**Program or project name**

Benefits Plan

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| Date: Tuesday, March 31, 2020 |

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**Using this Template**

This template outlines what information should be included in a benefits plan. To enable readers to understand who will be impacted by the change, how the impact will be measured, what activities need to be planned to realise benefits and who will be responsible. A benefits plan should be developed with a benefits register. It is useful to append supporting documents to a benefits plan including a benefits map, benefits register, benefits profiles and benefits distribution matrix. For information on these documents read the NSW Government Benefit Realisation Management Framework:

* Part 1: Principles
* Part 2: Process
* Part 3: Guidelines
* Part 4: Implementation
* Part 5: Glossary

A benefits plan should evolve throughout the program life-cycle, forming part of Prince2 Project Initiation documentation and business cases, should be finalised prior to service introduction, and handed over to the Benefit Owner(s) for on-going management of benefits realisation, identification of any new emerging benefits or dis-benefits, or changes that will impact the realisation of any benefits. The information in a benefits plan will inform an evaluation on whether a program delivered its intended benefits. Read Part 3 for details on the key questions, process and deliverables of the evaluated phase of benefits management. If an independent program evaluation may be required, review the NSW Government Program Evaluation Guidelines. Other relevant guidelines and strategies include:

NSW Department of Finance, Services and Innovation

* NSW Digital Government Strategy
* NSW Government ICT Assurance Framework
* Information Management Framework

NSW Treasury

* Guidelines for Capital Business Cases
* Guide to Cost Benefit Analysis,
* Program Evaluation Guidelines

NOTE: Please remove this page before finalising a benefits plan.

**Document Information**

**Document Location**

This file is saved electronically at <<location>>

**Version History**

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| **Author** | **Version**  | **Version Creation Date** | **Summary of Changes** |
|  |  |  |  |
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Date of next version (if known): TBC

**Approvals**

This document requires the following approvals.

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| **Name** | **Title/Role** | **Signature** | **Date** |
|  | Program Sponsor/Senior Responsible Owner |  |  |

Note that signed documents should be scanned and filed in the network filing system.

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# Initiative or Program or Project

## Initiative or program or project description

Summarise the initiative, program or project. Reference relevant planning documentation including a business case.

## Scope

Summarise the scope of the initiative, program or project.

## Organisational context

* List initiative, program or project objectives.
* List the strategic objectives that this change is aligned to achieve.
* Reference the organisation’s benefits realisation strategy, if available
* Reference any business processes or NSW Government framework that are integrated with the benefit management process described in this document.

## Stakeholders

* List stakeholders or stakeholder groups that will be impacted by the program.
* List any plans to identify or collaborate with stakeholders.
* Reference appended benefits distribution matrix or alternative stakeholder map, if applicable.

# Benefits

## Benefits map

Reference the benefits map for the program

## Prioritised benefits

List or tabulate benefits that have been prioritised by stakeholders. Reference benefit profiles or benefit register.

## Dis-benefits

Include any dis-benefits and show how they are being reduced, minimised or mitigated.

# Governance

## Roles and Responsibilities

* Reference benefit owners who will be accountable for realising the benefit.
* Reference measure owners who will be responsible for ensuring that agreed measures are reported upon at the required frequency.
* For large programs, reference the responsibilities for benefits realisation within the program or business as usual team. See RACI matrix in Part 3.

## Governance bodies

Reference governance bodies (either agency or program level) responsible for managing, receiving reports and approving benefit deliverables and evaluating benefits.

## Reports

Reference how reports will be generated, monitored and the intended use by intended users.

# Plan

## Program plan, resources, budget and timeframe

Reference program plan, project documentation and organisation requirements for benefits management.

## Risks, assumptions and dependencies

List significant risks to the delivery of benefits and mitigation plans. List assumptions, dependencies or constraints associated with the delivery of benefits

## Plan to manage and approve benefit deliverables

* List workshops to identify, classify or measure benefits.
* List collaborative activities with stakeholders to complete benefit deliverables.
* Reference who will approve benefit deliverables.

## Plan to manage and report benefits

* Reference how benefit reporting is aligned to program or project implementation milestones or embedded into business as usual operations.
* Reference any capabilities to access, interpret and report upon and use data.
* Outline responsibilities for handover of benefit realisation to the business as usual teams.

## Plan to manage evaluation activities

* Reference how the benefits plan and supporting deliverables will be reviewed and maintained.
* Reference any organisational requirements to evaluate programs and benefits data.
* Reference any activities to align the benefits plan with organisational evaluation plans.

**Appendices**

* Benefits Register, template for tracking each benefit or insert link to benefit tracking tool
* Benefits map
* Benefit profile
* Benefits distribution matrix
* RACI (Responsible, Accountable, Contribute and Informed), template or documenting roles and responsibilities.

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