

# CFAMLD17 - SQA Unit COde FM5A 04

## Build and sustain collaborative relationships with other organisations



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### Overview

This unit is about building and sustaining collaborative relationships with other organisations which share objectives that are similar or complementary to your own organisation's objectives. It does not cover setting up a formal legal partnership, but it does describe good practice in identifying and selecting suitable organisations to collaborate with and a process to ensure that your work with the other organisation is as effective as possible.

The unit is recommended for middle managers and senior managers.

This unit is linked to units:

B10 Manage risk

D12 Participate in meetings

E10 Take effective decisions

E11 Communicate information and knowledge

in the overall suite of National Occupational Standards for Management and Leadership.

#### Performance criteria

- You must be able to:*
- P1 identify organisations which share common or complementary objectives and evaluate the feasibility of collaboration in line with your organisation's strategic objectives
  - P2 decide whether to collaborate with other organisations, based on an evaluation of mutual net potential benefits, the compatibility of the two organisations and your ability to mitigate any risks involved
  - P3 agree internally and with the other organisation:
    - P3.1 the aims and objectives of collaboration
    - P3.2 the benefits each organisation expects from collaboration
    - P3.3 the costs to each organisation from collaboration
    - P3.4 the actions each organisation will take and when
    - P3.5 the required outcomes from collaboration
    - P3.6 arrangements for communicating with each other and reporting progress
    - P3.7 arrangements for processing information in line with relevant legislation
    - P3.8 how and when you will review the effectiveness of your collaboration
  - P4 take agreed actions at the agreed time; inform the other organisation if you are unable to do so and the reasons for this
  - P5 support the other organisation to take their agreed actions at the agreed time
  - P6 report to, and receive reports from, the other organisation according to arrangements agreed
  - P7 provide feedback to the other organisation in ways that help them to perform effectively and reinforce their commitment and enthusiasm for collaboration
  - P8 process information supplied by the other organisation in line with arrangements and relevant legislation
  - P9 review the effectiveness of your collaboration at agreed times and agree:
    - P9.1 the extent to which the aims and objectives have been achieved
    - P9.2 the actions carried out by each organisation, any deviations from the actions agreed and reasons for these
    - P9.3 any failures or mistakes, the reasons for these and ways of avoiding these failures or mistakes in the future
    - P9.4 the costs to each organisation of collaboration and ways in which these costs may be reduced in the future
    - P9.5 the benefits to each organisation, the value of these benefits and how mutual benefits may be increased in the future
    - P9.6 the extent to which the expectations of each organisation have been met

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P9.7 any changes to make your collaboration more effective in the future

### Knowledge and understanding

*You need to know and understand:*

#### **General knowledge and understanding**

- K1 the importance of identifying and evaluating potential partners
- K2 how to identify the potential benefits to each party of collaboration
- K3 how to identify the aims, values and working practices of potential partners and assess how compatible these are with your organisation's aims, values and working practices
- K4 how to identify the potential costs, both in terms of money and time, to each party of working together
- K5 the importance of agreeing with partners the benefits and costs to each party of working together
- K6 the importance of basing your decision to collaborate with potential partners on your evaluation of net potential benefits, the compatibility of the two parties and your ability to mitigate any risks involved, and how to do so
- K7 the importance of identifying and agreeing with partners the aims and objectives of collaboration, and how to do so
- K8 the importance of identifying and agreeing the action search party will take and when, and how to do so
- K9 the importance of identifying and agreeing the arrangements for communicating with each other and reporting progress, and how to do so.
- K10 how to identify and evaluate any risks involved in working together.
- K11 the importance of identifying and agreeing how and when you will review the partnership and its effectiveness, and how to do so
- K12 the importance of taking agreed actions at the agreed time and informing people promptly if you are unable to do so and the reasons for this
- K13 the importance of supporting partners to take their agreed actions at the agreed time, and how to do so
- K14 the importance of reporting and receiving reports from partners according to arrangements agreed, and how to do so
- K15 how to provide feedback to partners in ways that help them to perform effectively and reinforce their commitment and enthusiasm for collaboration
- K16 how to process information supplied by partners in line with arrangements and data protection legislation
- K17 the principles of effective communication and how to apply them

*You need to know and understand:*

#### **Industry/sector specific knowledge and understanding**

- K18 industry/sector requirements and legislation for collaboration with other organisations to achieve common or complementary objectives

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*You need to know and understand:*

#### **Context specific knowledge and understanding**

- K19 your organisation's aims, values and working practices
- K20 legal and organisational requirements for data protection
- K21 confidentiality policies for each organisation and how they may impact on the collaboration
- K22 who has a right to the information and knowledge you are communicating

### Additional Information

#### Behaviours

1. You present information clearly, concisely, accurately and in ways that promote understanding.
2. You keep people informed of plans and developments.
3. You show respect for the views and actions of others.
4. You comply with, and ensure others comply with, legal requirements, industry regulations, organisational policies and professional codes.
5. You identify clearly the value and benefits to people of a proposed course of action.
6. You act to understand and influence the climate and culture of the organisation/partnership.
7. You identify and work with people and organisations that can provide support for your work.
8. You clarify your own and others' expectations of relationships.
9. You articulate the assumptions made and risks involved in understanding a situation.
10. You identify the range of elements in a situation and how they relate to each other.

#### Skills

Listed below are the main generic 'skills' that need to be applied in managing partnership arrangements. These skills are explicit/implicit in the detailed content of the unit and are listed here as additional information.

Assessing  
Balancing competing needs and interests  
Communicating  
Decision-making  
Evaluating  
Information management  
Negotiating  
Planning  
Presenting information  
Reporting  
Reviewing  
Risk management  
Setting objectives  
Valuing and supporting others

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