



SEDBERGH
SCHOOL
FOUNDATION

FOUNDATION NEWS AND ANNUAL REPORT 2018-19

FROM THE FOUNDATION DIRECTOR

As I review our 2018-19 year from my 'lockdown' desk at home, I am reminded of an old Irish saying: "it is in the shelter of each other that the people live". We have seen examples of great community spirit in recent weeks, and as I look back at the activities undertaken by the Foundation last year, it is clear that it was then as it is today: a remarkable collection of individuals coming together under the Sedberghian banner to improve the lives and outcomes of each other, and indeed the next generation to join the 'pack'.

Our focus for the 2018-19 year was to continue our funding of crucial Roger Lupton Scholarships, complete our pledged support of the Hirst Centre funding and improve the lighting in our Chapel through the annual Principal's Appeal.

Our international presence took a gentle, determined step forward during this period, with our first Foundation Reception for supporters in New York in July, coinciding with the School's Choir Tour of America. This was a particular highlight in our events calendar for the year and it was remarkable to meet a broad range of OS, parents and friends of the School across the 'pond'.

I would like to offer my public thanks to our retiring 1525 Society President, Andrew Robertson CBE, who stood down in December 2019 after 6 years in the role.

One of the first Foundation figures I met after my appointment, Andrew's enthusiasm for our work and loyalty to the School is an inspiration to all. I'm sure you all join me in wishing him the very best for the future and look forward to seeing him at future Foundation events.

During such unprecedented times in our community at present, we are forgoing any large capital appeal this year. Instead, I urge you to think of that old Irish saying, and assist us in providing shelter to each other through our recently launched Hardship Fund to assist Sedberghians who find themselves in need of support because of the current crisis which has touched so many of our lives in different ways. A donation form can be found on the final page of this report.

My thanks to all of you for your continuing support,

Isabella Bennett

Trustees serving during the period ending August 2019 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) resigned January 2019
- Mr A. Fleck (Principal of Sedbergh School)
- Mr R. Gledhill (ex officio; 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)



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REVIEW OF ACTIVITIES 2018-2019

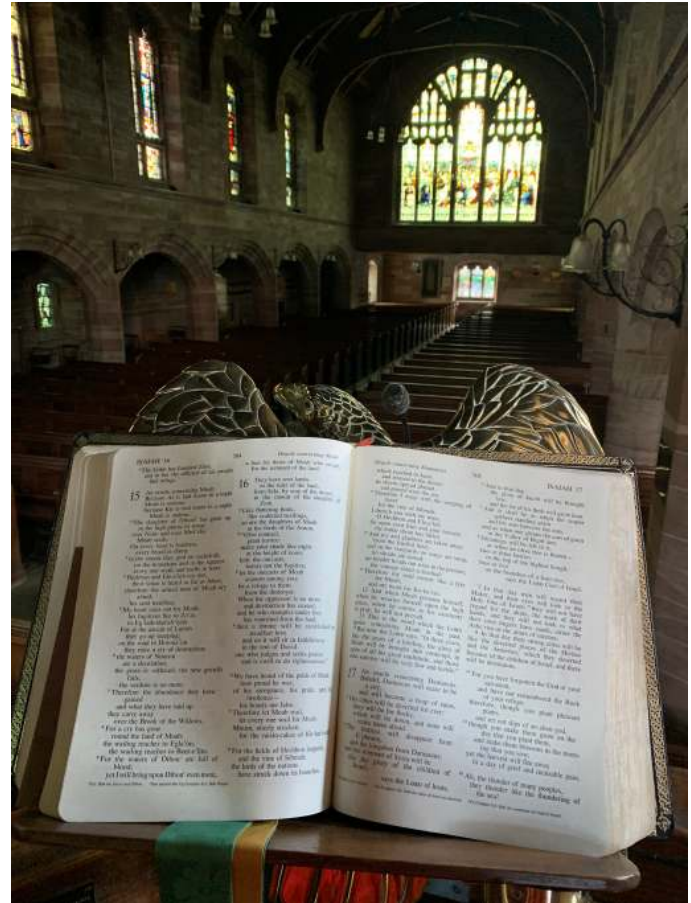
THE CHAPEL APPEAL

In the Spring of 2018, we were informed of a legacy left to the Foundation by parish vicar and former teacher Reverend Bill Long, who had expressed a wish for it to support the spiritual experience of pupils at Sedbergh School.

The Foundation, in collaboration with the School and the Chaplain, began an appeal during Lent Term 2019, to raise a minimum of £40,000 (around half of the cost of identified works) to redevelop the lighting in our Chapel, much of which was the original mid-century installation and deeply unsafe to use.

We were humbled by the response, which has raised £52,000 to date inclusive of Gift Aid. Work was due to commence on 17 March 2020, but has been unfortunately delayed by government action in response to the COVID-19 pandemic which has affected business operations and the ability for the workmen to be on site in such close quarters.

Once restrictions are lifted, we look forward to rescheduling these works and updating you on the progress.



THE 1525 LEGACY SOCIETY

There are currently around 240 members who have pledged to leave a gift to the Foundation in their wills. During the course of the year, six members passed away. Gifts from 1525 Society members' wills totalled approximately £31,000 last year, much of which was directed towards where the School needed it most. In addition, an 'in memoriam' gift of £10,000 was made by a widow of an OS 1525 member who passed away during the year.

Annual 1525 Society President's Lunches were held in London, Sedbergh and Edinburgh in May 2019. These marked the final lunches to be held under the Presidency of Andrew Robertson, who stood down from this role in December. During his tenure, the membership of the Society increased, with many younger members choosing to remember the Foundation and School in their Wills. We thank Andrew for his service and dedication.

The Foundation continues to run its Free Wills Scheme, with two new members choosing to make use of this service.

FRIENDS OF CASTERTON SEDBERGH PREP SCHOOL

The parental fundraising group 'FCSPS' raised funds through events and activities for pupils, parents and friends of Casterton, Sedbergh Prep School.

Over £14,000 was raised in charitable income this year via the Foundation, which paid for a new 'spider's web' style

climbing play structure set within the Casterton school grounds.

This increase was over double the amount raised in the previous year, and owing to the successes of the FCSPS events programme including the popular Christmas Fayre.

The climbing structure is a great success and Casterton pupils enjoy their new playtime activity!



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ONGOING PROJECTS AND GRANTS

CONTINUING SUCCESS FOR THE RLS!

£150,000 was granted to the School for Roger Lupton Scholars in 2018-19, which helped six pupils from Carus, School, Powell, Sedgwick and Hart Houses who were already part of the scheme.

£153,000 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. This includes the annual Christmas Big Give Appeal, match funded by The Reed Foundation and OS 'Champion Pledgers'. Our November 2018 appeal raised over £30,000.

A new initiative in this year was the Summer Challenge Week, tying in with the School's own week of charitable activities for pupils towards the end of the academic year. OS and families were encouraged to raise funds for scholars in their Houses. This appeal raised £41,000 in seven days and a further £10,000 in ongoing pledges.

The Roger Lupton Endowment Fund grew modestly during the year, and now sits at £160,000.



Year on year, as the awareness of this critical fund grows, we are seeing a greater number of applicants to the scheme. Many deserving candidates cannot be funded at current levels and so we ask you to consider supporting the Roger Lupton Scholarships if you currently do not, or increase your regular gift if you already donate.

This fund is specifically endowed to safeguard the provision for Roger Lupton Scholars in the future and we encourage donors to consider donating towards the endowment to ensure long-term security for future grants towards deserving pupils.

Applicants are reviewed termly and the Principal makes a recommendation to the Foundation Trustees for new scholars based on funding availability and need.

The endowment was not called upon this year. Our funds are currently managed by Ruffer at no cost to the Foundation, and are reviewed quarterly.

Please help us help more young people with the gift of education.

INTERNATIONAL GIVING RISES AGAIN

2018-19 brought in tax efficient gifts from America and even further afield. Over £50,000 was raised from non-UK donors for ongoing appeals during the course of the year, including from parents of current Sedbergh pupils.

YDNPA SPORTS GRANT

We were thrilled to receive a grant of £20,000 from the Yorkshire Dales National Park Authority in recognition of the Hirst Centre's Community Use initiatives. This grant was spent on equipment for the sports activities undertaken by pupils and community groups alike.

PREP SCHOOL STEM GRANT

Of the £28,000 raised towards STEM projects across the Schools during the year, nearly £8,000 was granted to Casterton Sedbergh Prep School for their growing STEM projects, including 3D printers, green screen digital technology and laser cutting machines.

Casterton are using this equipment to also run 'STEM Saturday' classes for young children in the local area who would otherwise not have access to such equipment in their own schools.

HOUSE PROJECTS

£16,000 was granted to Sedbergh Boarding Houses for a range of improvements throughout the year.

Housemasters organised a range of events for parents and OS to raise funds for specific small projects which make an immediate difference to the daily lives of the pupils for whom their House is also their home for much of the year.

Senior School Houses raised over £21,000 in total in 2018-19, some of which was for House Roger Lupton Scholars.



