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**Performance standards in building —  
Checklist for briefing — Contents of brief for  
building design**

**iTeh STANDARD PREVIEW**  
*Normes de performance dans le bâtiment — Liste de contrôle consultative  
— Contenu d'un programme de conception dans l'industrie du bâtiment*  
**(standards.iteh.ai)**

ISO 9699:1994

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## Foreword

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International Standard ISO 9699 was prepared by Technical Committee ISO/TC 59, *Building construction*, Subcommittee SC 3, *Functional/user requirements and performance in building construction*.

Annexes A, B, C and D of this International Standard are for information only.

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# Performance standards in building — Checklist for briefing — Contents of brief for building design

## 1 Scope

**1.1** This International Standard describes the content of a brief for building design.

**1.2** It can be used from the time when the client first considers the possible need for a building project. It should be of value when the client and others are attempting, in consultation with any necessary consultants, to document their needs, aims, resources and the context of the project and any other problems arising, in the form of a "brief".

This International Standard applies to all kinds and sizes of design project. It can also apply whatever the chosen function or purpose of the brief, for example instructing, promoting discussion, recording, as a basis for evaluation or in a formal competition to select consultants.

It can be used by all those taking part in the preparation of the brief, for example clients, consultants, users and any others who are authoritative, informed or likely to be affected. However, it has particular relevance for the client who, as initiator and purchaser of the works, will retain the responsibility for the project and its general management, including the choice of a designer, the preparation of the brief and the evaluation of any response to it.

## 2 Definitions

For the purposes of this International Standard, the following definitions apply.

**2.1 brief:** Working document which specifies at any point in time the relevant needs and aims, resources of the client and user, the context of the project and any appropriate design requirements within which all subsequent briefing (when needed) and designing can take place.

NOTE 1 A brief may use the headings set out in the checklist given in annexes A to C.

## 2.2 briefing: Process of

- identifying and analysing the needs, aims and constraints (the resources and the context) of the client and the relevant parties, and of
- formulating any resulting problems that the designer is required to solve.

**2.3 author of the brief:** Individual, group or organization in charge of the preparation of a brief. The author of the brief may be the client, a briefing consultant, the user(s), the designer, or a team selected from these.

## 3 Building design brief

The written brief should express the interests of all participants. The purpose of the checklist (annexes A to C) is to provide a standard framework for the presentation of this written brief which can be adapted for use with all sizes of building projects.

The checklist allows the original brief to be reviewed step-by-step and modified in response to solutions or new priorities which emerge as part of the design process. The development of the brief should be related to the dynamic process whereby creativity and systematic analysis combine to resolve conflicts in the original brief.

The checklist is therefore in three sections which reflect the logical sequence and methodology of decision making. Annexes A to C and their main subclauses are listed below to provide an overview of the structure of the checklist.

### Annex A: Project identification

- A.1** Identity of the project
- A.2** Purpose of the project
- A.3** Scope of the project
- A.4** Identity of the participants
- A.5** Identity of other related groups

**Annex B: Context, aims and resources**

- B.1** Project management
- B.2** Laws, standards and codes
- B.3** Financial and time constraints
- B.4** Background and historical influences
- B.5** Influence of site and surroundings
- B.6** Client's future enterprise
- B.7** Intended occupancy in detail
- B.8** Intended effects of the project

**Annex C: Design and performance**

- C.1** Site and surroundings
- C.2** The building as a whole
- C.3** Building fabric performance
- C.4** Grouping of spaces
- C.5** Spaces in detail
- C.6** Plant, equipment and furnishings

Although not exhaustive, the checklist is a reasonably comprehensive framework. In each part of the checklist, the items in the left-hand column are supplemented with examples where appropriate. Further explanation and commentary are provided in the Notes column on the right-hand side.

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## Annex A (informative)

### Briefing checklist A: Project identification

Annex A represents a preliminary stage in the preparation of the brief and is intended to establish a very general outline of the type of project and those people likely to participate.

Checklist and examples	Notes
<b>A.1 Identity of the project</b>	
A.1.1 Project, name/title/reference number	
A.1.2 Location/address	
A.1.3 Building category/type of use	
<b>A.2 Purpose of the project</b>	
A.2.1 Main reason for the project	A.2.1 and A.2.2: These general statements will be expanded in sections B.4 and B.6. A.2.3: See subclause 1.2.
A.2.2 Main aims of the project	
A.2.3 Tasks of the brief	
<b>A.3 Scope of the project</b>	
A.3.1 Size	A.3: This section should express the client's needs in the broadest terms. The statements are expanded in B.3 and B.6.  ISO 9699:1994 <a href="https://standards.iteh.ai/catalog/standards/sist/3b51e50f-e6e6-4d2f-adba-5bf322d3b37e/iso-9699-1994">https://standards.iteh.ai/catalog/standards/sist/3b51e50f-e6e6-4d2f-adba-5bf322d3b37e/iso-9699-1994</a>
A.3.2 Quality	
A.3.3 Financial frame	
A.3.4 Timeframe	
A.3.5 Current stage of project planning	
A.3.6 Future changes	
<b>A.4 Identity of participants</b>	
A.4.1 Client	A.4 and A.5: In order to facilitate initial contacts, names, addresses, telephone numbers, telex and facsimile (fax) numbers should be provided for all organizations and individuals likely to participate in the project.  The name of any official representative of an organization should also be given here. Further detailed information is provided in B.1.
A.4.2 Occupiers/users	
A.4.3 General manager/administrator	
A.4.4 Briefing consultants	
A.4.5 Designer	
A.4.6 Other consultants	
A.4.7 Builder	
<b>A.5 Identity of other related groups</b>	
A.5.1 Central government	A.5: In addition to the participants and those paid by the client to carry out the project, there will be related groups concerned with some aspects of the project. It is important that the participants should have information about the roles and organization of such bodies.
A.5.2 National/international agencies	
A.5.3 Local government	
A.5.4 Town planning/building authorities	
A.5.5 Financiers	
A.5.6 Groups/persons with special interest	
A.5.7 Site owners/tenants	
A.5.8 Neighbours and their consultants	
A.5.9 Media	
A.5.10 Insurers	



Checklist and examples	Notes
<p>B.2.5 Building/design regulation/codes international/national/local</p> <p>B.2.6 Environmental/pollution regulations air/water/noise/energy/waste disposal</p> <p>B.2.7 Political/administrative political approval procedures national/local political interest</p> <p>B.2.8 Social/cultural hearings/tribunals organized interest groups other influences/groups/media</p>	
<b>B.3 Financial and time constraints</b>	
<p>B.3.1 Financing the project grants/subsidies interest rates taxation time limits on finance loan interest rates/payback cash flow/phasing of project risk</p> <p>B.3.2 Budgets design/planning construction site building plant/furniture priorities</p> <p>B.3.3 Costs in use running cost maintenance cost life-cycle costs</p> <p>B.3.4 Target dates site availability finance availability consultant(s) appointments briefing/designing approvals/coordinating reviews construction/building phases occupation</p>	<p>B.3.1 to B.3.3: Finance is distinct from budgets or costs. Budgets are the financial allocation made to cover predicted costs. Costs are the consequence of decisions made during the briefing and design process. Although predicted costs are not included in the checklist, they should be reviewed at frequent and agreed intervals for comparison with budgets and available finance.</p> <p>Most actual costs will only be incurred once construction starts. Actual costs should also be monitored and recorded.</p> <p>B.3.4: For complex projects, planning the sequence of events by critical path analysis will be necessary in order to identify priorities.</p> <p>Information on building phasing should include the sequence and size of the accommodation needed both as part of the current project and for any future planned changes (see B.3.5).</p>

Checklist and examples	Notes
B.3.5 Life expectancy structure finishes occupancy adaptability leases B.3.6 Financial and time risk penalties/bonuses acceptable limits	
<b>B.4 Background and historical influences</b>	
B.4.1 Project history history of the client's enterprise local events political attitudes research studies/reports decisions B.4.2 Current situation client/user activities existing sites/facilities/buildings on-going investigations B.4.3 Reason for current action market forces legislation other pressures/opportunities B.4.4 Commitments organizational social contractual	B.4: This section allows participants to be aware of the detailed matters which may have influenced the purpose of the project set out in A.2. For comparison, the details of the client's intended future enterprise, the intended occupancy and the intended effects of the project are to be given in B.6 to B.8.  <div style="text-align: center;"> <p><b>iTeh STANDARD PREVIEW</b>  <b>(standards.iteh.ai)</b></p> <p>ISO 9699:1994  <a href="https://standards.iteh.ai/catalog/standards/sist/3b51e50f-e6e6-4d2f-adba-5bf322d3b37e/iso-9699-1994">https://standards.iteh.ai/catalog/standards/sist/3b51e50f-e6e6-4d2f-adba-5bf322d3b37e/iso-9699-1994</a></p> </div>
<b>B.5 Influences of site and surroundings</b>	
B.5.1 Site availability ownership/previous use rental/purchase legal conditions boundaries access to the site availability of surveys	B.5: This section will provide the basis for preliminary studies prior to the selection of a site/building or for assessing the suitability of an existing site/building owned by the client.  Future changes which may affect the matters listed in this section are likely to be outside the control of the client.  Each matter should be considered in relation to both the site and the surroundings.



Checklist and examples	Notes
<p>B.5.2 Commercial and social catchment areas hinterland neighbourhood population users     public/private obligations amenities/disadvantages</p> <p>B.5.3 Environmental data microclimate local climate hydrological seismic acoustic</p> <p>B.5.4 Infrastructure facilities utility services</p> <p>B.5.5 Geophysical data geographical topographical extent/area orientation landscape/vegetation</p> <p>B.5.6 Ground characteristics soil composition bearing capacity soil contamination water table</p> <p>B.5.7 Existing buildings use area form of construction state of repair adaptability availability of a structural survey protected status</p>	<p>B.5.2: Both trends and existing characteristics should be considered.</p> <p>B.5.4: The existing transport and services infrastructure is an important criterion which may need consideration at both site and regional levels. Consider both trends and existing characteristics.</p>
<p><b>B.6 Client's future enterprise</b></p>	
<p>B.6.1 Purpose company profile strategic aims priorities image new areas of activity</p>	<p>B.6: This section is intended to record information/decisions concerning the client's future activity. The activities of the client are what is intended to be done in contrast to the next section on intended occupancy which addresses how these activities are performed</p>

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Checklist and examples	Notes
<p>B.6.2 Size relative to other enterprises market share/turnover number of employees</p> <p>B.6.3 Context national/local trends social commercial technological availability of resources</p> <p>B.6.4 Future changes expansion/contraction</p>	<p>B.6.4: Reasons for change should be stated.</p>
<b>B.7 Intended occupancy in detail</b>	
<p>B.7.1 Activities/processes schedule nature and purpose frequency/duration/permanence sensitivity to disruption</p> <p>B.7.2 Users nature and numbers overall organization</p> <p>B.7.3 Relationships similarity of activities communications/transport goods people information organizational connections</p> <p>B.7.4 Schedule of items to be housed</p> <p>B.7.5 Special inputs raw materials energy/gas/electricity water information technology</p> <p>B.7.6 By-products waste material heat</p>	<p>B.7: In this section the activities of the future client and user occupancy are given a more detailed analysis by describing the individual activities to be performed and the necessary equipment which needs to be housed. The information begins to form the link between the client's future enterprise (see B.6) and subsequent design and performance requirements in annex C. Information under this heading should not, however, specify design requirements as this may unnecessarily restrict design options.</p> <p>B.7.4: The client should provide detailed information about items of specialist equipment, furnishings and plant.</p> <p>B.7.5: Quantities and capacities should be stated.</p> <p>B.7.6 and B.7.7: The opportunity for the recovery of by-products and the necessary precautions should be stated.</p>

Checklist and examples		Notes
B.7.7	Safety and health risks accident stability vibration/noise fire/explosion contamination radiation	
<b>B.8 Intended effects of the project</b>		
B.8.1	Effects on the client's enterprise financial social cultural political image continuity of operations	B.8: This section concerns quality and strategic matters of project priorities and value for money. Ultimately the building project will be judged in terms of the effects it produces on the client's enterprise, the occupancy and the public. Therefore the statement of the required effects that any future building is required to have must constitute the aims of the project.  When specifying the intended effects, the degrees of precision appropriate or possible will vary from item to item. The general nature of the effects may make specification difficult in some cases, particularly as many of the desired levels of required effects (or acceptable limits of adverse effects) can only be stated in qualitative, non-technical terms. Nevertheless, every effort should be made to be explicit as this will help the designer to understand client and user expectations and thus help to avoid abortive work, frustration, delay and disappointment with the final result.
B.8.2	Effects on users/the public convenience of spaces convenience of systems communications security maintenance escape levels of beneficial effects comfort cleanliness health safety aesthetic appearance atmosphere	
B.8.3	Effects on the environment ecology	
B.8.4	Control of undesirable effects disturbances nuisances pollution	B.8.4: The extent to which undesirable effects must be reduced by the design should be stated.
B.8.5	Priorities value for money time cost quality	B.8.5: Conflicts may arise, for example between image and security or among the interests of the client, user and the public, or on matters of cost, time and quality. Hence there is a need to consider here the overall project priorities as distinct from those under individual sections. In some cases, it may be difficult or even impossible to agree on these in the early stages without having a design proposal to hand. However, stating the conflicts explicitly helps to make the designer aware and helps to resolve the issues.