

Home > How to Develop a New Home > / Developing a New Home

Introduction



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Design Toolkit

Help with preparing a comprehensive and thorough Design Brief - [Design_Brief_Checklist.pdf](#)

During this stage the Outline Brief is refined to create a Design Brief that will inform the purchase of appropriate land and serve as the basis for developing a Concept Design, the first time the ideas in your Design Brief are presented as drawings.

Ideally, land should be bought after you have defined your needs and requirements in the Design Brief, so that any site conditions preventing the project's vision from being realised can be identified.

If you are purchasing land, it is likely that architects and architectural designers will want to visit your preferred site before you buy it, to see if it meets your design needs. This is an important step in the site selection process, but it is often overlooked.

If you already own land for the project, the Design Brief should capture site-specific characteristics (see the 'Key Activities' section of the 'Engage Design Team' stage).

How a Design Brief will help achieve your objectives

The Design Brief is a more detailed version of the Outline Brief, providing enough information for designers to draw a house that meets your needs or the needs of your intended market. The more thorough and detailed your Design Brief, the closer designers will get to achieving exactly the house you want.

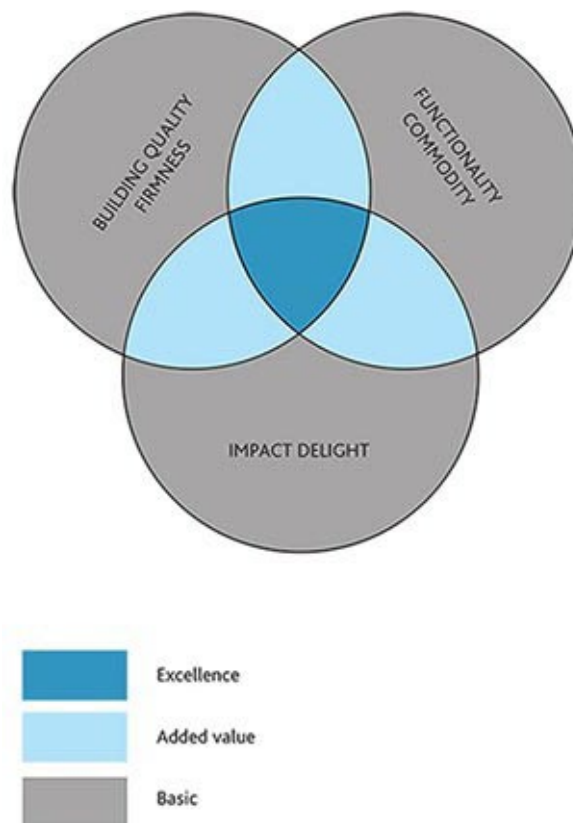
As well as adding more detail about what you want from your house, the Design Brief should set objectives and measurable targets around energy, water, comfort and health, lifecycle costs, which will be used to evaluate outcomes in the design and building stages. Examples of targets include:

- **Comfort:** Temperatures throughout the house should be between 19°C and 21°C all year round.
- **Energy:** Typical use of the home should consume no more than 5,000kWh of energy per annum.
- **Water:** 30% of water used in the home throughout the year should be supplied by a rainwater tank.

See 'Approaches to Sustainability' in the Sustainability hub for more information on setting sustainability objectives and targets.

Your Design Brief will evolve with the project. As information is gathered and knowledge increases, add this in to your Design Brief, always checking against what you set out to do in your Outline Brief and Vision Statement. This will help to ensure each decision made in the design and build process moves towards your original goal.

Key Activities



Striking a balance between quality, functionality and impact is very important

Refine needs and define requirements

In the Outline Brief, broad user and space requirements were defined, especially in terms of quality. At this stage you should review, refine and, where possible, quantify them. Some requirements may now not seem so important and can be removed from the document, while others will become more specific.

For example:

- If the Outline Brief stated open-plan living for socialising and entertaining was important, the requirement at this stage might be as follows: An open-plan kitchen integrated with lounge area; island bench allowing room for

some stools for casual family dining; room for a large oven, dishwasher and French door fridge.

- Or, if the Outline Brief had stated no heating was wanted in the winter, you could now define targets around comfort and health such as the ideal temperature range for different areas of the house (e.g. living areas between 19°C and 21°C all year round).

Balance cost, quality and time

The design should find a balance between quality (including the design and functionality of the house), cost and how long the house will take to build.

Communicating these in the Design Brief involves listing the requirements for each. Try to define your priorities and understand the relationships between each. A more complicated design may cost more, or take longer to build - but could be a better design outcome for your site.

It is important not to undervalue the concept of 'delight', or how happy your new house will make you. Sometimes what makes the design special can be lost in the face of time or cost pressure.

This is why a vision statement is important, and should be a reference point at each stage of the design.

Think about the long term cost of living in your house

Initial decisions about the design and construction of your house can have a big impact on how much your house costs to run. Designing your house to be naturally warmed and cooled by the sun and wind (called passive solar design) should not have any additional cost. Other measures, such as increasing the amount of insulation or adding solar hot water; will have an up front cost but will save money in the long term.

Lifecycle costing approaches the project from a wide perspective that includes the costs of operating and maintaining your home over its lifetime. Setting objectives around lifecycle costs can facilitate decision making and result in a house that both meets your initial budget and is affordable to run in the future.

See 'Lifecycle Costs' in the Sustainability hub for guidance on how to set objectives in this area.

Decide if a rating system might help to achieve objectives

Rating tools are mechanisms that can inform design and help you set objectives and targets around sustainability. See 'Approaches to Sustainability' in the Sustainability hub for more information on the most relevant tools for the New Zealand context and the way objectives and targets around areas such as **energy**, **water** and **comfort and health** are addressed. If you decide to pursue any of these certifications, remember to include the standard and its key objectives within the brief (e.g. 8 Homestar rating, Zero Energy, Passive House).

Recognised ratings tools can also be used to communicate the sustainable performance of your home to potential buyers, potentially resulting in a higher resale price.

Decide how important accessibility and future-proofing is to you

Consider how your requirements will evolve over time, for example as you have children or retire. **Universal design** involves creating a space that anyone can use regardless of age, size or ability. Taking this approach ensures your home will meet your needs as your situation or abilities change. If you are developing a house to sell it also means it will be attractive to a wider range of buyers, possibly resulting in a higher sale price.

Defined by a set of design standards, the **Lifemark** (<https://www.lifemark.co.nz/>) is an independent seal of approval indicating adaptable and accessible home design, making it safe and easy for New Zealanders to live in their own home for as long as they want.

Understand the consequences of changes in future stages

Making changes to the design requirements becomes more difficult and has more consequences as the project advances. During the early stages you can change your mind about things like the way the house will look or the number of rooms it will have without many implications. However, doing so in later stages once the design team has been engaged and the design process is underway is more complicated and will affect time and budget.

It is therefore important to have an honest review of the Design Brief before continuing the process, making sure it clearly reflects what is wanted and that there are no gaps or missing elements that may lead to future misunderstandings.

When additional team members are involved, key stages will require sign-off. Changes made to the design after these moments will incur additional charges and delays that can be easily avoided if time and effort are devoted to these early stages.

Deliverables



Consider the type of relationship you want with your neighbours and the street

Design Brief

This document should provide a clear description of the project in a way that should be understood by everyone that is likely to use it. It should elaborate on the objectives set in the Vision Statement and the requirements captured in the Outline Brief, and should include considerations regarding the following:

- ◆ **Lifestyle needs:** Preferences in terms of location, commuting and access to amenities.
- ◆ **Context:** What kind of relationship is wanted with neighbours and the street?
- ◆ **Land:** Characteristics of the desired site, such as orientation, resources or planning constraints. If you already have a site or are subdividing land, specific site limitations and possibilities should be included.
- ◆ **Form and style:** How the house will look, preferred materials or finishes, the type and quantity of spaces needed and desired layout. This includes the inside–outside relationship and the kind of outdoor spaces wanted.
- ◆ **Spatial needs:** Detailed information, where appropriate, in terms of quality and quantity.
- ◆ **User requirements:** Both for present and future users.
- ◆ **Future use:** Adaptation to changing needs in terms of accessibility, durability of materials, technology and marketability.
- ◆ **Sustainability considerations:** Objectives and targets that reflect your priorities around areas such as energy, water, comfort and health, lifecycle costs. At this stage, design strategies and technologies such as the type of glazing or the need for solar panels should not be included in the brief. Although these features will help you achieve your objectives, they are not objectives themselves.
 - **Design:** Shape, orientation, glazing percentages.
 - **Systems:** Water usage and disposal, energy generation, heating and cooling alternatives, lighting, monitoring systems.
 - **Materials:** Recycled or responsibly sourced resources, non-toxic coatings, efficient glazing and insulation.

- ◆ **Rating and certification:** If you are aiming for a certification or rating such as Homestar (<http://www.homestar.org.nz/>) or Passive (<http://www.phinz.org.nz/>) House the desired standard should be included. See 'approaches to sustainability' in the Sustainability hub for more information on the most relevant tools for the New Zealand context.
- ◆
- ◆ **Procurement decisions:** Summary of main points in the Procurement Plan (documented in the Plan stage, Section 2 of this guide) and an indication of the design processes to be used (e.g., integrated design approach).

Outline Budget

At this stage of the project you should have a clear idea of how much you can spend on the design and construction of the new house. After talking to the bank, a professional designer and completing research you should be aware of the costs that the project will incur, including those that might have been missed at the beginning (e.g. development contributions (<http://dcestimator.aucklandcouncil.govt.nz/>)).

In addition to the cost of design and construction, your budget should also include objectives around lifecycle costs which take into account the operating and maintenance costs of your home.

An Outline Budget should document rough estimates of how much can be spent during each of the subsequent stages of the process.

Who should you be talking to?



By this stage you should have already spoken to the bank, but make sure and keep in regular contact

Council

Although it is not compulsory to talk to the council at this stage, the 15 minutes of free advice (<http://www.aucklandcouncil.govt.nz/EN/ratesbuildingproperty/PreapplicationAdvice/Pages/PreApplicationMeetings.aspx>) it offers may be helpful to clarify doubts regarding consent requirements, timeframes and costs at a high level.

For more complex projects you can request a pre-application meeting with the council to speak with the relevant specialists and determine the key issues the council will be concerned with in the consenting process.

You can also enquire about development contributions and how they may affect the cost of the project either during the 15 minute consultation, or by using the Development Contributions Estimator (<http://dcestimator.aucklandcouncil.govt.nz/>) tool on the Auckland Council website.

The council also offers a free two-hour consultation with a specialist Eco Design Advisor (http://www.aucklandcouncil.govt.nz/EN/ratesbuildingproperty/sustainablehomes/Pages/ecodesignadvice.aspx?utm_source=shorturl&utm_medium=print&utm_campaign=Eco_design_advice) for guidance on saving money on energy and water bills. This can increase the resale value of your home, improve indoor air quality and reduce your home's environmental impact.

Architect/architectural designer

The expertise and experience of a professional designer can help create the platform for a successful project and a quality outcome. A good architect or architectural designer will ensure the brief is comprehensive enough without setting excessive constraints on the design, and ensure your aims and requirements are communicated clearly. Engaging someone at this stage shouldn't imply a commitment to using them throughout the rest of the project.

Others

Expert advice on specific subjects may help you more clearly document and communicate aspects that are of special importance to the design. For example, sustainability consultants can help you set objectives and targets around different aspects of sustainability that match your priorities. They are also able to provide information about certification schemes.

What to look out for



It is essential to include an appropriate amount of detail in the brief

Not including the right amount of detail in the brief

It is essential to include an appropriate amount of detail in the brief, and failing to do so can result in one of the following undesirable situations:

1. Producing a brief that is incomplete or unclear, which may lead to misinterpretations and failures in communication. Ultimately this can result in a house that does not meet its initial objectives or the needs of the people it was designed for. It can also generate time delays or extra costs if adjustments to the design have to be made in later stages of the project.
2. Writing a brief that is too detailed and specific in its requirements will limit the ability of designers to find creative solutions for the needs and aims of the people that will live in the house.

Not using a Design Brief for Group Housing or Design & Build projects

Even though you have less input into design with these types of projects, a Design Brief helps to communicate your requirements to the company constructing your home. A conversation about which requirements they can and cannot provide can then be had with the company. Revising the Design Brief following this process also establishes a benchmark against which the finished house can be measured.

Designing only to permitted activity

District Plan rules stipulate what building activity is permitted, and a house that meets all the rules does not require resource consent.

However, the best design outcomes for a particular site may require a house that falls outside of the permitted activity and designing within the limits may weaken the end result. You should weigh this up against any perceived consenting risks during the Design Brief process in order to arrive at the best solution for you. If you have engaged a design professional to help write your Design Brief they may be able to give some guidance on the actual level of consenting risk. Auckland Council can also provide guidance.

Houses can require consent for a variety of matters, such as earthworks or vegetation clearance - so even if the design complies with the development controls (i.e. it is under the minimum height and far enough away from the boundary) it may still require consent.