



## NEW FOUNDATION DIRECTOR

“I am delighted to announce that we had a strong field of candidates for the position of Foundation Director and have now appointed Isabella Bennett who will start in September.

Isabella is a very experienced fundraiser from the south of England having worked in the sector for 10 years in a number of roles in both state and independent secondary and prep schools. She is a Trustee of the Institute of Development Professionals in Education, a well-respected presenter at national conferences and seminars and I am sure she will make a seamless transition into the post whilst delivering some new and innovative ideas. We look forward to an exciting future for the Foundation and I hope that she has half the fun and enjoyment that I have had from my involvement with the whole Sedbergh community”

**Richard Witt**



### A continuing role for Richard Witt

Richard will continue his work with the Foundation on a part time basis, acting as an ambassador to maintain the many contacts he has built up over the past 15 years, a significant number of which have developed in to warm personal friendships. He is looking forward to taking on this new role, to keeping in touch with many of you and to supporting Isabella as she assumes the position of Director.



## TAX EFFICIENT GIVING FOR OUR OVERSEAS PARENTS AND OS

### Chapel and York – Hong Kong

The Foundation is delighted to announce the association of Sedbergh School Foundation with the *Chapel and York Hong Kong Foundation for Charities*. This will enable Hong Kong residents and tax payers to make tax efficient donations to the Foundation.

### British Schools and Universities Fund – New York

As with Hong Kong the Foundation has registered with the *BSUF* to enable US residents and tax payers to make donations tax efficiently.

Anyone interested in finding out more about these schemes can contact the Foundation for further information.

## A NEW CONSTITUTION FOR THE FOUNDATION

During the year 2016-17 the Trustees sought permission from the OS Club to amend the governing document, to register the Foundation as a Charitable Incorporated Organisation and to change the method of appointing Trustees.

The motion was passed unanimously on 26 November 2016. This new constitution has broadened the objects to allow the Foundation to support “broader educational initiatives” to encompass schemes such as CECATS (Cumbria Education Centre for Advanced Technology and Science).



### PETER YORKE (P52-57)

“We received the very sad news that Peter died on Thursday 12th April after being poorly for a few months. Peter was instrumental in establishing the Foundation in 2001 in conjunction with Andrew Robertson CBE and other OS. He then helped to develop it through its early years, initially with Jeremy Prall the first Director and then for another five years as administrator of the charity. Peter’s knowledge and experience of all things Sedbergh was invaluable for me as the new Director in getting to grips with the School. His calm demeanour and sense of humour made those first few years of the Foundation great fun. He established the initial Foundation database and used his amazing memory to constantly add information to it about relatives and contemporaries of OS which has helped to make the Foundation what it is today. He will be sadly missed by all of us who have worked and known him and by many Old Cressbrookians and Sedberghians.”

**Richard Witt, Foundation Director**



# REVIEW OF ACTIVITIES 2016-2017



## THE ROGER LUPTON SCHOLARSHIP APPEAL

The main fundraising activity continued to be in support of the Roger Lupton Scholarships which provide up to 100% of the fees of pupils who would not otherwise be able to receive an education at Sedbergh. In 2016-17, with your help, the Foundation was able to support six scholars.

We continue to maintain a partnership with The Springboard Bursary Foundation who identify potential candidates and provide a grant to cover approximately one third of the fees. Once again this year The Big Give Christmas Challenge provided a boost to fundraising and the opportunity for our generous supporters to donate an additional £25,000 towards the scholarship programme. We are particularly grateful for the support of two major donors to this initiative who pledged the initial matching funds.



## THE HIRST CENTRE

Thanks to significant contributions from both the School and the Foundation The Hirst Centre was completed in May 2018 at a cost of around £4m. The Foundation launched an appeal to raise £350,000 from grants and trusts, alumni and parents. Two major donations helped significantly with hitting this target.

Although no grant was forthcoming from Sport England we did receive a grant of £20k from the Yorkshire Dales National Park Authority. The Foundation subsequently agreed to run an appeal to generate the funding required to provide the equipment for the Fitness Suite.

£350k

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## CASTERTON SEDBERGH PREP SCHOOL

The Friends of CSPS continue to raise funds for projects at Casterton through a number of events held at the School throughout the year. Grants have been provided for play equipment and the "Secret Garden". The Friends also organised a major dinner dance for the Headmaster who left at the end of the summer term.

## CECATS

## CECATS

With considerable support from a variety of local and national partners including universities, colleges, schools, companies and organisations the Foundation continued to work on the concept of CECATS based at Sedbergh.

However the potential Local Enterprise Partnership (LEP) European Regional Development Fund grant was ultimately restricted for use by SMEs rendering the School's application ineligible. This project continues to be developed in conjunction with other parties based on a proposal to run a pilot programme from the Casterton SPS site.

A revised plan for the new advanced technology centre at Sedbergh is currently under consideration.



## THE HERITAGE LOTTERY FUND PROJECT

### LOTTERY FUNDED

During the year the Foundation and Archivist were successful in receiving a grant from the Heritage Lottery Fund for £28,000 towards "Celebrating 190 years of Women in Education". Based on the archives at Casterton

School and the Bronte connection this project included cataloguing some of the artefacts to make them publicly available through digitisation as well as generating theatre productions, talks and exhibitions throughout the local area.

£28k



## 1525 SOCIETY

## THE 1525 LEGACY SOCIETY

The 1525 Society recruited 16 new members during the year and sadly lost 6. Annual lunches were held at the East India Club, Sedbergh and the Glasgow Science Museum, all in May 2017 and were, as ever, well attended and much enjoyed.

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# THE HIRST CENTRE – STAGES OF CONSTRUCTION



September 2017



January 2018



October 2017



April 2018

## CELEBRATION TO THANK ALL DONORS TO THE HIRST CENTRE

The occasion of Speech Day will be used to mark the formal opening of the Hirst Centre for parents, pupils and staff with a special event planned for the autumn to thank all 120+ donors to this appeal and give them the opportunity to view the amazing new hall and facilities. Details are still being discussed – donors will be informed as soon as these are available.

120+



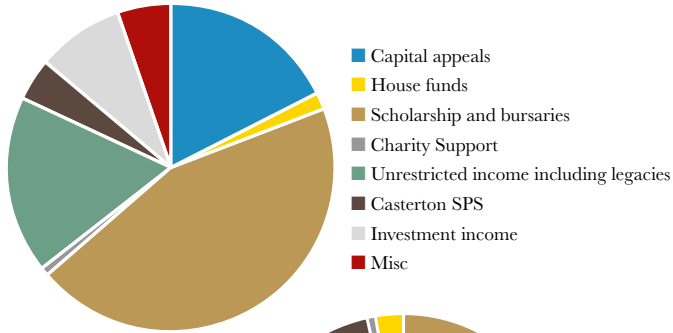
## UPDATE ON FITNESS SUITE EQUIPMENT APPEAL

£15k

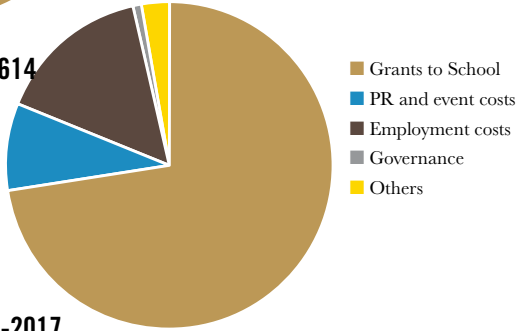
This Appeal has continued to garner support with now just over £15,000 left to reach our target and provide all the items of equipment needed for the Fitness Suite. If you are able to help with this final push please complete and return the donation form overleaf, call the Foundation on 015242 79217 or download an Appeal leaflet from the Foundation website.

# FOUNDATION INCOME AND EXPENDITURE AND SUMMARY 2016-2017

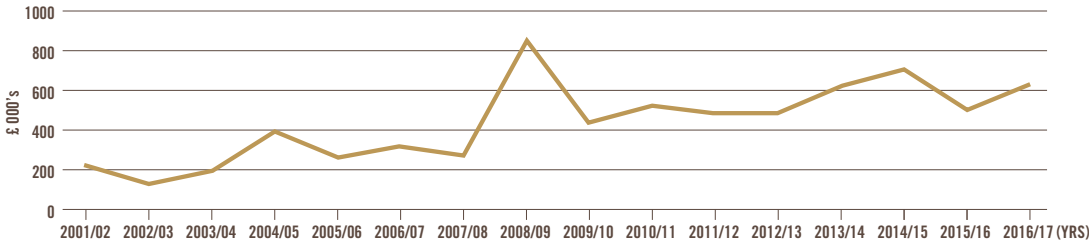
**TOTAL INCOME £624,782**



**TOTAL EXPENDITURE £651,614**



**FOUNDATION INCOME 2001-2017**



## TRUSTEES

The Trustees serving during the year ended 31 July 2017 were:

- Mr A J N Bedford  
*(Chairman and Governor of Sedbergh School)*
- Mr J C van der Velde ex-officio  
*(Chairman of the OS Club)*
- Mr W E Wild *(retired September 2016)*
- Mr A W Smith *(member of Audit Committee)*
- Mr M C Baker *(member of Audit Committee)*
- Mrs L Denney *(Governor of Sedbergh School)*
- Mrs L Bates *(Governor of Sedbergh School)*
- Mr M W Stephenson
- Mr H Bagot

Sedbergh School Foundation  
Sedbergh  
Cumbria LA10 5BR.  
Tel: 015242 79217  
Registered charity no. 1176189

## Fitness Equipment Appeal Donation Form

Please complete sections **A** or **B** along with **C**. This will allow the Foundation to claim an extra 25% at no cost to yourself, if you are a current tax payer.

### Your details

Mr/Mrs/Ms: \_\_\_\_\_ Initials: \_\_\_\_\_  
Surname: \_\_\_\_\_  
Address: \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
Postcode: \_\_\_\_\_  
Tel: \_\_\_\_\_ Mobile: \_\_\_\_\_  
Email: \_\_\_\_\_

### B By cash donation

I would like to make a single donation of:  
£   
 By Maestro/Delta/Master Card/Visa/Amex/Diners Club/CAF Card.  
 By BACS to Account no 50680249 Sort code 20-45-28 ref GYM  
 Or I enclose my cheque made payable to Sedbergh School Foundation.  
*(please tick as appropriate)*  
Card No:   
Issue Number:  Valid from: /  
(Switch only)  
Expiry Date:  Today's Date: //  
Security Code (last 3 digits on reverse of card):   
Signature: \_\_\_\_\_

### 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 Holder(s): \_\_\_\_\_  
\_\_\_\_\_  
Bank Sort Code:  -  -   
Bank/Building Society 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:



### C Gift Aid

Please treat as Gift Aid donations all qualifying gifts of money made to Sedbergh School Foundation. *giftaid it*  
today  in the past 4 years  in the future   
Please tick all boxes you wish to 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 the charity will reclaim 25p of tax on every £1 that I give on or after 6 April 2008.  
Signature: \_\_\_\_\_  
Date: \_\_\_\_\_  
Please notify the Sedbergh School Foundation 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.  
If you pay Income Tax at the higher or additional rate and want to receive the additional tax relief due to you, you must include all your Gift Aid donations on your Self Assessment tax return or ask HM Revenue and Customs to adjust your tax code.

