

# More

## The Roger Lupton Scholarship Scheme: fundraising to provide 100% bursaries

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Chair: Sean Davey

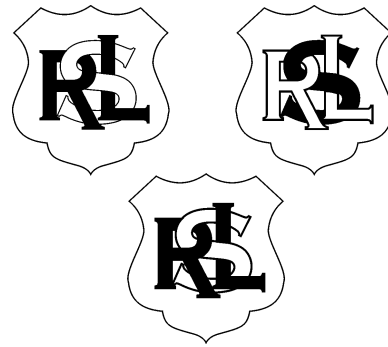
# SEDBERGH SCHOOL FOUNDATION



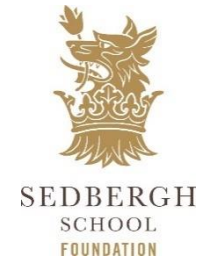
SEDBERGH  
SCHOOL  
FOUNDATION

## THE ROGER LUPTON SCHOLARSHIPS.

PROVIDING LIFE CHANGING OPPORTUNITIES FOR YOUNG  
PEOPLE WHO MAY COME FROM A DIFFICULT OR  
DISADVANTAGED BACKGROUND.



# SEDBERGH SCHOOL FOUNDATION



- ▶ Separate charity established 2001. Now about to be a C.I.O.
- ▶ I have been there since 2003.
- ▶ Currently around 535 boys and girls in senior school and 200 in Prep school. Highest numbers ever.
- ▶ Around 5,500 alumni with contact info.
- ▶ We contact around 1,000 current and former parents.
- ▶ Raises on average around £600–700k a year, legacy dependent.
- ▶ Costs around £250k with salaries, event and appeal costs.

# The Foundation Development Office

- ▶ “Are we just making the lives of the privileged a bit more privileged”

Swimming pools, sports halls, boarding houses, science labs and classrooms, 3D printers, cricket and hockey pavilions, astro pitches, netball and tennis courts, indoor cricket nets.....

This scheme was targeting boys and girls whose parents would never be able afford the fees at a full boarding school.

# Why we did it

Three main reasons:

- ▶ 1– We thought it might be a requirement when the Charity Commission stated their case for schools retaining their status.
- ▶ 2– We felt this could be more attractive to our donors than bursaries or scholarships of 10 and 20% helping the relatively wealthy middle class parent.
- ▶ 3– It seemed like something we just should be doing.

# How we went about it

- 1– Researched other 100% bursary schemes
- 2– Looked at the Arnold Foundation – Rugby
- 3– Presented to Governors and Foundation Trustees
- 4– Drew up a brief for the designer for materials/logo, etc
- 5– Decided on a separate branding and title
- 6– Set a time frame of five years to test responses

# The Strategy and the First Appeal

## LAUNCH 2012

- ▶ School five year strategic plan identified this as one of its 5 key objectives.
- ▶ We went for a theme of 5.
- ▶ 5 Young People for 5 years, target of £750,000.
- ▶ Roger Lupton (1525) established the school for “poor northern folk” as a philanthropist.
- ▶ Direct mail campaign with comprehensive case for support.
- ▶ Promoted through newsletters and website.

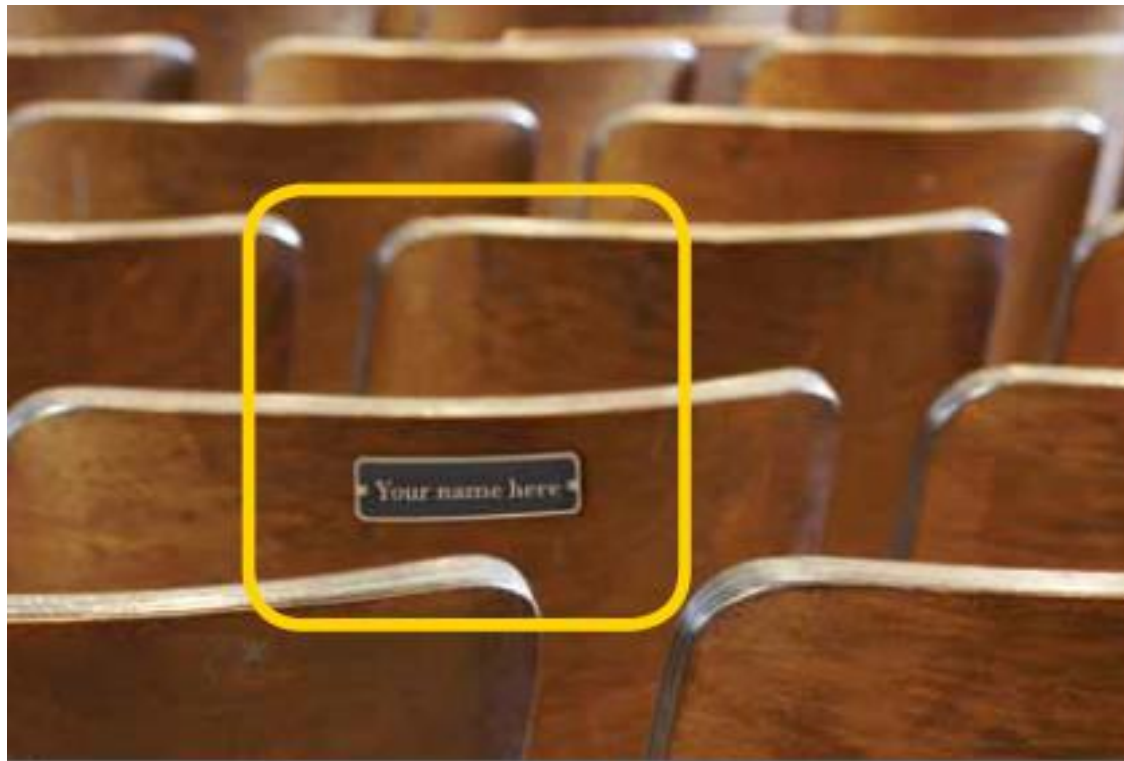
# Concerns and Risks

- ▶ 1– Appeals had previously been capital based.
- ▶ 2– Would donors and parents object to funding pupils from poorer backgrounds.
- ▶ 3– Would it reduce the Foundation's overall income.
- ▶ 4– Would we still be able to raise money for other capital projects over the five years.
- ▶ 5– If it failed how would we be able spin it.
- ▶ 6– How would we identify the individuals.
- ▶ 7– What would the consequences be for the pupils at school and home.



# Initial responses

- ▶ Two of our warmest supporters pledged £25k a year for five years each. Sponsoring two of the 5 children. (>£300k with GA).
- ▶ We had a significant number (75) of 5 year pledges of total value of £1,000.
- ▶ Total raised or pledged amounted to around £400k.
- ▶ Gave us the confidence that we were on the right track and that whatever happened now we could have some confidence that the appeal would be seen to succeed.



### Name a chair – our token of thanks

The final stretch of any challenge is always the most demanding and we still need lots of help. To encourage further support and in recognition of our thanks we are now offering donors the opportunity to have their name featured on a plaque fitted to one of the new chairs in Powell Hall

This opportunity is available to all those supporting the appeal with a gift of £1,000 whether as a single or regular donation, for example as

- £16.67 per month for 5 years
- £200 per annum for 5 years
- A single cash gift of £1,000

In the words of Tony Smith (parent):

*'I believe that all pupils, not just the recipients of a Scholarship, will benefit from a scheme to attract an extraordinary range of the most talented youngsters in the country'*

# Follow on

- ▶ Drew up a plan to maintain the appeal profile with commentary in monthly e-newsletters, references at Speech day and Headmasters talks at events.
- ▶ After 6 months mailed a Roger Lupton Scholarship Newsletter.
- ▶ Did a direct mail appeal the following year. Acorns to Oak Tree. Supported with internal telephone campaign to alumni.
- ▶ Continued with RLS newsletter in between annual mailings

# Initiatives and Activities

- ▶ Mansion House Events
- ▶ Springboard Bursary Foundation
- ▶ Big Give Christmas Challenge
- ▶ House Anniversary Appeals
- ▶ Sedbergh Cycle Sportive
- ▶ Donating shares
- ▶ Major donors private dinner – RSM

# Springboard Bursary Foundation

- ▶ One of first boarding schools in north to work with Springboard.
- ▶ Identify the young people, work with school and families, give financial support.
- ▶ Three of our 11 pupils have been from Springboard.
- ▶ Usually 6<sup>th</sup> form entry not Year 9.
- ▶ Just merged with the Royal National Children's Foundation.
- ▶ Planning to increase from 600 to 1,500 bursaries.

# House Fundraising

- ▶ 100 AND 125 YEAR ANNIVERSARIES Boys Boarding Houses.
- ▶ Special appeal materials for each of three houses.
- ▶ Support from Housemasters.
- ▶ Anniversary dinners at Sedbergh and in London.
- ▶ Silent Auctions for each house.
- ▶ Hart House 125 yr anniversary raised £130k.
- ▶ Winder House 100 yr anniversary raised £105k.
- ▶ Powell House 100 yr anniversary raised £70k.

# BIG GIVE CHRISTMAS CHALLENGE

- ▶ Three days online giving on Big Give Platform.
- ▶ Need a donor to make a pledge say £5k.
- ▶ Big Give get Reed Foundation to match it £5k.
- ▶ You then have three days in December to get online donations of £10k which are matched.
- ▶ On average we generate around £25k each year. Almost one school fee.
- ▶ Generated whole new tranche of donors, mainly female and mainly parents.



# BIG GIVE CHRISTMAS CHALLENGE



 **theBigGive.org.uk**  
CHRISTMAS CHALLENGE 2016  
MIDDAY 29<sup>TH</sup> NOV - MIDDAY 2<sup>ND</sup> DEC

 **SEDBERGH**  
SCHOOL  
FOUNDATION

 **Support the Roger Lupton Scholarships**  
and donations will be doubled between  
midday 29 November and midday 2 December.  
*Donate at [www.sedberghschool.org/foundation](http://www.sedberghschool.org/foundation)*





# SEDBERGH SPORTIVE

Join our 30 or 70 mile sponsored cycle to raise funds for the Roger Lupton Scholarship Programme.

# Five Years On

- ▶ £1m raised or pledged
- ▶ 11 pupils funded
- ▶ 3 Springboard pupils
- ▶ £300k remaining to cover current pupils
- ▶ £150k cash in endowment
- ▶ £1.5m legacy pledge for endowment
  
- ▶ But

# Issues we are facing now

- ▶ 5 year direct debit and pledges coming to an end.
- ▶ Generated <£10k in most recent 2017 appeal.
- ▶ Conflicted with new Sports Hall appeal.
- ▶ No “House Anniversaries” coming up

# Long Term Strategy

- ▶ Major donors – try to retain the major annual gifts,
- ▶ Endowments– identified we want to build a £5m endowment to provide the RLS in perpetuity.
- ▶ Legacies to fund endowment.
- ▶ Continue RLS with Annual Appeals and Big Give Christmas Challenge.
- ▶ May have a fundraising pause for RLS as we face a new capital appeal in 18/19.

# The 1525 Society

- ▶ We have the 1525 Society, we think, the largest Legacy Society of any school with around 260 members who have pledged to leave a gift in their will.
- ▶ Would the idea of building the scholarship endowment increase the number of pledgers, the level of gifts or would it just reduce the unrestricted legacies the governors love best.

# Conclusion

- ▶ It has changed 11 young people's lives.
- ▶ We hope these pupils will be the most engaged alumni.
- ▶ It has raised £1m.
- ▶ It has generated gifts from lots of new donors including parents and younger females.
- ▶ It has introduced the concept of supporting less privileged young people to alumni, parents and pupils.
- ▶ It helps with issues/perceptions raised over charitable status.
- ▶ We haven't had one single complaint about the concept.

# Sedbergh School Foundation

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