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BSI Standards Publication

Briefing for design and construction –

Part 1: Code of practice for facilities management (Buildings infrastructure)

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Publishing and copyright information

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Contents

Summary of pages

This document comprises a front cover, an inside front cover, pages i to iv, pages 1 to 88, an inside back cover and a back cover.

Foreword

Publishing information

This Part of BS 8536 is published by BSI Standards Limited, under licence from The British Standards Institution, and came into effect on 31 July 2015. It was prepared by Technical Committee FMW/1, *Facilities management*. A list of organizations represented on this committee can be obtained on request to its secretary.

Supersession

This Part of BS 8536 supersedes BS 8536:2010, which is withdrawn.

Relationship with other publications

BS 8536, *Briefing for design and construction*, will eventually comprise two parts:

- *Part 1: Code of practice for facilities management (Buildings infrastructure);* and
- *Part 2: Code of practice for asset management (Linear and geographical infrastructure).*

Information about this document

The initial drafting of this British Standard was produced in association with BIS as part of their ongoing programme of support for standardization.

Briefing for design and construction focuses on those aspects of design, construction, testing and commissioning, handover and start-up of operations that are concerned with achieving the required operational performance of a new or refurbished asset/facility. These include, but are not limited to, overall concept, context, uses, access, visual form, environmental impact, space, internal environment, durability, adaptability, usability and engineering performance.

This revision introduces the following principal changes:

- broadening of the scope of the standard to take account of operational requirements during design, construction, testing and commissioning, handover, start-up of operations and during defined periods of aftercare;
- the incorporation of the principles of soft landings (**3.1.51**);
- integration of comprehensive information management with the requirements for post-occupancy evaluation (POE) to strengthen the link between asset/facility owners, operators, operations teams and facility managers, as appropriate, and the design and construction team to assure performance of the design and the operational asset/facility;
- cross-referencing of information requirements associated with "Level 2 BIM" in accordance with PAS 1192-2, PAS 1192-3 and BS 1192-4; and
- updating the retained content to align with current industry best practices in briefing.

The aim is three-fold: to improve the focus of the supply chain on performance in use; to extend supply chain involvement through to operations and defined periods of aftercare; and to involve the operator, operations team or facility manager, as appropriate, from the outset.

Whilst this standard assumes the use of "Level 2 BIM" for projects, the adoption of soft landings (see **3.1.51**) is not precluded where "Level 2 BIM" cannot be achieved across the project.

This standard forms part of an existing set of standards connected with facilities management.

This standard broadly aligns with the principles of *The soft landings framework* published by UBT and BSRIA [1] and the principles identified in *Government Soft Landings* [2]. Soft landings (**3.1.51**) is concerned with the smooth transition from design and construction into operation and use of an asset/facility. It advocates close collaboration during briefing, design, construction and handover between the design and construction team and the operator, operations team or facilities manager, as appropriate, in matters affecting operations and end-users, in order to maintain focus on the required outcomes.

Use of this document

As a code of practice, this British Standard takes the form of guidance and recommendations. It should not be quoted as if it were a specification and particular care should be taken to ensure that claims of compliance are not misleading.

Any user claiming compliance with this British Standard is expected to be able to justify any course of action that deviates from its recommendations.

Presentational conventions

The provisions of this standard are presented in roman (i.e. upright) type. Its recommendations are expressed in sentences in which the principal auxiliary verb is "should".

Commentary, explanation and general informative material is presented in smaller italic type, and does not constitute a normative element.

The word "should" is used to express recommendations of this standard. The word "may" is used in the text to express permissibility, e.g. as an alternative to the primary recommendation of the Clause. The word "can" is used to express possibility, e.g. a consequence of an action or an event.

Notes and commentaries are provided throughout the text of this standard. Notes give references and additional information that are important but do not form part of the recommendations. Commentaries give background information.

Contractual and legal considerations

This publication does not purport to include all the necessary provisions of a contract. Users are responsible for its correct application.

Compliance with a British Standard cannot confer immunity from legal obligations.

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0 Introduction

This British Standard considers matters relating to projects for the delivery of assets/facilities according to defined operational requirements, including maintenance, and expected performance outcomes. For the purpose of this British Standard, the term "design and construction team" covers the collective efforts of designers, constructors, subcontractors, operators, operations teams, facility managers and other specialists, representing the disciplines and skill-sets engaged in the delivery of a new asset/facility or the refurbishment of one existing. An integrated design and construction team offers benefits in terms of coordinated design and problem solving, as well as consideration of buildability and operational impacts. This British Standard emphasizes the importance of adopting a whole-life view of an asset/facility; not solely its design and construction or refurbishment. In this regard, it is important to recognize that a vast amount of information and data about an asset/facility is generated and exchanged during its lifetime and that a security-minded approach to the handling of such information and data will need to be adopted.

The principle of buildability is widely applied in design. However, the principle of operability has not historically been considered to the same extent. Design decisions have to be based upon accurate and relevant information and data, and their impact on operational needs has to be understood before they are committed to construction work and/or installation. The most effective time to comment on the suitability or effectiveness of design is before it is finalized. Testing assumptions during design is necessary to understand how the asset/facility will perform in operation. Whilst it is too late to comment on the design of the asset/facility once it is operational, systematic measurement, analysis, comparison and feedback can be useful in informing the design of future assets/facilities.

This British Standard is intended to complement and strengthen briefing practices and procedures by:

a) promoting the early involvement of the operator, operations team or facility manager, as appropriate; and

b) extending the commitment on the part of the design and construction team to aftercare post-handover of the asset/facility and its correct, safe, secure and efficient operation in line with environmental, social, security and economic performance targets.

The requirements of inclusive design and of managing design in construction have been incorporated to anticipate the implications for managing assets/facilities and their environments effectively and inclusively when they become operational. This British Standard outlines the primary activities, information, questions and deliverables to be addressed by the designers, constructors, subcontractors and other specialists to support their work and so ensure that the asset/facility owner and the operator, operations team and facility manager, as appropriate, are provided with as much certainty as possible in regard to the required operational performance of the asset/facility.

This British Standard broadly aligns with the principles of *The soft landings framework* published by UBT and BSRIA [1] and the principles identified in *Government Soft Landings* [2].

1 Scope

This Part of BS 8536 gives recommendations for briefing for design and construction to ensure that the design takes account of the expected performance of the asset/facility in use over its planned operational life. It is applicable to the provision of documentation supporting this purpose during design, construction, testing and commissioning, handover, start-up of operations and defined periods of aftercare.

This British Standard is not intended to provide detailed guidance on design or construction, but is concerned with information and data that are needed in order that due consideration can be given to operability and performance requirements for the new or refurbished asset/facility. It does not cover decommissioning or other end of life activities.

This British Standard is intended for use by individuals and organizations preparing or contributing to design, construction and operations, in both the public and private sectors, including owners refurbishing an existing asset/facility, organizations procuring a new asset/facility, and the designers, constructors, subcontractors, operators, operations teams, facility managers and other specialists engaged in such activities.

2 Normative references

The following referenced documents are indispensable for the application of this document. For dated references, only the edition cited applies. For undated references, the latest edition of the referenced document (including any amendments) applies.

BS 1192:2007, *Collaborative production of architectural, engineering and construction information – Code of practice*

BS 1192-4, *Collaborative production of information – Part 4: Fulfilling employer's information exchange requirements using COBie – Code of practice* [1)]

PAS 1192-2, *Specification for information management for the capital/delivery phase of construction projects using building information modelling* [2)]

PAS 1192-3, *Specification for information management for the operational phase of assets using building information modelling* [3)]

PAS 1192-5, *Specification for security-minded building information modelling, digital built environments and smart asset management*

1) This standard also gives an informative reference to BS 1192-4:2014.
2) This standard also gives an informative reference to PAS 1192-2:2013.
3) This standard also gives an informative reference to PAS 1192-3:2014.