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Directive on Benefits Management

Approval Authority:	Director General Investment Procurement and Project Management, CFOB
Business Owner:	Senior Director Enterprise Project Management Office Investment Procurement and Project Management, CFOB
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Revision History

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1.0	Final	12 February 2019	Director General: Investment Procurement and Project Management	Senior Director: Enterprise Project Management Office; Investment Procurement and Project Management

Forward

This Directive provides guidance for the management of programme and project Benefits within Employment and Social Development Canada (ESDC). It applies to all programmes and projects managed by ESDC unless otherwise specified.

The guidance contained herein is consistent with, and serves to support compliance to, the Treasury Board (TB) *Policy on the Planning and Management of Investments* in force as of the date of signing as well as other related TB directives. In the event of a conflict, TB policy or directives will take precedence. The directive is found on the Treasury Board Secretariat website.

Assistant Deputy Ministers are responsible for ensuring that the performance agreements of all branch executives have specific, measurable objectives including alignment to this Directive, as follows:

- Anyone managing a programme or project must follow the processes and standards for Benefits Management as defined in this Directive.
- Benefits are appropriately identified, managed, reviewed, and realized in accordance with this Directive.
- Accountability of programme and project Benefits realization is clear and documented.
- Appropriate approvals are sought and received for all projects at the specified gate or important milestone in accordance with the project governance structure defined in ESDC's Investment Plan, this Directive and as specified in the programme or project Benefits Realization Plan.
- Timely and accurate reporting on Benefits is performed regularly and consistently, and is used as the basis for proactive management decision-making and action.

ESDC has opted to capitalize Benefits to ensure a clear distinction is understood between social benefits delivered to Canadians through operational Programs (i.e. Employment Insurance benefits or Old Age Security benefits; and Benefits realized through implementation of a change Directive.

This Directive will take effect from the date of signing, and will be updated regularly, as part of continuous improvements, to ensure that it reflects the latest Benefits Management policies and practices as they relate to ESDC.

This Directive is approved by the:

Director General,

Investment, Procurement and Project Management

Chief Financial Officer Branch

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1 Title

Department of Employment and Social Development Canada (ESDC) – Directive on Benefits Management.

2 Effective Date

This Directive takes effect on 12 February 2019.

3 Introduction

3.1 Background

This Directive lays the guidance by which ESDC applies a consistent and effective approach to ensuring end-to-end Benefits Management of its investment programmes and projects. The focus of Benefits Management presented in this document is to provide the direction by which ESDC can measure the deliverables and outcomes delivered by programmes and projects against its strategic objectives.

The purpose of the Benefits Management Directive is to address some of the "*What needs improvement*" areas in the PM Maturity Assessment –performed by Ernst & Young in 2016 for ESDC. Specific areas of mention are:

- "Reinforce…gating (for approval to proceed based on planned benefits)"
- To "Develop a benefits mapping process as part of the Benefits Management Directive…"

This is a strong call for results on all of the work and activities undertaken at ESDC. To enable ESDC to effectively track and report on these results, a robust and disciplined practice for Benefits Management is required. As ESDC's Project and Programme Management Practice (PPMP) deals with the processes for delivering a new or enhanced capability within an agreed-upon scope, timeframe and budget, Benefits Management focuses on the processes needed to realize the planned Benefits outlined in each programme and project, whether these Benefits be social, environmental, improved client experience, financial, or other.

3.2 Purpose

Treasury Board (TB) established the *Policy on the Planning and Management of Investments*, which impacts the way departments deliver programmes and projects. TB has recently undertaken a Policy Suite Reset in the Acquired Services and Assets Sector developing the new policy state and supporting directives such as the *Directive on the Management of Projects and Programmes* with a renewed emphasis and focus on project results and Benefits. This Benefits Management Directive outlines how ESDC will ensure compliance to these TB policy obligations. In addition, it will seek to ensure that the benefits of an investment (project, programme or Directive) supports the achievement of ESDC'S Departmental Plan and alignment with the Strategic Framework.

This Directive provides a consistent approach to managing Benefits across the Department, by supplying an important reference for programme and project team members throughout and post completion of the programme and project life cycle. The objectives of the Directive are:

- Develop and promote a strong Benefits Management culture by defining common processes based on industry standards and practices.
- Provide the Directives to be referenced and used to manage Benefits (for example. The Treasury Board Directive on the Management of Projects and Programmes, the ESDC Directive on Programme Management and the ESDC Directive on Project Management., etc.)
- Define standard Benefits Management roles and responsibilities.
- Define ‘which’ activities are consistently required for the successful management of Benefits.
- Specify tools and artifacts such as the Investment Logic Map (ILM) and Benefits Realization Plan (BRP) to support Benefits Management.
- Support and increase the level of Benefits Management knowledge, maturity, and capability.

Using the Directive, including the supporting guides and templates referenced herein, will help all programme and project team members do the “right” things at the “right” time, increasing the repeatability of programme and project Benefits realization.

3.3 Document Scope

This Directive applies to all programmes and projects managed by ESDC and must be used by all ESDC personnel that direct, oversee, or manage programmes and projects. This includes:

- Programme Sponsors, Senior Responsible Owners (SRO) or Project Sponsors, ESDC Executives, Programme and Project Managers, Project Management Office (PMO), or Project Delivery Office (PDO) personnel, Business Change Managers, Benefit Owners and Technical Authorities, to support an integrated approach within ESDC’s Programme and Project Benefits Management in terms of processes, tools, and templates.
- ESDC programme and project stakeholders, as a reference for Benefits Management life cycle, gating, governance, and oversight applicable to ESDC programmes and projects Benefits.

Benefits are the “reason we invest in change” in response to corporate objectives and strategies. Together with Portfolio Management, programmes and projects exist to “change the business”. Operations “run the business” and it is generally in Operations that Benefits resulting from the programmes and projects’ outcomes are realized.

4 Context

During the development of the Benefits Directive, the Treasury Board Secretariat (TBS) has been undertaking a Policy Suite Refresh in the Acquired Services and Assets Sector. The proposed new policy state will include specific requirements pertaining to Benefits Management. The approach described in this Directive is developed to meet the anticipated related TBS policy requirements and promote successful Benefits Management. These requirements are identified within this section.

4.1 TBS Policy on the Planning and Management of Investments[1]

The Treasury Board Policy is proposing a greater focus by project and programme governance to ensure:

Focus on the achievement of the business outcomes and project benefits (4.1.10.4.3).

4.2 TBS Directive on the Management of Projects and Programmes[2]

The objective of this directive is that government projects and programmes are effectively planned, implemented, monitored and controlled, and closed to enable the realization of the expected benefits and results for Canadians. (3.1).

One of the expected results of this directive is to ensure that *decisions are made throughout the life of the project and programme with a view to maximizing efficiency and ensuring the realization of benefits (3.2.2).*

Implementing processes that promote the coordinated management of related projects to reduce risk, contribute to shared outcomes, and realize efficiencies and benefits not available from managing the projects individually (4.1.7).

Ensuring programmes employ an appropriately flexible procurement strategy, to reduce risk and/or provide opportunity for earlier, incremental realization of benefits (4.2.7).

Including at each gate: a revalidation of the business case; confirmation that the intended benefits are still relevant and attainable; and, an overall determination of the ongoing viability of the project (4.2.19).

Benefits Management and Transition to Operations

Ensuring that project's and programme's expected outcomes and benefits are clearly defined and measureable as an input into the business case (4.2.27).

Ensuring that a benefits realization plan is in place at the time of project approval and is monitored and updated throughout the project life cycle (4.2.28).

Ensuring the business owner(s) responsible for the realization of benefits is identified in the benefits realization plan (4.2.29).

To support the transition of the project to operations, ensuring that (4.2.30):

- *A transition plan is developed prior to the commencement of the implementation phase (4.2.30.1); and*
- *The transition plan is updated throughout the project life cycle (4.2.30.2).*

Additional Requirements for Joint and Enterprise Projects and Programmes

Working with participating departments to ensure that requirements 4.2.27 through 4.2.30 reflect a joint or enterprise perspective (4.2.31).

[1] The TBS Policy on Planning and Management is expected to be released in summer 2019.

[2] The TBS Directive on the Management of Projects is expected to be released in summer 2019.

5 Principles

The following principles form the cornerstone for this Directive. They represent the Benefits Management standards for programmes and projects to which ESDC adheres.

5.1 Align Benefits with Strategy (Departmental Plan in Alignment with Strategic Framework)

Benefits represent a measurable improvement as to how the organization delivers its business and contributes to achievement of one or more strategic objectives or goals. Understanding the contribution that the change and the realization of its key Benefits make to the achievement of organizational objectives is at the heart of Benefits Management.

Strategic alignment of the Benefits should be clearly demonstrated from strategic objectives, through measurable Benefits down to the necessary “enablers” developed in programmes and projects. An Investment Logic Map is an effective mapping tool to illustrate this ‘clear line of sight’.

5.2 Start with the end in mind

Base Investment decisions on what Benefits will result from that initiative. The Benefits that are required by the organization should determine both the scope and the requirements of the initiative rather that Benefits being used to justify a pre-selected solution. It is important to understand the current and expected drivers of the organization to make the changes to what it does and how it conducts its business. Success should be defined from the onset and solution built to achieve that success.

5.3 Integrate Benefits with Enterprise Performance Management

Wherever possible, linking Benefits measures to the organization’s key performance indicators (KPIs) and making use of data available from existing management information systems within ESDC Branches – this helps minimize the costs of baselining performance, tracking and reporting on Benefits realization.

5.4 Benefits are dynamic

It is recognized that Benefits, as they are defined at the beginning of the investment life cycle, will almost certainly change over the life of the investment.

Review Benefits regularly and update in response to changes in the programme boundary, project scope, objectives, and delivery. Identify any change in the overall Benefits forecast, and clearly communicate to senior management. Should the initiative(s) fail to deliver their expected Benefits, consideration may be given to prematurely closing those projects and programmes.

5.5 The ‘Business’ must own the Benefits

While the new capabilities delivered by a programme or project contribute to the realization of Benefits, the programme or project manager is not the owner of the Benefits. Normally the Benefit Owner is the Senior Responsible Owner/Project Sponsor or business owner. While many areas across an organization may have some responsibility for providing supporting elements to the realization of Benefits, the Benefit Owner is ultimately accountable for the realization and reporting of Benefits.

6 Requirements

6.1 Why a Benefits Management Directive

A standard approach to Benefits Management serves to:

- Provide ongoing measurement with clear linkages between Benefits and the programmes and projects (or Directives) necessary to achieve them, the ESDC/branch strategic plans and priorities (Strategic Intent), and the policy goals endorsed by government.
- Ensure that Benefits are identified, defined, and clearly linked to ESDC outcomes and corporate objectives.
- Ensure that the desired Benefits are achievable and verifiable (and that they can, and will be measured).
- Ensure that the affected parts of the ESDC business areas understand their responsibilities and the critical role they play in Benefits realization, and are able to commit to undertaking those activities.
- Actively drive the process of realizing Benefits, which includes actively measuring, tracking and recording Benefits during the period of Benefit realization.

6.2 Benefit Management Process

The Benefits Management process is comprised of four stages:

1. Identifying and Defining Benefits
2. Planning Benefits
3. Realizing Benefits
4. Reviewing Benefits

6.2.1 Identifying and Defining Benefits

Benefits are measurable improvements, supported by key performance indicators (KPIs), resulting from a change initiative which contributes to organizational objectives.

New or enhanced business capabilities are a result of work that is done to achieve the desired Benefits. When using those capabilities in an operational context, Benefits measurements will tell us if the expected Benefits are being realized.

While some benefits are realized quickly, others may take months or years to be realized.

Benefits do not happen automatically because of a new capability – they arise because organizations transition successfully the new capability and the desired outcomes become visible. The first step in the Benefits Management process is to identify and define Benefits.

Stakeholder involvement is crucial to the identification and validation of Benefits. As part of Organizational Change Management (OCM) activities within a programme or project, a Benefits Mapping Workshop is an effective way to get key stakeholders involved and thinking about programme or project Benefits from the very beginning.

6.2.1.1 Map the Benefits (Investment Logic Map)

An Investment Logic Map (ILM)/Benefits Architecture Map[3] enables the Programme or Project Sponsor to articulate the value proposition of the investment by making the link between business drivers, objectives, Benefits and the solution. The ILM must support the Investment Proposal as an appendix to provide a visual and holistic overview of the programme or project. Update the ILM regularly as more information becomes available throughout the life cycle of the programme or projects. The ILM is the foundation from which the Benefits Realization Plan is developed.

6.2.1.2 Determine Benefit Eligibility

- Describable – What precisely is the Benefit? When will it arise? In describing a Benefit, distinguish between outputs, capabilities, outcomes and Benefits. For direct Benefit, there should be clarity around where the Benefit will arise, in which part of the client journey and who the recipient will be.
- Attributable – Can this initiative claim the Benefit? To claim a direct Benefit, a Programme or project must demonstrate that the improvement arose because of its implementation.
- Measurable – How and when will the Benefit achievement be measured? Some Benefits may be measured directly; others will be assigned an indicator as a proxy. Measurements against this indicator will occur prior to implementation (baseline) and at regular intervals post-implementation.

6.2.1.3 Determine Benefit Category

Categorize all identified Benefits and Dis-Benefits to ensure the organization could better model its priorities in planning, ensure effective reporting, and enable a portfolio level view of Benefits across programmes and projects through consistency.

Claimed Benefits should align wherever possible with the following categories, derived from the ESDC Strategic Framework. This is the Strategic Map developed to support the delivery of strategic objectives within ESDC. As such, all investments should be "mappable" back to this structure. The primary purpose of categorization is to enable investment analysis of the area to ensure the right "investment profile" across the portfolio.

[3] A Benefits Architecture Map is a simplified version of the ILM. The ILM supersedes the Benefits Architecture Map as ESDC matures its practices in Benefits Management.

Growth That Benefits All			
1) **DIVERSITY AND GROWTH** : Support well-being and full and equal participation in Canada's prosperity	2) **ADAPTING TO A CHANGING LABOUR MAKET**: Help Canadians succeed in an evolving economy and changing labour market.	3) **A FAIR AND SAFE WORKPLACE**: Promote equality in the workplace and combat unsafe and unfair practices.	
Transforming Our Services			
4) **EXPERIENCE**: A world-class service experience with benefits and services delivered when needed.	5) **QUALITY**: Accurate and consistent service.	6) **TIMELINESS**: Issues resolved at first point of contact.	7) **ACCESS**: Services are accessible to all, with digital by choice.
Mobilizing Our Organization			
8) **EVIDENCE-BASED DECISION MAKING**: Develop the infrastructure, tools, skills and processes to leverage data and analytics.	9) **MODERN AND SECURE TECHNOLOGY**: Develop and implement modern and secure IT infrastructure that enables digital services and effective access to information.	10) **A PRODUCTIVE AND INCLUSIVE WORKPLACE**: Support our workforce through transformation and ensure a safe, healthy workplace.	11) **RESOURCE MANAGEMENT EXCELLENCE**: Strengthen project management and investment planning to direct resources to emerging priorities and deliver results.

6.2.1.4 Determine Benefit Type

Categorize Benefits by the following Benefit types:

Benefit Type		Definition
Financial Anticipated Benefits which can be measured in monetary terms, or which can be measured in other terms that can be translated to monetary value. Financial Benefits must be quantifiable using a reasonable methodology and well documented assumptions. Financial Management Advisors (FMAs) of the Chief Financial Officer Branch must be consulted to assist in quantifying financial Benefits/cost savings and identifying	**Reduced Cost**	Defined by attaining objectives at a cost lower than the historical cost.
	Cost Avoidance	Defined as actions taken to limit potential increases in expenses, or

Benefit Type		Definition
related budgeting impacts i.e. budget reductions or reallocations.		to reduce the rate of increased costs.
Non-Financial	Measurable Benefits that cannot be translated in monetary value (e.g. improved staff engagement, customer satisfaction or response time, for example). For ESDC, non-financial Benefits are as important as financial Benefits as its core mission is to always strive to serve and improve services to Canadians.	

6.2.1.5 Key Performance indicators

ESDC develops high-level forward-looking vision and/or strategic documents that set out the strategic priorities necessary to achieve that vision, while staying within ESDC overall organizational purpose.

Within those individual strategic priorities, a program area or a major initiative may also need to develop its own supporting strategy to guide its work. The Integrated Channel Management Strategy (ICMS) to support the Target Operating Model (STOM) is a recent example from TISMB. Key performance indicators can be aligned with such a strategy to demonstrate support for the delivery of the strategy within the overall context of ESDC's Strategic priorities e.g. Benefit Category – Quality, Benefit Type Non-Financial (Enhanced Service Delivery) with the KPI – client satisfaction for services.

6.2.1.6 Determine Dis-Benefits

As a result of change, there will sometimes be a negative impact or perceived negative impact on one or more stakeholders involved. Whether this will be a negative financial impact or service impact (for example, temporarily reduced productivity during implementation), these impacts need to be identified and tracked to ensure they are appropriately managed. As with Benefits, Dis-Benefits that are identified as resulting from a programme or project's implementation will need to be validated by business representatives. Dis-Benefits must not be confused with risks, as risks are uncertain events that may or may not occur whereas Dis-Benefits are actual consequences of the change.

6.2.2 Planning for Benefits

6.2.2.1 Establish Clear Benefit Indicators and Measurements

Assign Benefit indicators, baseline measurements, and Benefit targets as part of the planning process for each of the Benefits, and include them in the Benefits Realization Plan.

Benefit Profiles are written in plain language and address:

- What will change (often refers to a behaviour or capability or the result of a behaviour or capability).
- Who is expecting the change.
- How many will be affected by the change.
- How much of a change.

- By when the change is expected to happen.

Indicators should be sufficient in number to allow accurate assessment of the measurement of the Benefit. When assigning Benefit indicators, the following principles should be followed:

- Benefit indicators should be valid and reliable: that is, of sufficient strength in order that conclusions can be drawn, and of a consistent and repeatable nature.
- Where possible, use existing data collection and indicators.
- Where possible, establish indicators that can be automated or drawn from enterprise systems, such as Project Server or SAP (e.g. increased performance levels or reduced costs for service delivery). When establishing measurement methods, use central data sources within ESDC in preference to local data sources for both efficiency and consistency between repositories.

Establish benefit targets based on their baseline value. The benefit targets require agreement with the investment group and the operational stakeholders.

6.2.2.2 Develop Benefit Realization Plan

The Benefits Realization Plan provides the baseline against which progress in terms of Benefits realization are monitored and evaluated. It provides a consolidated view of the Benefits forecast, by type/category and period. The key purpose of the BRP is to define programme or project Benefits, and responsibilities for their realization, measurement, and reporting.

6.2.3 Realizing Benefits

6.2.3.1 Pre-Transition Activities

As projects approach completion, certain business areas within ESDC will need to be prepared for converting the project outputs into capabilities and outcomes for the organization. Following is a list of activities to consider in preparing the pre-transition activities.

- Review the Benefits Realization Plan relevant to the business area.
- Monitor the delivery of project outputs. That is, maintain a Benefit focus on the projects, and escalate if adjustments are required.
- Plan the transition from projects to business-as-usual operations through Change Management activities identified in the Change Management Plan.
- Engage with the business/operational areas throughout the project life cycle.
- Assess and establish the readiness for change of the business-as-usual operations area(s).

6.2.3.2 Transition Activities

As the projects hand over project outputs to the business, Business Change Managers/Business Owners will need to manage the acceptance of the new capabilities into operations as outlined in the Change Management Plan. To manage the transition, the Business Change Manager(s)/Business Owner should:

- Initiate the transition into the business-as-usual operations areas.
- Establish the change management support arrangements.

- Make the transition.
- Manage the achievement of the planned outcomes in operations, as a result of receiving the project outputs.
- Review the handling of the transition, and be ready to provide feedback on shortfalls or opportunities.

6.2.3.3 Post-Transition Activities

As new capabilities are embedded into business-as-usual operations, the Benefit Owner needs to measure and understand what has been achieved in terms of Benefits, and what remains outstanding. To manage the post-transition from programmes and projects into business-as-usual operations, the Business Change Manager(s)/Business Owners should:

- Measure the Benefits and report discrepancies between planned and actual.
- Decommission old systems/practices when ready.
- Respond to and provide feedback on any changing requirements.
- Continue to monitor, reinforce, and report on Benefits realization.

6.2.3.4 Communicate Success

Programmes and projects that succeed in delivering real Benefits to an organization often fail to communicate this success. Communicating success acknowledges contributions from various parties involved in the change, and informs the broader audience not involved in the change process of the new capabilities. It also provides a model for successful implementation of future programmes and projects for change initiatives. Such communication may occur during project implementation, or after as more Benefits materialize. The programme or project's Stakeholder Engagement Plan should outline the methods for broadcasting project successes for communication teams to assist the Business Change Team after project finalization.

6.2.4 Reviewing Benefits

The scope of the Review practice runs throughout the business change life cycle from the commencement of an initiative through 'in-flight' and stage/phase gates to after closure and integration into business as usual.

The objective of reviewing Benefits is to ensure and assure that:

- Benefits to be realized are achievable and continue to represent value for money.
- Appropriate arrangements have been made for Benefits monitoring, management and evaluation.
- Benefits realization is being effectively managed.
- Lessons are learned for both the current initiative and as a basis for more effective Benefits Management practices generally.

In order to effectively manage Benefits to ensure anticipated results are achieved, Benefits in-flight reviews are essential. At a minimum, review Benefits at each stage Gate of the Project/Programme Management Process. Such reviews ensure:

- Planned Benefits are still achieved and have not changed in scope or value.

- Confirm that the Benefits remain aligned to strategic priorities and realign as necessary.
- Inform senior management and stakeholders of progress in Benefits realization and help identify any further potential Benefits.
- Assess the level of Benefits achieved against Benefits targets in the Benefit Realization Plan.
- Review the effectiveness of Benefits Management implementation by documenting a list of lessons learned and by developing improved processes.

Tracking Benefits post-implementation allows the Benefit Owner to:

- Establish baselines for new measures, as required.
- Take corrective action where Benefit realization is falling short of the forecast and the target is a risk.
- Leverage emergent Benefits and mitigate Dis-Benefits, as required.

6.3 Roles and Responsibilities

ESDC programme and project teams are comprised of various key roles and stakeholders playing an important part in the management of Benefits.

6.3.1 Project Sponsor

The Project Sponsor (Programme Sponsor/Senior Responsible Owner (SRO)) is the senior executive responsible for the business area for an established project. The Project Sponsor is ultimately accountable for achieving the business outcomes and for realizing the Benefits. An actively engaged Project Sponsor is a critical factor for project success.

To fulfill this key role, the Project Sponsor should:

- Be accountable for the initiative meeting its objectives.
- Build and maintain effective relationships with key strategic stakeholders, obtaining their commitment to the project objectives, outcomes and Benefits.
- Include, at each gate, a reassessment of the business justification and confirmation that the intended Benefits are still relevant and attainable.
- Ensure that the expected Benefits are clearly defined and measurable in the Business Case, including cost-benefit position.
- Initiate a Benefits Realization Plan as early as possible. Ensure that it is in place before the execution of the programme or project and that it is monitored and updated throughout the programme or project life cycle.
- Identify the responsible Benefit Owners.
- Review and approve the Investment Logic Map and the Benefits Realization Plan.
- Document roles, responsibilities, and delegate authorities concerning Benefits Management to the Project Manager through the project charter.
- Separate programmes into smaller components to provide opportunity for earlier, incremental realization of Benefits.

6.3.2 Project Manager (Programme Manager)

The Project Manager is responsible to manage the project throughout the project's life cycle, from Initiation to Closure, and is responsible to deliver the standard project management deliverables as defined by the Project Sponsor in the project charter.

The Project Manager is responsible for the day-to-day management of the project. In addition, the Programme Manager is accountable for achieving the approved project outputs and maintaining the Investment Logic Map (ILM) and Benefits Realization Plan (BRP) for the life of the Programme or project.

Relating to Benefits Management, the Project Manager should:

- Develop the ILM and the BRP in consultation with the Business Change Manager, Benefit Owner, and Project team members.
- Plan for Benefit reviews during the life of the initiative.

6.3.3 Programme Business Change Manager

The Business Change Manager (BCM) is responsible for Benefits Management from identification through to realization (post-closure). The BCM is from the operational/business area to ensure an operational perspective.

The BCM should:

- Identify and quantify Benefits with the support of the Project Manager and project team.
- Review and provide input to the ILM and BRP prepared by the Project Manager and reach agreement with the Benefit Owners regarding the scale and timing of Benefits realization.
- Ensure adequate preparation for transition and advise the Project Sponsor on business readiness for transition.
- Monitor transition and check that all required project deliverables and business changes occur so that Benefits can be realized.
- Monitor and report to the Project Sponsor regarding:
  - Benefits realization throughout the project's life and after project closure
  - Dis-Benefits

Note:

- ✓ *Where Benefits have been identified for standalone projects, (as opposed to projects within a programme) these activities must be undertaken either by an identified BCM for the project or by ensuring that the responsibilities of a BCM are undertaken by the identified Benefit Owner. It is critical that these responsibilities are assigned, documented, and available when Benefits are identified.*

6.3.4 Benefit Owner(s)

The Benefit Owner is from the operational/business area and complements the Business Change Manager. Together, they support the realization of Benefits.

The Benefit Owner should:

- Review and approve the ILM and the BRP prepared by the Project Manager – including agreeing with the scale and timing of Benefits realization.
- Ensure appropriate management and measurement during Benefits realization through Benefits sustainment (after investment Programme/projects close).
- Monitor the successful delivery of enabling and business changes upon which realization of the Benefit depends.
- Report to the Business Change Manager on the realization of the Benefit.

Note:

- ✓ *In the case of an investment Programme, some of these responsibilities may fall to the BCM. This must be documented and available.*

7 Conclusion

As the Functional Authority for programme and project management within ESDC, the EPMO is responsible for communicating this Directive, for ensuring that its content is understood, for validating the associated Benefits Management processes, and that the templates and guides are managed and maintained. The following key factors will serve to achieve, support, and reinforce a high level of Benefits Management consistency, capability, and maturity within ESDC programmes and projects:

- Regular reviews of the Benefits Management Directive by the EPMO and be supported and enforced by executives across the branches.
- Embrace a Benefits Management culture throughout the organization by building a strong and a vibrant knowledge network across all programme and project management practitioners, and by including skills development support.
- Programme and Project Managers will consult appropriate governance bodies and the EPMO for guidance on this Directive.

8 References

8.1 Treasury Board Policy and Directives

- Treasury Board Policy on the Planning and Management of Investments
- Treasury Board Directive on the Management of Projects and Programmes
- Treasury Board Directive on the Management of Material (Development)
- Treasury Board Directive on the Management of Procurement (Development)
- Treasury Board Directive on Real Property Management (Development)

8.2 ESDC Supporting Policy and Directives

- ESDC Policy on Project and Programme Management (Development)
- ESDC Directive on Programme Management (Development)
- ESDC Directive on Project Management (Development)

9 Enquiries

Please direct enquiries about this directive to the Enterprise Project Management Office:

NC-BGPE-EPMO-GD@hrsdc-rhdcc.gc.ca

Appendix A: Definitions

"Benefit" A benefit is the measureable improvement resulting from an outcome perceived as an advantage by one or more stakeholders, and which contributes towards one or more organizational objectives.

"Benefits Management" A collective set of processes and practices for identifying benefits and aligning them with a formal strategy ensuring benefits are realized as project implementation progresses and finishes and that the benefits are sustainable and sustained after project implementation is complete.

"Business Driver" A resource, process, or condition that is vital to the continued success and growth of the organization.

"Capability" is the completed set of project outputs required to deliver an outcome. It is a service, function, or operation enabling the organization to meet the business need.

"Output" is a deliverable of the investment, such as a product, service, or other solution to the problem.

"Outcome" is a new operational state achieved after transition of the capability into live operations.