

DATED 1st September 2025

(1) THE SOCIETAS TRUST

(2) BALL GREEN PRIMARY SCHOOL

ASSOCIATE MEMBER AGREEMENT

THIS AGREEMENT is made on 1st September 2025

BETWEEN:

- (1) **THE SOCIETAS TRUST** a company limited by guarantee registered in England and Wales (company number 09987031) whose registered office is situated at Ellison Primary Academy, Ellison Street, Newcastle-under-Lyme ("the Trust")
- (2) **THE GOVERNING BODY OF BALL GREEN PRIMARY SCHOOL** situated at Whitfield Road, Ball Green, ST6 8AJ ("the School")

HEREINAFTER REFERRED TO AS THE PARTIES.

WHEREAS

- (A) The company is a Multi Academy Trust incorporating 8 academies and 2 associate member setting in the North Staffordshire area
- (B) The School is a Maintained Community Primary School maintained by Stoke on Trent Council
- (C) The Trust and the School have agreed from the date of this Agreement to collaborate with each other and this Agreement is intended to set out the terms of the collaboration and will in particular set out the vision as well set out the responsibilities and communication mechanisms between the Trust and the School, with a view to the school joining the Trust by April 2026.

1 DEFINITIONS AND INTERPRETATION

- 1.1 In this Agreement, the following words shall have the following meanings:

Stakeholder – anyone with a vested interest in any of the parties (e.g. Staff Members, Governors, Pupils, Parents etc.)

- 1.2 In this Agreement (except where the context otherwise requires):

- 1.2.1 use of the singular includes the plural (and *vice versa*) and use of any gender includes the other genders;
- 1.2.2 a reference to a party is to a party to this Agreement and shall include that party's personal representatives, successors or permitted assignees;
- 1.2.3 a reference to persons includes natural persons, firms, partnerships, bodies corporate and corporations, and associations, organisations, governments, states, foundations, trusts and other unincorporated bodies (in each case whether or not having separate legal personality and irrespective of their jurisdiction of origin, incorporation or residence); and
- 1.2.4 a reference to a Clause or Schedule is to the relevant clause of or schedule to this Agreement; a reference to a sub-clause or paragraph is to the relevant sub-clause or paragraph of the Clause or Schedule in which it appears.

- 1.3 The Schedules form an integral part of this Agreement and have effect as if set out in full in the body of this Agreement. A reference to this Agreement includes the Schedules.

- 1.4 In the event of any conflict or inconsistency between the Clauses and the Schedules of this Agreement, the Clauses shall prevail.

1.5 General words are not to be given a restrictive meaning because they are followed by particular examples, and any words introduced by the terms "including", "include", "in particular" or any similar expression will be construed as illustrative and the words following any of those terms will not limit the sense of the words preceding those terms.

1.6 Any reference to a statute, statutory provision or statutory instrument includes a reference to that statute, statutory provision or statutory instrument together with all rules and regulations made under it as from time to time amended, consolidated or re-enacted

2. GOALS AND OBJECTIVES

2.1 In signing this Agreement, the parties agree to fully collaborate with one another at all levels to the benefit of their respective stakeholders and the wider communities they each serve; to bring about harmonisation of statutory policies and procedures, where possible; to respect each other's ethos and values at all times; to promote the good working relationship of the parties whenever and wherever possible.

2.2 This Agreement is viewed as an interim agreement until such time that the School may formally join the Trust.

3. COLLABORATION VALUES

3.1 The underlying values of this Agreement are rooted in honesty, transparency and mutual respect. Each of the parties, in signing this Agreement, agrees to respect and abide by these values and all those values held by the other parties.

4. ROLES AND RESPONSIBILITIES

4.1 The parties, in signing this Agreement, agree to be responsible for the success of the Agreement to the benefit of their respective stakeholders and the wider communities they each serve. For the Trust, the CEO ultimately has this responsibility, and for the School, the responsibility ultimately lies with the Head Teacher.

5. EVALUATION

5.1 It shall be for the parties, both individually and jointly, to evaluate the success of this Agreement to the benefit of their respective stakeholders and the wider communities they each serve. The Agreement shall be reviewed termly by all the parties.

6. DECISION MAKING

6.1 Whilst this Agreement does not contractually bind the parties, nor make the parties legally responsible for each other, it is recognised that the parties, whilst working together in the interest of their respective stakeholders and the wider communities they each serve, may take joint decisions from time to time. Where decisions are taken jointly, all the parties will seek to abide by them to the best of their abilities.

7. RESOLVING CONFLICTS

7.1 Where conflicts arise, it will be for the parties to work together constructively to resolve them in the interest of their respective stakeholders and the wider communities they each serve. Should such a resolution not be possible, then the affected parties may serve notice on the other parties to terminate this Agreement.

8. JOINT PLANNING OF THE COLLABORATION BETWEEN THE PARTIES INCLUDING COMMUNICATION AS SET OUT IN SCHEDULE 1.

8.1 The parties, under the terms of this agreement, will also abide by the joint planning of the collaboration, including communication, as set out in Schedule 1.

9. OTHER OBLIGATIONS OF THE TRUST UNDER THIS AGREEMENT INCLUDING A DESCRIPTION OF THE SERVICES TO BE PROVIDED AS SET OUT IN SCHEDULE 2

9.1 The Trust, under the terms of this agreement, will also abide by its other obligations, including the provision of a number of benefits and services to the School, as set out in Schedule 2.

9.2 An annual SLA is to be agreed between the parties to cover the cost of the benefits and services listed in Schedule 2. Initially this will be £7k per term.

10. OTHER OBLIGATIONS OF THE SCHOOL UNDER THIS AGREEMENT AS SET OUT IN SCHEDULE 3

10.1 The School, under the terms of this Agreement, will also abide by the list of its other obligations as set out in Schedule 3.

11. CONFIDENTIALITY

Each party undertakes to the others that it will keep the contents of this Agreement, and any other information or data exchanged between the parties, confidential as between the parties and the Department for Education (or its successors) except to the extent that disclosure is required by law.

12. THIRD PARTIES

No person who is not a party to this Agreement is intended to reserve a benefit under, or be entitled to enforce, this Agreement pursuant to the Contracts (Rights of Third Parties) Act 1999 (the "Act") save that any Contractor may enjoy the benefit and enforce the terms of this Agreement in accordance with the Act. Notwithstanding this, neither party requires the consent of any Contractor to rescind or vary this Agreement at any time, even if that variation or rescission affects the benefits conferred on such Contractor.

13. FORCE MAJEURE

Neither party will be liable to the other for any delay or non-performance of its obligations under this Agreement arising from any cause or causes beyond its reasonable control.

14. GENERAL

14.1 No forbearance or delay by either party in enforcing its rights will prejudice or restrict the rights of that party, and no waiver of any such rights or of any breach of any contractual terms will be deemed to be a waiver of any other right or of any later breach.

14.2 No variation of this Agreement will be valid unless recorded in writing and signed by or on behalf of each of the parties to this Agreement.

14.3 If any provision of this Agreement (or part of any provision) is found by any court or other authority of competent jurisdiction to be illegal, the other provisions will remain unaffected and in force.

14.4 Nothing in this Agreement will be construed as constituting or evidencing any partnership, contract of employment or joint venture of any kind between either of the parties or as authorising either party to act as agent for the other. Neither party will have authority to make representations for, act in the name or on behalf of or otherwise to bind the other party in any way.

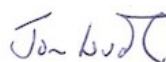
- 14.5 Neither party will make any announcement relating to this Agreement or its subject matter without the prior written approval of the other party (such approval not to be unreasonably withheld or delayed).
- 14.6 Each party will, at the request of the other party and its own cost, do (or procure others to do) everything necessary to give the other party the full benefit of this Agreement.
- 14.7 Any notice required to be given under this Agreement shall be in writing and shall be delivered personally, or sent by pre-paid first class or recorded delivery or by commercial courier, to each party required to receive the notice at the addresses specified by the relevant party by written notice to the other (and if no such address is specified), the address set out at the front of this Agreement.
- 14.8 Any notice shall be deemed to have been duly received:
- 14.8.1 if delivered personally, when left at the address and for the contract referred to in this Clause; or
- 14.8.2 if sent by pre-paid first class post or recorded delivery, at 9.00 a.m. on the second business day after posting; or
- 14.8.3 if delivered by commercial courier, on the date and at the time that the courier's delivery receipt is signed.
- 14.9 A notice required to be given under this Agreement shall not be validly given if sent by email.
- 14.10 This Agreement may be executed in any number of counterparts, each of which will be an original and all of which will together constitute a single agreement.
- 14.11 This Agreement constitutes the entire agreement and understanding between the parties in respect of the matters dealt with in and supersedes any previous agreement between the parties.
- 14.12 Each of the parties acknowledge and agrees that in entering into this Agreement it does not rely on, and will have no remedy in respect of, any statement, representation, warranty or understanding (whether negligently or innocently made) of any person (whether party to this Agreement or not) other than as expressly set out in this Agreement.

15. GOVERNING LAW AND JURISDICTION

- 15.1 This Agreement will be governed by and interpreted in accordance with the law of England and Wales.
- 15.2 Each party irrevocably submits to the exclusive jurisdiction of the courts of England and Wales over any claim or matter arising under or in connection with this Agreement.

Duly authorised on behalf of the **THE TRUST**.

SIGNED by the Jon Lovatt, CEO



Duly authorised on behalf of the **THE SCHOOL**.

SIGNED by Hannah McCall, Chair of Governors/Jonathan Hawkey, Headteacher

SCHEDULE 1

JOINT PLANNING OF THE COLLABORATION BETWEEN THE PARTIES INCLUDING COMMUNICATION

The parties to the Agreement undertake to work collaboratively in such areas as:

1. To share with and educate stakeholders about the services provided, either individually or jointly by the parties, through meetings, events and marketing materials;
2. Professional Development opportunities for staff and governors;
3. Networking opportunities for staff and governors including (but not restricted to) attendance at:
 - a. Executive Board;
 - b. Headteachers' Network;
 - c. Deputy Headteachers' Sub-Working Group;
 - d. Chairs' and Vice Chairs' Group;
 - e. Working Parties and Sub-Working Groups (ref Group Membership);
 - f. Academy Business Managers' Group;
 - g. Workforce Sub-Group;
 - h. RUGS' Group;
4. Regular meetings to drive collaborative planning, alignment and structures that work to improve student success and development, including but not restricted to:
 - a. The Head Teacher (or representatives) of the School to be invited to attend Executive Board, Working Party and Working Sub Group meetings, and the JCNC once an academy order has been issued up until conversion;
 - b. The Chair and Vice Chair (or representatives) of the Governing Board of the School to be invited to attend Chairs' and Vice Chairs' Group meetings;
 - c. The CEO of the Trust to be invited to attend Local Governing Board meetings of the School as a representative of the Trust.

SCHEDULE 2

OTHER OBLIGATIONS OF THE TRUST UNDER THIS AGREEMENT INCLUDING A DESCRIPTION OF THE SERVICES TO BE PROVIDED

Under the terms of this agreement, the Trust undertakes to provide the following services to the School:

1. Improving Education Strategy (including Self-Assessment, External QA);
2. Lead Practitioner Support if required;
3. Ofsted Support if required;
4. HT / DHT Mentoring;
5. Internal Audit Services;
6. Trade Union Relations;
7. Data Protection Officer Services;
8. External SEND Review;
9. External Safeguarding Review;
10. Policy Development;
11. Enrichment Opportunities for Pupils;
12. Professional Development Opportunities for staff/ governors;
13. Educational Psychology Support;
14. National College On-line Training;
15. Lyfter;
16. Website Rebuild.

SCHEDULE 3

OTHER OBLIGATIONS OF THE SCHOOL UNDER THIS AGREEMENT

Under the terms of this agreement, and as a minimum, the School undertakes to abide by the following Trust policies and procedures:

- Code of Conduct
- Data Protection
- Data Retention
- Information Security
- Privacy Statements
- HR Policies
- Safeguarding Policies

From September, the school will release Kelsey Lockett for one day per week to be a Strategic Improvement Lead for the Trust (See Appendix 1 for Job Description). The School will pay Kelsey as agreed. The notice period shall be 2 months by either party. The Trust will pay the school £14k p.a. for this arrangement, to be billed quarterly in arrears.

Appendix 1 - The Societas Trust

Job Description



Job Title:	Strategic Improvement Lead
Grade:	

Job Purpose

Purpose

To support the planning and delivery of strategic improvement initiatives that enhance the quality of education across the Trust, contributing to sustained progress and alignment with the Trust's vision and objectives.

Role

As a member of the strategic team, this role works under the direction of Trust and School leaders in driving school improvement by supporting curriculum development, enhancing teaching quality, and ultimately making a measurable impact on pupil outcomes.

Main Duties and Responsibilities

Support for Strategic Improvement Projects

- Collaborate effectively in the strategic planning of school improvement projects aligned with the Trust's priorities.
- Develop and deliver agreed improvement plans alongside senior leaders, the implementation team and others as agreed.
- Support the coordination and deployment of activities and resources as agreed with senior leaders.

Curriculum and Teaching Support

- Participate in activities such as coaching sessions, modelling best practice, and facilitating learning opportunities.
- Help promote and embed the Trust's vision, values, and ethos in day-to-day practices.
- Collaborate with the implementation team and other staff to support curriculum initiatives and classroom strategies that meet pupil needs.

Staff Development and Support

- Work alongside colleagues to support their professional development needs.
- Contribute to coaching, mentoring, or induction support as appropriate.
- Share effective practices and participate in team-based learning and reflection.

Data Use and Monitoring

- Assist in collecting and analysing data related to pupil outcomes and teaching quality.
- Help identify patterns and report findings to inform future planning and support.

- Contribute to the evaluation of project impact and progress monitoring.

Governance and Communication

- Support reporting processes by contributing relevant information and evidence to be shared with senior leaders or the Trust Board.
- Engage in meetings and discussions to ensure consistency and alignment with Trust-wide goals.

Collaboration and Administrative Support

- Lead and take part in working groups or PLNs, ensuring timely and effective contributions to assigned initiatives.
- Assist with meeting preparation, note-taking, and administrative follow-up as needed.

Safeguarding and Well-being

- Ensure all activities maintain high safeguarding standards and promote the well-being of pupils and staff.
- Encourage a supportive team culture that values collaboration, respect, and workload balance.

GENERAL BEHAVIOURS

- Be outward looking and actively promote collaborative working within and outside of the Trust.
- Build effective relationships with staff to develop further cross-communication across the related service areas.
- Support the organisation's ethos.
- Work cooperatively, managing and coordinating multiple projects in a busy and dynamic environment.
- Ensure that the Trust reflects a vibrant and inclusive ethos, which actively values and promotes diversity, unity and community cohesion, and supports pupils to become successful integrated citizens.
- Be aware of the Trust's duty of care in relation to staff, pupils and visitors and to comply with all health and safety policies at all times.
- Be aware of and comply with the codes of conduct, regulations and policies of the Trust and its commitment to equal opportunities.
- Be committed to personal and professional development of self and others in order to help the Trust develop and improve.
- Be committed to, and contribute to helping the Trust develop and improve.
- Actively challenge and address discrimination.

The post holder will undertake any professional duties reasonably delegated.

+

The Societas Trust Strategic Improvement Lead Person Specification

Qualifications

Essential	Desirable	Assessment
Qualified Teacher Status (QTS)	Completion of Learning to Lead CPD Completion of National Professional Qualifications (NPQs)	Expression of Interest / Interview
Evidence of ongoing professional development		Expression of Interest / Interview

Experience

Essential	Desirable	Assessment
Proven outstanding teaching over time	Experience working in more than one school/academy	Expression of Interest / Interview
Ability to audit, analyse, and interpret data to inform school improvement	Experience using OFSTED framework for self-evaluation	Expression of Interest / Interview
Team Leadership and Subject leadership experience	Experience working as or with senior leaders	Expression of Interest / Interview
Primary teaching experience (EYFS, KS1 & KS2)	Project management experience	Expression of Interest / Interview
Effective use of a range of assessment strategies	Experience using specific coaching programmes	Expression of Interest / Interview
Ability to empower others to raise achievement		Expression of Interest / Interview
Strong time management and organisational skills		Expression of Interest / Interview
Up-to-date with current pedagogy and evidence-based practice		Expression of Interest / Interview
Experience of: inspiring and leading school improvement strategies and projects, coaching and mentoring colleagues, leading CPD and developing teaching and learning resources		Expression of Interest / Interview

Leading Learning and Teaching – Ability to:

Essential	Desirable	Assessment
Model excellent, inclusive and adaptive teaching	Raise attainment in challenging contexts	Expression of Interest / Interview

Drive improvement for all pupils		Expression of Interest / Interview
Maintain a culture of continuous learning		Expression of Interest / Interview
Personalise learning to meet individual needs		Expression of Interest / Interview
Demonstrate enthusiasm for teaching and learning		Expression of Interest / Interview
Promote excellence and address underperformance		Expression of Interest / Interview
Coach and mentor colleagues		Expression of Interest / Interview
Use and interpret data to raise standards		Expression of Interest / Interview
Apply inclusive teaching strategies for EAL, PP, and SEN pupils		Expression of Interest / Interview
Use feedback and assessment effectively to plan next steps		Expression of Interest / Interview

Developing Self and Working With Others

Essential	Desirable	Assessment
Build positive relationships with teaching and support staff	Set staff development targets through performance management	Expression of Interest / Interview
Promote shared leadership and effective teamwork		Expression of Interest / Interview
Commit to personal and team professional development		Expression of Interest / Interview
Uphold a fair, open, and inclusive working culture		Expression of Interest / Interview
Empower individuals and teams through support and feedback		Expression of Interest / Interview

Shaping the Future

Essential	Desirable	Assessment
Set and achieve ambitious goals	Build and communicate a coherent, strategic vision	Expression of Interest / Interview
Use technology effectively to enhance improvement	Inspire and motivate others to carry the vision forward	Expression of Interest / Interview
Promote inclusion and support all pupils to achieve		Expression of Interest / Interview
Model the values and vision of the school and Trust		Expression of Interest / Interview