



**SEDBERGH**  
SCHOOL  
FOUNDATION

# FOUNDATION NEWS AND ANNUAL REPORT 2019-20

## FROM THE FOUNDATION DIRECTOR

Our initial plans for much of the year 2019-20 were dramatically altered by the pandemic. Projects in the Lent and Summer Terms were paused so that the Foundation could lead the charge in offering assistance to families within the Sedberghian community who were financially impacted by the pandemic.

Our Hardship Fund raised over £100,000 and much of this was disbursed to current pupils whose Sedbergh future was at risk. We also supported OS, members of staff and members of the local community whose livelihoods evaporated as the restrictions increased in severity and duration.

Without question, grants provided from this Fund enabled many pupils to remain at Sedbergh, whether through Remote Learning or in person. My sincere thanks to our donors for supporting the Sedbergh community during such unprecedented times.

Meanwhile, works were completed in the Chapel for our lighting project during the first few months of Michaelmas Term and whilst there were no Chapel services for some months, I am delighted to tell you that now restrictions have eased somewhat, the lighting is being put to good use and those who have had the opportunity to attend a service are delighted with the results which truly bring out the internal features of this remarkable building.

It seems strange that our last Foundation event was the Gala Dinner at Draper's Hall in November 2019, hosted in conjunction with the OS Club. Over 100 voices from all generations joining in to sing Winder was an experience we shall hopefully recreate in the near future - and I look forward to singing alongside you all.

My thanks to all of you for your continuing support,

Isabella Bennett



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Trustees serving during the period ending August 2020 were:

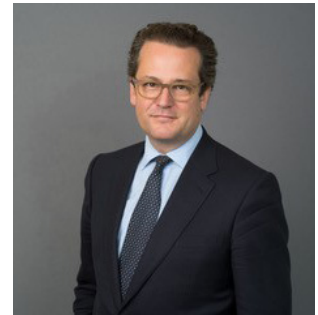
Mr A.J.N. Bedford (Chairman and Governor of Sedbergh School)  
Mr H. Bagot (resigned 29 January 2021)  
Mr M.C. Baker (Audit Committee)  
Mrs L. Bates (Governor of Sedbergh School)  
Mr A. Fleck (Principal of Sedbergh School)  
Mr R. Gledhill (ex officio; Governor of Sedbergh School)  
Mr A.W. Smith (Audit Committee)  
Mr M.W. Stephenson (resigned 13 January 2020)  
Mr J.C. van der Velde (ex officio; Chairman of the OS Club)

Mr I.W. Durrans (Governor of Sedbergh School) was appointed as a Trustee on 09 October 2020

Mr A.J.N. Bedford stood down as Chairman of the Foundation on 29 January 2021 after completing his terms in office.

## VALETE

Our heartfelt thanks go to Jeremy Bedford (H 86) who retired as Chairman of the Foundation and as a Trustee in January 2021.



Jeremy has led the Foundation since March 2014, having been appointed as a Trustee in 2007.

Jeremy's tenure included the reorganisation of the Foundation as a CIO, significant fundraising events such as Centenary House Dinners, the Hirst Centre development and the growth of the Roger Lupton Scholarships Scheme.

Throughout his time as a Trustee and more recently as Chairman, Jeremy has given invaluable advice and time to ensuring the longevity and success of the Foundation in its aims to support the School, its pupils and OS.

It has been a pleasure for me, and my predecessor Richard Witt, to have benefitted from his knowledge and passion for everything Sedbergh as well as have the pleasure of his friendship.

We welcome Ian Durrans (SH 76) as our incoming Chairman. Ian is also a Governor of Sedbergh School and was previously a Senior Partner at PWC LLP where he focused on deals for both Corporates and Private Equity. We look forward to working under his leadership in the future and hope that many of you will be able to meet him in person at future Foundation events.

# REVIEW OF ACTIVITIES 2019-2020

## ROGER LUPTON SCHOLARS

£150,000 was granted to the School for Roger Lupton Scholars during the course of the year, slightly down on anticipated grant-making owing to fee reductions for the Remote Learning period.

Four Scholars left at the end of the Summer Term, progressing to a broad range of universities and opportunities. These four young men not only excelled in their studies and activities, but became true figureheads for the younger pupils in their Houses and more widely in the School.

One Scholar was appointed Head of House for the forthcoming academic year, and other Scholars featuring as Captains of sports and activities.

£104,000 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 was lower in previous years, owing to the success of the Hardship Appeal which was the Foundation's focus for the second half of the academic year.



The annual Christmas Big Give Appeal, match funded by The Reed Foundation and OS 'Champion Pledgers' raised over £30,000 in 7 days, which was a real boost for the fund during uncertain financial times for the country and matched the amount raised in 2018-19.

The Roger Lupton Endowment Fund grew significantly during the year to £258,000 (2019: £160,000) owing to donations of shares from donors and investment gains.

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.



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## HARDSHIP FUND

The impact of the COVID-19 pandemic on our community could neither be foreseen, nor truly quantified. Many Sedberghians have been impacted financially and the effects of this are likely to be seen for many months ahead.

In April 2020, we launched our emergency Hardship Appeal to the whole School community, and were overwhelmed with the response.

The aims of this appeal were clear: to support Sedberghians with emergency grants to cover fees, supplies, and general financial hardship as a result of the pandemic.

The Hardship Appeal raised £50,000 in a matter of days, £80,000 in two months, and closed at £103,000 in October 2020.

This was the Foundation's first true online giving appeal, where the majority of donations were made via our website pages, greatly assisting those supporters who were isolating or otherwise unable to make the journey to post a letter.

In turn, this helped the Foundation staff who were similarly working from home and unable to make regular trips to the School to receive post. We were able to maintain contact with you through online channels and the rapidly growing popularity of video messaging software to release updates on the progress of this appeal.

A grant of £5,000 was made to the local Sedbergh community to assist with special projects including emergency food supplies and transport services. Small grants were made to furloughed staff and OS in need, and the majority of the fund was awarded to numerous Sedbergh families whose livelihoods had vanished overnight and school fees became a sudden unachievable burden.

The messages of thanks received from recipients all remarked upon the incredible kindness of the Sedberghian community. One particular recipient got in touch to share the following message:

"I will rest easier tonight knowing that my son's education is secure for the next term - I do not know to whom I am indebted for this but please pass on my thanks. Words cannot truly do this justice but I hope the sentiment shines through to those who have helped our son stay at Sedbergh and take some of the pressure off our situation."

# PROJECTS AND GRANTS

## SOUTH AFRICA RUGBY TOUR

Parents, pupils and OS came together to raise £67,500 for activities relating to the SSFC Rugby Tour to South Africa, which was unfortunately cancelled due to the pandemic.

Nevertheless, the funds raised were disbursed as planned, with £20,000 donated to Sports Connect Academy - a Cape Town charity uplifting the lives of poor children through rugby and scholarships.

The remainder of funds was allocated to supporting rugby at the Senior School with new equipment and extra coaching for the teams. Our sincere thanks go to the volunteer parents for their hard work in raising such a magnificent sum and to all who supported their efforts.



## THE 1525 LEGACY SOCIETY

There are currently over 245 members who have pledged to leave a gift to the Foundation in their Wills. During the course of the year, 2 members sadly passed away. Gifts from 1525 Society members' wills totalled approximately £19,000 last year, much of which was directed towards where the School needed it most.

We are delighted to welcome former Judge and OS Club President John Walford (E 66) as our new 1525 Society President from 2021.

## THE CHAPEL APPEAL

With much of the fundraising taking place in the previous financial year, the works due to commence in March 2020 were delayed by government action in response to the COVID-19 pandemic during lockdown.

We are delighted to announce that the £52,000 raised for the Chapel has now been granted to the School and works were completed over the Summer Holidays, ready for the new academic year.



## SCHOOL HOUSE LIBRARY APPEAL

In February, Housemaster of School House Mr Coke launched an appeal to parents and OS to refurbish the deteriorating House Library.

The resulting £5,000 paid for improved heating, flooring and fixtures, as well as refurbished furniture and some additions to the stock of books for the boys.

When pupils returned to the House for the new year, it was immediately put into action, becoming the hub for our youngest Kingfishers to study and complete their prep. Thanks to all who supported this much-needed small project.



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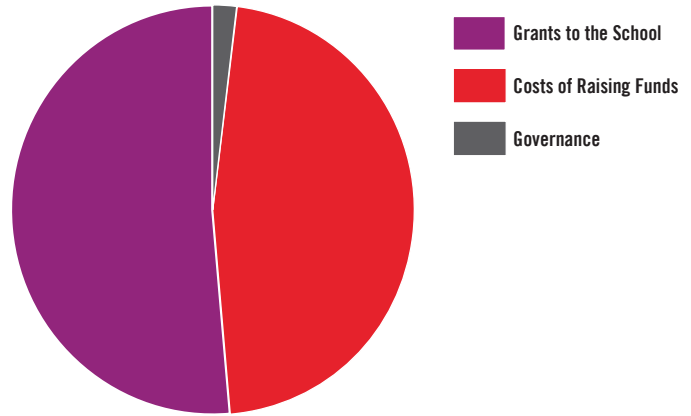
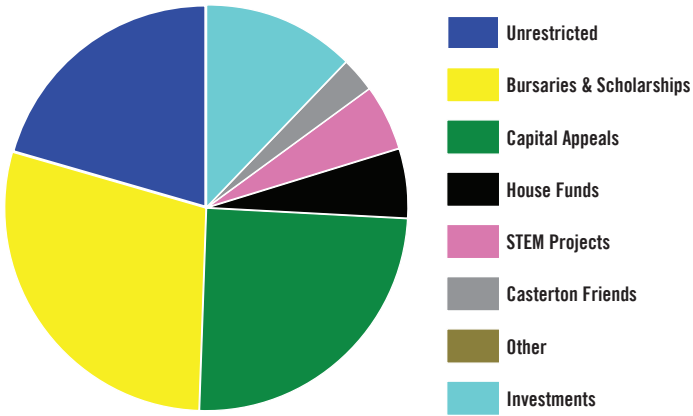
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# SUMMARY OF FOUNDATION INCOME AND EXPENDITURE FOR THE YEAR 2019-20

The pandemic forced the Foundation to put on hold planned events and fundraising projects for the year, which is demonstrated in the downturn in income for the year. Budgets were carefully re-written to ensure that expenditure was similarly reduced in line with expected income levels.

Total Income: £438,164

Total Expenditure: £341,756



## 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
- Casterton Sedbergh Prep School
- House Projects
- 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:

## 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: \_\_\_\_\_