



Foundation*400*

The campaign for the Heriot's Foundation

A photograph of two young girls in school uniforms walking away from the camera. They are wearing dark blue jackets and plaid skirts. The girl on the right has her arm around the girl on the left. They are walking on a paved surface, and other people are visible in the background.

The campaign goal is to
raise £15m to secure the
Heriot's Foundation

The ambition of Foundation400 is to raise £15 million to endow George Heriot's Foundation by the School's 400th Anniversary in 2059. While the Heriot's Foundation is one of Scotland's oldest and most enduring charities, it does not enjoy the security of an endowment and 90 percent of its funding comes directly from School fees.

However, Foundation400 is not about numbers. It is about the lives of children who have lost their mum or dad. It is about the School helping these boys and girls from ordinary backgrounds to flourish.

Losing a loving parent is extremely hard for any young person. Since 1659, the Heriot's Foundation has been affording children who find themselves in this situation a great education that is fully supportive of their needs.

Please take some time to read this booklet about the Heriot's Foundation and about Foundation400. Support at all levels will be instrumental in helping bereaved children from in and around Edinburgh to make the most of their futures.

A Message from the Chairman of the Governors

In 2059 George Heriot's School will celebrate its 400th Anniversary. By then, this generation will have passed into the annals of the School's history and perhaps the man or woman who will lead Heriot's into its fifth century is currently a young Herioter tearing around the Junior School playground.

Much will have changed by then, just as the School has changed greatly over the three and a half centuries since the Foundation stone was first laid and the first boys walked through the Pend. We cannot foresee what all of those changes will be but we know what makes Heriot's Heriot's. And at the core - the very spark of life that is fundamental to our School - is the Heriot's Foundation. Since 1659, hundreds of children who have experienced loss of a parent have been supported at Heriot's in accordance with the wishes of our founder.

George Heriot left his bequest to build our magnificent School to look after the 'faitherless bairns' of Edinburgh. However today only a very small endowment remains to contribute towards the cost of the Foundation. While the School currently can, and continues to, support the Foundation through fee income, I believe it is the responsibility of this generation to build an endowed fund that will provide for the long-term financial security of the Foundation. We can only do this with your

help and it is the reason we are embarking on Foundation400.

I believe passionately that every Herioter benefits because of the Foundation. When your peers have shouldered a shattering loss it encourages compassion, consideration and perspective. These are all qualities that we want our young people to carry into their adult lives.

The Foundation is in the DNA of the School. I feel duty-bound to safe-guard it: I see the children every day who are flourishing at Heriot's because of the place the Foundation afforded them. They have all been through an extremely tough time in their young lives and it is a privilege to be part of the process that will help them make the most of their futures.

"I believe passionately that every Herioter benefits because of the Foundation. When your peers have shouldered a shattering loss it encourages compassion, consideration and perspective."

Sandy Paton, Chairman of the Governors



*Foundations Malcolm Hunter, class of '47
and Emily MacLeod*



“Both bereavement and youth
can be times of major transition
and significant disruption to the
general flow of social life and
personal emotions.
Young people experiencing
bereavement may be
doubly vulnerable.”

Joseph Rowntree Foundation

Heriot's legacy – then and now

In December 1623 George Heriot, a successful Scottish goldsmith, finalised his will, making an unprecedented gift to the people of Edinburgh. He determined that the bulk of his estate be used by the city to build a Hospital for the 'edification, nourishing and upbringing' of children whose father had died.

With Heriot's legacy, the city set about constructing a building 'that probably excelled every Structure of its Kind then upon Earth'. But more than create a magnificent building – Heriot had begun the first, and now the most enduring, educational charity in Scotland.



Heriot's is a very different place than it was in the 17th century. Political, economic and social changes have been immense and what started as a boys' boarding institution for less than 100 'fatherless bairns', is now a thriving independent day-school for 1650 pupils from the ages of 4 to 18.

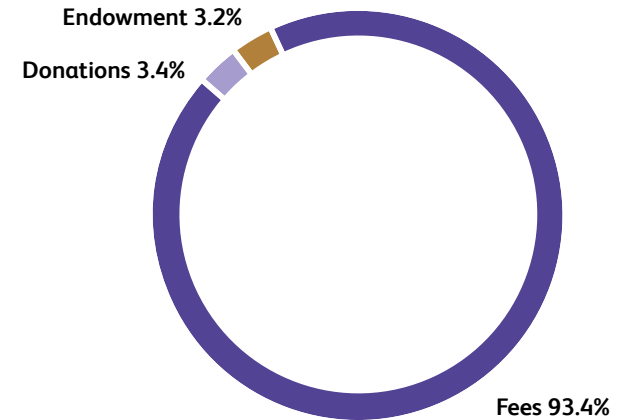
Throughout this exciting history, custodians of the School have kept the Foundation at its heart continuing to provide fully-funded places for the children of Edinburgh who have lost a parent.

With the School now providing for up to 80 Foundationers (and need out-stripping the number of places available) the annual cost of the Foundation can reach upwards of £900,000.

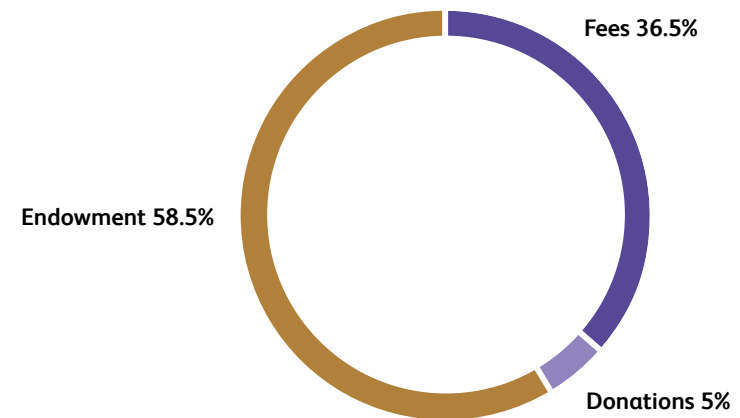
With the generous support of the Heriot's community over the years, the School has been able to establish an endowment of £800,000 which provides in the region of £25,000 every year – just seven per cent of the total cost and the equivalent of less than three Foundation places.

With a £14 million increase in the endowment – the ambition of Foundation400 – forty Foundation places would be financially secured in perpetuity.

Breakdown of Foundation income at launch of Foundation400



Target for Foundation income by 2059



The Heriot's Foundation in the 21st Century

Who is supported by the Heriot's Foundation?

School children in Edinburgh and surrounding areas who have experienced the death of one or both parents are eligible to apply for a Foundation place. There are also financial criteria that families have to meet to ensure the places go to those who otherwise would not be able to afford to attend Heriot's.

If a child is accepted as a Foundationer, all School fees and additional costs, including uniform, school trips and books will be covered to ensure that there is no financial risk to a child's education once they have started at Heriot's.

How are Foundationers supported at Heriot's?

First and foremost, the very nature and ethos of Heriot's provides a secure and supportive learning environment for children who have experienced the trauma of parental loss. The qualities of kindness, empathy and respect are engendered from nursery right through to the senior school. In 2018, Heriot's was awarded the Gold Rights Respecting Schools accreditation by UNICEF.


Specifically, the School has invested in resources to support Foundationers. A dedicated post exists within the guidance team to offer full-time support to all Foundationers as and when they require it. For some contact is intensive whereas for others it is minimal. Teachers throughout the school have undertaken specific training in understanding how bereavement can affect young people. The School also runs a loss and grief peer-group education programme called Seasons for Growth on a rolling basis.

Parents also have the opportunity to maintain contact with the support team and to join peer support networks with other Foundation family members.

“Since Garry killed himself in 2007 both of them have coped extraordinarily in their own ways. What Heriot's has been able to do is normalise their situation. There are so many others at Heriot's who have been through losing a parent that they didn't feel different. There is support here that other schools just can't provide, there were times when they needed it and times when they didn't but it is there constantly. Heriot's has given them confidence in themselves.”

Shona Sturgeon, mother of Foundationers Emma and Andrew





GEORGE HERIOT'S SCHOOL

FOUNDED AS A HOSPITAL SCHOOL
IN 1628 IN IMITATION OF CHRIST'S
HOSPITAL IN LONDON AND IN
COMPLIANCE WITH THE WILL
OF GEORGE HERIOT (1563-1624),
A GOLDSMITH AND JEWELLER
AT THE COURT OF KING
JAMES THE SIXTH AND FIRST.

FROM 1886 A DAY SCHOOL FOR
BOYS, AND SINCE 1979 FOR BOTH
BOYS AND GIRLS.

“Losing a parent isn’t something
I would wish on my worst enemy
but becoming a Founder
was amazing for me. It allowed
something great to come out of
something so bad. I knew getting
the most out of the opportunity
to come to Heriot’s was the right
thing to do and I can safely say
that without Heriot’s I would not
be where I am.”

Aidan Duffy (2010) joined Heriot’s in S3

Fraser and Olivia McLean's father Colin drowned during a family holiday in Spain in 2011. They were aged 8 and 5 at the time. Their mother Jenny reflects on how the tragedy has affected the children and the positive difference becoming Foundationers has made to their lives and to hers.

Olivia had only been in P2 at Corstorphine Primary School a few months when Colin died while we were in Spain on holiday. We were at the beach and Colin and Fraser were playing in the sea together when Colin got pulled out by a current. We don't know exactly what happened. He was a strong man but when they got him out there was nothing that could be done. It was horrendous. The kids were there and saw it all.

When I heard about the Heriot's Foundation my first reaction was 'no way' – the thought of causing Fraser and Olivia more upheaval by taking them out of school just didn't seem right. It was my sister-in-law that persuaded me to go along to the open day. The youngsters we met kept saying how much they enjoyed being at Heriot's and there was just a nice feeling about the place. I was taken with the fact that there would be no worries about how they would cope with the transition to senior school.

When I met with Mr Adams, who was Head of the Junior School at the time, he asked about the children the whole time - what they were interested in; how they were finding school and how I felt they might cope with the change. It was obviously important to him to know that Heriot's was going to be the right place for Olivia and Fraser as individuals. He told me about the support that the School could provide and that there would always be someone for them to speak to one-to-one when they wanted to.

Before Colin died, Olivia had been streets ahead in her reading and was thriving at school but it was like her head couldn't cope with the situation. She seemed to lose everything. It was a concern but I was assured that she could repeat Primary 2 and being in a class of 21 children rather than 35 has been a huge help. The children were already at a very good school but I was afraid they would get lost and that the school just wouldn't have the resources to give them the particular attention they might need.



Heather* is fantastic. She looks after the children and the mums and dads as well. She has invited speakers to talk to us and arranges time for us to get together. It is so helpful being able to talk through things with other parents who have lost their partner and are now bringing up kids on their own.

Education is a major part of the jigsaw for any family. As parents you talk all the time about how the children are getting on at school. When you are on your own you cannot share the worries and decisions, and of course it is made far worse because the worries now include ones about how losing their dad will affect their learning. For me, Heriot's has taken away this load.

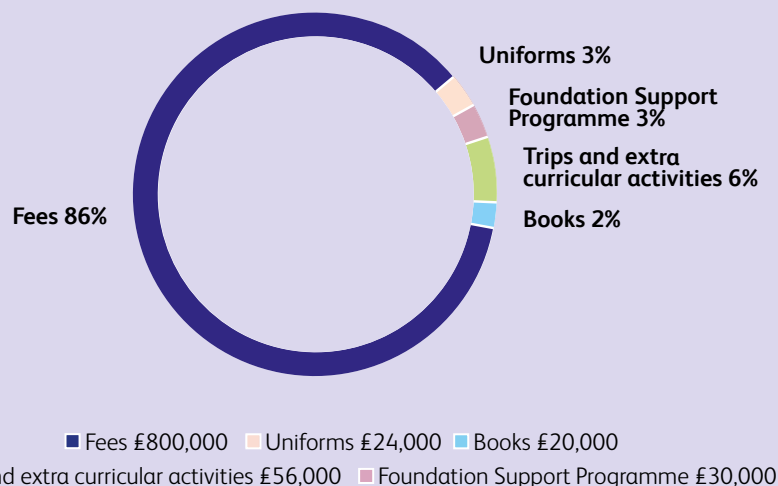
Heriot's is such a supportive environment for the children. They are encouraged to be individuals, to excel in their own way and to believe in themselves. Despite everything Fraser and Olivia are happy kids who want to do well.

“Before Colin died, Olivia had been streets ahead in her reading and was thriving at school but it was like her head couldn't cope with the situation. She seemed to lose everything.”

What will my gift to the Heriot's Foundation achieve?

Each Foundation place costs Heriot's annually an average of £12,000. Gifts of all levels are instrumental in supporting Foundation pupils.

Breakdown of Foundation Annual Costs (based on 80 Foundationers)



£350,000

Could endow in perpetuity one named Foundation Studentship covering all fees and costs.

£50,000

Could endow in perpetuity an Annual Bursary for a Foundationer that covers all their supplementary costs including uniform, trips, extra-curricular activities and books.

£10,000

Could endow in perpetuity a Foundation Music Award to enable a talented Foundationer to take instrumental lessons and participate in musical activities.

£6,000

Could endow in perpetuity a Books Bursary that purchases all the school books a Foundationer requires.

Every gift makes a difference

A gift of £30 a month

plus Gift Aid for one year could buy a bus pass for a Foundationer who lives outside the city. For some families this is a prohibitive cost even when all fees are covered.

A gift of £20 a month

plus Gift Aid for six years could purchase school uniforms and PE kit for a Foundationer throughout their senior school education.

A gift of £10 a month

plus Gift Aid for two years could pay for a junior Foundation pupil to participate in their five-day P6 activity trip. For many children this is the longest time they have been away from their family and often an even bigger milestone for Foundation children.

Making your gift go further

Tax-Effective Giving*

The Government has made various tax incentives available to individuals and companies to encourage giving to charity. You can structure your giving to the Heriot's Foundation in such a way that it helps you to save tax and helps us reach our campaign goal.

Giving shares

Donating shares as a gift to the Heriot's Foundation is one of the most tax-effective ways you can give money.

- You won't have to pay any capital gains tax on the shares you donate and you can claim income tax relief as well.
- If you are a higher rate (40%) taxpayer you will be able to claim income tax relief equal to 40% of the value of the gift.
- If you are a highest rate (45%) taxpayer you will be able to claim income tax relief equal to 45% of the value of the gift.

Inheritance Tax

Gifts to charity are deducted from the value of your estate before applying the nil band and calculating the inheritance tax due. There is no limit on how much can be gifted and as a result charitable gifts can be used to entirely eliminate any inheritance tax liability.

Gift Aid

If you are a UK tax payer then for every £1 you give to the Foundation, Heriot's can claim an extra 25p from the Government. This is equivalent to the tax you have paid on £1 of your earnings. Therefore a gift of £500 is actually worth £625. This mechanism is called Gift Aid.

* Tax relief information is correct as at October 2018 but maybe subject to change. Please consult the HMRC website for the most up-to-date information.



“We didn’t feel different. We knew the support was there if we needed it but we were just able to get on like normal pupils and enjoy school. If we hadn’t been able to come to Heriot’s after our dad died I think we probably wouldn’t have been going to University and would be working on the family farm.”

Fergus and Innes Brown (2015) whose father died in a road accident when they were four years-old

Giving to the Heriot's Foundation

When you support the Heriot's Foundation the gift is more than just money. You are giving a bright, young person who is coping with the tragedy of losing a parent, the chance to come to Heriot's where they will be supported to get the most from their school days. It is a chance they otherwise wouldn't have. A gift to the Foundation is literally life-changing.

CAMPAIGN GIFTS

George Heriot's is looking for partners who share our belief in the Foundation and who wish to make a transformative gift to accelerate the campaign towards its 400th Anniversary goal.

The Foundation 400 Campaign offers many exciting opportunities to make a life-changing difference to the education of a young person who has lost a parent, including with a named Foundation studentship, a books bursary or a music award.

Gifts can be made over a period of years to take full advantage of tax incentives and can be given either to cover annual expenditure or to be held in the School's endowment to support a full or partial Foundation studentship in perpetuity.

100% OF EVERY GIFT IS USED FOR THE PURPOSES DIRECTED BY THE DONOR

REGULAR GIFTS

Giving a manageable amount regularly, either monthly or year-on-year, is a way that everyone can make a difference to this campaign in a way that is both sustainable and personally appropriate.

A dependable gift of £10 every month is equal in value to the annual return on additional endowment funds of £4,000. Regular gifts can be used to directly fund Foundation fees as well as books, uniforms and enable participation in School trips.

EVERY GIFT MAKES A DIFFERENCE, NO MATTER HOW LARGE OR SMALL

LEGACY GIFTS

Heriot's owes its very existence to a legacy. Since George Heriot's bequest in the 17th century, many others have chosen to give back to the School in their Will.

Legacy gifts, both large and small, play a very important part in Heriot's philanthropic history. Our 1628 Society for legacy pledgers is a thriving community of former pupils and friends who are committed to seeing Heriot's excel many years into the future.

A legacy is the gift that everyone can make, regardless of their financial position during their lifetime. A gift in your Will to the Heriot's Foundation will support generations of Foundationers to come.

YOU CAN GIVE TO HERIOT'S TAX-EFFICIENTLY FROM MOST COUNTRIES

“It was a fantastic release not having to worry on my own about how they were coping at school and what to do if they weren't. I know at Heriot's they will do as well as they can and will be supported all the way.”

Kelly MacLeod, mother of Calum and Emily, whose husband Alistair died of cancer in 2012

“The Foundation is what
made Heriot’s more than
300 years ago and it is what
makes Heriot’s now.
We are a school like no
other, and of that - and of all
our Foundationers -
I am very proud.”

Lesley Franklin, Principal





George Heriot's School

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