

# **Business Engagement Procedure**

## Version Control History

Version Number	Date of Change	Summary of Revisions Made
.0		
.1	June 2020	New procedure drafted
1.1	December 2020	CMT Approval
1.2	May 2022	EIQA minor revision and approved
1.3	March 2023	Rebranded

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**Title:** Business Engagement Procedure  
**Version/Status:** 1.3/Final  
**Approved By/Date:** CMT/December 2020  
**Issue Date:** March 2023

**Owner:** VP, Business Engagement  
**Lead Author:** Head of Business Development  
**Lead Editor:**  
**EIQA Approval Date:** June 2022

## 1 Purpose

- 1.1 To provide an effective, streamlined approach to business engagement that ensures alliance to the College Strategic Plan and legislative parameters.

## 2 Scope

- 2.1 The procedure covers all business engagement activity conducted on behalf of Perth College UHI by staff, students, or business partners. For example:
- Staff outsourcing time and intellectual property to an external organisation, including working in partnership with them
  - Student outsourcing time and intellectual property to an external organisation on behalf of the college as part of a research project – the output of which may or may not lend itself to final assessed work (ethical approval notwithstanding)
  - Outsourcing delivery and/or assessment and/or internal verification of course curriculum to an external organisation. For delivery on or off college campus.
- 2.2 The procedure does not cover work experience or placements either as part of a course curriculum or on a volunteering basis.

## 3 Definitions

### 3.1 Business Engagement

Perth College engaging in an interaction/partnership with external parties that results in a desired strategic outcome for Perth College

### 3.2 Business Development

Perth College pursuing business to deliver key strategic opportunities or objectives linked to Perth College Strategic plan or Business Development Strategy

### 3.3 Project working

Tasks and activities undertaken by appropriately qualified/experienced personnel in order to deliver successful outcomes and high level of customer experience

### 3.4 Partnership working

Perth College Works with people/partners to achieve common purpose

### 3.5 Business Proposal

A one-page document that describes the proposed development and type of engagement, that provides initial market research and costings, identifies the strategic aims it is designed to meet, etc

### 3.6 Business Case

Describes the justification for a proposed project or undertaking on the basis of its expected benefit. Whilst a Business Case may be closely aligned to a Strategy, its primary focus is likely to be on specific aims and it will therefore be appropriate for the Business Case to be approved directly by the appropriate College or Board Committee.

### **3.7 Project Brief**

A document that clearly defines Perth College and client's requirements and provides a scope, timing, roles and responsibilities, milestones to review project, IP ownership, allowable usage, etc.

### **3.8 Project Manager**

Identified staff member in charge of overall project

### **3.9 Due diligence**

A process undertaken to determine assets and liabilities that come with a business opportunity and help determine its commercial potential

### **3.10 Project**

An individual or collaborative opportunity/enterprise

### **3.11 Knowledge Exchange**

A process/agreement to share ideas, experience, data and expertise that will benefit all parties involved

### **3.12 Service Level Agreement**

A service- based or customer-based contract clearly defining the level of service we will provide/receive, highlighting any penalties for not fulfilling/receiving agreed levels of service and clearly highlighting outcome expected within agreement. This may not be required if MOU in place (agree scope)

### **3.13 Memorandum of Agreement:**

The legal document describing the terms and conditions of the partnership/service. This may not be required if SLA in place (agree scope)

### **3.14 Curriculum Embedded Project**

A project negotiated with an external partner with the primary goal of providing experiential learning and/or curriculum assessment opportunity as oppose to financial gain.

## **4. Responsibilities**

- 4.1 The Vice Principal External Engagement (VPEE), as a member of SMT and Chair of CBP, is responsible for approving all initial business proposals to progress to full business case, informing Senior Management Team (SMT) of all new business proposals, signing all partnership agreements or delegating this responsibility to another SMT member in their absence, keeping SMT up to date on the progress of business engagement projects.
- 4.2 The Head of Department/Sector Development Director is responsible for:
- submitting the initial business engagement/project proposal for approval
  - ensuring that all appropriate procurement and risk assessments have taken place relevant to the project prior to the Agreement being presented for signature.
  - Appointing a Project Manager to the project
  - Having oversight and monitoring of the effectiveness of a business engagement project in their area of responsibility
  - reporting to CBP on the progress at each milestones and final evaluation of impact to college business on completion of the project.

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- 4.3 Head of Business Development is responsible for providing staff and prospective business partners with advice and guidance on the process and for monitoring the projects and providing an overview to the VPEE and CBP on the risk and impact of business engagement projects
- 4.4 Sector Manager/Subject Leader/Research Supervisor is responsible for ensuring appropriate ethical approval and risk assessment has been completed on behalf of any student conducting research with an external organisation on behalf of the college as part of a business engagement partnership.
- 4.5 Project Manager is responsible for appointing an project team, that the relevant policy and procedure that govern the project are noted in the Agreement and where equivalent policy or procedure of the partner are to be utilised that the College Quality Manager has undertaken a quality review of said policy or procedure prior to the Agreement being signed, and for ensuring that a relevant Agreement has been completed and signed by all parties prior to the project commencing.
- 4.6 The Project Manager is responsible for the project meeting agreed costings outlined in the business proposal and for submitting addendum to the original business case if the costings are anticipated to change by more than +10%. For producing a report on project objectives at each milestone and for producing an impact evaluation report once the project has completed and/or terminated.
- 4.7 Head of Business Development is responsible for providing support and guidance to staff, students and business partners on the business engagement process and required outputs. They are responsible for liaising with and reporting to Quality on any infractions to college policy and/or procedure that come to light during their contact with a project team.
- 4.8 Finance Director- Has responsibility with VPEE for understanding financial implication of any business proposal and adjusting budgets accordingly in appropriate department
- 4.9 The Procurement Manager is responsible for assuring that the project has undergone all relevant procurement procedure and risk assessment relevant to meet appropriate legislative procurement requirements prior to the Agreement being signed.
- 4.10 Quality Manager is responsible for providing advice and guidance on the appropriate College policy and procedure to be utilised by the project group and correctly referred to in any partnership agreements. Where a quality review of the equivalency of partner policy and procedure is required this will be completed by the Quality Manager prior to a partnership agreement being signed by the College.

**5 Procedure** The Sector Development Director or Head of Department must submit a business engagement proposal form (BEP1), which should include simple costings to CBP for discussion prior to any formal activity taking place i.e. full business case or Agreement being signed. NB: where due to timing this proposal has already been issued to and approved by the Chair/SMT then it will be discussed by CBP and relevant points should be considered and included in the Business Case.

- 5.2 All new or amended proposals for all formal business engagement with an external organisation must be approved by the VPEE, as Chair of CBP, or delegated SMT member.
- 5.3 If a proposal is approved to progress, then a full business case (BEP2) project brief (BEP3) and project costings (BEP4) must be completed with the partner/client and approved by the VPBE, or other SMT in their absence prior to any work starting.
- 5.4 A project manager must be appointed to each business engagement partnership approved to commence.
- 5.5 The project manager will provide a project update report (BEP5) at each milestone of the project or at relevant stages of the business engagement activity, as determined in the project brief and a final project impact report on completion of the project (BEP6)

## 6 **Linked Policies/Related Documents**

- 6.1 Perth College UHI Strategic Plan
- 6.2 Business Development Strategy
- 6.3 SFC Regional Outcome Agreement
- 6.4 Business Engagement Policy
- 6.5 Procurement Strategy
- 6.6 Procurement Policy
- 6.7 Business Engagement Procedure documentation
  - 6.7.1 Business Engagement Proposal (BEP1)
  - 6.7.2 Business Case (BEP2)
  - 6.7.3 Project Brief (BEP3)
  - 6.7.4 Full Project Costings (BEP4)
  - 6.7.5 Project update report (BEP5)
  - 6.7.6 Final project impact report (BEP6)
- 6.8 Service Level Agreement (SLA)
- 6.9 Regional Economic Recovery Plan