



Strategic assessment



Gate 0

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Overview of Gate 0: Strategic assessment

About this workbook

This workbook supports Gate 0: Strategic assessment.

This review investigates the direction and planned outcomes of the program, together with the progress of its constituent projects. It can be applied to any type of program, including policy and organisational change.

The review is repeated throughout the life of the program from start-up to closure. An early Gate 0 review is particularly valuable as it helps to confirm that the way forward is achievable before plans have been finalised.

The wider context of program delivery

Programs are delivered in the wider context of carrying forward policy and strategic objectives and improving organisational performance.

Program structures provide a means of managing progress at different rates while ensuring coherence and keeping the focus on the overall outcomes. The program's potential to succeed is checked as it is established, using a Gate 0 review. The review can be repeated whenever key decision points are reached or as desired throughout the program's lifecycle.

A program may contain a number of linked sub-programs, projects and other pieces of work. These are delivered in a coordinated sequence to achieve the program outcomes with the optimum balance of cost, benefit and risk. The program's projects may be reviewed at key decision points from start-up through to the point where they have contributed the benefits set out in the project's business case. Feedback from any final project review informs the ongoing program review.

The program will be managed as part of a corporate portfolio of organisational programs, which may be competing for resources and may have changing priorities. Program managers should be aware of any interdependencies between their program and other programs in the agency's portfolio and, where relevant, those in other agencies.

Types of programs

Different types of change may be delivered by the program, such as:

- making and delivering new facilities—typically led by the specification of the outputs required, a clear view of what is required and a well defined scope
- changing the way the agency works—led by a vision of the outcomes and benefits and typically involves some uncertainty about the change, but with clear delivery approaches that can be used to achieve the vision
- policy change focused on changes and improvements in society, driven by a desired outcome but likely to be ambiguous and complex to define in terms of what it will involve. The scope may need to be revisited as uncertainty is resolved
- if a project is very large or complex, it is broken down into a series of related projects and managed as a program.

Purpose of Gate 0: Strategic assessment

- Review the outcomes and objectives for the program (and the way they fit together) and confirm that they make the necessary contribution to the overall strategy of the agency and its senior management.
- Ensure that the program is supported by key stakeholders.
- Confirm that the program's potential to succeed has been considered in the wider context of Queensland Government policy and procurement objectives, the agency's delivery plans and change programs, and any interdependencies with other programs or projects in the agency's portfolio and, where relevant, those of other agencies.
- Review the arrangements for leading, managing and monitoring the program as a whole and the links to individual parts (e.g. to any existing projects in the program's portfolio).
- Review the arrangements for identifying and managing the main program risks (and the individual project risks), including external risks such as changing business priorities.
- Check that provisions for financial and other resources have been made for the program (initially identified at program initiation and committed later) and that plans for the work to be done through to the next stage are realistic, properly resourced with sufficient people of appropriate experience, and authorised.
- After the initial review, check progress against plans and the expected achievement of outcomes.
- Check that there is engagement with the market as appropriate on the feasibility of achieving the required outcome.
- Where relevant, check that the program takes account of joining up with other programs, internal and external.
- Evaluate actions taken to implement recommendations made in any earlier assessment of deliverability.

Strategic assessment

The same set of questions is used for every Gate 0: Strategic assessment review, but the focus is adjusted depending on the nature of the program and the stage in its lifecycle. For example, the governance arrangements and stakeholder involvement may be the most difficult aspect of a multi-agency program. In contrast, the management of a smooth transition to new ways of working may require the most attention where there is complex change.

At the start of the program the strategic priorities should be clear and the main focus will be on what can be achieved realistically. At subsequent stages managing the impact of change, risks and resources will become more important and there may be the additional complexity of changing policy priorities. At program closure, evaluating outcomes, the final review of the achievement of outcomes and identifying the lessons learned for future programs will be the main features of the review. The program owner and review team should agree the particular focus of each review when the review is planned.

When to repeat Gate 0: Strategic assessment

Gate 0 is:

- applied at the start-up of a program (the initial Gate 0 review)
- repeated at appropriate key decision points during the program (the mid-stage Gate 0 review)
- applied at the end of a program (the final Gate 0 review).

Initial Gate 0: Strategic assessment

The program start-up process draws together the justification for the program based on policy or agency objectives that are to be secured, an analysis of the stakeholders whose cooperation is needed to achieve these and an initial assessment of the program's likely costs and potential for success.

An initial Gate 0 review may come after the broad strategy for change has been set, before a public commitment is made and before a development proposal is put before a program board, executive authority or similar group for authority to proceed. This review would focus on the justification for the program.

Typically, the initial Gate 0 review will take place following the production of a program brief or similar document which contains an outline of the program's objectives, desired benefits, risks, costs and timeframe.

The initial review provides assurance to the program board that the scope and purpose of the program has been adequately researched, that there is a shared understanding of what is to be achieved by key stakeholders, that it fits within the agency's overall policy or management strategy and priorities. It also provides assurances that there is a realistic possibility of securing the resources needed for delivery and that any procurement takes account of prevailing government policies.

The review will, in addition, examine how work strands will be organised (such as in sub-programs and projects) to deliver the overall program objectives, and that the management structure, monitoring and resourcing are appropriate. In short, the initial Gate 0 review aims to test whether stakeholders' expectations of the program are realistic in terms of costs, risks, outcomes, resource needs, timetable and general achievability.

Mid-stage Gate 0: Strategic assessment

Subsequent Gate 0 reviews revisit the same questions to confirm that the key stakeholders have a common understanding of desired outcomes and that the program is likely to achieve them.

Gate 0 is repeated at appropriate key decision points during the program. For example:

- at scheduled milestones, such as the completion of a set of projects in the program portfolio
- when there is a significant change to desired outcomes
- when the way outcomes are delivered must change (perhaps as a result of government changes), or when it becomes apparent that the program will not provide the necessary outcomes and needs to be reshaped
- when the program's sponsors have concerns about its effectiveness
- when there is a change in program ownership
- when transferring lesson learned to other programs after a substantial amount of successful delivery has taken place.

A repeated Gate 0 review will focus on establishing the continued validity of the business case for the program and ensuring that the outcomes and desired benefits of the program are on track.

Final Gate 0: Strategic assessment

A final Gate 0 review will take place at the conclusion of the program to assess the overall success of the program, the extent to which the desired outcomes and benefits have been achieved and to check that the lessons learned have been analysed and disseminated.

Review guidance

This section contains topics that would commonly be considered when undertaking a Gate 0: Strategic assessment review. Review teams are expected to use their own expertise in determining whether these topics are relevant and appropriate for the specific program under review. The review team may determine additional topics be considered that are also critical to the assessment of the program.

1. Policy and business context

How to use this section	
Initial Gate 0: Strategic assessment	<p>If it is early in the program lifecycle information may be uncertain because options are still being explored to identify a way forward. There must be a clear link between the business strategy and why the program is needed. The governance framework will be in outline, but there should already be a clear program owner. Capability to deliver will be considered at a high level, ideally supported by indicative estimates based on evidence from similar initiatives.</p> <p>There should be mechanisms in place for lessons learned regardless of the stage in the program lifecycle. High-level risks should have been identified even at a very early stage. Review teams will positively evaluate actions taken to implement recommendations made in any earlier assessment of deliverability.</p> <p>At program initiation, all areas in this section will need thorough investigation as they provide the foundation for successful delivery.</p>
Mid-stage Gate 0: Strategic assessment	<p>The focus on each area in this section is whether assumptions or circumstances have changed, such as a change in policy direction or continued availability of skilled resources.</p>
Final Gate 0: Strategic assessment	<p>The critical area at this final stage is to confirm that the link to business strategy is still robust and supported by senior management, such as ministers or the agency’s management board.</p>

Areas to probe		Evidence expected
1.1	Is the business strategy to which this program contributes agreed with the program's sponsoring group (e.g. ministers or the agency's management board) and robust?	<ul style="list-style-type: none"> • a clear direction set out in the business strategy which is owned by key stakeholders and informs all investment including public service reform or organisational change.
1.2	Does the program reflect the current policy and agency environment and does the scope of the program fit with the strategy?	<ul style="list-style-type: none"> • documented evidence that the sponsoring group (e.g. ministers or the agency's management board) have agreed the scope of the program and its alignment with policy objectives, strategy and/or change priorities • where, in stakeholders' views, there are significant changes in policy priorities or the key objectives • evidence that there has been a re-appraisal of the program.
1.3	Is the governance framework fit for purpose and, in particular, is there commitment to key roles and responsibilities for this program within current corporate priorities?	<ul style="list-style-type: none"> • evidence of commitment from the sponsoring group (e.g. senior management, key partners and ministers), a willingness to take ownership, and a clear understanding of their roles in achieving successful outcomes • key roles have been identified and assigned (e.g. responsible minister, program owner, program director, program manager, business change manager or equivalent role) and sub-program managers with named individuals have been given responsibility for the transition to new ways of working for multi-agency programs, evidence that all parties involved know how they are engaging in the program and are committed to its delivery • clear governance arrangements to ensure sustainable alignment with the business objectives of all agencies involved.
1.5	Is the agency able to learn from experience with this program and other programs?	<ul style="list-style-type: none"> • evidence that the agency has processes in place to incorporate lessons learned from this program, and its components, into wider best practice • evidence that the agency learns from the experiences of others.
1.6	Is there a framework for managing issues and risk to this program?	<ul style="list-style-type: none"> • defined roles, responsibilities and processes for managing issues and risk across the program, with clearly defined routes for bringing issues and risks to the attention of senior management.

2. Business case and stakeholders

How to use this section	
Initial Gate 0: Strategic assessment	<p>Even at the very early stages of the program there must be a clear understanding of the outcomes needed from the program despite the overall scope and way forward not yet being clear. Measures of success will be in outline. Key stakeholders should already have been identified, especially for multi-agency programs.</p> <p>The components of the program (sub-programs and projects) and its resource requirements will not be certain at this stage. There should be early indicators of the additional factors that could affect success, which will vary significantly depending on the program. The program controls will not have been established in detail.</p> <p>At program initiation all areas in this section will require thorough investigation.</p>
Mid-stage Gate 0: Strategic assessment	<p>Assumptions will need to be revisited. Particular areas to probe include:</p> <ul style="list-style-type: none"> • whether stakeholders remain supportive • whether the program is still affordable • management of issues relating to additional factors that could affect success • the effectiveness of program controls.
Final Gate 0: Strategic assessment	<p>The main areas to investigate are continued clarity of understanding about the required program outcomes and supportiveness of stakeholders as the program closes.</p>

Areas to probe		Evidence expected
2.1	Is there a clear understanding of the outcomes to be delivered by the program and are they soundly based?	<ul style="list-style-type: none"> • a description of the program's business or policy, drivers or objectives and how they contribute to the overall objectives of senior management for a particular public service or the agency's change agenda • an outline of the required outputs or outcomes and their relationship to each other • definition of the benefit profiles for the program for each of the benefits expected • evidence that the way forward is likely to achieve the intended outcome • for policy implementation, a rationale and objectives statement, appraisal of options and evaluation plan for the option being pursued • where applicable, a clear explanation of the link between to government performance and delivery targets and commitments of senior management.

2.2	Does the program demonstrate a clear link with wider government objectives?	<ul style="list-style-type: none"> • analysis to show the program’s relationship to relevant multi-agency government policies • options identified that reflect the requirements of government initiatives • account has been taken of relevant impact assessment and appraisal issues such as any regulatory impact, sustainable development and environmental appraisal • demonstrated link between strategic objectives and outcomes and the program’s deliverables.
2.3	Is there an understanding of the scope of the program?	<ul style="list-style-type: none"> • a description of the program scope as far as it is known—what is in and out of scope?
2.4	What will constitute success?	<ul style="list-style-type: none"> • definition of key critical success factors and how the required quality of performance will be measured • description of main outcomes and analysis of their leading and lagging indicators • relationship between program outcomes and government targets or major policy initiatives, where applicable • projected performance over the life of the program, with key performance targets and measures agreed with stakeholders • evidence that the program can be evaluated in a practical and affordable way.
2.5	Who are the stakeholders and are they supportive?	<ul style="list-style-type: none"> • a list of key stakeholders and statements of their needs and support for the program • plan for communicating with and involving stakeholders in appropriate ways and securing common understanding and agreement • for multi-agency programs, clear lines of accountability for resolving any conflicting stakeholder requirements • recognition of the need to involve external delivery partners and industry, plus the supply side where appropriate.
2.6	What are the component projects and sub-programs of the program, and why is it structured in this way?	<ul style="list-style-type: none"> • description of program and/or sub-programs and main projects with an explanation of how each will contribute to the required outcomes, key deliverables and identification of key interdependencies • evidence that implementation will be broken up into manageable steps and phased delivery where appropriate.
2.7	Is the proposed program affordable?	<ul style="list-style-type: none"> • an estimate of the program cost based on previous experience or comparison with other similar programs, broken down as appropriate by program strands and/or sub-programs and main projects • available funds identified and methods of securing additional necessary funding determined • market soundings and assessment of likely cost profiles.

2.8	What are the additional factors that could affect success?	<ul style="list-style-type: none"> • main risks identified at the outset with nominated risk owners, options for mitigating these risks considered, the need for contingency plans recognised and, where appropriate, business continuity plans • description of dependencies or other factors or programs already underway that could affect the outcomes of the program • engagement with delivery chains and the market to determine capability to meet the need and, where appropriate, to identify suitable options for delivery • where suppliers or partners are already in place, evidence that their ability to deliver has been considered • a legal framework for the program and its projects exists, is comprehensive and sound.
2.9	Have program controls been determined, especially where constituent projects will be joined up with other agencies?	<ul style="list-style-type: none"> • overall program controls defined (progress tracking, risk management, issue identification and resolution and impact assessment) • interdependencies between other programs and projects defined with high-level plans for managing them • for collaborative programs, accountabilities and governance arrangements for different agencies defined and agreed • parties in the delivery chain identified and an approach to working together established • processes to manage and record key program information and decision-making.

3. Management of intended outcomes

How to use this section	
Initial Gate 0: Strategic assessment	<p>If the initial review is in the early stages of planning for the program, the key aspects to investigate in depth are:</p> <ul style="list-style-type: none"> • main outcomes identified • relationships between outcomes. <p>Plans for achieving the outcomes are likely to be unclear at an early stage, but there should be evidence of high-level plans for the way forward (or a set of options for consideration, with a preferred option identified) and a reasonably clear indication of how success will be measured (e.g. a trajectory for take-up of a service).</p> <p>At program initiation, all areas must be investigated in depth to confirm that expectations for delivery are realistic and that performance can be measured with reasonable accuracy.</p>
Mid-stage Gate 0: Strategic assessment	The main focus of this mid-stage review is to check that plans for delivery of outcomes remain achievable.
Final Gate 0: Strategic assessment	The topics in this section may not need to be covered at program closure.

Areas to probe		Evidence expected
3.1	Have the main outcomes been identified?	<ul style="list-style-type: none"> • up to date list of the main outcomes and desired benefits, linked to strategic outcomes and to the deliverables from specific projects.
3.2	Are the planned outcomes still achievable or have any changes in scope, relationship or value been properly agreed, and has the business case or similar document been reviewed?	<ul style="list-style-type: none"> • outcomes identified together with any inter-relationships • credible plans for achievement of outcomes • ongoing commitment from stakeholders to the outcomes and their achievement.
3.3	Are key stakeholders confident that outcomes will be achieved when expected?	<ul style="list-style-type: none"> • confirmation that planned outcomes have been achieved to date • mechanisms for collecting performance data in place and a plan for evaluating impact of program in operation • program board is confident that planned milestones will result in high quality deliverables that will, in turn, deliver the necessary outcomes • commitment from key stakeholders that program deliverables will achieve the desired outcomes.

3.4	Is there a plan for achieving the required outcomes?	<ul style="list-style-type: none">• a benefits management strategy and/or similar plan has been developed to ensure that outcomes are delivered in terms of performance measures or key performance indicators• plans to identify appropriate baseline measures against which future performance will be assessed• plans to carry out performance measurement against the defined measures and indicators• where planned outcomes have not been achieved, evidence that the problems have been identified and plans are in place to resolve them• clarity on how the objectives from the sub-programs or projects link to the outcomes of the program.
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4. Risk management

How to use this section	
Initial Gate 0: Strategic assessment	<p>If the initial review is in the early stages of planning for the program, the major risks must be identified at a high level with an indication of how they will be managed and initial consideration of the requirements for contingency plans.</p> <p>At program initiation all aspects of risk management must be probed in depth.</p>
Mid-stage Gate 0: Strategic assessment	The main focus is on checking that risk management is effective.
Final Gate 0: Strategic assessment	The status of the risk register at program closure will be the principal area to investigate—which risks have now been removed and which risks (if any) will be transferred to the risk register for a new initiative or corporate risk log.

Areas to probe		Evidence expected
4.1	Have the major risks been identified?	<ul style="list-style-type: none"> • up to date list of major risks to the overall program (strategic, political or reputational and legislative) analysed by likelihood and impact • early warning indicators identified • evidence that the risks of success (e.g. take-up or usage greater than expected) have been considered and contingencies identified • evidence of regular review of risks, mitigation options and contingency plans.
4.2	How will risks be managed?	<ul style="list-style-type: none"> • identification of a governance framework and procedures for risk management in the program and allocation of responsibilities • details of the risk allocation (to whom it was allocated and why) with high-level plans for managing them • action to manage the risks identified and, where appropriate, action taken • evidence of the escalation procedures.

4.3	Have assurance measures for the program been put in place?	<ul style="list-style-type: none"> • ‘critical friends’ of the program (e.g. internal audit, procurement, specialists and/or peer reviewers co-opted onto the program board) appointed, with evidence that they challenge assumptions, decisions and risks • Gateway reviews, health-checks and/or policy reviews incorporated into plans • evidence that review recommendations are turned into action plans • evidence that advice from critical friends are acted upon • evidence that the program is subject to the agency’s assurance framework for its portfolio of programs and projects • evidence that market or supply considerations are understood and acted upon.
4.4	Is there a contingency plan and, where appropriate, business continuity plans?	<ul style="list-style-type: none"> • decisions about contingency and, where necessary, business continuity arrangements made with appropriate plans • program’s effects on public services analysed and decisions made about those for which contingency arrangements will be needed • milestones relating to contingency measures in plans and the milestones being achieved as expected.

5. Review of current outcomes

How to use this section	
Initial Gate 0: Strategic assessment	This section would not normally apply, but some of the topics may need to be considered.
Mid-stage Gate 0: Strategic assessment	All areas will need to be investigated in depth to confirm that the program remains on track and that issues are being managed effectively.
Final Gate 0: Strategic assessment	This section of the review concentrates on confirming that the expected outcomes have been achieved and that no outstanding issues remain.

Areas to probe		Evidence expected
5.1	Is the program on track?	<ul style="list-style-type: none"> • program report and plan updated • milestones achieved as planned • plan for benefits measurement and achievement is on track • risk register is up to date • progress reports for constituent work streams • resources and funding used to date • issues being resolved • confidence from delivery partners that future milestones and plans are realistic • interdependencies with other programs being managed.
5.2	Have problems occurred and, if so, how have they been resolved?	<ul style="list-style-type: none"> • issues documented, with details of action taken • governance framework with escalation routes to senior management • program plan updated to reflect changing issues and risks • recommendations from any earlier assessment of deliverability actioned • recommendations from last Gateway review actioned.

6. Readiness for next phase—delivery of outcomes

How to use this section	
Initial Gate 0: Strategic assessment	<p>If the initial review is in the early stages of planning for the program, plans may be in too early a stage of development to provide reliable evidence.</p> <p>At program initiation all areas would apply to this review, with the main focus on ensuring that everything is in place to start delivering the required outcomes.</p>
Mid-stage Gate 0: Strategic assessment	All areas should be probed in depth.
Final Gate 0: Strategic assessment	This section would not normally apply at program closure, but some of the topics may need to be considered.

Areas to probe		Evidence expected
6.1	Is there a continuing need for the program?	<ul style="list-style-type: none"> the desired outcomes of the program are still aligned to the agency's strategy continuing commitment from stakeholders confidence that the program is organised to deliver the outcomes when needed the program business case has been updated as necessary and is still valid.
6.2	What assumptions have been made about the program?	<ul style="list-style-type: none"> a listing of major assumptions made in preparing the program, updated to reflect any changes that could affect success, together with current assessments of the validity of all assumptions.
6.3	How will change be managed?	<ul style="list-style-type: none"> plans for managing the transition to new ways of working or structures or policies with any key barriers identified (such as cultural resistance to change) and the approach to overcoming them agreed.
6.4	Affordability—are the funds to reach the next phase available?	<ul style="list-style-type: none"> budget provision for the program adequate approaches for estimating, monitoring and controlling the expenditure on the program established.

6.5	Are the required internal or external individuals suitably skilled, available and committed to carrying out the work?	<ul style="list-style-type: none"> • information showing who needs to be involved, when and what they must deliver • identification of the key skills—specialist and management—required for the next phase of the program • key roles in place, with skills matched to the nature of the work • evidence these resources will be available when needed throughout the next phase.
6.6	Achievability—are the plans for the next phase realistic?	<ul style="list-style-type: none"> • plan developed showing streams of work (such as sub-programs and projects), deliverables or milestones and the route map to achieve them, timescales, agency costs and resourcing, stakeholder involvement, risk management and benefits management • evidence that the robustness of the plans has been tested and found to be adequate.
6.7	Are appropriate management controls in place?	<ul style="list-style-type: none"> • accountabilities allocated to program owners • program management controls and reporting mechanisms defined and operational • plans for ongoing management of the delivery chain are in place.
6.8	Where procurement is part of the program—how is capability and capacity for acquisition to be managed?	<ul style="list-style-type: none"> • procurement strategy in place and evidence of its application to the program and its projects • procurement innovation and sustainability issues have been considered • market management plan in place and evidence that a good understanding exists of supply-side capability and capacity.

Program information required for Gate 0: Strategic assessment

The areas of investigation together with examples of evidence relevant to the areas of investigation should be available before the Gateway review commences.

The information is likely to be found in the documents suggested below, but may be located in other program or project documents or elsewhere in the agency's documentation system. These documents include:

- the business strategy and business plan, where applicable. This should set out the agency's strategy and policy objectives or explain the objectives of the agency's change agenda
- a program brief or program business case. This document will be loosely formed at the outset and developed over the life of the program. It should provide progressively more detailed information about the
 - objectives—a description of the purposes, outcomes sought, key deliverables and timescales, plus the main success criteria against which the program will be measured
 - background—outline of the key drivers for the program, showing how it will contribute to policy outcomes or the business strategy
 - a model of the intended outcome(s) as a vision of the future and how the vision will be delivered through the agency involved, delivery agents, new services etc.
 - scope—the boundaries of the program
 - required benefits from the program—these will be elaborated in a benefit profile for each defined benefit, covering a description of the benefit, when it will be realised, and the measures and performance indicators that will be used to assess achievement levels and their costs
 - main assumptions and constraints on which the program will be founded and dependencies with other programs or strategies
 - stakeholders—a list of the key stakeholders and their role in the program, with a strategy and plan for communicating and engaging with them
 - finance—the financial provision made for the program and its components
 - agency—the way in which the program is to be organised, led and linked into other related programs
 - risks—the main risks identified so far, a strategy for managing them and need for any contingency arrangements
 - issues—a strategy for capturing and resolving issues
 - outcomes—a strategy for measuring results and achieving outcomes
 - components—a list of the projects in the program's portfolio and interdependencies that have to be delivered successfully if the program is to achieve its objectives and their current status
- a plan covering the work to be done over the short to medium term, including
 - identifying the streams of work and sub-programs, together with the main deliverables and milestones for each one and the contribution each is to make to the program outcomes
 - resource estimates (e.g. funding for delivery bodies, people, systems).

Further information

The following documents have been developed to provide further information on the Gateway review process:

- Gateway review process overview
- Gateway review process guidebook for project owners and review teams
- Gate 0: Strategic assessment
- Gate 1: Preliminary evaluation
- Gate 2: Readiness for market
- Gate 3: Investment decision
- Gate 4: Readiness for service
- Gate 5: Benefits realisation

Further information is available on the Queensland Treasury and Trade website www.treasury.qld.gov.au/clients/government/gateway-review-process.shtml

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