

**The Essential Elements of the Perfect Project Brief paper for the 2011 IPWEA Public Works Conference. Presented 11 May 2011 by Rick Di Paola - BEng(Civil), PostGradDipMgt, MIEAust, CPEng.**

### **About the Author**

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Rick has over 18 years experience in a wide range of civil engineering projects (including working in London from 2000-2005 primarily for Transport for London) in the areas of project management and co-ordination, with a design background in civil design for local government, rail, highways, drainage, urban development and general infrastructure.

Rick's particular expertise is managing engineering teams and successful delivery of multi-disciplinary projects in a design management and project management role. Rick writes proposals, project manages and design manages projects in State and Local Government areas.

Rick has previously worked for Whitehorse City Council, Mornington Peninsula Shire Council, and engineering consultancies.

### **1. The Essential Elements of the perfect project brief**

This presentation is written from the perspective of a design consultant receiving and responding to a Brief. Certainly while some of the items in this presentation are applicable to construction Briefs, or procurement Briefs, the intended audience is for clients issuing a Brief for professional consulting services.

The project brief, like any project, must have clear and definable scope and deliverables. Like writing any publication, there is a skill involved, and the more you write, the better you will write them, honing your skill by learning from mistakes and by assessing the proposals that respond to your briefs.

If the Brief is unclear on the outcomes or deliverables expected, you are likely to receive proposals that are high priced to cover for risk, and/or that do not fulfil your requirements.

The essential elements that a good project Brief should cover off on include the following:

- Appropriately skilled people
- Scope
- Deliverables
- Budget
- Timing for response
- Meetings
- Non specific extras
- Stakeholders
- Variations
- Contract conditions

## **Use Appropriate People to Prepare the Brief**

Writing a brief is a skill, and the more you write the better you will be at them. Ensure the author has the knowledge of what is required to be delivered, and the process required to provide the deliverables. A poorly written brief can expose the client organisation to risk, and due to misinterpretation, will result in proposals that do not fulfil the requirements to be delivered.

If using younger or inexperienced staff to prepare the Brief, ensure the Brief is reviewed, as it is very easy to cut and paste from previous Brief's, and then have erroneous and confusing information included.

## **Scope**

Know what you want and define it. The scope should be very clear with definable and quantifiable outcomes. The less defined (or open ended) the Brief, the more expensive the quotes will be to cover off on risk. Specify meetings, deliverables, outcomes, timing, and provide a realistic budget.

A clearly articulated and quantified scope, defining what needs to be done and the budget available, will ensure the consultant's response is in line with expectation. This will ensure you will receive proposals clearly addressing the scope.

This has the benefit of saving the industry time and money, as consultants will prepare appropriate responses to briefs (even no go some), while it will also assist clients in evaluating/assessing proposals – which can differ vastly depending on the clarity of the brief.

If you aren't sure about what a project may cost, it is fine to ask consultants for advice, and to pay them for writing specific technical components of Brief's if the relevant expertise is not in your organisation.

## **Deliverables**

Deliverables should be defined. If the deliverable has many variables and there is not a defined solution, then state the objective the deliverables are to provide.

If design drawings are to be provided, advise how many drawing issues are required for comment (eg Preliminary, Final, IFC,etc) or the number of hold points. For example, if the Brief describes preliminary and final drawing issues, then it is likely Issued For Tender, Issued For Construction and As-Built drawings will not be allowed for.

If a report or study is required, state what it is supposed to achieve. Eg a report to support a Development Plan Approval, or a report to advise risks and mitigation measures for a project.

If a design report or memo is required with the drawings to describe how the design was developed, it should be stated and not assumed.

## **Provide Budget/Capex**

Providing the budget in the Brief assists consultants as a fee check. This also lets consultant know whether the scope of work is realistic against the budget. For a design brief, providing the budget and also the construction budget also assists the consultant in pricing the Brief. If the budget is too small for the services required in the Brief, the consultant can review and No Go the Brief, or advise the services that can be provided for the budget.

## **Allow Sufficient Time to Respond to the Brief**

Usually a minimum 2 week turnaround is appropriate, and 3 weeks is better. We are all busy and need to fit preparing and responding to a Brief in amongst other projects and deadlines. For

multidisciplinary projects there is also the added effort required to liaise with and obtain input from various capabilities, and subconsultants and subcontractors.

## **Meetings**

Meetings are quite often not mentioned in Briefs.

In my opinion, regular progress meetings are essential for the client and consultant to keep each other informed of progress, to discuss issues that may arise and how to resolve them, to discuss and agree changes in scope and variations, and delays.

Attending meetings does cost, but it is a worthwhile investment.

## **Non Specific Extras**

It is common to receive a brief that describes a basic scope of work – but then includes a list of "other things to consider" or sweeping statements that are not quantified that can often be quite significant components of design – it is difficult to know whether such items are genuinely required, or if they have been cut and pasted from the previous brief.

Such items can include

- Obtain all approvals
- Carry out consultation with stakeholders

## **Stakeholders**

"All Stakeholders should be consulted and provide approval" is a good typical example of such a non specific extra. This may not actually be required, or the writer had a specific authority in mind.

Stakeholder consultation may be a complex task costing in the hundred of thousands of dollars. In this instance it may be prudent to nominate the specific stakeholders to be consulted, and define the consultation expected.

If approval is required from stakeholders, note this is not always able to be quantified in a lump sum. It is very common for authorities to provide several iterations of comments to a design or document before approving. This is one item that can easily lead to prolongation and claims for variations.

## **Variations**

Generally it is reasonable to expect variations, unless the work is very simple and straightforward. On a design project, there are usually various solutions and the most elegant or optimal solution may not be the solution adopted due to various deciding factors such as cost, time, political influence, authority requirements. Variations can be expected if the Brief is poorly written, if there are going to be options to be worked through, or changes of mind, continued comments from authorities, prolongation due to needing to get reacquainted with the project after a period of being dormant, and so on.

## **Contract**

Contract conditions can delay projects starting do to prolonged negotiations of clauses putting risk onto the consultant. Consultants are wary of items such as unlimited or excessive liability and prolongation, warranties, fit for purpose, incurring design changes at its cost, indemnities, and absolute guarantees.

## **2. Keeping it simple and concise**

A good Brief is easy to follow and understand, should be logical in its format, and be clear and concise. Some things to keep in mind to achieve this are as follows:

- Use Dot points stating deliverables
- Define project boundaries
- Define what is to be achieved
- Quantify variables

## **3. Tips of keeping stakeholders engaged and contributing**

### **Communication of delays**

Communication, or lack thereof, following submission of the proposal is a source of frustration from consultants. If a decision date is mentioned in the Brief, keep to the date, or provide feedback during the decision making process and if decision dates change.

The proponent keeping to their nominated dates is as important as the consultant keeping to their nominated dates for deliverables. Communicate if things change. Knowing early whether we are shortlisted helps for staff resourcing.

### **Assistance in writing the Brief**

It is worth asking consultants/specialists to write or review project scopes if the skills or understanding is not in-house. This will help ensure a project outcome that meets your expectations.

Requesting assistance to prepare the Brief can also include meeting with relevant experts to gain an understanding of an area in a phase of works that will be required.

### **Request Assistance to Understand Potential Risks**

A good example is understanding the implications of a flora and fauna assessment if significant species are found. The resultant Habitat Hectare calculations and offsets that may be required will require potential significant funding and result in delays of many months. A similar example is the potential impacts of a cultural heritage survey that finds artefacts.

There may be specific engineering examples too, where particular expertise can be called upon to provide insight and advice of potential risks and ways to overcome them, such as for projects with rail or freeway impacts, or where a contaminated land assessment and remediation may be required.