

About the Trust: a guide for applicants

The Summerfield Charitable Trust was established by Ronald Summerfield, a Cheltenham antique dealer, shortly before his death in 1989. The Trustees have discretion as to which charitable uses to apply the funds.

In 2009 £1,153,312 was awarded in a total of 49 grants, from £500 upwards. A copy of the latest Trust accounts is available upon request.

Charities applying to the Trust must either be based in the county of Gloucestershire or they must be engaged in a project that is of specific benefit to residents of the county.

VIEWED ESPECIALLY FAVOURABLY ARE PROJECTS AND ORGANISATIONS WORKING IN:

- The arts, museums and the built heritage;
- The environment and natural heritage;
- Community work;
- Education, sport and recreation;
- Vulnerable or disadvantaged sectors of society.

THE TRUSTEES ENCOURAGE APPLICANTS TO SHOW THEY HAVE CONSIDERED:

- The impact of their project on the environment;
- Planning for long term self sufficiency;
- The potential to work in partnership with other statutory and non-statutory funders;
- Their active involvement with the people who will benefit.

DONATIONS ARE NOT GIVEN TO:

Medical research; private education; animal welfare appeals; fund trips abroad; projects that have already taken place.

Appeals from churches: will not be considered in 2010. You are advised to apply to the Gloucestershire Historic Churches Trust.

Individuals: Applications from individuals are no longer accepted. Should an individual resident of Gloucestershire need financial support for educational needs, they are recommended to contact the Lumb's Educational Trust. SCT awards an annual grant to Lumb's to enable it to support local residents on SCT's behalf. Write to: Mrs Margaret Wanless, 4 Manor View, Cold Pool Lane, Up Hatherley, Cheltenham GL51 6HZ.

Charities which have been in receipt of a grant should not re-apply for at least two years unless they have specifically been asked to do so.

PROCEDURE:

The Trustees meet quarterly - usually in January, April, July, and October – to consider all applications received prior to the deadline date (see overleaf for dates).

Applicants must read the website and download a grant application cover sheet. It is essential that a concise explanation of the application (no more than one side of A4) is sent to me by email. However, you must send a hard copy which might have more detail, and any supporting documentation to me at the address below.

Applicants are welcome to telephone and discuss queries with me at any stage.

Please note that I often ask one of our independent advisers to visit organisations who apply to the Trust.

I aim to inform applicants of the Trustees' decisions as soon as possible after the quarterly meetings. All appropriate new applications are acknowledged: stamped addressed envelopes are welcomed.

Contact: Mrs Lavinia Sidgwick, Administrator
Summerfield Charitable Trust
P.O.Box 4
Winchcombe
Cheltenham
Gloucestershire
GL54 5ZD

Telephone: 01242 676774

Email: admin@summerfield.org.uk

Website: www.summerfield.org.uk

Registered charity number 802493

**CHECKLIST FOR
MAKING AN APPLICATION**

1. Have you filled in a grant application cover sheet?
2. Have you included your full name, address including postcode, a telephone number and email address?
3. Have you included a financial summary and your most recent accounts?
4. Have you made a note of the deadline date (listed below)?
5. Have you enclosed all other necessary documents, including a sae?
6. Have you emailed a précis of the application to the administrator?

DATE OF TRUSTEE MEETINGS 2010

	<u>DEADLINE DATE</u>
FEBRUARY 2010	31 st December 2009
APRIL 2010	31 st March 2010
JULY 2010	11 th June 2010
NOVEMBER 2010	30 th September 2010

*Applications received after the deadline date may be considered at the next meeting.
Please advise us if you wish to withdraw or postpone your application.*

*For more information visit our website:
<http://www.summerfield.org.uk/>*

**THE
SUMMERFIELD
CHARITABLE TRUST**



Trustees:

Charles Fisher (Chairman)
Jamila Gavin
Edward Gillespie
Jan Urban Smith
Richard Wakeford

Guidelines

Revised & updated November 2009