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Continuous Briefing and User Participation in Building Projects



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INTRODUCTION

In recent years the interest in briefing has increased. One reason is that the view of buildings has changed from seeing buildings as mainly architectural expressions or passive physical constructions to regard buildings as facilities that must support the needs of an organisation. An increased awareness of buildings as physical frames for work processes, that can either obstruct or be designed to support the dynamic needs of organisations, has emerged. This has been reinforced by the increasing amount of knowledge work and the need for modern organisations to support the creativity of the knowledge workers by a diversity of settings and the need to create suitable working environments to attract the most desirable part of the workforce. Another reason for an increased interest in briefing is the trend for companies to put more emphasis on branding and the possibility of using building as part of their face to the public. This has altogether created a new perspective on briefing as a mean to create supportive surroundings for businesses in new buildings that are used as symbolic expressions of companies' image.

This paper examines the literature to identify how the briefing process can be organized to fulfill these new requirements. This requires a change in the briefing process from an expert based information collection to a guided learning process with involvement of top management as well as end users. It also implies a change from mainly being a process of developing a design or construction brief to a more continuous process during the whole building project from feasibility study to commissioning.

An example of this new briefing process is provided as a case study of a huge ongoing building project. It concerns a new headquarters for DR (Danish Broadcasting Corporation in Copenhagen. The complex called DR Byen (DR town) is altogether 130.000 sqr. m, and it is divided in four segments designed by different design teams following an architectural master plan competition and three ordinary architectural competitions. The author of this paper was deputy project director in the client organisation for the building project from the start in 1999 until 1. April 2005 with responsibility for briefing and design coordination. He is now a researcher and lecturer at the Department of Civil Engineering at the Technical University of Denmark. Hence, the research can be seen as a kind of action research. The author has presented his experiences from the early stages of DR Byen in a book published in Danish [Jensen, 2002].

THEORY

The briefing processes

The new way to regard briefing was outlined by Nutt [1993]. He described the traditional briefing as design briefing defined as a definite phase leading to a set of requirements specified in a design brief. The nature and pace of change has, according to Nutt, challenged the simple basis of the traditional brief and exposed the limitations in the logic of its process. The future needs cannot be forecasted with confidence. Instead Nutt suggests firstly to incorporate truly strategic characteristics in the design briefing procedure and secondly to foster strategic attitudes within a post-occupancy briefing process. This resulted in a proposal of a briefing process starting with an organisational/development brief, a design/construction brief and a use/facilities management brief, which together constitutes the strategic brief.

Barrett & Stanley [1999] has undertaken a major empirical investigation of briefing in the UK, and they observe that briefing is done in a lot of different ways dependent on the experience of the individual professional. There is no formal education of professionals in briefing, and there are no general accepted methods and procedures. They stress that briefing must be seen as a process and not an event and conclude, that better briefing requires that the building client becomes empowered.

The idea of strategic briefing has been further developed by Blyth & Worthington [2001], but unlike Nutt they do not see the strategic briefing as an overall framework for briefing but as a specific briefing activity at an initial pre-project stage. In their interpretation the strategic brief is more or less similar to the organisation/development brief described by Nutt. Furthermore Blyth & Worthington operates with a lot of different briefing activities, for instance related to concept brief, project brief, detailed brief, fit-out brief, furniture brief, operational brief, environmental brief and facilities management brief. The brief activities vary according to the organisation of the building project.

In Sweden comprehensive research on briefing has taken place, and Ryd [2001] and Fristedt & Ryd [2004] also stress the importance of seeing briefing as a continuing process. They adopt the idea of strategic briefing as an activity in the pre-project phase, but they compliment the strategic brief by a tactical brief in the design phase and an operative brief for the construction phase. Furthermore, they emphasize the continuous follow-up of and feed-back between the different levels of briefing activities.

However, the traditional ways of regarding briefing as a definite stage to define requirements for buildings still prevails for instance in recent international text books, for instance Cherry (1999).

User participation

An important question in relation to user participation is, whether genuine participation requires real influence on decisions about the building project. This has been investigated in relation to a Norwegian hospital project in Trondheim [Jensø, 1999]. The conclusion was that genuine participation requires some degree of involvement in decision making. However, even without involvement in the decision making users can obtain real influence on a project by being part of the information process.

User participation is not a new phenomenon. It started in the 1960's as part of the increased focus on democracy in the workplace. The development in user participation during the last 30 years has been described by the Swedish researcher Granath [2001] as a change from a power based to a knowledge-based process. Granath identified three steps in the development of user participation. The first step had a focus on democratic representation as a parallel to the political system, which in the briefing process meant that staff representatives became members of building committees. The second step had a focus on product quality, and in the briefing process this meant that interviews with staff were carried out by building spe-

cialist. The third step is based on staff in the knowledge society being the most important resource for companies, and an active involvement of staff is a necessity to create improvements in the work processes.

User participation is of particular importance when a building project is part of an organisational change process. Another Norwegian research project on the hospital project in Trondheim investigated the relation between the development of processes in an organisation and the building process. Klagegg et al [1999] define a so-called “clutch effect” (koblingseffekt) between these processes. One of the most important elements in creating such a clutch effect is to define an overall vision for the building project based on the development needs of the organisation. The strategic briefing is very much aiming at this. Among other elements in creating the clutch effect is involvement of the users in the building project and creation of a shared understanding of the project among all participants.

User is a broad term, and it can be useful to distinguish between different groups of users. Both Barrett & Stanley [1999] and Blyth & Worthington [2001] describe a so-called user gap referring to users often not being involved in the dialogue with neither top management nor experts in building planning, because the main dialogue takes place between experts and top managers. However, top managers can also be regarded as a group of users. In the “democratic” step in the development of user participation the main users were top managers and elected staff/union representatives. Another main category of users is the end users, which covers the ordinary employees but can also include middle managers. A special group of users are internal specialists, who get involved in the building project because of their special competencies within a specific part of building planning.

CASE STUDY

DR Byen is a complicated development which besides a construction project with a budget of €400 million (1999 price level) includes an €100 million investment in electronic media technology. The technology project has been planned parallel with the construction project and integrated in the building client organisation. The technology implementation is carried out at the end of the construction work in each segment before staff is moved in. Although most of the technology is new, there is also a considerable amount of technical equipment reused from existing facilities.

Altogether 10 briefing activities have been undertaken as part of the DR Byen project as shown in Table 1 together with information on the users mainly involved in each activity and the project stage, where the briefing activities have taken place. Briefing started at the pre-project stage to create a basis for the project decision. It was followed by an initial strategic briefing process to define the overall vision and objectives. A competition brief and a construction brief was developed for each segment with extensive involvement of users in working groups during the development of the briefs and as well as in the follow-up activities during design development. A parallel briefing process concerned the broadcasting technology and a particular briefing process concerned facilities management with involvement of a number of internal specialists. The interior design briefing was divided in an interior room layout stage followed by an interior furniture design stage; both involving a large number of user groups. The removal briefing was divided in two parallel processes – one for furniture and archives and one for technology to be reused.

EVALUATION AND DISCUSSION

The case study is an example of a briefing process with a client organisation as a mediator between the users on the demand side and the design companies on the supply side. The client organisation has facilitated the briefing process and formulated the final brief documents based on input from the users and formulated the requirements and intentions in a form which is in accordance with the professional language

and standard that are common to the design companies. However, the client organisation has been careful to make sure that the users take responsibility for and ownership of the requirements. This was accentuated by the working groups involved in the briefing process having a manager appointed by DR's directors as chairman.

<i>Briefing activity</i>	<i>Users involved</i>	<i>Project stage</i>
1. Briefing for decision Proposal	Top managers	Pre-project feasibility study
2. Strategic briefing	Top managers and Union representatives	Project definition after board decision (part of Five Finger Plan)
3. Competition briefing for the master plan	Top managers and selected middle managers	Preparation of competition with follow-up after competition
4. Construction briefing	Middle managers and staff (end users)	Preparation of competitions with follow-up afterwards and during design development
5. Technology briefing	Middle managers, technology specialists and staff	Design development and detailed design
6. Facilities management Briefing	FM managers, specialists and staff	Design development, detailed design and construction
7. Interior room layout Briefing	Middle managers and staff (end users)	Design development and detailed design
8. Interior furniture layout briefing	Middle managers and staff (end users)	Construction and technology Implementation
9. Technology removal	Middle managers and staff (end users)	Construction and technology Implementation
10. Furniture and archives Removal	Middle managers and staff (end users)	Construction and technology Implementation

Table 1. Briefing activities and users involved in relation to project stages in DR Byen

The briefing process has, in general, taken place as a more or less continued process following the principles outlined by Blyth & Worthington [2001]. One difference was that the strategic briefing took place at the initial project stage after the formal decision by DR's board had been made and not in the pre-project stage as suggested by Blyth & Worthington. The reason for this is that DR is a political controlled institution, where formal decision is necessary at an early stage.

The case is also a clear example of a building project which is used as part of a fundamental change process in a company. Such a case puts particular emphasis on the timing and coordination of the change processes in the company and the briefing process. This can be compared with the linkage between business planning and facilities planning, which Barrett & Baldry [2003] describes as four alternatives: Administrative, one-way, two-way and integrative linkage. In relation to DR Byen the strategic briefing as part of the Five Finger Plan was an ideal example of an integrative linkage with a fully synchronized coordination between strategic business planning and the strategic briefing for the building project.

Later on, during interior design, the situation was less ideal as the implementation of the change processes in major parts of the user organisation had not progressed sufficiently for the users to be ready for the briefing process, when this was needed to accommodate the building process. The interior design process, so to say, got caught in the middle between the synchronization of the business processes and the building project. The linkage was no longer integrative but an example of a two-way linkage without sufficient

synchronization. This is probably a common situation in huge building project with many years duration. The business organisation is changing dynamically and the users want to postpone the decisions on requirements for the interior design to the last possible moment, while the design team wants to know these requirements as early as possible. Therefore, the opinion on the right time for the last responsible moment will vary between the parties – particularly on complex building projects.

In relation to user participation the chairmen of the work groups for construction briefing turned out to have a very important role. This was the case during the initial steps of the briefing process, where the quality of the decisions was dependent on how the chairman managed the working groups. However, it was just as important in the follow-up, which based on the experiences in segment one was intensified in the following segments. The client representatives had meetings with the chairmen every second week in between the fortnightly meetings with the design team during the design development stages. The chairmen were important both as decision makers, ambassadors and gate-keepers in relation to DR's organisation. As a consequence is caused severe problems when a chairman left there position and was replaced by a new manager. The participation of the users in the briefing process had a clear positive effect. The users involved in working groups expressed much higher appreciation of the relocation project in satisfaction surveys compared with other users.

CONCLUSIONS

With the increased focus on buildings being an important asset for the development of companies and creation of attractive working environment for knowledge workers the briefing process has got more focus and the need to involve the users in the briefing process has increased. Briefing has changed from being a single process in a specific initial stage resulting in a final document with definite requirements to being a continuous and interactive process during the whole building project, where the users' requirements and intentions for the different parts of the building process are presented and discussed with the design and construction team, and where the design, construction and commissioning proposals are evaluated and optimized. The client organisation has a crucial role in mediating between users on one side and design and construction team on the other side and in creating synchronized coordination and integration of the business processes and the building process.

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