

# Benefits Management Policy

## FAQ's



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## What is the Benefits Management Policy (BMP)

### What is benefits management?

Benefits management is the identification, quantification, analysis, planning, tracking, realisation, and optimisation of benefits. It is an important change discipline that, when applied effectively, increases confidence in realising intended benefits and demonstrating the success of investments.

### What is the BMP?

The BMP is a best-practice policy for the APS that standardises benefits management practices for whole of government digital and ICT-enabled investments. The BMP defines how benefits must be managed across the Australian Government digital and ICT portfolio. The Policy supports agencies to deliver digital and ICT outcomes by detailing investment oversight requirements and providing guidance on benefits management. The BMP document includes Policy, Standard, Guidance and Process components. Through the application of these components, agencies can ensure that digital and ICT-enabled investments successfully realise investment objectives.

### Who developed the BMP?

The DTA developed the BMP, which is predominantly based on APMG-International's Managing Benefits™ methodology and definitions. When developing the BMP, the DTA undertook a robust discovery and consultation process, engaged with numerous entities in Australia and overseas, and drew on existing literature and best practice publications.

### Why was a whole-of-government digital and ICT BMP developed?

The [Digital Review \(2021\)](#) and other DTA internal reviews identified substantial gaps in benefit measurement, management and oversight across the Australian Government's Digital and ICT Portfolio. The Digital Review recommended to 'develop and mandate whole-of-government digital and ICT initiative benefits realisation, outcome tracking, and implementation oversight'. In the absence of an overarching benefits framework that details a consistent way of identifying and baselining benefits, agencies are looking to DTA to provide a position and guidance around digital investment benefits management.

### Where can I find the BMP document?

The BMP document can be downloaded from the [Benefits Management Policy](#) page on the DTA website or through the [Australian Government Architecture](#) website.

# How will the BMP impact my agency

## How is the BMP relevant to my agency?

The BMP is now included in the Digital Capability Assessment Process (DCAP). This means that all digital and ICT-enabled proposals that are subject to the Investment Oversight Framework will now be assessed for compliance with the BMP before proceeding to Cabinet for decision.

## What is the DCAP?

The Digital Capability Assessment Process (DCAP) underpins the Digital and ICT Investment Oversight Framework (IOF) and is used by the DTA to assess digital and ICT-enabled investment proposals being presented for Cabinet decision. Specifically, proposals are assessed for their compliance and alignment with whole-of-government digital and ICT policies and standards and the resultant DCAP assessment may determine whether a proposal goes forward for Government consideration.

## How does the DCAP assess a proposal for BMP compliance?

Full information about the DCAP BMP assessment process can be found in the BMP document.

## Our agency already has an established enterprise benefits management framework. Are we required to adopt the BMP?

Agencies are free to use existing tools, templates, and guidance from their respective enterprise level benefits management frameworks, provided they comply with the BMP. Benefits management, as a discipline, may vary in some respects but outcomes are mostly similar.

## Are expectations scaled to the size and complexity of the investment?

Better practice benefits management principles are equally applicable across all investments irrespective of size, scale, and complexity. As such, all digital and ICT-enabled investment proposals are expected to articulate the purpose of their investment, including defining key anticipated outcomes and how improvement against those outcomes will be measured, monitored, and optimised. DTA Investment Advisors have some discretion with respect to the level of detail and documentation expected for each investment, provided that the DCAP assessment criteria are met.

# When does the BMP come into effect

## Will BMP compliance be assessed in the DCAP in 2023-24 MYEFO?

Yes, from 2023-24 MYEFO, all digital and ICT-enabled investments coming forward to Cabinet will be assessed for compliance with the BMP by default, unless agencies elect to 'opt out'. When doing so, agencies are required to provide reasons why they are opting out, noting these reasons will be reported back to SDDC and other forums as part of providing visibility on progress implementing the BMP across whole-of-government.

## Will an investment proposal be at a disadvantage without DTA's BMP assessment?

The BMP is designed to support agencies in applying best practice principles and building a robust benefits case to support Government decision-making. The purpose of the DCAP's BMP assessment is to understand how well an agency intends to manage the delivery of the benefits that are used to support an investment decision by Cabinet. The DCAP provides Cabinet with the necessary confidence that an investment's proposed benefits will be quantified, measured, tracked, governed, and eventually realised. Given the relatively poor track record of previous APS investments, Cabinet is increasingly seeking this assurance from the DTA to inform investment decisions.

# What resources are available to help agencies

## Does the DTA have benefits management tools and templates?

Although the DTA does not have benefits management tools and templates, there are a number of resources published by other government jurisdictions that may be of use to agencies that do not have a dedicated benefits management suite. DTA recommends the following resources:

- UK Government - [Managing Benefits from Projects and Programmes: Guide for Practitioners](#) provides general guidance for benefits management.
- Victoria State Government – [Investment Management Standard \(IMS\)](#) provides guidance for delivering benefit discovery workshops and mapping benefits using the Investment Logic Mapping (ILM) technique. This resource includes examples and a detailed practitioner's guide.
- NSW State Government - [Benefits Realisation Management Framework](#) includes a suite of templates such as benefits profiles and benefits realisation plans.

## When should I speak to the DTA about my proposal and benefits management compliance?

Agencies are required to engage with the DTA at the earliest opportunity when preparing digital and ICT-enabled investment proposals. This ensures there is sufficient time for the DTA to work with agencies to ensure their proposals align and comply with relevant whole-of-government digital and ICT policies and standards. To speak to an Investment Advisor, contact [investment@dta.gov.au](mailto:investment@dta.gov.au).

## Contact & Feedback



### Please contact us for further information.

We value your feedback and ideas to help improve our processes and information. If you have any comments regarding this document, please share your thoughts with us.

The DTA is actively seeking agency support in ensuring this policy is fit for purpose. If you'd like to be involved, please contact:

[benefits.management@dta.gov.au](mailto:benefits.management@dta.gov.au)