and the skills required from a consultant team to advise on design, technical specification and construction as applicable.

The aim of the appointment process should be to select the best team to help realise the project brief objectives within the budget available. For large-scale, ambitious or innovative projects, specialist consultant teams, not normally included in consultant lists on framework agreements, will frequently be required.

Announcing the brief to the market is a key opportunity to attract the best consultant teams and should aim to reach the widest pool of potential consultants. The brief should include a summary at the beginning that will generate interest in the project and help consultant teams determine their suitability to participate in the project. Announcing the brief to the market is the chance to attract the interest of the most appropriate consultant teams.

The brief should be circulated widely using available networks such as Sell to Wales and advertised through social media and other communication channels.

6.2 Appointment Process

The project brief should be the central reference document used in the appointment of a consultant team.

The consultant selection and appointment process might include:

- Seeking expressions of interest from suitably qualified individual consultants or teams.
- Shortlisting of teams to be invited to tender.
- Tender invitations.
- Tender evaluations.
- Team interviews.
- Appointments.

A two-stage process is recommended for most projects as it will help narrow down a wide field of potential candidates to focus engagement with a few respondents. This will manage the amount of work required by the consultant teams in making bid submissions. Material required in expressions of interest should be brief but enable the client team to narrow down the field to a suitable shortlist of candidates. Generally no more than five or six teams should be invited to the second stage of the tender process. This will ensure that bidding teams give the process adequate focus and that it can be well-resourced and managed by the client team.

To ensure a successful project outcome, teams should be selected based on their ability to respond to and deliver the client's requirements as set out in the project brief. The weighting of decision-making should focus on quality over cost so that the lowest cost bid cannot win the commission if it is not of sufficient quality.

The information required for submission in response to the brief should be succinct and specific to allow fair comparisons to be made between responders. Specific questions related to the requirements of the brief should be asked that enable the client team to understand how well the consultant team has understood the requirements of the project, their initial creative response to the challenge and how they will work efficiently as a team and with the client to realise the project. Page or word limits should be specified for tender responses and assessment criteria for each question should be set out.

The weighting of decision-making should focus on quality over cost.

7 Conclusion

Successfully delivering well-designed projects and creating great places is a complex undertaking, whatever the project scope or scale. Taking time at the commencement of any built environment project to think through and develop strategies to address the complex matters that the project will confront is essential to achieving successful outcomes.

All built environment projects in Wales require some level of innovation to address pressing social, economic, cultural, environmental issues and legislation such as the Well-being of Future Generations Act. A project brief ensures that relevant research and lessons from precedent projects inform the design development and implementation stages.

A well-prepared project brief includes a rigorous analysis of users' needs and the project's purpose as the essential creative inspiration for purposeful design and change. It provides clients with the essential information needed to initiate the processes of team selection and appointment, design and project management, and the fundamental project narrative needed to engage diverse project stakeholders.

A project brief is the inspirational starting point for all built environment projects.

Appendix 1: **Case Studies**

Case Study 1: GCRE Masterplan Brief

The Design Commission for Wales worked with The Global Centre of Rail Excellence (GCRE) to prepare a Site Development Masterplanning (SDM) brief for their proposed rail testing facility on the 475 ha Nant Helen / Onllwyn former open-cast coal mine site.



■ Images within the brief provided a sense of the scale and context of the site

GCRE had completed preliminary studies and layouts for the Rail Testing facility that included two test loops, one being a 6.9km electrified high-speed rolling stock track with a maximum speed of 177km/h and the other a 4.5km 65km/h test track. Following the preliminary studies, GCRE concluded that, with suitable earthworks, the two tracks could be satisfactorily accommodated on the site.

GCRE wished to appoint a suitably qualified, design-led, consultant team to prepare a masterplan for the entire site. The masterplan was to incorporate the rail test loop layouts determined by the early engineering studies.

The Site Development Masterplan (SDM) brief was prepared in four sections.

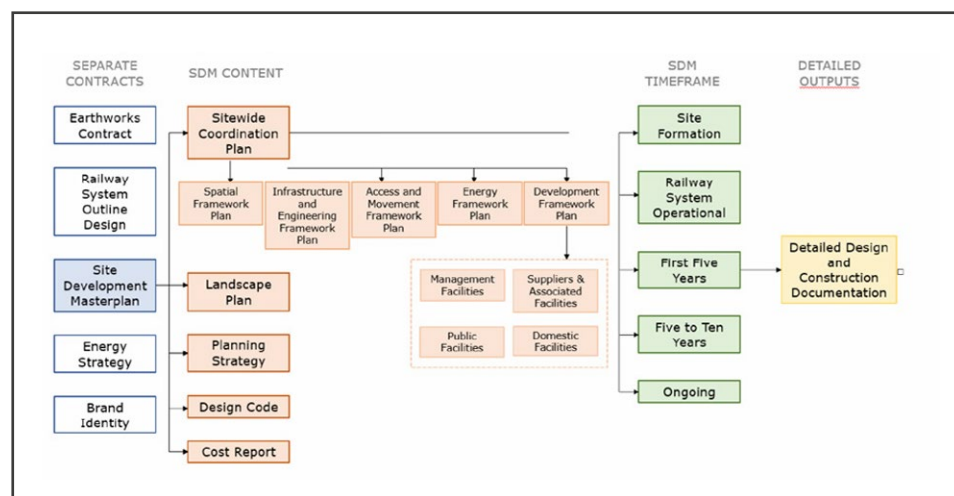
Part one outlined GCRE's project vision and an overview of the main project aims.

Part two set out the strategic context including:

- The rail industry strategic context.
- GCRE's aims and goals for the project.
- The Welsh Government policy context and objectives.
- The masterplan background and context including a summary description of the indicative masterplan that had determined the test track site alignments.

Part three set out in detail the SDM requirements including:

- Its purpose.
- An outline of GCRE's business plan.
- GCRE's ambition to deliver innovation, including construction innovation.
- Requirement for sustainability including zero carbon energy self-sufficiency.
- Details of the masterplan scope deliverables and timing.
- An outline of GCRE's accommodation requirements.
- A description of six framework plans to be prepared by the consultant team each addressing a different aspect of the SDM.
- A description of the consultant services required.
- A design programme.
- A schedule of SDM deliverables.



- The key requirements of the masterplan and how it relates to other work streams was set out in a diagram

A separate consultant appointment brief was also prepared, setting out appointment terms and conditions and details of how to respond to the tender opportunity.

The consultant team appointment process was concluded in two stages following advertising of the appointment opportunity in the press, on media outlets and on 'Sell to Wales'. Expressions of interest invited from suitably qualified teams responding to advertised submission requirements. These were revised and scored against predetermined criteria to identify a shortlist of five teams.

The shortlisted teams were then invited to submit full tenders and to attend interviews. The submission and interviews were then scored, and a team was selected for the appointment.

The rigorous brief preparation and team selection process led to the successful delivery of the SDM in line with CGRE's requirements against a challenging delivery programme. The masterplan has gained widespread support and endorsement through a coordinated programme of consultation with local communities and planning authorities.

Having established a robust Site Development Masterplan, the CGRE project is progressing to the detailed stages of planning, design and implementation.

Stage	Meetings and Events	Outputs	Key Dates
One	<ul style="list-style-type: none"> > Inception meeting > 1-2 design team workshops > Railway System Outline Design coordination meetings > Engagement events > DCFW Design Workshop 	<ul style="list-style-type: none"> > Summary site and context analysis > Review response to Rail Systems Outline Design > Engagement plan > Summary of initial engagement > Summary of constraints and opportunities > Presentation of initial vision and ideas 	1 month
Two	<ul style="list-style-type: none"> > Fortnightly design development workshops > Engagement events > DCFW Design Workshop 	<ul style="list-style-type: none"> > Site-wide landscape, biodiversity, environmental and public access plan (including a series of drafts to be agreed with client input) > Site-wide masterplan (including a series of drafts to be agreed with client input) > Planning strategy 	4 months

■ The expectations of each stage of the process were set out

Case Study 2: Caerphilly Transport Interchange

Identified as a key part of the Caerphilly 2035 Placemaking Plan, the proposed Caerphilly Transport Interchange project will provide an enhanced transport interchange and point of arrival into the historic town of Caerphilly. It will support the implementation of the South Wales Metro and better connect the town to the wider region.

DCFw provided client support to TfW and Caerphilly CBC to develop an RIBA Stage 2/3 brief for the design of the interchange, following review of early feasibility studies. The following advice was taken on board as the client team developed the brief and defined the procurement process.

The Brief

It was important in the opening section of the brief to convey the scale of the project and the ambition of the client team. This allowed potential bidding teams to get an early understanding of what is involved and whether it is a project they would be interested in bidding for. In this instance, this could be conveyed through the overall project budget, the anticipated change in passenger numbers, and the fact that this is the only current interchange in the south Wales region, as well as being linked to the wider plans for the Core Valley Lines.



■ The interchange was set in the context of other projects in the town centre

The brief defined the range of skills that were needed for the project. It was clear that an architectural lead was required as well as other skills on the team which might include urban design, landscape architecture and highway engineering, structural engineer, and cost consultant, but that rail systems expertise may not be needed.

Defining the budget to match the scope and ambition of the project was important as well as setting out the funding programme and any requirements associated with this.

Providing a brief client commentary on the feasibility report to highlight why some options were not taken forward, what the preferred option does well, and where there is room for improvement provided a helpful background and steer to potential bidders.

The brief sought to emphasise the scope for a design team to develop a creative response that addressed the parameters of the preferred option and fulfill the clients' desire for this to be a development that makes an impact, provides an appropriate sense of arrival and welcome to Caerphilly, and incorporates a sense of delight and distinctiveness.

Detailed requirements were provided where possible as part of a list of deliverables. The more clarity there is for the bidding teams the easier it is to compare submissions.

The decision-making process at key stages in the project was set out to ensure this did not create delays. It should be clear who needs to be involved or consulted as part of the approval process but also who will ultimately make any decisions.

The objectives of the project sought to be measurable, so it is clear whether they are being met or not. This included objectives on the programme, affordability, environmental sustainability, pedestrian flows, movement and waiting requirements.

The programme for the project was set out but comments on it were invited on it.

Where possible links were included to existing reports, so the information was easy to find and manage.

Clarity was provided regarding what surveys and information would be provided and what is expected to be done by the bidding team.

The boundaries of the site were clearly defined to provide clarity on what is included and what is not (such as works to surrounding roads and pavements).

A clear direction was provided to ensure bidders looked at the value of the existing buildings and set out clearly the rationale for loss, modification, or retention.

The requirement was set out to include at least two DCFW design review sessions and the expectations for public consultation and client meetings were also made clear.

Procurement Process

Bidders were asked to test, challenge and improve upon the feasibility proposal to deliver the objectives set out. Whilst the feasibility stage established some clear parameters and requirements relating to the 'efficiency' and 'effectiveness' of the proposal, there was significant scope to improve upon the 'expression' of the building(s).

RIBA Stages 2 and 3 were procured together which helped make the project more appealing to bidding teams but also made the process smoother as there were fewer transitions between teams and less time spent on procurement after Stage 2.

The bidding teams were asked to clearly set out what they considered to be the scope of works against which they provided their costs.

The procurement process included a pre-qualification stage that enabled the client team to narrow the field down to a maximum of six teams to take through to the next stage. Assessment at this stage included the make-up of the team, previous experience, proposed fee, programme, and understanding of project requirements.

The second stage of the process included requesting design development ideas from the shortlisted bidding teams. A clear brief for what design material was to be submitted as part of this stage was set out. Limiting the amount of material that teams submitted such as 3 A1 boards or 10 A3 sheets helped to manage the time spent and enable a better comparison between teams. The client team provided a fixed sum honorarium for completion of this stage.



■ An organised site visit for bidding teams allowed them to understand the setting and ask questions.

The assessment criteria for the submitted schemes needed to be clear and relate to the project requirements and client aspirations. Scoring was appropriately weighted to ensure that it can be won on the quality of the submissions and not just price.

Outcome

There were 16 qualifying bidders from a range of local and national design-led teams for the first stage. The bids were reviewed to create a short-list who moved on to the next stage. A site visit and in-person briefing were provided for the shortlisted teams. This gave them the opportunity to explore the town and the location of the interchange.

An interview process was undertaken with all of the shortlisted teams including submission of preliminary design thinking. Grimshaw Architects were appointed as the chosen design partners.

Case Study 3: Cyfarthfa Plan

The Design Commission for Wales provided client support to Merthyr Tydfil County Borough Council in the development of a strategic masterplan for the transformation of internationally important assets at Cyfarthfa in Merthyr Tydfil. The Commission initiated a process of visioning, created the brief and supported a competitive tender process leading to the appointment of an internationally renowned, design-led multi-disciplinary team.

Background

The task under way at Merthyr Tydfil's Cyfarthfa Castle is the transformation of a vital museum and gallery from a local asset into national one. Today's vision is one of transformation; working in harmony with nature to celebrate heritage for the benefit of future generations.

Getting started – the charette

On 21st October 2017 at Cyfarthfa Castle, Merthyr Tydfil, the Design Commission for Wales and the Welsh School of Architecture at Cardiff University devised and facilitated a Charette that brought together over 60 creative minds including local people, architects, planners, heritage specialists, landscape architects and artists to help shape a vision for the future of the town and surrounding landscape. The findings from the charette highlighted four strategically integrated areas, published in Crucible, the report that emerged from the charette. These four areas formed the core of a detailed brief for a strategic masterplan, created by the Design Commission for Wales, on behalf of the Council.

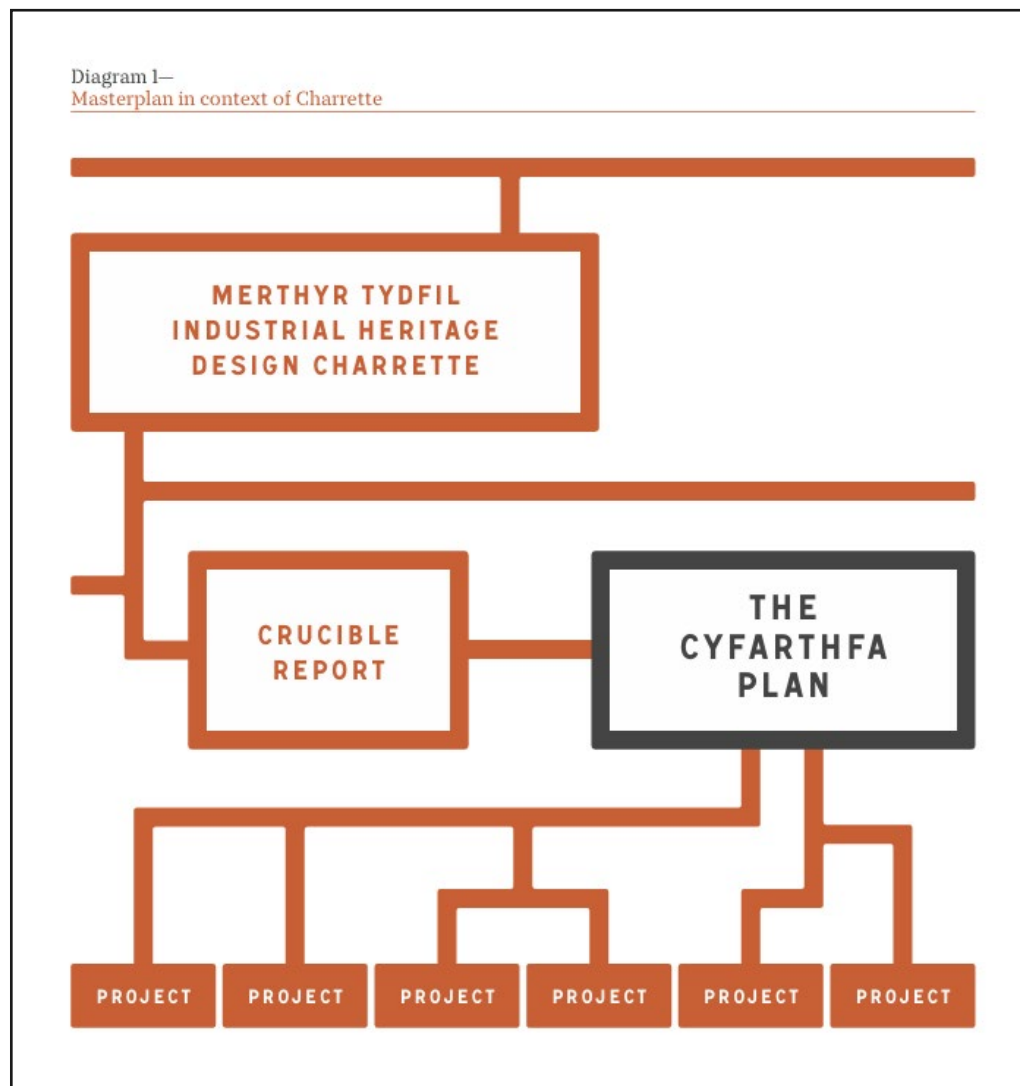


■ A creative process fed into the development of the vision and brief

The Brief

The brief called for bidding teams to include architects, engineers, cost consultants, landscape architects, business planners and public engagement specialists team to lead the masterplan process. It included key deliverable elements and was issued by way of open tender.

It was important that the brief communicated a compelling context for the project, its importance and ambition. This allowed potential bidding teams to comprehend early on that this would need a long-term strategic vision underpinned by business planning - not simply a wish list. The ambition and expected quality of the project was reflected in the presentation of the brief in terms of its clarity, graphic design and specific requirements.



■ Diagrams were used in the brief to illustrate the relationship between different documents

The brief defined the skills that would be needed and several stages to be clearly addressed and delivered in the resulting plan. The brief set out detailed requirements including the need for a strategic, bold and creative response. Objectives and key deliverables at each stage were required by the brief and built into the programme, allowing client assessment and sign off at each stage.

Where possible links were included to existing reports so the information was easy to find and manage. Clarity was provided regarding what surveys and information would be provided and what was expected to be done by the bidding team.

The requirement was set out to include DCFW strategic design reviews for each stage, along with public engagement and client meetings.



■ The programme and requirements of the brief were clearly set out

Procurement Process

The brief attracted significant global interest and international submissions. The competitive tender appointment process included the opportunity for bidders to ask questions and attend a site visit where the client team and DCFW support were all present to take questions and walk the site before the formal tender submissions were submitted and evaluated.

The bidding teams were asked to clearly set out what they considered to be the scope of works against which they provided their costs.

Clear requirements for submission materials were set out including word limits and length of submission such as team CVs and selected projects demonstrating experience and approach and the role of each person in the team.

The procurement process included a pre-qualification stage that enabled the client team to narrow the field. Assessment criteria at each stage included the make-up of the team, previous experience, proposed fee, programme, and understanding of project requirements.

The assessment criteria for the submitted schemes needed to be clear and relate to the project requirements and client aspirations. Scoring was appropriately weighted to ensure that it could be won on the quality of the submissions and not just price.

From a larger longlist, seven international teams were selected for interview by the Design Commission for Wales' expert panel over a two-day period. Competitive interviews were held in person with the same format for each team. The Commission's expert interview panel 'mirrored' the expertise that would be needed on the team meaning that the interview panel had the same understanding and expert experience as the teams being interviewed. Officers of the Council from procurement and regeneration were also members of the interview panel.

Ian Ritchie Architects were confirmed as the successful bidders in August 2019, and they began a 12-month study undertaking a strategic appraisal of Cyfarthfa Park and its context within Merthyr Tydfil and the wider valleys region of South Wales as part of a masterplanning exercise. The resulting work carried out by Ian Ritchie Architects is the Cyfarthfa Plan - a visionary plan and working document that set out a route to transform Merthyr Tydfil's Cyfarthfa Castle into an international quality museum and visitor attraction, set in an expanded 100-hectare public park and expected to draw more than half a million visitors each year.

Appendix 2:

Further reading

- RIBA Plan of Work
- RIBA Job Book (10. Edition)
- Briefing for Buildings – A practical guide for clients and their design teams. By Juriaan van Meel and Kjersti Bjokeng Stordal- Published by Brief Builder- Realdania. Tegn-3.
- Managing the Brief for Better Design- By Alastair Blyth and John Worthington. Published by Routledge



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