



SEDBERGH
SCHOOL
FOUNDATION

FOUNDATION NEWS AND ANNUAL REPORT 2020-21

FROM THE FOUNDATION DIRECTOR

Writing about the previous academic and financial year is an opportunity to reflect on what was the continuation of an unprecedented year of tiers, bubbles and restrictions.

Despite all of the pandemic challenges we faced at home, in our communities and at School, the Foundation was fortunate to be able to fund a broad range of activities undertaken by pupils, OS and the local community. We were able to progress our work because of your ongoing support and for that, we are very grateful.

Funds raised throughout 2020 for the Hardship Fund were disbursed well into 2020-21 as families' financial difficulties continued. The importance of educational security for Sedbergh pupils was clear and nearly £80,000 was granted in 2020-21 to help families with fees.

During this period, the School redeveloped the Queen's Hall into a new Sixth Form Centre for our pupils, with a bright open workspace and smaller breakout rooms. This development was made possible thanks to a generous legacy from a 1525 member. The redevelopment was well received by staff, pupils and parents and is a much-used space for our oldest Sedberghians.

As the Summer Term 2021 drew to a close, we bid farewell to Andrew Fleck upon his retirement. Headmaster, Principal and Trustee of the Foundation, Andrew was a good friend and wise counsel to so many. His leadership and support of the Foundation enabled us to achieve many inspiring and transformative projects over more than a decade and I know you join me in expressing my thanks to Andrew for his dedication.

My thanks to all of you for your continuing support,

Isabella Bennett



10TH, 200TH & 500TH ANNIVERSARIES

We live in extraordinary times. Milestones and celebratory historic moments serve to remind us of the familiar and act as a beacon for us all - to come together in support of an institution in which we are all a part.

2022 marks the 10th Anniversary of the Roger Lupton Scholarship Scheme. Launched in June 2012, it has now raised over £2m and funded over 20 scholars through the School over the decade. In our anniversary year, the challenge has been set to have 15 fully funded scholars in the School by 2025. Do consider joining your fellow Sedberghians in support of this crucial appeal.

Casterton Sedbergh Prep School celebrates its 200th Anniversary in 2023. A year of activities and events are planned culminating in the Gala Weekend on 24th and 25th June 2023. If you have any Old Castertonian friends and family, do pass on the invitation to participate in the celebrations which will be launched in September 2022.

Finally, Sedbergh School celebrates its 500th Anniversary in 2025. From humble beginnings, we have grown into a world-class establishment with a global reach. We must not stand still in our endeavours to continue to improve and fulfil the vision set forth by Roger Lupton in 1525.

The 500th Campaign launches formally in 2022 and aims to raise vital funds for scholarships, a new Technology Centre, Music and Sports at Casterton, new all weather pitches and a Green Investment Fund. We have raised over £4m to date and your support is key to the successful delivery of our plans. Keep a close eye on Sedbergh news in the coming weeks!



REVIEW OF ACTIVITIES 2020-2021

ROGER LUPTON SCHOLARS

£100,000 was granted to the School for Roger Lupton Scholars during the course of the year, with fewer Scholars on roll and reduced fee bills owing to Remote Learning. An additional £78,000 was disbursed from the Hardship Appeal to families in need.

Four Scholars left at the end of the Summer Term 2020, three of whom had been in the School since Year 9. All went on to prestigious universities to study a range of courses from PPE to Music.

The annual Christmas Big Give Appeal, match funded by OS 'Champion Pledgers' raised over £30,000, on par with 2019's donation income. We had reduced our target this year in anticipation of the overwhelming support we had received for the Hardship Appeal and that we were still able to match the previous year's total was an extraordinary achievement.

The Roger Lupton Endowment Fund grew by £22,000 during the year owing to investment gains made during a turbulent economic market. A further £96,000 was raised through annual giving and restricted donations. Thank you to all who supported the Scholars this year.

THE 1525 LEGACY SOCIETY

There are currently over 250 members who have pledged to leave a gift to the Foundation in their Wills.

During the course of the year, 4 members sadly passed away. Gifts from 1525 Society members' wills totalled £1.7m last year, an incredible sum which was both unexpected and much-needed to kick-start various projects which would otherwise be unable to progress during uncertain economic times.

Former Judge and OS Club President John Walford (E 66) became our new 1525 Society President in 2021. Whilst we had no events during the year, we were delighted to catch up individually with many of our members.

Events began again in 2022, at the venues which had been on hold for the cancelled 2020 (!) lunches.

2023 events are being planned in London, Sedbergh and in Scotland. Please do consider joining us in May for our annual series of 1525 Society Lunches.



A NEW SIXTH FORM CENTRE IN THE QUEEN'S HALL

During the pandemic, the School took the opportunity to reflect upon the shared social and study facilities it offers pupils outside of the House. Feedback received from pupils and parents demonstrated that a larger collective working and socialising space for the Sixth Form would be a positive improvement, giving them greater autonomy and ownership of a dedicated space.

Following the generous legacy of 1525 member Norman G Wright (H 45) who passed away in April 2020, the School was in a position to entirely redesign the upper level of the Queen's Hall from a generic function space into a bespoke Sixth Form Centre with a main central space and smaller breakout rooms and offices for quieter study. It was Norman's intention that his gift should go towards upgrading the facilities provided to pupils and we are delighted to have been able to honour his wishes in this way.



PLAY TO LEARN FUND AT CASTERTON

As Summer Term 2021 drew to a close, the Prep School embarked upon an appeal to raise £50,000 towards improvement of the outdoor play and learning facilities for our youngest Sedberghians.

The Prep School site was designed for ‘senior school use’ and as such, much of the outdoor spaces were not laid out with young children in mind. Play is a critical element of learning development and active outdoor sessions form a large part of a Sedberghian’s journey. Thanks to a generous parent and a legacy left by an Old Castertonian, the Foundation was able to fund the first project in this fund - resurfacing Top Lawn so that the climbing frame can be used all year round.

Work took place during the Easter break in time for the Summer Term where Headmaster Will Newman led the inaugural game of Four Square to the delight of the pupils.



DUCKWORTH MEMORIAL LIBRARY STEPS UNVEILED

Prior to his passing in April 2020, John Duckworth (E 45-49) had been working with the Foundation and The Edward Barnsley Workshop to design and craft a bespoke set of wooden steps for the Bracken Room in our School Library.

Sadly, John did not see the steps in situ, and once the pandemic forced educational establishments to temporarily close, our pupils were not able to make use of these expertly crafted steps until 2021.

After his passing, some key items from his collection were donated to the School, including a special limited edition folio copy of the Domesday Book. These have been on display and are much-respected items in the Archives & Heritage Centre.

BSA COMMUNITY WORK AWARD WON BY SCHOOL

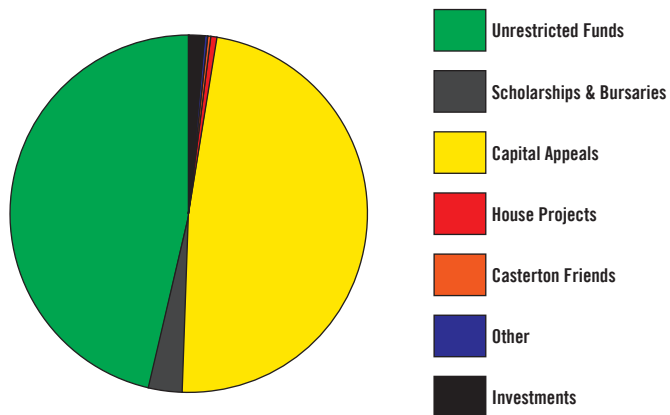
The Boarding Schools’ Association announced the winners of their 2020 awards at their virtual conference in October. Deputy Head Lotte Tulloch wrote with the good news that we had been named the winners of the ‘Best Community Work’ for the year.

“Please may I use this opportunity to thank all those who have been so pivotal in extending our work to our wider community – particularly those who have led our voluntary service programme, our conservation work, our ‘challenge week’ and all of our Christmas work – amongst so many other contributions made by Sedberghians of all ages.”

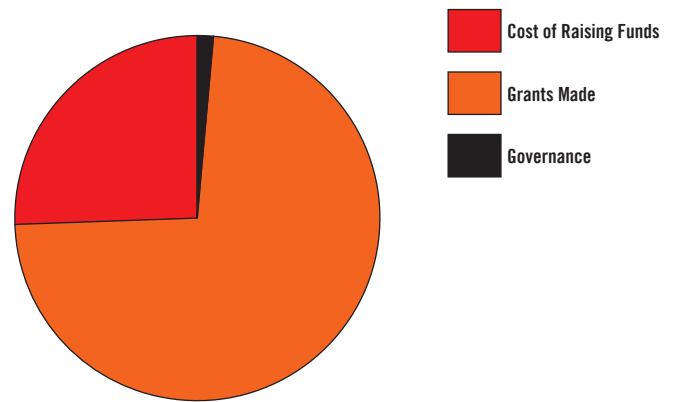
“We have a proud history of our work in our local and wider community. The sense that we are built into the local town of Sedbergh is something we take great pride in and something that we have been recognised for – winning the ‘Community Outreach’ award at the Independent School of the Year Awards in 2019.”

SUMMARY OF FOUNDATION INCOME AND EXPENDITURE FOR THE YEAR 2020-21

Whilst events were still on pause for the year, and this was reflected in lower event income and expenditure, our grant-making increased to £447,000 to cover Hardship grants and the Sixth Form Centre project. Income was up to record levels owing to generous legacies left by 1525 members.



Total Income: £3,349,795



Total Expenditure (inc Grants): £612,357

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:

- Roger Lupton Scholarships
- Casterton Sedbergh Prep School
- The New Technology Centre
- Where the Foundation needs it most

Gift Aid

Please treat as 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: _____