Foreword

CABE believes that good design is fundamental to higher quality buildings and open spaces and represents true value for money. Function is one of the cornerstones of good design and accessibility is vital for a project to function well. Creating places and facilities that are accessible to everyone should not be seen as merely an afterthought, or as compromising other aspects of the overall design. The Disability Discrimination Act means that designing for people who are impaired becomes our first consideration so that integrated solutions become the automatic standard for all services and new developments.

This Act is placing new demands on providers of services and those who commission and design the environment in which those services will be delivered. Everyone involved in the procurement process has a part to play but those who manage and maintain facilities in the long term have a particularly important role. At CABE we have often emphasised the importance of a clear brief in achieving design quality, but the task of providing an inclusive environment is on-going and I support the emphasis on the Occupational Brief in this document.

Successful projects need strong, informed leadership. CABE has campaigned for Design Champions to be appointed throughout the public sector to promote and safeguard design quality in new buildings and open space projects. I welcome the call to appoint Access Champions to perform a parallel role to mainstream issues concerning access at all stages in every project.

I am very pleased to sponsor the publication of this considered and useful guide and I am confident that by adopting the best practice set out in these pages we can achieve fully accessible buildings, open spaces and streets that can be a benefit and a source of pride for everyone.

Jon Rouse
CEO
Commission for Architecture and the Built Environment

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Good practice point No.1

- The implementation, design and construction team should understand and commit to the commercial, legal and moral benefits of inclusive environments.

Good practice point No.2

- Appoint an appropriate project Access Champion and:

  (a) empower them to act effectively within the project structure in the interests of access; and

  (b) pay a fee for the services the Access Champion will have to undertake. Do not deem the services to be included within a designer's existing appointment.

Good practice point No.3

- Actively consider and integrate access issues at all stages of the project briefing process.

Good practice point No.4

- Through the proactive and consistent contributions of the key participants, convert the access requirements of the project briefs into appropriately designed and constructed buildings that meet the requirements of the briefs.

Good practice point No.5

- Review projects upon completion and use any lessons learned for enhancing the delivery of future projects.

1. About this guide

1.1. The purpose of this guide

1.1.1. This guide offers best practice advice on how all participants in the development process can contribute to the delivery of a high quality inclusive environment that provides access to all members of society, including disabled people.

1.1.2. To achieve this, the guide:

- explains the meaning of inclusive environments and conveys the social, legal and commercial benefits;
- describes the typical stages of the development process;
- highlights the significant role that 'Project Briefs' play in defining the access requirements of a project at every stage;
- underlines the importance of proactively (rather than through expectation) converting the project briefs into inclusive environments;
- explains the pivotal role that the 'Access Champion' plays in the project briefing and development processes; and
- explains the roles that the other key participants play in the project briefing and development processes.

1.1.3. The guide also provides:

- best practice guidance on writing project briefs for inclusive environments;
- best practice guidance on converting the project briefs into inclusive environments;
- guidance on identifying and appointing a suitable Access Champion;
- real life examples of common problems and the reasons for them; and
- a glossary of key terms.

1.2. Who is this guide for?

1.2.1 Inclusive environments are the concern of everyone involved in the design, construction and occupation of buildings and transport infrastructure. This guide is therefore of general interest to all participants in the process.

1.2.2. However the guide is of particular relevance to the key participants in the process. These key participants are:

- the employer/developer;
- the Access Champion;
- the project manager;
- the lead designer;
- other designers;
- the contractor;
- the funder; and
- the end-user/occupier.

1.3. Terms used in this guide

1.3.1 Within this guide, jargon and technical language has been avoided wherever possible. However there are a number of important and unavoidable terms with specific meaning relevant to the purpose of this guide. There is an explanation of these terms in the Glossary, which can be found at the end of the document.

1.4. How widely does this guide apply?

1.4.1 Although the guide explains the development process in some detail, it should be recognised that the construction industry is highly creative and develops numerous variations to the common process. These variations may exist for reasons of speed, risk, complexity or cost.

1.4.2 As a result this guide cannot address every possible variation to the basic process.

1.4.3 For this reason it is essential that the key participants have a full understanding of the effect on design and construction responsibilities that differing project structures or procurement routes have.

1.4.4 If this knowledge does not exist then further advice should be sought.

2. The built environment

2.1. Introduction

2.1.1. The built environment is important because in one way or another it effects almost everything we do, whether at work, at play, at home or when travelling. Without full consideration of people's needs, the built environment can exclude people from playing a full and active part in society.

2.1.2. The development industry is significant, as it is the vehicle through which the built environment is created, regenerated and maintained. It is also a substantial industry with an annual construction output of some £60 Billion, which accounts for 8% of UK domestic product. If it is to deliver well-designed and constructed environments that enhance the quality of people's lives, then it must conform to the objective and measurable principals of good design i.e. functionality, build-quality, efficiency and sustainability.

2.1.3. Despite the long-term adoption of these principals, the development industry still delivers environments that do not meet the needs of the whole community. By definition these environments are badly designed.

2.1.4. This is best illustrated by looking at how the needs of disabled people have been accommodated in recent years. Disabled people's needs are often considered separately from other groups of people, or after the design of a building has been completed. Solutions often consist of separate facilities, such as platform lifts or ramps for wheelchair users located on one side of a stepped entrance. Children's needs are often ignored altogether, for example, wash-hand basins in public toilets which are usually too high. Baby changing facilities are sometimes located in the women's toilet but not in those for men, preventing fathers from using the facility.

2.1.5. This type of design misses major social and economic opportunities and is to the detriment of all members of society.

2.2. What are inclusive environments?

2.2.1. Inclusive environments are those that can be used by everyone, regardless of age, gender, ethnicity or disability. This makes them truly functional, efficient and sustainable. If the build quality is also high, then these developments meet the principals of good design described above.

2.2.2. Inclusive environments are made up of many elements such as the attitudes of individuals and society, the design of products, communications, as well as the design of the built environment itself. Inclusive environments recognise and accommodate differences in the way people use the built environment and provide solutions that enable all of us to participate in mainstream activities equally, independently, with choice and with dignity.

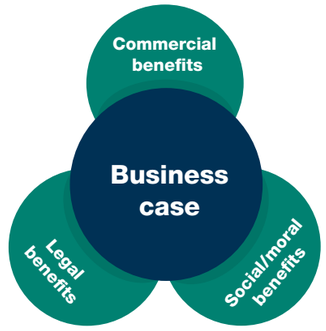
2.2.3. An inclusive environment does not attempt to meet every single need, but considers people's diversity and breaks down unnecessary barriers and exclusions in a manner that benefits us all. This is significant because although society and individuals have invested heavily in enabling people to manage their personal circumstances effectively (e.g. by providing aids and adaptations for disabled people), many people remain unnecessarily 'disabled' by ill-conceived environments.

2.2.4. As a result many people are made unnecessarily dependent on others and are unable to take full responsibility for themselves.

2.3. Inclusive environments – the business case

2.3.1. There are three interwoven and substantial benefits in delivering inclusive environments through the development process. These are social/moral benefits, legal benefits and commercial benefits.

2.3.2. Considered collectively, they form a powerful business case:



2.4. The social/moral benefits of creating inclusive environments

2.4.1. Society has an interest in creating inclusive environments because an estimated 20% of the population, some 12 million people are disabled.[1] Of these some 2.8 million disabled people of working age are out of work and receiving benefits. Over 1 million of these say they want to work.[2].

2.4.2. There are two further important points to consider:

- this percentage is set to increase dramatically over the next few decades, as UK demographics shift towards an increasingly elderly population. Indeed, over the next 40 years, the number of people over 65 is set to rise by 73% while the population as a whole is set to increase by only 10%[3]; and
- it is not only disabled people who benefit from inclusive design. There are currently a further 18 million people who would directly or indirectly benefit.[4] These include older people, families with small children under the age of five, carers, friends and relatives who accompany people with disabilities. Indeed it is fair to say that all members of society benefit to some degree from inclusive environments.

1. (Source: Analysis of data from an omnibus survey: In-house report 30, Grahame Whitfield, DSS, 1997)
2. (Source: Disability Rights Commission: Disability brief October 2002)
3. (source: Government Actuary's Department/National Statistics. National Population Projections 2000-based. Series: PP2 No. 23. Date: 2002)
4. (Source: Summer 1997 Labour Force Survey UK).

2.5. The legal benefits of creating inclusive environments

2.5.1. The Government is increasing its legal emphasis on the need to deliver inclusive environments on both new and existing buildings. This can be seen in a number of initiatives:

- it is actively encouraging the use of the Town and Country Planning system to promote and enforce the delivery of inclusive environments. The Office of the Deputy Prime Minister has recently published 'Planning and Access for Disabled People – A Good Practice Guide'. In simple terms the guidance describes how to ensure that inappropriately designed proposals are not granted planning permissions;

- in 2002 it consulted on proposals for amending the Building Regulations Part M - Means of Access to and use of buildings. The proposed amendments extend the coverage of the requirements and would encourage more attention to inclusive environments than previously required, including an access statement setting out the approach taken; and

- Part III of the Disability Discrimination Act 1995 gives disabled people a 'right of access' to goods, facilities, services and premises. These rights are being phased in from 1996 to 2004. From October 2004, service providers may have to alter the physical features of premises if the service continues to be impossible or unreasonably difficult for disabled people to use.

2.6. The commercial benefits of creating inclusive environments

2.6.1. There are very real and substantial commercial benefits to the design and delivery of inclusive environments. Four illustrative examples are given below:

- disabled people have an estimated spending power of £51.3 Billion.[5] To this the spending power of their families, friends and helpers must also be added, which is likely to more than double this figure. This 'spending power' is of great significance to the commercial market. For example, at the National Portrait Gallery it has been reported that visitor members have increased by 20% since the addition of the Ondaatje Wing, which improved accessibility, circulation and other facilities;

- developments designed to be inclusive are likely to have an enhanced market value. The reason is that occupiers now favour accessible buildings during a selection process. This is because they recognise that inclusive environments are suitable for a more diverse range of people and are therefore more functional, sustainable and efficient. They are also aware of the commercial, legal and moral disadvantage of excluding such a substantial percentage of the population;

- it is significantly more cost-effective to provide for access at the design stage, rather than by making retrospective adjustments during the construction phase or after occupation. Additional costs can be marginalised or eliminated if inclusive design is considered at an early stage; and

- if a development is designed from the earliest concept stages to meet the needs of everyone, planning approval or building regulation consent is unlikely to be refused on the grounds that it does not meet appropriate access standards. This minimises the potential for delay, with obvious financial benefits. The implementation by local authorities of the government's good practice guide, as described above, will further enhance the risk of rejection.

5. (Source: the Institute of Employment Studies 1999).

3. Enhancing the delivery of inclusive environments

3.1. Three steps to success

3.1.1. Research has indicated that there are three distinct yet substantial steps that can be made to enhance the delivery of inclusive environments during development.

3.1.2. These are;

- incorporating inclusive environment principles into all stages of the project briefing process;
- successfully converting the project briefs into inclusive environments; and in support of these two steps:
- the appointment of an appropriately skilled Access Champion.

3.1.3. The next part of this guide provides a brief background to the development and project briefing processes and the key participants involved. The following part:

- describes the development process and the project briefing process;
- identifies the key participants and explains their respective roles;
- gives best practice advice on the preparation of project briefs;
- gives best practice advice on how the key participants in the development process (including the Access Champion) can convert the project briefs into inclusive environments; and
- describes how to locate an appropriately skilled Access Champion.

Part II: The development and project briefing processes

4. The development process explained

4.1. Introduction

4.1.1. The UK construction industry is made up of an extraordinary diversity of professions, specialists and suppliers, all of whom are involved with the definition, design, construction, repair, refurbishment, regeneration and occupation of our built environment.

4.1.2. Because of this complexity, a project's structure can vary substantially from development to development. The choice of project structure or of procurement route is dependent on many factors. These include the desired speed, cost certainty, flexibility, complexity, price competition and to some degree the quality of design and workmanship required.

4.1.3. That said, once a project is structured it can be categorised into it's three constituent phases, namely:

The Strategic definition phase

The Design and construction phase

The Occupation phase

4.1.4. By understanding the nature of the phases and by matching appropriate contributions from the key participants, it is possible to build robust and comprehensive guidance that is applicable to any particular project structure. It is this approach that is taken by the guide. In addition notes and commentary are provided to indicate the possible consequences of a different type of project structure.

4.1.5. However in taking this approach, the guide assumes a level of knowledge in those responsible for structuring the project and defining the roles and responsibilities of the participants. If this level of knowledge does not exist, then further advice on procurement and project structures should be sought.

4.2. The Strategic Definition phase

Stage Description	Key functions of stage
Strategic definition phase	
1 Project Inception and definition. Preparation of Business case	Identification of business need or commercial potential of project. Identification of key business objectives and outcomes. Identification and appraisal of options for delivery of business objectives. Identification of site(s). Definition of project scope, time-scale and available budget based on business needs and objectives.
2 Appointment of key project team advisors including strategic advisor.	May include the appointment of some of the following: project manager, lead designer and cost consultant. The timing of the appointment of the key consultants will vary depending on the complexity of the scheme, the level of detail or accuracy required at these initial stages and the skills the developer/employer has 'in house'. The lead designer is usually the architect. May be a different team from the one that develops the detailed designs and oversees construction.
3 Strategic briefs.	The preparation of a written document that encompasses the developers/employers requirements for the project. The content and level of detail will vary depending on the relative complexity of the project and the procurement route being selected. Strategic briefs are explained in greater detail below, but in summary it may include: a statement of corporate needs and objectives, strategic statement of intent, key design and aesthetic aspirations, design and construction requirements, an assessment of

Stage Description	Key functions of stage
	options supported by feasibility studies, an assessment of procurement options, an assessment of value for money and affordability, project structure, future-proofing, programme constraints and budget. The form, content and even the existence of the Project Brief will be entirely dependent on the particular characteristics of the project and the client.
4 Feasibility studies	If the project is complex or if there is a choice of options then it may be necessary to undertake one or more feasibility studies to amend or clarify the Project Brief. The appointed consultants will visit the sites and undertake an initial appraisal of each. Procurement and construction options will be appraised. A development budget will be prepared and compared with the available budgets. This may lead to further amendments of the project brief. This stage may be re-visited on several occasions until the scope, output and cost of the project meets the business case and strategy.

4.3. The Design and Construction phase

Stage Description	Key functions of stage
Design and Construction phase	
5 Outline Proposals	Preparation of basic site plans, elevations, and construction principles in written and drawn format. Cost plan generated based on the outline proposals. Outline proposals prepared and assessed against the developers brief and the project budget. Outline proposals amended as often as is necessary to ensure exact fit with developers brief and project budget.
6 Draft Design and construction brief	The timing and formulation of these briefs (and even their names) will depend on the nature, scale, complexity and procurement of the project. Some projects may have a number of different briefs, or 'sub-briefs' covering specific aspects of the design and construction such as the urban environment or equipping requirements. Most briefs will develop in stages with more and more detail being added. Design and construction briefs are discussed in greater detail below.
7 Initial Statutory Consultations	Outline design may form the basis of a planning application for outline planning permission or the agreeing of a Planning brief with the Local Planning Authority. (There is little point in developing a scheme in greater detail without outline consent). Negotiations/discussions held with other statutory authorities such as Building Control/Approved Inspector or Highways Authority. Amendment made to outline proposals if required by statutory authorities.
8 Appoint Remainder of Design Team	The content of the design team will be dependent on the nature of the development and the skills required. The timing of the remaining appointment will similarly be dependent on the nature of the project and the chosen procurement route. For example a mechanical and electrical service consultant or a structural engineer may be appointed much earlier in the process if it is warranted by the complexity of the scheme.
9 Scheme Design	Outline proposal developed in greater detail to indicate for example spatial arrangements, materials and appearance. Cost plan updated and scheme design revised if required to meet project budget and developers brief.
10 Detailed design and construction brief	Depending on the chosen procurement route, a very detailed design and construction brief may be issued. These are particularly important where there are substantial elements of contractor's design.
11 Detailed Statutory Consents	Further consultations with planning and other statutory authorities undertaken. Revisions made to scheme design as necessary and full applications made for detailed planning consent, building regulation consent, highways consent etc as necessary.
12 Detailed Design & Specification	Detailed design developed from approved scheme design to a level of detail appropriate for construction. Detailed reference will also be made to the design and construction brief. Further approvals and discussions with the statutory authorities undertaken.

Stage Description	Key functions of stage
	Cost plan updated. Detailed design revised as necessary to meet budget requirements and requirements of statutory authorities. NB: detailed design of some elements of the development scheme are likely to take place after the main contractor has been appointed. For example a subcontractor may be designing the lighting or a passenger lift based on a “scheme design” performance specification. This design would typically take place with construction well under way. The total duration of this stage is variable. Further consultations also take place with statutory authorities. In particular elements of the scheme designed late in the construction sequence will be subject to further discussion, amendment and approval by the statutory authority.
13 Main Contractor Appointed	Following tender action the main contractor or the construction manager will be appointed. The timing of the appointment will vary enormously depending on the chosen procurement route. For example in design and build or traditional two stage contracting the contractor will have great input into the design stages of the project and is likely to be appointed at approximately scheme design stage. Novation may also take place at this stage for example in design and build schemes. This is the process whereby the employment of a design team is novated from the employer to the contractor. It is then their role to develop the detail of the design on behalf of the contractor.

Stage Description	Key functions of stage
14 Subcontractors /Trade Contractors Appointed	As noted above the timing of the subcontracts (and the design responsibilities of the subcontractors) will vary enormously. The design responsibility of the subcontractors is of great relevance in ensuring appropriate accessibility. With traditional construction, subcontractors may have agreed fixed price contracts with the main contractor based on a detailed design provided by the design team prior to the main contract being lead. The appointment of a subcontractor might therefore be “back-to-back” with the main contract. However with construction management, trade contracts will only be tendered as and when necessary, often long after other contracts have been completed.
15 Construction	The sequential delivery of the construction project to the designs provided by the various designers.
16 Hand-over	Completion of the project to include completion of all snagging. The successful completion of a snagging period which may include proving of mechanical and electrical services. The provision of operating and maintenance manuals including as installed drawings. Training of staff in the operation of the mechanical and electrical services.

4.4. The Occupation Phase

Stage Description	Key functions of stage
The Occupation phase	
17 Occupation	The successful occupation and use of the building. The delivery of appropriate staff training and familiarisation with the environment and facilities. In particular with PFI projects, the services the facilities manager (FM) provider is contractually obliged to deliver must be properly tailored to meet the needs of end users and occupiers.
18 Occupation brief	The post occupation review of both the design and construction process and the use of the building by the occupants. The constructive use of lessons learned for the benefit of future projects.

5. The Project Briefing process explained

5.1. What is the 'project briefing' process?

5.1.1. The briefing process is the creative process that provides a framework against which the key participants in the development process can conceive, design, construct and occupy buildings.

5.1.2. It is not a process concerned exclusively with the capture and clarification of detailed performance criteria at the early stages of the design process. It is a much wider process that begins during the strategic phase of the project, develops through the design and construction phases and concludes after the occupation of a building.

5.1.3. It is this systematic briefing process that allows development projects to be fully and robustly defined.

5.1.4. The project briefing phases can be categorised into three phases, which broadly reflect the similar stages in the development process.

5.1.5. These are;

Name of Briefing phase:	Related Development phase:
The Strategic briefing phase	**The Strategic Definition phase**
The Design and construction briefing phase	**The Design and construction phase**
The Occupation briefing phase	**The Occupation phase**

5.1.6. The project briefs are the outputs that result from the briefing processes. The various briefs are explained below.

5.2. The Strategic briefing phase

The Strategic brief

The strategic brief will be drafted in response to a particular corporate need. Its exact content and structure may vary and many elements of it will only be defined following completion of inward-looking studies and outward looking feasibility assessments.

However a well written strategic brief will generally incorporate the following:

- *Corporate needs and objectives.*
- *A strategic statement of intent. This may be in the form of a mission statement.*
- *A statement of key design and aesthetic aspirations, with guidance on relative priorities.*
- *Outline design and construction requirements.*
- *An assessment of options, supported by the results of feasibility studies.*
- *An assessment of procurement options and the implications of each.*
- *Assessment of value for money and affordability.*
- *A project structure defining roles, responsibilities and the decision making process.*
- *An assessment of adaptability for change and growth (future proofing).*

5.3. The Design and Construction briefing phase

Design and Construction briefs

Design and construction briefs develop in incremental stages, with greater detail being added to draft documentation as the project evolves. This happens through an incremental process of validation, evaluation and testing, with the strategic brief used as the benchmark against which ideas and proposals are measured.

The timing and formulation of design and construction briefs (and even their names) will depend on the nature, scale, complexity and procurement of the project. Some projects may have a number of different briefs, or ‘sub-briefs’ covering specific aspects of the design and construction such as the urban environment or equipping requirements.

The briefs allow the detailed design and construction requirements of a project to be clearly defined for all participants. Consequently the downstream detailed design and construction activity is closely influenced by this document.

A relevant sample of the access related issues that a design and construction brief might cover are as follows:

- A re-affirmation of relevant elements of the strategic brief including:
  - *The Strategic statement of intent. This may be in the form of a mission statement*
  - *The statement of key design and aesthetic aspirations, with guidance on relative priorities.*
- Enhanced details of the project structure including the procurement structure and the roles and responsibilities of the participants and the mechanics of the decision making and project assessment processes
- Enhanced details of the more specific design aspirations relating to particular functions or construction elements
- Details of design standards, including prescriptive requirements where appropriate

5.4. The Occupational briefing phase

Occupation briefs

The design and construction of a building including the fitting-out is of great importance in defining the quality of access. The shell and core of a building will typically have a life-span of 50 to 100 years and because it is relatively difficult to amend or improve, delivering appropriate accessible design and construction at the first time of asking is of great importance.

However the post-occupation effect on accessibility should not be overlooked as these day to day changes can have a significant positive or negative impact on accessibility. It is these microenvironments that are also very reactive to the actions of individuals.

An occupation briefing process therefore serves two functions through post occupation evaluation;

- it allows improvements to be made to the completed development through management and equipment techniques; and
- it allows the information and lessons learned to be used for the benefit of other projects.

Typically the post occupation briefing process will include:

- A review of the design and construction process
- A review of the resultant structure and fabric measured against the original strategic and design and construction briefs
- A review of the building performance when measured against the original business need.

The first review should not be undertaken until such time as the building and occupants have ‘settled’, typically one month after occupation. Subsequent reviews should be undertaken on a periodical basis to ensure that the original strategic requirements continue to be met. These rolling reviews are over great significance as neither business nor society is static. Some elements of the development will expect to change over time and the development must respond to this.

5.5. The link between ‘Project Briefs’ and ‘Access Statements’

5.5.1. The elements of these project briefs that relate to access are sometimes known as ‘access statements’. The development of the Access Statement will closely mirror the development of the larger project brief, within which it sits.

5.5.2. The Disability Rights Commission (DRC) is currently developing further guidance on Access Statements.

6. Examples of Best Practice

6.1. Strategic briefs

6.1.1. The following list of access issues for inclusion within the project brief is not intended to be exhaustive. The exact content and scope will be dependent on the nature of the development.

6.1.2. The exact location of the access issues within the wider strategic brief will also be dependent on the nature of the project and the documentation. To maximise the impact of the access message, we recommend that access related issues are grouped where possible.

6.1.3. This grouping into a self-contained sub document is often referred to as an 'access statement'.

Description	Access related example
Corporate needs and objectives	*'The relative inaccessibility of our retail unit has resulted in the loss of customers to similar but accessible stores. We have a commercial need to maximise our customer base and thus our revenue. In addition the existing access provisions within our store may leave us vulnerable to civil action under the Disability Discrimination Act 1995.*
A strategic statement of intent. This may be in the form of a mission statement.	*'Our aim is to deliver well-designed and constructed quality buildings that fulfil the principals of functionality, build-quality, efficiency and sustainability. To achieve this we must maximise the access provisions within our store.* *In doing this we will increase customer numbers, increase the efficiency with which our existing customers shop, reduce the risk of future civil action under the Disability Discrimination Act 1995 and be able to publicly and privately brand ourselves as a morally and socially exemplar organisation'.*
A statement of key design and aesthetic aspirations, with guidance on relative priorities.	*'Our intention is to exceed the 'minimum' access standards defined by Part M of the Building Regulations and other mandatory documentation. Our goal is to achieve best practice aspirational access standards for all design, construction and operational aspects of our new store'.*
Outline design and construction requirements.	*Our high level design and construction requirements are the full integration of the relevant best practice access standards across the four areas collectively representing high quality access:* • *The urban environment – getting to the building* • *The structure and fabric* • *Information and equipment* • *Our staff*
An assessment of options, supported by the results of feasibility studies	***Option 1: Refurbishment of the town-centre site – key considerations:*** • *Reduced site footprint demands that the multi-storey configuration is retained* • *Changes in levels and spaces has implications for way-finding and circulation reducing the efficiency of shopping* • *Availability of public car parking reduced. Increased reliance placed on public transport* • *Shorter journey*

Description	Access related example
	Option 2: New out of town development – *key considerations:* • *New site give opportunities for a 'from scratch' single storey design allowing high levels of access to be more easily achieved* • *Ample parking and opportunities for extension of the local public transport infrastructure* • *Longer journey*
An assessment of procurement options and the implications of each	*The two procurement options currently under consideration are 'Traditional' and 'Design and Build'.* *If a **Traditional** route is chosen, then the independently appointed Access Champion will contribute to the design, construction and occupation processes through independent and sequential contributions to the process. These contributions can be summarised as:* • *Assistance in the development of the design and construction brief* • *Contribution to and review of the emerging design* • *On-site monitoring of construction activities* • *Occupational review and assistance* *If a **Design and Build** route is chosen, we will maintain the involvement of an independently appointed Access Champion throughout the lifetime of the project. We will also make it a condition of the contractor's design and build contract that they appoint an appropriately skilled Access Champion within their own design team.* *The contributions of our own Access Champion can be summarised as:* • *Detailed assistance in the development of the design and construction brief including the*

Description	Access related example
	development of any outline design where appropriate • *Contribution to and review of the contractors emerging design* • *On-site monitoring of construction activities* • *Occupational review and assistance*
Assessment of value for money and affordability	*Whilst designing to best practice standards may be marginally more costly in bottom line terms, the enhanced commercial, legal and moral benefits will in turn enhance value for money.*
A project structure defining roles, responsibilities and the decision making process.	*Whichever procurement route is chosen, we will maintain the involvement of an independently appointed Access Champion who contractually will operate independently of either the client's design team or the contractor's team.* *The Access Champion will liase and integrate fully with the clients team but shall provide independent reports on access issues that shall be issued directly to the clients as required.*
An assessment of adaptability for change and growth (future-proofing)	*The development shall be designed and constructed in an inclusive manner allowing people with all forms of disabilities to gain full access.* *The scheme shall be adaptable to maintain high quality access in the event of:* • *Minor changes by the occupants in the way the building is used on a day to day basis. This shall include changes that are made for operational reasons and for this reason full consultation with the end users will be required* • *More significant expansion or refurbishment*

6.2. Design and Construction briefs

Description	Access related example
A re-affirmation of Corporate needs and objectives	*'The relative inaccessibility of our retail unit has resulted in the loss of customers to similar but accessible stores. We have a commercial need to maximise our customer base and thus our revenue. In addition the existing access provisions within our store may leave us vulnerable to civil action under the Disability Discrimination Act 1995.*
A reminder of the strategic statement of intent. This may be in the form of a mission statement.	*'Our aim is to deliver well-designed and constructed quality buildings that fulfil the principals of functionality, build-quality, efficiency and sustainability. To achieve this we must maximise the access provisions within our store.* *In doing this we will increase customer numbers, increase the efficiency with which our existing customers shop, remove the risk of future civil action under the Disability Discrimination Act 1995 and be able to publicly and privately brand ourselves as a morally and socially exemplar organisation'.*
Enhanced details of the project structure including the procurement structure and the roles and responsibilities of the participants and the mechanics of the decision making and project assessment processes	***The Access Champion (traditional scenario)*** *Project structure:* • *Directly appointed (i.e. is employed and paid) by the employer* • *Reports to the employer on an independent basis* • *Works with the design team and feeds day to day contributions directly to them.* *Responsibilities:* • *Refer to 'The role of the Access Champion'* • *May or may not actually undertake design, depending on circumstances (may be limited to advising and critiquing designers work).*

Description	Access related example
	Decision making authority • *Design authority usually limited to reporting on designers proposals and construction observations.*
Enhanced details of the more specific design aspirations relating to particular functions or construction elements	*In respect of the provision for access within the new building, it is our intention to design and construct to best practice aspirational access standards for all elements of our new store. In particular the guidance set out in the following two documents are indicative of the level of provision that we wish to achieve:* *British Standard 8300:2001 – The design of buildings and their approaches to meet the needs of disabled people* *Greenfield Council's 'Access and facilities for people with disabilities – Supplementary Planning Guidance No.2'.*
Details of design standards, including prescriptive requirements where appropriate	***Parking*** *Parking shall be designed and constructed in accordance with the following standards:* • *British Standard 8300: 2001 –The Design of buildings and their approaches to meet the needs of disabled people – code of practice* *It shall comply generally with section 4 car parking, setting down and garaging and specifically with the following sections:* • *4.1.2 – provision of designated parking spaces* • *4.1.2.3 – Shopping, recreation and leisure facilities* • *4.1.3 0 - Off-street parking, garaging and enclosed parking*

Description	Access related example
	• *4.1.3.1 – Uncovered parking areas* • *4.1.3.2 – Design and layout of designated off street parking spaces (including figure 2)* ***Decorative finishes*** *Colour schemes shall be selected and specified in accordance with the guidance contained within:* • *'A design guide for the use of colour and contrast to improve the built environment for visually impaired people' published by ICI Paints* ***Internal Steps*** *Internal steps shall be designed and constructed in accordance with the Approved Document M (1999 edition) to the Building Regulations 1991 as follows:* *The basic design shall meet Part M2 Section 2: Means of access within buildings other than dwellings – Internal Stairs 2.19 – 2.21 including diagram 12* • *The design of the internal steps shall be enhanced by designing the internal steps to also meet Part M2 Section 1: Means of access to and into buildings other than dwellings – Stepped approach 1.24 a,b,h and diagram 2* *(N.B: Part M of the Building regulations is currently under review. The focus of the revised Part M is likely to be on access to and use of buildings by everyone rather than by disabled people.)*

6.3. Occupational briefs

Description	Access related example
A review of the design and construction process	The project structure generally operated satisfactorily. However if the Access Champion had been appointed independently, rather than as a sub consultant to the architect, the design review process by the Access Champion would have had a greater transparency and clarity to the remainder of the project team. In future we shall appoint Access Champions independently.
A review of the resultant structure and fabric measured against the original strategic and design and construction briefs.	Although the detailed design brief made general reference to the needs of people with visual impairments, their specific requirements were not stipulated in detail. As a result we have a reception desk that is back-lit by south-facing structural glazing this casting the faces of the receptionists into deep shadow on bright days. In future we need to accurately specify the design requirements of all disabled people.
A review of the building's performance when measured against the original business need.	We have seen an increase in visitor numbers as a result of our enhanced access provisions and this has made a substantial contribution to our primary business need of increasing revenue. In particular improving the integration of our building with the local transport infrastructure has had a major impact. On future projects we should further enhance investment in this particular area.

Part IV: The Access Champion

7. The Access Champion

7.1. Introduction and definition

7.1.1 The 'Access Champion' is the title given by this guide to individuals or organisations who concern themselves with the definition, design and construction of buildings and facilities in accordance with the accepted principles of high quality inclusive design.

7.1.2. The existence of 'Access Champions' is nothing new, although research indicates that the frequency with which they are appointed and the scope of their involvement varies enormously from the non existent to the substantial.

7.1.3. One of the key messages highlighted by research (undertaken prior to the preparation of this guide), is the direct correlation between the presence of an 'Access Champion' during the design and construction of a building and the subsequent quality of access.

7.1.4. Ideally the Access Champion will be an independently appointed expert with a direct and contractual link to the employer. Although independence is not essential, it is usually preferable, as it allows the Access Champion to operate without any contractual, political or aesthetic obligation to the design team or the contractor.

7.1.5. If the role is undertaken by the project architect, it is important for all parties to ensure that the quality of access and facilities is not inadvertently eroded or compromised in any way by other design aspirations.

7.2. Two important points

7.2.1. In appointing an Access Champion the developer/employer must consider two important facts.

7.2.2. The first consideration is that to receive appropriate professional advice, it is reasonable to expect that a fee will have to be paid, even where the role is being undertaken by the architect.

7.2.3. The role of an Access Champion requires a commitment that has an associated time and expense implications. Research indicates that some employers wrongly expect their architect to discharge the role of an Access Champion as an integral function of their existing appointment. If this attitude is adopted, then it is likely that the quality of output will be diminished.

7.2.4. The second consideration is the robust assessment of a potential Access Champion's abilities, prior to appointment. The following section deals with the basic skills and experience required of a competent Access Champion and the subsequent sector gives guidance on how these skills might be assessed.

7.3. The relevant skills of an Access Champion.

7.3.1. It is essential that an Access Champion has appropriate skills in four areas, namely consultation and negotiation skills, technical skills, legal skills and contractual skills.

7.3.2. Consultation and negotiations skills should include an understanding of the workings and structure of the project team, and should include an ability to accurately and persuasively convey the requirements and benefits of access, especially when other pressures or considerations exist.

7.3.3. The necessary technical skills required can be summarised as:

- an understanding of the processes and principles applicable to design and construction of buildings and the built environment;
- an understanding of technical and structural constraints of access solutions;
- an ability to read and understand complex technical drawings and specifications;
- an understanding of current guidance and/or best practice in the access field;
- an understanding of the needs of, and design issues relating to all users and potential users of environments, particularly those users with disabilities;
- an understanding of the importance of consulting with users and/or potential users and experience of such consultation;
- understanding of the non-physical issues which may impact upon the accessibility of an environment, such as management issues;

- understanding of the importance of an access policy and access strategy;
- understanding of the reasons for undertaking an access audit of design proposals;
- experience of carrying out satisfactory access audits and preparing access audit reports;
- experience of representing the issues to technical and non-technical groups and to design teams/employers;
- an understanding of the means of escape requirements for disabled people including BS5588 Part 8;
- an ability to act as an Access Champion on a range of project types including new build and refurbishments;
- problem identification and solving;
- an ability to identify barriers and hazards to accessibility within an environment by physical inspection;
- an ability to identify barriers and hazards to accessibility within an environment from drawings and specifications;
- an ability to recommend access solutions to barriers and hazards identified above, in line with current guidance and or best practice;
- an ability to identify situations not covered by current guidance and or best practice and make recommendations accordingly;
- an ability to apply current guidance and/or best practice and the design issues relating to all users and potential users of environments beyond construction related activities;
- an appreciation of the technical constraints to access solutions and the ability to take these into account when recommending solutions;
- an appreciation of aesthetic aspirations and technical, time and cost implications and constraints faced by design teams and clients and the ability to take these into account when recommending solutions; and
- an ability to prepare access statements and strategies.

7.3.4. The legal skills required of an Access Champion can be summarised as follows:

An understanding of:

- the Disability Discrimination Act 1995 and associated regulations and codes of practice;
- the Building Regulations (England and Wales, Scotland, Northern Ireland);
- Health and Safety Legislation;
- Occupiers Liability Acts;
- Construction (Design and Management) Regulations;
- Fire Regulations; and
- Highways Act 1980.

7.3.5. The contractual skills required of an Access Champion can be summarised as follows:

- an understanding of the legal obligations and liabilities associated with offering expert advice:
- an understanding of the different ways of arranging payment for consultancy services' and
- an understanding of negotiating and operating under formal consultancy agreements.

7.4. Finding an Access Champion and assessing their abilities

7.4.1. Selecting an appropriate Access Champion is key to project success. The suggested steps are as follows:

7.4.2. Firstly, identify potential candidates.

- This can be achieved by discussions with colleagues, contacts or other construction professionals. Organisations such as the Royal Institution of Chartered Surveyors or Royal Institute of British Architects are also likely to have suggested candidates.
- There is also a National Register of Access Consultants (www.nrac.org.uk) who through membership are deemed to have met the minimum competencies described above. However the reader should bear in mind that the experience of many

consultants on the register varies in terms of its relevance, and also that many competent Access Champions are not registered (as the National Register is still in relative infancy). Additionally it should be noted that registration is voluntary, not obligatory.

7.4.3. Secondly, a shortlist of candidates should be identified.

- Contact should be made with a shortlist of candidates who should be asked to demonstrate their ability to meet the competencies described above. Some of the technical competencies in particular can be 'deemed included' within a professional construction qualification, although others should be demonstrated. From this process a shortlist of up to three candidates should be identified.

7.4.4. Thirdly interviewing and fee tendering should be undertaken.

- On more substantial schemes this could include visits to completed schemes where access provisions could be demonstrated and the Access Champion's contributions assessed. Where the Access Champion is not the lead designer, it is recommended that the lead designer also participates in the interview process to assess their ability to work closely together.

7.4.5. Lastly a fee paying contractual agreement should be entered into.

- This should include details of the scope of service described above.

Part V: Delivering the Briefs – Best practice

8. Introduction and project structure

8.1.1. The benefit of a considered and detailed series of briefing documents will not be realised unless the design, construction and occupation of a building is undertaken in strict accordance with the requirements of the briefs.

8.1.2. This part of this guide explains how each of the key participants can contribute to the conversion of the briefing documents into high quality inclusive environments. This explanation is achieved by highlighting the key access considerations of each stage in the development process. These include:

- the stage description;
- the key access tasks of that stage;
- documentation required to properly complete the stage;
- the key participants of the stage;
- the relevant stage outputs;
- general commentary/notes.

8.1.3. It is important to appreciate that the exact format and sequence of each stage will be dependent on the way in which the project is structured and procured.

8.1.4. For example, a traditionally procured project will allow the sequential steps and the design and construction responsibilities illustrated in the document to be followed in a similar sequential manner. With this form of procurement the employer's design team will also retain the design responsibilities.

8.1.5. Conversely where a contractor or sub contractor is undertaking elements of design, then it is the responsibility of the Employer/Developer, the Access Champion and the Project Manager, to ensure that the contractor is (a) competent to design and (b) produces design proposals that meet the requirement of the brief.

8.1.6. For this reason and as previously stated it is important that the reader of this guide has a good understanding of the nature of development and in particular the project structure and the distribution of the various design and construction responsibilities.

8.1.7. Based on this detailed understanding of the project structure, the key access tasks described in the following table must then be clearly and rigorously allocated to the appropriate member of the design team. The exact distribution of responsibilities can and will vary enormously from project to project. Consequently it is not possible to address every potential project structure in this guide.

Guide to Best Practice

9. A guide to best practice

9.1. The Strategic Definition phase

(1) Project Inception and definition. Preparation of business case.`

Key tasks

- Where relevant, discuss and understand the commercial, legal and moral benefits of high quality access.
- Understand the whole-life cost benefits of delivering inclusive environments.
- Integrate these benefits with other business case issues.
- Where relevant undertake an access audit or other review of existing premises or operations to establish existing strengths and weaknesses and potential future benefits.

Relevant documentation

- Pre-existing Access Audits and results of user consultation.
- Other market analysis.

Key participants

- Employer/developer.
- End users/occupiers.

Relevant outputs

- Business case to include Access considerations.

Notes:

- Access issues (ie the accessibility of existing and proposed premises) are likely to contribute to the business case behind the development. This is particularly relevant for service providers with a high throughput of members of the public.

9.1. The Strategic Definition phase

(2) Appointment of key project team advisors including strategic advisor/ project manager, lead designer and cost consultant

Key tasks

- Employer/Developer to locate appropriately skilled personnel to contribute to the definition, design and construction and occupation processes through a process of tender (if required), interview and appointment.
- Ensure that the basis of the appointments (the consultancy agreements) adequately record in detail the scope of service for each stages for each of the participants, including the access functions listed in this guide.
- Ensure the financial remuneration is adequate to ensure that appropriate resource is made available by each participant to adequately undertake the duties described in this table.
- Ensure that this resource is made available on a planned and committed basis.
- Ensure that the continuity of the personnel contributing to the scheme is maximised.

Relevant documentation

- Project inception/business case documentation.
- Consultant's tender documentation.
- Draft consultancy agreements.

Key participants

- Employer/ Developer.
- Lawyer.
- Access Champion.
- Project Manager.
- Lead Designers.

Relevant outputs

- Signed or sealed consultancy agreements.

Notes:

- The number of other consultants appointed at this early stage will be dependent on the nature of the scheme.
- This is ideally the stage at which the Access Champion (whether they be the architect or an independent appointment) is appointed.
- NB: The appointment (the consultancy agreement) may be limited to the development of the scheme to a particular design stage. For example the existence of the scheme may be dependant on securing a planning consent.

9.1. The Strategic Definition phase

(3) Strategic Brief

Key tasks:

Ensure that all key participants fully understand the access requirements of the business case including the legal, moral and commercial drivers within it.

Based on the project inception/business case documentation, discuss and agree the content of the strategic brief in accordance with the advice given in Part III of this guide.

For example this might include on assessment of

- Corporate needs and objects.
- Strategic intent/mission statement.
- Design aspirations with relevant priorities.
- Outline design and construction requirements.
- Client or sector led design standards (such as those provided by the National Health Service).

After completion of any relevant feasibility studies, the strategic brief will also include:

- An assessment of options including procurement options.
- Value for money assessments.
- Project structure.
- Adaptability/future proofing.

Relevant documentation

- Project inception/ business case documentation.
- Consultancy agreements.
- Feasibility Studies (where these have been undertaken prior to the full completion of the strategic brief).
- Any pre-existing access policies or standards that the employer or developer might have.
- Any sector-based access policies that may exist.

Key participants

- Employer/developer.
- Access Champion.
- Lead designer.
- End user/occupier.
- Project manager.

Relevant outputs

- Those sections of the strategic brief that relate to access as described in Part III of this guide.

Notes:

- It may not be possible to fully complete the strategic brief until after any feasibility studies have been undertaken. This is particularly relevant where multiple sites are being considered.
- The importance of involving the end users/occupiers during the initial preparation of the Strategic Brief should not be under estimated.

9.1. The Strategic Definition phase

(4) Feasibility studies: (RIBA Stages A&B)

Key tasks:

- Visit site(s) and understand the topography, local transport infrastructure and other relevant issues.
- Review local Development Plan (DP) and any relevant Supplementary Planning Guidance (SPG) to fully understand planning and other local statutory restrictions.
- Analyse any access implications of proposed scheme(s) being put forward.
- Assess any design proposals against the strategic brief and advise on the implications of any shortfall.
- Advise on alternative methods of delivering access.
- Develop an understanding of the financial implications of any differing access proposals.
- Ensure that the access implications of different procurement solutions are fully debated/understood. For example: will subsequent contracts for the fitting out of shell and core areas also be appropriately designed and constructed? If this issue is not addressed, then good intentions can be compromised.

Relevant documentation

- Architects drawings/specifications.
- The local DP and SPG where relevant.
- The strategic brief including design standards.
- The consultancy agreements.
- The cost plan.

Key participants

- Access Champion.
- Employer/Developer.
- Lead Designer.
- Town & Country Planning Advisor.
- Project Manager.
- The end users/occupiers.

Relevant outputs

- Relevant sections of the feasibility report(s) including commentary on how each option addresses the initial elements of the strategic brief as set out in Part III of this guide i.e.:
  - Corporate needs and objectives.
  - Strategic intent/mission statement.
  - Outline design and construction aspirations.

Notes:

- This stage might precede the strategic brief. Alternatively some elements relating to particular sites might be completed after feasibility studies have been undertaken.
- The choice of scheme, site and brief will be made following the collection consideration of many issues, not just those relating to access.

9.2. The Design and Construction phase

(5) Draft design and construction brief

Key tasks

- Develop the strategic brief into a draft design and construction brief in accordance with the recommendations made in Part III of this guide.
- Re-affirm the relevant elements of the Strategic brief ensuring that the relevant elements have been properly considered and integrated into the draft design and construction brief.
- In developing the strategic brief, ensure that all parties understand the distinction between essential (mandatory) access standards, which are minimum provision, and best practice (aspirational) access standards which contribute to inclusive environments.
- Establish the financial ramifications (if any) of choosing best practice design standards rather than the statutory minimum standards.
- Develop designs in accordance with chosen design standards.
- Define the project structure in respect of the lines of communication, authority and contract all parties.
- Liaise with the end user/occupier to establish in detail how the building will be used during the operational phase. If necessary and in response to the consultations amend appropriate design standards to reflect the intended use of the building.
- Where the design and construction brief is to be used as an Employers Requirement Document, specify how the bidder is to demonstrate their compliance with the access requirements of the brief at each stage (i.e. through appointment of their own expert, through illustration, plans, text or presentation).

Relevant documentation

- Project inception and business case documentation.
- Consultancy agreements.
- Feasibility studies.
- The Strategic Brief.

Key participants

- Employer/developer.
- Lead designer.
- Access Champion.
- End users/occupiers.

Relevant outputs

- A draft design and construction brief meeting the requirements made in section III of this guide.

Notes:

- The exact format and timing of the draft Design and Construction Brief may vary. Whatever the nature of the design and construction brief, it is essential that access is a continuous consideration during the development of the design.
- This should be ideally completed before outline proposals (RIBA Stage C) are developed and should form the basis of all subsequent design.

9.2. The Design and Construction phase

(6) Outline Proposals (RIBA Stage C)

Key tasks:

- Based on the recommended option at feasibility stage and the standards and requirements set out in the draft Design and Construction brief; develop an outline design proposals.
- At all stages of the design development review the design against the Strategic Brief and the Draft Design and Construction Brief to ensure that the two are compatible. Any instances where the design does not meet the requirements of the brief should be thoroughly re-assessed.
- Consider corporate needs and objectives and whether the emerging design is compatible.
- Re-visit and understand the practical implications of the chosen access standards and the effect they will have on the design.
- Compare emerging drawing and specification proposals against the chosen design standards and address any shortfalls.
- Access as a 'desk top exercise' whether the design meets relevant statutory requirements including Building Regulations and Fire Precaution requirements.
- Similarly assess whether the design meets local town & country planning requirements including the local transport plan, the local Development Plan and any Supplementary Planning Guidance. This will require further development at a subsequent stage.
- Consider local transport infrastructure requirements.

Relevant documentation

- The Draft design and construction brief including appropriate design standards.
- Feasibility report(s).
- Emerging Stage C drawings and specifications.
- Local DP/SPG/Transport plan.

Key participants

- Employer/developer.
- Lead designer.
- Access Champion.
- End users/occupiers.

Relevant outputs

- A Stage C design that meets the access requirements of the strategic and draft design briefs.
- Where required, a commentary on the access strategy (for the relevant section of the Stage C report). This will form the basis of any access statement required in connection with the Planning Application.

Notes:

- The Access Statement will begin to develop as an integral part of the Stage C report, building on the considerations in the strategic brief.
- Access Statements are increasingly required in connection with planning and funding applications and will be an essential part of the next stage (Stage (7) Initial statutory consultations and outline planning consents.

9.2. The Design and Construction phase

(7) Initial Statutory Consultations and where relevant an application for outline planning consent.

Key tasks:

- Based on the strategic and draft design and constructive briefs and the emerging Stage C design:
  - Hold pre-application consultations with local Access Officer (if the local authority has one) and Planning Officer.
  - Liase with Building Control/approved Inspector/Statutory Highways Authority, Fire Authority.
  - Consider and integrate any amendments required to the scheme to meet statutory obligations.
- Re-consult with statutory authorities based on any issues raised and revisions made.

Relevant documentation

- The Strategic Brief and the Draft Design and Construction Brief.
- The Stage C design and specification.
- Relevant design standards.
- Statutory documentation including local DP, SPG, Building Regs, Fire Precaution Legislation.
- The draft Access Statement.

Key participants

- Local Access Officer/Planning Officer.
- Building Control/ Approved Inspector as necessary.
- Statutory Highways Authority.
- Fire Authority.
- Lead Designer.
- Employer/developer.
- The Access Champion.

Key outputs

- An amended (if appropriate or necessary) outline design that meets the requirements of both the strategic brief and the draft design and construction brief and any statutory requirements.
- An Access Statement for incorporation into any planning application.

9.2. The Design and Construction phase

(8) Appoint Remainder of Design Team

Key tasks

- It is essential that the employer/developer properly appraise the access capabilities of any subsequent designers or other team members. The Access Champion should contribute to this process.
- The manner in which these designers shall demonstrate their ability shall also be considered whether it be through track record, assessment or discussion. This process could be very similar to the method for the appointment of an Access Champion as described in Part IV of this guide.

Relevant documentation

- The Consultancy agreements.

Key participants

- Employer/developer.
- Other Designers.
- Lawyers.

Relevant outputs

- Consultancy agreements containing the required scope of service and the basis of remuneration.

Notes:

- The nature of the scheme will dictate which designers are appointed in which sequence and at what stage.
- For example lighting, catering or interior designers may be specialist appointments on larger schemes.
- The Access Champion will have a key role in ensuring that all participants are properly considering access issues at all stages.
- Contractor may appoint their own designers. If this does take place it is important to ensure that the ‘Designing Contractors’ competence also is assessed.

9.2. The Design and Construction phase

(9 & 12) Scheme Design and detailed design stages (RIBA Stages D&E)

Key tasks

- Based on the Stage C and then D design and the requirements of the Strategic Brief and the Detailed Design and Construction brief, develop an appropriate and corresponding scheme and detailed design.
- At all stages of the design development review the design against the Briefs to ensure that the two are fully compatible. This is best achieved through a formal review and sign-off process specifically focussed on access requirements.
- Any designs not fully compatible with the brief should be thoroughly re-assessed and the design amended if necessary.
- In particular:
  - Consider the access implications of various design options put forward.
  - Hold specific workshops or design team meetings to consider access related issues.
  - Consider whether the design meets relevant statutory obligations including the local DP and SPG, Building Regulations and any outline Planning Conditions.
  - Consider relevant transport infrastructure.
  - Liase with statutory authorities.
  - Revisit the site to understand the site related access implications of the proposed scheme design.
  - Liaise with end user/occupier.
- If the project is to be tendered at this stage, ensure that the tender documentation is specific about the access design and construction obligations of the contractor.

Relevant documentation

- The strategic brief.
- Consultancy agreements.
- Stage C and D drawings and specifications.
- Detailed design and construction brief.
- Local DP/SPG.
- Relevant design standards.

Key participants

- Employer/developer.
- Lead designer.
- Other designers.
- Access Champion.
- Statutory authorities as necessary.
- End users/occupiers.
- Local Access groups (on larger schemes).

Relevant outputs

- A Stage D + E design that meets the requirements of the strategic design and construction brief.
- An updated Access Statement.

Notes:

- The exact sequence and format of the scheme and detailed design may vary. The key requirements of both stages are broadly the same, hence the reason that they are displayed here on the same page. Similarly the Design and Construction brief will develop in parallel with these stages.
- Depending on the chosen procurement route, there may be substantial elements of detailed design that takes place after construction has commenced.
- In such circumstances it is also possible that the latter stages of design are being undertaken by different designers possibly those appointed by the contractor. In such cases it is important to ensure that Access considerations are fully co-ordinated across all designers. The Access Champion can play a big role in implementing such a strategy.

9.2. The Design and Construction phase

(10) Detailed design and construction brief

Key tasks

- To develop in detail the design and construction requirements in accordance with the recommendations made in Part III of this guide.
- The exact format and timing may vary, but as a minimum it should address the following:
  - Re-affirm the relevant elements of the Strategic brief and the draft design and construction brief. Ensure that these have been properly considered and integrated.
  - Describe in detail the project structure in respect of the lines of communication, authority and contract between the Access Champion and the remainder of the project team including the contractor and any designer.
  - Provide enhanced details on the specific design aspiration of particular functions or elements of design and construction.
  - Undertake discussions with occupier/end user in respect of how the building will be used post-completion. If necessary amend appropriate design standards to reflect the intended use of the building.
  - Provide details of design standards including the detailing of any prescriptive design requirements where appropriate.
- Liase with the cost consultant and fully understand the financial ramifications of selected design standards.
- Where the brief is to be used as an Employers Requirement Document, specify in detail how the bidder is to demonstrate their compliance with the access requirements of the brief at each stage (i.e. through appointment of their own expert, through illustration, plans, text or presentation).

Relevant documentation

- Project inception and business case document.
- Consultancy agreement.
- Feasibility studies.
- The strategic brief.
- The draft design and construction brief.
- The Stage C Designs.
- Bibliography of design standards.

Key participants

- The employer/developer.
- The lead designer.
- The end users/occupiers.
- The remaining designers (including the contractor's designers where relevant.
- The cost consultant.
- The Access Champion

Relevant Outputs

- The detailed design and construction brief in accordance with the recommendations made in Part III of this guide.

Notes:

- The exact timing and format of this brief may vary substantially depending on the requirements of the project and the form or procurement.
- In some instances this detailed document may form the basis of the access elements of Employers Requirements (when using a D&B route) or Invitation to Negotiate (when using PFI).
- In such cases the detailed recording of access design and construction standards in essential.

9.2. The Design and Construction phase

(11) Detailed Statutory Consents

Key tasks of stage

- Undertake further pre-application consultations with relevant statutory authorities including the local Access Officer (if the Local Authority has one).
- Identify those design elements that are relevant to access.
- Fully develop the Access Statement for use in the detailed planning application, the Building Regulation consent and any consents required from the statutory Highways Authority.
- Work with the Fire Consultant/statutory Fire Authority on appropriate means of escape and life protection strategies.
- Feedback all findings and conclusions to Design Team and assist with integration of these findings into the relevant design.
- Undertake the detailed applications and secure the statutory consents.

Relevant documentation

- Stage E design information.
- DP/SPG.
- Other Statutory instruments such as the Building Regulations, fire precaution legislation, Highways requirements etc.
- Appropriate design standards.
- Strategic Brief and detailed design and construction brief.
- Draft Access Statements and the Access Strategy defined in the proceeding briefs.

Key participants

- Employer/Developer.
- The Design Team.
- Statutory authorities.
- The Access Champion.
- The contractor (where appropriate).
- Local Access groups (on larger schemes).

Relevant outputs

- Access statement(s)
- Statutory Consents

Notes:

- Detailed statutory consents are likely to be granted incrementally when dealing with larger and more complex schemes. This will also be the case with those schemes prepared with significant elements of contractors design. This stage may therefore take place over a prolonged period of time.

9.2. The Design and Construction phase

(13 & 14) Main Contractor Appointed. Trade or Sub-Contractors appointed.

Key tasks

- Assessment of the suitability, skills, resource and experience of the contractor from an access perspective. (Part IV gives guidance on how this might be achieved through a process of assessment of experience, track record and interviews).
- In particular, if the contractor has design responsibilities and the Design Team are not to be novated, then the contractors designers skills and competence should be vigorously assessed.
- If novation is to take place, ensure the basis of appointment to the contract or is similarly robust and that the influence of the Access Champion is not compromised.
- Ensure the contractor has allocated appropriate resource to effectively deal with access issues.
- The contract documents should explicitly state the access requirements of the scheme and the contractor's role in delivering them. Enclosing the access elements of the Detailed Design and Construction Brief and any Access Statement will assist in clearly stating these requirements.
- The contract documents should also state how the contractor(s) are to actively deliver the access requirements of the briefs and of the designs. This could be achieved by requiring the contractor to include a compulsory section on access, in each of his monthly progress reports. These would require him to actively demonstrate how access has been considered in the course of the month.
- This reporting requirements could be supplemented by a 'tick-sheet' that places the onus of proof on the contractor. For example the tick sheet might ask: Passenger Lift: has the manufacture's design proposals been checked against section 17.46 of the detailed design and construction brief?

Relevant documentation

- Tender (and subsequently) contract documentation.
- Access Statements.
- Detailed Design and Construction briefs.
- Deeds of Novation.
- Contractor method statements and access experience.

Key participants

- Main contractor.
- Sub contractors.
- Employer/developer.
- Lead designer.
- Access Champion.

Relevant outputs

- An assessment of the contractor's ability to design and/or construct an appropriately accessible building.
- Appropriate contract documentation including evidence of professional indemnity insurance where contractor is undertaking elements of design.

Notes:

- The contractor may be appointed at very early stage in the design process or much later. The presence or absence of contractor's design will significantly influence the appropriate level of design competence required from the contractor.
- The extent of design undertaken by the contractor will vary enormously. It could consist of the detailed design of the entire project or be limited to particular packages such as lighting, catering or passenger lifts. Alternatively the contractor may have no design responsibilities.
- The design process itself would then take place in accordance with the recommendations made in RIBA stage D+E above.
- Where there are substantial elements of contractor's design, setting up and implementing a robust self certification regime for the contractor is essential. Research indicates that access issues are often overlooked during contractor's design and construction.

9.2. The Design and Construction phase

(15) Construction

Key tasks

- Ensure that the contractor's self-certifying reporting and checking regime is implemented in accordance with the requirements of the contract. The Access Champion will play a key role in this task.
- Monitor construction to ensure appropriate co-ordination between key trades and that the construction takes place in accordance with the requirements of the agreed design.
- Issue supplementary design advice as necessary in response to change requests or requests for information.
- Liase with statutory authorities to secure detailed consent/discharge of conditions if appropriate based on contractor's design.

Relevant documentation

- Contract specification and drawings.
- Statutory consents.
- Relevant sections of the contractor's progress reports and check-sheets.

Key participants

- Contractor.
- Employer/developer.
- Access Champion.
- Lead designer.
- Other designers.
- Project manager.
- End users/occupiers.

Key outputs

- A completed and considered set of access issues reports and checklists (provided by the contractor and monitored and approved by the Access Champion).

Notes:

- Ensuring that a project is appropriately designed and specified is an essential step in delivering an accessible building. However in many instances the construction is not undertaken in accordance with the stipulated design standards. This can seriously compromise the quality of the completed building.
- This happens for a number of reasons including errors in construction, unforeseen circumstances, clashes or the absence of specific and appropriately detailed construction requirements.
- It is therefore essential that the Access Champion maintains an input during the construction process to overcome these potential problems.

9.2. The Design and Construction phase

(16) Hand-over

Key tasks

- Ensure operating and maintenance manuals contain appropriate information on the operation and maintenance of access related equipment.
- Ensure that the end users/occupiers are appropriately familiarised with the access strategy for the building and also on any access related equipment.

Relevant documentation

- Operating and maintenance manuals.
- Access statements/strategies including a statement of access provisions.
- As Built Drawings and Specifications for subsequent fit out contracts.
- Training manuals.

Key participants

- Employer/developer.
- Designers.
- Main contractor.
- Sub-contractors.
- Access Champion.

Relevant outputs

- O&M Manuals.
- Familiarisation with access related equipment and strategy.

Notes:

- Often the completion of one contract or project does not mean that the building or environment is complete. Subsequent contracts may be placed for fitting-out certain elements of the building. If this is the case then it is important to ensure that these are similarly well designed and constructed. (Subsequent contracts for the fitting out of shell and core areas can seriously compromise the quality of access if not undertaken appropriately).
- Hand over may be phased or staged depending on the nature of the development.

9.3. The Occupation phase

(17) Occupation

Key tasks

- Provide periodic training to occupants on access into and within the building. This should also include issues on building use that are unrelated to the structure and fabric. Training might include:
  - Understanding of access strategy for the building.
  - Familiarity with the facilities within.
  - Disability awareness/customer service.
  - Appropriate staff interface with disabled people.
  - General health and Safety Issues.
- Recipients of training should include Personnel staff, facilities and building managers, reception staff and any others involved in interfacing with the public.

Relevant documentation

- Operating and Maintenance manuals.
- Training manual.

Key participants

- End user/occupier.
- Local Access Group.
- Access Champion.

Relevant outputs

- Training regimes.

Notes:

- The occupation may be phased or staged depending on the nature of the development.

9.3. The Occupation phase

(18) Occupation Brief

Key tasks

- Review the briefing, design, construction and occupation processes and feedback lessons learned for subsequent projects.
- Review the buildings actual performance measured against the original business need, perhaps through an access audit or staff interview.
- Provide information on how to make adjustments or improvements in the day to day operation of the building.

Relevant documentation

- The operating and maintenance manuals.
- As Built drawings.
- Staff feedback based on interviews and observations.

Key participants

- End user.
- Employer/developer.
- Lead designer.
- Access Champion.

Relevant outputs

- The Occupational Brief.
- Specification for building and equipment improvements.
- Specification for continuous staff training.

Notes:

- The format of the occupational brief will vary. Guidance on the content is given in section III of this guide.

10. Appendices

10. Appendix A: Typical pitfalls and possible causes

10.1.1. The following examples indicate some of the more common defects that arise and also highlights a number of possible causes.

A ticket hall located off a station concourse

Key Access Issue

The ticket hall generally provides high quality access including automated doors and a dropped service counter. However the tenant has installed freestanding queuing barriers that prevent unhindered circulation within the ticket hall. Additionally a tenant's raised floor behind the counter (containing structured cabling) prevents step-free access to the staff side of counter.

Possible causes

- A lack of co-ordination between the tenant's and the developer's /employer's design team.
- The absence of an occupational brief (including relevant access considerations).
- Failure by the design team to liaise with the tenant.
- The absence of an Access Champion in the tenant's equipping team resulting in access issues being overlooked.
- Post –completion changes by local managers
- Hand-over documentation lacking information on access strategy.

A doorway between an external car park and the interior of a building

Key Access Issue

A short, steep concrete 'ramp' has been installed late in the project to accommodate the difference in finished floor levels between the car park and the inside of the building.

The ramp is inappropriate in many respects but cannot be improved without encroaching the circulation within the car park.

Possible causes

- The absence of a co-ordinated access strategy at project briefing stages.
- A split in design responsibilities between contracts and / or design teams.
- A lack of strategic co-ordination between designers.

An Accessible WC

Key Access Issue

Although many aspects of this facility have been appropriately designed and constructed, the WC pan has been moved by necessity into the centre of the cubicle to allow connection of the waste outlet to the soil and vent pipe (the pipe is boxed-in to the back right of the cubicle).

This renders the available transfer space to the WC pan far below the minimum required, thus seriously prejudicing the effectiveness of the cubicle.

Possible causes

- A lack of design co-ordination between the architect and the mechanical services engineer.
- A mechanical services contractor may have slightly relocated the soil and vent pipe to avoid structural obstructions or other services.
- Inadequate detail on the drawings.
- Inadequate supervision.

Lift controls

Key Access Issue

Although many aspects of the lift controls are appropriately designed, the duel controls are located beside each other rather than on opposite sides of the lift car.

Possible causes

- The requirement for duel controls is likely to have been written into a project brief and hence into a specification. It is also likely that a sub-contractor undertook the detailed design of the lift car.
- The absence of an Access Champion to rigorously assess and approve the sub contractor's design proposals, may have allowed this inappropriate design to gain approval

Street furniture

Key Access Issue

A lamp post is located in the centre of the pavement, thus obstructing one of the main approach routes to the new public facility seen on the right hand side of the picture.

(The lamp post is likely to have predated the development).

Cars are also obstructing the pavement.

Possible causes

- An absence of a co-ordained access strategy within the project briefing stages to include liaison with the local statutory highway authority.
- A failure to consider access issues beyond the boundary of the development, such as reaching the development by local transport.

External approach to a principal entrance

Key Access Issue

The edge of the car-parking bay is not clear delineated. Car drivers therefore inadvertently obstruct the external approach to the building

making it impassable to prams, buggies and wheelchair users.

Possible causes

- The lack of a clear access strategy within the project briefs.
- Failure of designer to appreciate the importance of maintaining a clear and protected external approach.

Principal entrance door

Key Access Issue

Vision panel does not provide adequate visual communication between the interior and exterior.

The weight of the door is excessive, rendering it difficult to operate.

Possible causes

- Designers did not consider in a co-ordinated way, the 'in-use' performance requirements of the building including the door.
- The District Surveyor or Approved Inspector may have inadvertently approved a door design that does not meet the prescriptive requirements of Part M of the Building Regulations.

Internal circulation

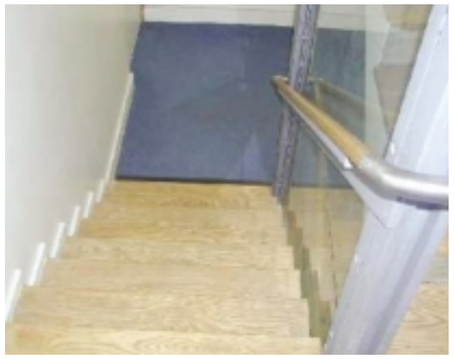
Key Access Issue

The location of the fire extinguishers and the presence of the column cladding reduce the effective width of the corridor and also create a hazard.

Possible causes

- The absence of an occupational brief (including relevant access considerations) highlighting the need to maintain access provisions.
- Post completion changes by local managers with thought given to access routes.

Internal staircase



Key Access Issue

A handrail has only been provided to one side of the staircase. This may be for aesthetic reasons.

Possible causes

- Absence of a clear access strategy within the project briefs.
- Architect's aesthetic desires may have over-ridden access considerations.
- The District Surveyor or Approved Inspector may have inadvertently approved a design that does not meet the prescriptive requirements of Part M of the Building Regulations.

Internal staircase

Key Access Issue

Although compliant with the essential requirements of the Building Regulations (Part K) due to the presence of nearby passenger lift, this principal entrance staircase does not meet accepted good practice standards as the flight rise and pitch is excessive.

Possible causes

- Employer/designers did not appreciate the good practice requirements of access.
- May have been due to the absence of clear discussion and agreement on best practice versus essential standards.
- Possible absence of access considerations in project briefing documents.

Internal reception area

Key Access Issue

Furniture is unsuitable as it is too soft, has no armrests and is too low. No alternative furniture is provided.

Possible causes

- The absence of an occupational brief (including relevant access considerations).
- Uninformed furniture purchases by tenants based on absence of guidance/handover information.
- Failure of design team to liaise with tenant.
- Post-completion changes by local manager.

Emergency escape

Absence of signage and emergency communication facilities within the refuge

Key Access Issue

The wheelchair refuge is inadequately sized and obstructs the passage of escape by others.

Possible causes

- The absence of an appropriate evacuations strategies within the project briefs.
- Absence of clear discussion and agreement on the distinction between best practice and essential standards.

11. Appendix B: Glossary/terms used

Access Champion

The ‘Access Champion’ is the title given by this guide to individuals or organisations who concern themselves with the definition, design, construction and occupation of buildings and facilities in accordance with the accepted principals of high quality inclusive design.

Access Groups

Informal independent consumer groups, usually of disabled people, who work with local authorities and commercial service providers on a range of matters relating to access, including planning proposals.

Access statement

The ‘formalisation’ of the access strategy developed within the project briefing process. Access Statements are often used for planning application purposes but in usual circumstances they will be considered within the wider project briefs.

Approved Documents (to the Building Regulations 2002)

A series of design documents suggesting one possible way in which the requirements of the Building Regulations 2002 might be met.

British Standards

A series of voluntary design standards produced by the British Standards Institute.

Building Regulations 2002

Regulations arising out the Building Act 1984 applying to construction work in England and Wales. They are designed to ensure the health and safety of people in and around buildings, to provide for energy conservation and to provide appropriate Access and Facilities for Disabled People.

Built environment

Those elements of the environment that are created artificially including buildings, transport and urban infrastructure and landscaping.

Consortia

A consortium is the grouping together of three or more organisations, generally of differing skills, with the objective of carrying out a specific project.

Construction management (CM)

A form of procurement in which the employer enters into a contract with a 'Construction Manager' and also with a series of trade contractors. The Construction manager is paid a fee for managing the work of the trade contractors.

Contractor

The contractor is the organisation traditionally responsible for the construction of the development. However in many construction contracts the contractor will also have substantial design responsibilities and will often employ designers to fulfil this role. Co-ordination and continuity between the employers and the contractor's designers is therefore essential.

Design-and-build (D&B)

This form of procurement has many possible variations but the most common is where the employer's design team prepare 'Employer's requirements' based on the performance of a building. A contractor then completes the design and undertakes construction.

Design team

The team of designers and other construction experts who collectively define, design, construct and deliver a development project.

Development

For the purpose of this guide, 'development' means the carrying out of any building, alterations or operations that require planning permission (Section 55 of the Town and Country Planning Act 1990). This also includes changes of use. The development process in explained in detail in 4.0 of this guide.

Development plan (DP)

The development plan is rarely a single document. Once all the plans required by Town and Country Planning legislation are in place, the development plan for an area may comprise one or more types of plan depending on geographical location. Outside metropolitan areas these will be structure plans, local plans and minerals and waste local plans. Within metropolitan areas these will be unitary development plans (DPs).

The plans set out the planning requirements and policies for that particular area including any requirements for access. Meeting these requirements is an essential element of gaining planning consent.

Disabled People

The Disability Discrimination Act 1995 defines a disability as 'a physical or mental impairment that has a substantial or long term adverse effect on an individuals ability to carry out normal day to day activities'.

Disability Discrimination Act 1995

A significant piece of legislation representing the cornerstone of civil rights for disabled people in the UK.

Employer/developer

Employers or developers are the organisations (which might be occupiers or developers) commissioning a development project.

End users/occupiers

These are loosely defined as those individuals or organisations who will occupy the completed development. Understanding their needs is an essential element of successful project briefing and development. For this reason the potential value of their input should never be underestimated or overlooked.

Fast-tracking

Fast-tracking is a means of reducing project time by the overlapping of design and construction. Each trade's work commences as its plans and specifications are substantially completed.

Funders

Funders are organisations or individuals providing the capital funding for a development. The funder might be a bank or a charitable fund. Funders often impose their own requirements in respect of access as a condition of funding. These requirements may include the appointment of an Access Champion.

Fixed price contract

A fixed price contract may be a lump sum contract or a measurement contract based on fixed prices for units of specific work.

Highway Authority

This is usually a County Council or a Unitary Authority. It is the authority responsible for the maintenance, cleansing, drainage and lighting of particular public highways.

Inclusive design/inclusive environments

Inclusive design creates inclusive environments, where everyone can access and benefit from the full range of opportunities available to members of society. The aim is the removal of barriers which create undue effort, separation or special treatment and enables everyone to participate equally in mainstream activities independently with choice and dignity.

Joint venture

A joint venture is the pooling of the assets and liabilities of two or more firms for the purpose of accomplishing a specific goal and on the basis of sharing profits/losses.

Lead designer

This is the term used for the designer who usually prepares and delivers the concept in functional, aesthetic and quality terms, with assistance from other designers.

The lead designer is usually the architect (although not always) who develops a design with assistance from other designers.

Listed building

English Heritage has the task of identifying and protecting historic buildings in England. The main means of doing this is by listing - recommending buildings for inclusion on statutory lists of buildings of 'special architectural or historic interest' compiled by the Secretary of State for Culture, Media and Sport.

Local transport plan

Local transport plans are five year integrated transport strategies that cover all modes of urban and rural transport and link them together.

Lump sum contract

With a lump sum contract, the contractor agrees to perform the work for one fixed price, regardless of the ultimate costs.

Management contracting

In management contracting the contractor works alongside the design and cost consultants, providing a construction management service on a number of professional bases. The management contractor does not undertake either design or direct construction work. The design requirements are met by letting each element of the construction to specialist sub-contractors.

Negotiated contract

In a negotiated contract the client selects, at the outset, one main contractor with whom to negotiate. In essence the arrangement is the same as that for a two-stage tender.

Novation

In this approach the client employs consultants to design and specify the project in accordance with stated requirements. On the basis of the documentation prepared, a contractor is selected by competition. The client then novates (or transfers) his agreement with the consultants to the contractor, who then takes full responsibility for the project through to completion.

Other Designers

The presence of 'other designers' who contribute to the design process will vary enormously depending on the size and complexity of the project. These may include service engineers, structural engineers, interior designers, space planners, lighting or catering designers, lift designers and so forth.

On larger more complex projects it is common for the contractor to contribute in some way to the design process.

Part M of the Building Regulations 2002

One of the 13 Parts of the Building Regulations that relates to Access and Facilities for Disabled People. This part is currently under review.

Partnering

A concept where organisations agree to work together for a period of time, perhaps unspecified, on a basis of mutual trust and with common objectives thereby optimising each partner's strengths.

Prime cost contract

Under this arrangement the contractor carries out the work for the payment of a prime cost (defined) and a fixed fee calculated in relation to the estimated amount of the prime cost.

Private finance initiative (PFI)

PFI is a means whereby the private sector can contribute to the provision of what has been regarded, traditionally, as a public service. The promoter designs, builds, finances and operates the facility on behalf of the (public) client.

Procurement

A ‘Building Procurement system’ can be defined as ‘the organisational structure adopted by a client for the management of the design and construction of a building project’.

Project briefing process

The process that results in the creation of project briefs, as described in section 5 of this guide.

Project management (PM)

Project management is concerned with the overall planning and co-ordination of a project from inception to completion, aimed at meeting the client’s requirements and ensuring completion on time, within cost and to required quality standards.

The Project Manager

The project Manager is concerned with the overall planning and co-ordination of a project from inception to completion, aimed at meeting the client’s requirements and ensuring completion on time, within cost and to required quality standards. N.B Contrary to some expectations, the project manager does not need to be the Access Champion.

RIBA Design stages A - F

Design and construction stages as defined by the Royal Institute of British Architects.

Statutory consents

Mandatory consents required before and during a development project. These may be for development control reasons, such as Town and Country Planning, or for Health and Safety reasons such as Building Regulation or Fire Precaution requirements.

Supplementary Planning Guidance (SPG)

Supplementary planning guidance can take the form of design guides or area development briefs. They supplement specific policies in a plan including in many instances access issues.

Traditional contracting

The traditional form of contracting is where the client appoints an architect or other professional to produce the design, select the contractor and to supervise the work through to completion. The contractor is selected on some basis of competition.

Turnkey

A turnkey contract is one where the client has an agreement with one single administrative entity, who provides the design and construction under one contract, and frequently effect land acquisition, financing, leasing, etc.

Two-stage tender

With a two-stage tender three or four contractors with appropriate experience are separately involved in detailed discussions with the client’s professional advisers regarding all aspects of the project. Price competition is introduced through an approximate or notional bill or schedule of rates.

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Further information

For further information on inclusive environments, the work of DPTAC and links to sources of advice, please see our website www.dptac.gov.uk and Access Directory