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 that standardises benefits management practices and defines how benefits must be managed across the Australian Government digital and ICT portfolio.

The BMP includes Policy, Standard, Guidance and Process components that detail investment oversight requirements and provide guidance on benefits management.

The DTA supports agencies to apply the BMP during the Digital Capability Assessment Process (DCAP) to ensure agencies are better placed to realise the benefits from digital and ICT-enabled investments.

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 included a recommendation 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.

Is the BMP assessment a mandatory inclusion in the DCAP?

Yes, Cabinet has mandated the BMP for all proposals coming forward to Budget in 2024-25 and beyond.

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 with 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.

What resources are available to help agencies

Does the DTA have benefits management tools and templates?

The DTA is building a repository of benefits management templates and guidance based on best practice examples and feedback received by the DTA. Interim templates and guidance can be downloaded from the AGA Website.
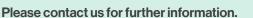
What other guidance is available?

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.

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