

INTRODUCING THE BUSINESS CASE APPROACH GUIDANCE PACK

BCA guidance for 2018 RLTP reviews

MAY 2016

This set of guidance documents has been prepared in response to feedback from key stakeholders across the sector, highlighting the need for clearer, earlier guidance regarding the application of the BCA principles in the RLTP development and RLTP mid-term review processes.

FEEDBACK FROM THE SECTOR

During late 2015/early 2016 we conducted a series of interviews with a range of stakeholders and identified five key themes for improvement. These five themes were:

- **Leadership** – the Transport Agency needs to be more effective at leading this change.
- **Expertise** – lifting our collective capability and collaboration to better guide and support the sector.
- **Expectations and guidance** – we need to be clear about what ‘good’ looks like and improve the guidance we provide.
- **Clear and consistent** – we need to use clear and simple language to communicate consistent messages.
- **Pragmatic and fit for purpose** – we need to get better at communicating what is sufficient for an investment decision.

To be successful, the responses to the issues raised by stakeholders will need to be owned jointly across the sector. As part of this collective responsibility we are now working with stakeholders to implement a range of solutions over the short, medium and long-term period in response to this feedback that will help lift BCA capability across the sector.

The first of these initiatives is the RLTP kick-start process - a programme of engaging with key stakeholders with the aim of ensuring that, ‘by August 2016 all RTCs and Auckland Transport are prepared to successfully apply BCA principles to the 2018 review of their RLTPs.’

We are currently running a series of workshops to train and prepare our own staff to support the mid-term review process, and then meet directly with each RTC and Auckland Transport, to take them through the guidance materials and identify any additional support required.

We will use these meetings with staff and stakeholders to:

- identify and confirm any gaps in understanding
- test key messages
- ensure Transport Agency staff have everything they need to lead conversations with AOs, regional council staff and RTCs about what’s expected

- refine our guidance and supporting materials
- ensure RTCs are clear on the requirements and how to access any required guidance or support they need.

To support this process we have developed a pack of four BCA guidance documents that, together, provide all of the information our stakeholders need to be able to apply the BCA principles during the 2018 RLTP review process.

WHAT THE GUIDANCE CONTAINS

The rest of this pack includes the following four key BCA guidance documents:

- 1. Requirements and recommendations:** this document provides clear guidance on what is required in your RLTP development and mid-term reviews, as well as additional recommendations on ‘what good looks like’.
- 2. Frequently asked questions:** this document provides responses to some of the most common questions regarding the BCA principles & their role in RLTP development & reviews. This will be also made available online and updated regularly.
- 3. Mid-term review checklist:** this is a guide to conducting your mid-term review and some of the key things to consider as you evaluate your current RLTP.
- 4. An introduction to investment logic and benefits mapping:** this document gives a brief introduction to these tools and links to further information and accredited ILM facilitators for those who need it.

Further information can be found at www.nzta.govt.nz/bca