



SEDBERGH
SCHOOL
FOUNDATION

FOUNDATION NEWS AND ANNUAL REPORT 2017-18

FROM THE FOUNDATION DIRECTOR

Since joining the Foundation in September 2018, it has been my great pleasure to meet so many of our supporters. You have set the bar high with successfully funded projects both large and small and it is a real honour to continue the work of Richard Witt in ensuring your dedication to Sedbergh flourishes long into the future.

Writing this report gives me the opportunity to offer sincere thanks on behalf of all those who have benefitted from your generosity during 2017-18. The Roger Lupton Scholars whose education you have enhanced, our sportsmen and women of all ages who have made great use of the Hirst Centre with its fully operational Fitness Suite and Hospitality area, and pupils across the Houses, who have seen improvements to their social spaces during the course of the year. Lupton House, in particular, benefitted from a legacy gift from the family of Richard (Ben) Cole which enabled a renovation of their ground floor social area.

Towards the end of the year, the new charity CIO structure came into being, with the old unincorporated charity being dissolved in June. Whilst this does not change the purpose or aims of the Foundation, it affords greater structural security and longevity for the future. At the same time, much work was undertaken in preparation for GDPR data protection legislation, ensuring that the data we hold is compliant and in the best interests of the needs and preferences of our supporters.

There is no doubt that the strength of our community will help drive us forward with further improvements and initiatives. The warmth of your welcome and the stories you have shared with me of your time here, whether as a pupil or parent, have confirmed that the Foundation has a key role to play in promoting the advancement of Sedbergh School as it looks towards its 500th anniversary in 2025.

Isabella Bennett

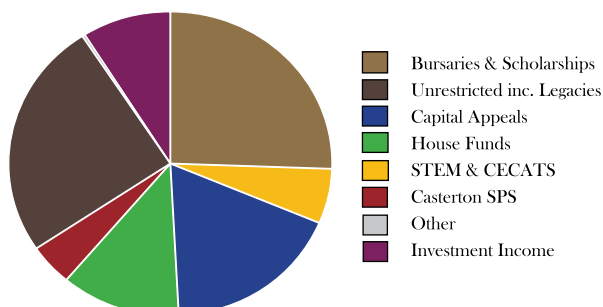


Trustees serving during the year ending July 2018 were:

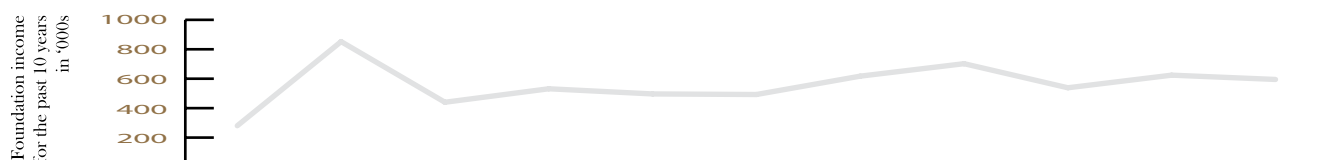
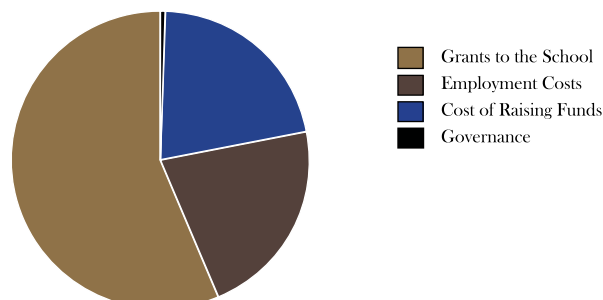
Mr A.J.N. Bedford (Chairman and Governor of Sedbergh School)
Mr H. Bagot
Mr M.C. Baker (Audit Committee)
Mrs L. Bates (Governor of Sedbergh School)
Mrs L. Denney (Governor of Sedbergh School)
Mr A. Fleck (Principal of Sedbergh School)
Mr R. Gledhill (Governor of Sedbergh School)
Mr A.W. Smith (Audit Committee)
Mr M.W. Stephenson
Mr J.C. van der Velde (ex officio; Chairman of the OS Club)

SUMMARY OF FOUNDATION INCOME AND EXPENDITURE FOR THE YEAR 2017-18

Total Income: £595,272



Total Expenditure: £540,735



www.sedberghschool.org/foundation



@SedFoundation1



www.facebook.com/SedberghSchool

REVIEW OF ACTIVITIES 2017-2018



THE ROGER LUPTON SCHOLARSHIP APPEAL

Just over £147,000 was granted to the School for Roger Lupton Scholars in 2017-18, which helped six pupils from Carus, School, Powell and Hart Houses. Two of these pupils were in their final year at Sedbergh and have since taken up university places; one girl leaving to read Astrophysics.

£151,000 was raised during the course of the year towards this appeal and it continues to be a vital part of the annual fundraising work undertaken by the Foundation.

Nearly 100 donors are regularly contributing via Direct Debit and our annual 'Big Give' week at the end of November attracted a record amount of £50,000 towards the appeal - enough to fund a full Scholarship for a year. Since its inception in 2012, over £1.4m has been raised towards this project, with 14 Scholars having benefitted overall.

Our partnership with the Springboard Bursary Foundation has now ended, but we continue to attract world-class applicants for our scholarships and look forward to the next generation of Roger Lupton Scholars for many years to come.



THE 1525 LEGACY SOCIETY

There are 224 members who have pledged to leave a gift to the Foundation in their Wills. During the course of the year, 8 members passed away. Gifts from 1525 Society members' wills totalled approximately £74,000 last year, much of which was directed towards scholarships and Houses. Lunches were held in London, Sedbergh and Blair Atholl.

We received a legacy gift from former Foundation Trustee and Old Sedberghian Rick Abbott (L 73), part of which funded an inspirational sculpture celebrating the Performing Arts at Sedbergh School. The sculpture was created by local artist Michelle Castles and unveiled in 2018 outside the Thornely Music Studio.

THE HERITAGE LOTTERY ARCHIVE PROJECT

In 2016-17, a successful bid was made for £28,000 towards the Archive Project, celebrating 190 years of Women in Education.

During 2017-18, Katy de la Riviere, our Archivist, organised a series of events and activities for all ages, based on items and artefacts in the Casterton School archives and the Bronte Collection. Theatrical performances, talks and events were held throughout the local area and these were well received by the community.

This project included a significant digitisation and cataloguing process enabling some of the most significant items in the collections to be made publicly available. The project came to an end in 2018, with surplus funds from the grant being returned to the Heritage Lottery Fund.

FRIENDS OF CASTERTON SEDBERGH PREP SCHOOL

The parental fundraising group 'FCSPS' had a busy year raising funds through events and activities for pupils, parents and friends of Casterton, Sedbergh Prep School.

In excess of £6,800 was raised in charitable income via the Foundation, which paid for items of furniture for the new 'Secret Garden' planned in 2016-17 as well as raising funds towards a forthcoming new outdoor play structure.

INTERNATIONAL GIVING ON THE INCREASE

2017-18 heralded one of the strongest years to date for our international donors. Using tax efficient methods including the BSUF, we are delighted to see our community giving grow across the seas!

THE HIRST CENTRE

For the past few years, the objective of the Foundation's capital fundraising was to contribute towards the School's new Sports and Recreation Centre costing £4m. The Foundation raised £350,000 towards this, of which £104,000 was donated during 2017-18 by supporters.

A further £65,000 appeal was launched in early 2018 to raise funds for the Fitness Suite on the ground floor of the Sports Centre. This was ongoing at year-end and had raised £50,000 by July 2018 with pledged funds to continue into the next year.

The centre was completed in May 2018, with the School's Speech Day and Official Opening held in July 2018. The building was named after former Headmaster Christopher Hirst and his wife Sara, both of whom had a significant impact on the School's advancement.

Donors were recognised on a plaque in the Hospitality Suite, which was furnished in the Michaelmas Term of 2018.

The Hirst Centre is not only a facility for our Sedberghians, but for our local community. It has hosted Netball trials as well as weekly fitness classes and is a real asset for Sedbergh.

Our sincere thanks go to all of our supporters, without whom this facility would not have been possible. A modern, yet sympathetically designed sports facility with an eco-roof that blends into the surrounding landscape that provides 21st century sporting provision for all.



SEDBERGH SCHOOL WAS NAMED THE INDEPENDENT SCHOOL OF THE YEAR FOR OUTSTANDING SPORTING ACHIEVEMENT IN THE INDEPENDENT SCHOOLS OF THE YEAR AWARDS 2018.

STEM & 'CECATS'

The Foundation was grateful to receive £35,000 towards the Science, Technology, Engineering & Maths project entitled 'CECATS' this year.

Potential partnerships with corporate organisations were investigated to ascertain the viability for Sedbergh School becoming a hub for STEM education and innovation in the North West following a successful initial conference in 2016.

The School and Foundation continue to work together to create a programme and facility that fulfils the needs of our teaching and learning programme as well as wider outreach for the local area.

Initially, primary education projects are being piloted at Casterton Sedbergh Prep School. This project will be a focus for 2018-19.

INVESTMENTS & ENDOWMENTS

During the course of 2017-18, the Foundation appointed Ruffer to manage its investments and endowments, in line with the direction taken by the School to ensure that funds are managed in an appropriate manner.

An endowment fund specifically for the Roger Lupton Scholarships and bursaries exists to ensure security of funding for pupils in need. A further separate endowed fund exists for the preservation of environmental and conservation work, under the auspice of the Sedgwick Society.

Two significant donations of shares were received during the year totalling around £57,000.

The value of endowed funds totalled £157,779 at year end.

Foundation Donation Form

Your Details

Mr/Mrs/Ms: _____ Initials / First Name: _____
Surname: _____
Address: _____

Postcode: _____
Tel: _____ Mobile: _____
Email: _____

Gift Choices

I would like to donate towards:

- ☐ The Roger Lupton Scholarship Appeal
- ☐ The Chapel Appeal (2019)
- ☐ The STEM/CECATS Project
- ☐ Where the Foundation needs it most

Gift Aid

Please treat all Gift Aid donations all qualifying gifts of money made to Sedbergh School Foundation

☐ today ☐ in the past 4 years ☐ in the future

Please tick all boxes which apply

I confirm I have paid or will pay an amount of Income Tax and/or Capital Gains Tax for each tax year (6 April to 5 April) that is at least equal to the amount of tax that all the charities that I donate to will reclaim on my gifts for that tax year. I understand that other taxes such as VAT and Council Tax do not qualify. I understand that the charity will reclaim 25p of tax on every £1 that I give on or after 6 April after 2008.

Signature: _____ Date: ____ / ____ / ____

Please notify us if you:

- Want to cancel this declaration
- Change your name or home address
- No longer pay sufficient tax on your income and/or capital gains

Sedbergh School Foundation is a charity registered in England and Wales (Registered No. 1176189) whose registered address is Sedbergh School Foundation, Sedbergh, Cumbria, LA10 5HG

A Direct Debit

I would like to make a regular gift of:

£ _____ a month / quarter / year

To: The Manager (Bank/Building Society)

Address: _____

Postcode: _____

Name(s) of Account Holders: _____

Bank Sort Code: ____ - ____ - ____

Account No.: _____

Instruction to your Bank/Building Society to pay by Direct Debit

Please pay Sedbergh School Foundation Direct Debit from the account detailed in this instruction, subject to the safeguards assured by the Direct Debit guarantee. I understand that this instruction may remain with Sedbergh School Foundation, if so, details will be passed electronically to my Bank/Building Society.

Signature(s): _____

Date: ____ / ____ / ____

Originator's Identification Number:

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B Cash Donation

I would like to make a single gift of: £ _____

☐ By Maestro/Delta/Mastercard/Visa/Amex/Diners Club

(please fill out the information below)

☐ By BACS (to Account 50680249 Sort Code 20-45-28)

☐ By Cheque (made payable to Sedbergh School Foundation)

Card No: _____

Issue No.: _____ Valid From: ____ / ____ Expires: ____ / ____

CVV: _____ Today's Date: ____ / ____ / ____

Signature: _____