



COLLABORATION AGREEMENT

Between:

- (1) **Stamford Endowed Schools (SES)** of Brazenose House, St Paul's Street, Stamford, Lincolnshire PE9 2BS (Company No: 527618) (**SES**)
- (2) **The Old Stamfordian Club (OSC)** of Brazenose House, St Paul's Street, Stamford, Lincolnshire PE9 2BS (**OSC**)

BACKGROUND

SES and the OSC recognise the importance of maintaining an engaged and supportive alumni association and the many benefits this can bring to both the School and the Club. School leavers have an automatic eligibility to OSC membership by virtue of membership fees being incorporated into School fees, giving them the opportunity to 'opt in' to membership should they so choose.

The OSC is managed by a committee of volunteers whose objective is to provide a calendar of events and programmes to meet the needs of the members. Increasingly, the range and number of Club activities require the professional support of the SES Development Office whose personnel have the technical skills necessary for effective event management, communications and programme implementation.

This Collaboration Agreement formalises the relationship between SES and the OSC and provides the framework for a mutually supportive partnership.

AGREEMENT

It is agreed as follows:

1. SERVICES

SES will provide the Services outlined in the Appendix.

2. DUTIES OF SES

SES will work with the OSC in a spirit of collaboration, good faith and co-operation and will provide the Services outlined in the Appendix professionally and in a timely manner.

3. DUTIES OF OSC

The OSC will deliver on its responsibilities (as outlined in the Appendix) and will partner with the SES in a spirit of collaboration, good faith and co-operation.



4. ANNUAL MEETING

Representatives of the Development Office and the OSC Committee will meet as soon as possible after the Annual General Meeting of the OSC for the purpose of:

- Reviewing the operation of this Agreement
- Agreeing the programme of activities (including all events and projects) for the ensuing OSC year
- Reviewing the financial viability of the OS owned Bank Account

4.1 In the event that the parties agree to amend this Agreement and/or the Appendix, the changes will be noted in a memorandum to be signed by a representative of SES and the OSC.

4.2 In the event that an AGM cannot be held, this annual meeting will be arranged at a convenient time to all parties and may be held virtually, if circumstances dictate.

5. FINANCES

Background

There are currently three sources of funding for alumni relations:

- (1) The OSC owned bank account
- (2) Funds allocated to the OSC by SES in the form of an annual budget
- (3) SES owned alumni relations expenditure

- (1) The OSC owned bank account is the repository for donations from members who left School prior to the current fee arrangement being implemented. The amount of donations received into this account is reducing as the number of older members reduces, however the Committee presently maintains an overall level of funds in this account sufficient to cover the potential expenditure listed below.

Decisions as to how the monies in this bank account are spent are at the sole discretion of the OSC Committee.

Examples of expenditure from this account include:

- Expenditure for initiatives beyond the agreed activity plan and outside the annual budget
 - Donations or memorial items
 - Legal or administrative costs that relate to the operation of the OSC.
- (2) Funds allocated to the OSC by SES reflect the fact that membership fees for School leavers are now incorporated into School fees and are not remitted directly to the OSC. The base budget was set in 2020 at a level commensurate with the number of School leavers x 90% paying £150 in membership fees. This is now the ongoing basis for the calculation of the budget which guarantees a budget held by the School for OSC activities reflective of



the number of School leavers irrespective of how many of this group actually 'opt in' to OSC membership.

The OSC Committee will ensure that budget expenditure is consistent with the overall objectives of the Club.

Examples of expenditure from the OSC annual budget include:

- The annual OS publication for members
- Events (e.g. Reunion Weekend)
- Bursaries
- Commemorative gifts for Stamford School leavers
- Mentoring and Sector Group Projects

(3) SES have their own alumni expenditure fund and are responsible for how these funds are spent.

Examples of expenditure from the SES Alumni Relations fund:

- Development Office staffing costs
- Licence fees and management costs (e.g. for the Donorfy Customer Relationship Management system) and Mailchimp (marketing platform for communications)
- Events (Fully funded as with the Lansdowne Club drinks event or part funded via a contribution towards the Reunion Weekend)
- The Stamford magazine and other general alumni publications.

5.1 SES will provide an agreed annual budget for the provision of OSC activities.

5.2 There will be no carry over of any budget overspend or underspend to the following year(s).

5.3 The Treasurer of OSC will receive a detailed account of the budget funding made available from SES to OSC so that a regular report can be made to the OSC Committee on spend against budget.

6. DISPUTE RESOLUTION

6.1 In the event of a dispute arising between the parties, best endeavours will be brought to bear to resolve such disputes in a cost effective and proportionate manner.

7. TERM OF THIS AGREEMENT

7.1 This Agreement will continue in full force and effect unless and until terminated by either party giving to the other no less than twenty four months' notice in writing - such notice to expire at the end of a calendar month.

Signed on behalf of the SES:



Hannah Hamilton
Director of Development and External Relations

Date: 17/5/2022



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Natalie Pretsell
Community Engagement Manager

Date: 17/5/2022

Signed on behalf of the OSC:

Cam Park
Chairman

Date: 14/5/22

David Denney
Secretary

Date: 14/5/22



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APPENDIX

Division of tasks: OSC / Development Office

DEVELOPMENT OFFICE	OLD STAMFORDIAN CLUB
EVENTS AND ACTIVITIES	
<p>Please note the list below is not exhaustive and does not include School led events that require our support (i.e. Carol Concerts, Remembrance Service, Open Days) or visits from/tours to alumni.</p> <p style="text-align: center;"><u>Events:</u></p> <p style="text-align: center;">Virtual quizzes Networking Events – school based Sector Group Events - OS based Stamford Lectures Y13 Leavers Day and engagement throughout the year Support with organisation and comms for sports events including golf, Friday Night Lights and Sport for the OS Reunion Weekend Events across the globe to tie in with the School travel plans Lansdowne Drinks event Reunion Weekend</p> <p style="text-align: center;"><u>Responsibilities:</u></p> <p style="text-align: center;">Development Office to plan each event including comms, promotion, liaison with suppliers, budget, facilitation, booking facilities, staffing, manage tickets sales/attendance, social media, feedback, maintain any database needs</p>	<p>OSC to have the idea for an event and let the Development Office know.</p> <p>OSC to work with give careful oversight on events reported to the GCM by the Community Engagement Manager.</p> <p>Teams for OSC Sport will be organised by the OSC with the Development Office supporting with any advertising/communications needs.</p> <p>Sector Group leads will work in collaboration with the Development Office on event requirements which are Sector Group specific.</p> <p>Everything other than the events and activities listed in the opposite column will be subject to discussion between the OSC Committee and the Development Office and will only go ahead if approved by the OSC Committee.</p> <p>Peer to peer contact – building and maintaining relationships, promotion of the club and engagement/attendance at events.</p> <p>Share information to increase attendance – social media, direct contact, through peer network</p> <p>Attend and chaperone if needed.</p>



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SOCIAL MEDIA

Update and maintain OS website – continue to make pages attractive, relevant, user friendly.

Maintain profiles and presence on all communication platforms to build on engagement.

Share information about events, publications and news from OS, committees, the Schools.

Analyse interactions (what works well/not so well) / changes and update details.

Monitor for any concerning posts and remove/report.

Implement a Comms Strategy, using also initiatives such as Awareness Days, items from the archives, link in with main Schools strategy and values.

Collate any information from social media to share with families following any posts relating to deaths, birthdays etc.

LinkedIn specific – maintain sector group pages, post articles, encourage engagement, promote events.

Have ideas for content and share with the Development Office.

Post, share, like, comment on a regular basis on all platforms of OS social media (Twitter, Instagram, Facebook, LinkedIn,) and the website.

Encourage peers to join and share photos, articles, information, updates.



DATABASE	
<p>Update and maintain database for all stakeholders and members etc.</p> <p>Ensure appropriate tags are applied to be able to produce lists for future reference and requirements (e.g. those interested in being year group rep, those wanting info about Stamford Lectures etc)</p> <p>Ensure all GDPR guidelines are adhered to and any breaches of information reported accordingly</p> <p>Utilise the Donorfy CRM system and Mailchimp functions as far as possible to be able to gather information and use (e.g. use of forms).</p>	<p>Encourage peers to ensure they have updated any changes to their personal details with the Development Office</p> <p>Complete any training required and adhered to any agreements should data be released for project work.</p> <p>Report any data breaches accordingly.</p>
FINANCE	
<p>Keep a record of any spending of funds on the committee's behalf and ensure Treasurer is informed as outlined in the Agreement.</p>	<p>Maintain accounts and manage spends for the committee.</p>
MERCHANDISE	
<p>Support in promotion of this in comms sent to the OS community.</p> <p>Support with ensuring open communication channels with the School Shop and OS to discuss merchandise.</p>	<p>Identify opportunities for promotion of merchandise through the members and take forward where appropriate.</p> <p>Currently: David Jennings, Neil Paterson, School Shop as sources for merchandise.</p>



CAREERS AND BUSINESS/LIFELONG SUPPORT

<p>Update and maintain the LinkedIn profile, checking the database for each request to join to ensure OS.</p> <p>Ensure information is shared and promoted in comms with OS.</p> <p>Administer the OSC Bursary Scheme.</p> <p>Support the Sector Group Project including providing an administration function, a marketing function, reinforcing existing Sector Groups and developing additional Sector Groups.</p> <p>Support the OSC Mentoring Project including providing an administrative function and a marketing function.</p> <p>Maintain and promote the Stamford Business Directory to OS community.</p>	<p>Work with the Development Office to ensure alignment on:</p> <ul style="list-style-type: none"> -networking organisation -support organisation throughout the OSC member's career -provide guidance and help for students or alumni contemplating entry into the Sector <p>Committee to be active in the LinkedIn platform for sector groups, offering and sharing of careers opportunities and information</p> <p>Peer to peer encouragement to join the LinkedIn network and become sector group Leads</p> <p>Like, share, comment, add articles of industry interest</p> <p>Generate interest in sector group events</p>
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ARCHIVES

<p>Archivist to continue to work on organising and cataloguing the archives and contribute pieces to be shared across our communication with the OS and wider community.</p> <p>Archivist to hold a minimum of one event per academic year to showcase the archives (can include the Reunion Weekend).</p> <p>Archivist to write articles where appropriate on those OS who have passed away or where there are significant events.</p> <p>Archivist to contribute articles to publications (OS annual publication and Stamford Magazine) including direct interviews where possible.</p>	<p>Peer to peer encouragement to share items for the archives.</p> <p>Like, share, comment on any archive social media posts across the platforms.</p>
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<p>Archivist to work on digitising the archives.</p>	
<p>ADMINISTRATION AND GOVERNANCE</p>	
<p>To be responsible and accountable to the OSC Committee.</p> <p>To support with administrative tasks that fall outside the scope of the role of the Secretary to the OS Committee.</p> <p>To work with the Secretary in organising Committee Meetings for OSC (virtual and in person)</p> <p>Community Engagement Manager to produce a report to the OSC outlining progress and updates on comms, events, engagement, data, and any significant information relevant to the OSC or that they should be made aware of.</p>	<p>OSC to attend and make contribution to discussion and building of ideas for future events, comms and support to the OS community.</p>
<p>ANY OTHER BUSINESS</p>	
<p>Engagement with OS Overseas</p> <p>Marketing material</p> <p>Promotion of the Schools overall and involvement in wider Schools events</p> <p>University Ambassadors project</p> <p>Work with sixth form to promote OS and throughout the Schools as a whole</p> <p>Networking with other schools</p> <p>Training</p> <p>Partnership/wider community working</p> <p>Fundraising support</p>	<p>Committee to communicate any other thoughts, ideas, needs to the Development Office for discussion</p>



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Manage volunteers within the team/service	
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