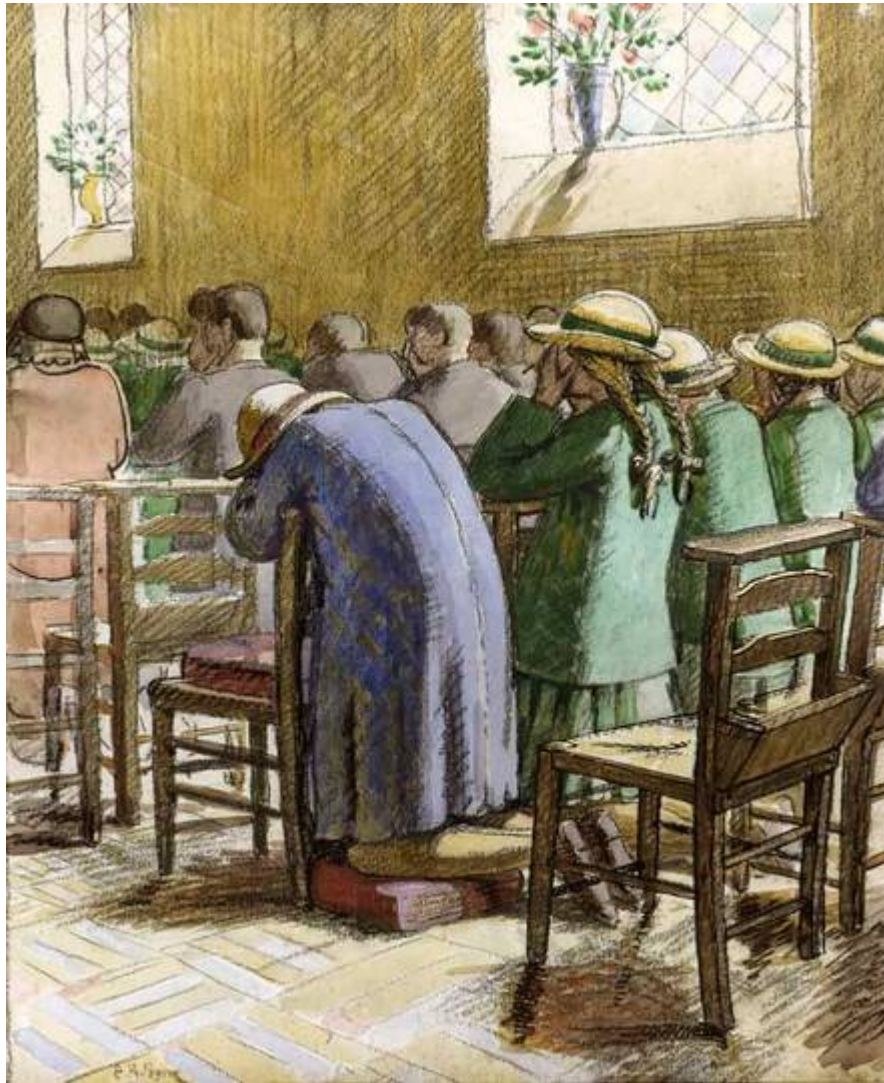


THE
SUMMERFIELD
CHARITABLE TRUST

*Trustees: Charles M. Fisher, Mrs Jamila Gavin,
Dr. The Hon. Gilbert Greenall,
Mrs Jan Urban-Smith and Mr Richard Wakeford*



GRANTS PAID

1st January to 31st December 2006

Registered charity number 802493

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Front cover Photo:

Box Village Hall Management Committee: Edward Payne Centenary Committee exhibition and lecture (see page 7).

About the Trust

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 2006 £434,169 was distributed in a total of 78 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 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.

Individuals are very rarely supported. They must be residents of Gloucestershire. Trustees request individuals to use a specialist charity to sponsor their application.

Donations are not given to:

- Medical research;
- Private education;
- Animal welfare appeals;
- Fund trips abroad;
- Projects that have already taken place.

PROCEDURE: The Trustees meet quarterly - usually in January, April, July, and October - to consider all applications received prior to the deadline dates. These dates are occasionally subject to change and you are advised to check on our website or by contacting the office to confirm dates.

TO APPLY: Applicants must log on to our website to view information about eligibility for funding and download a copy of the current guidelines and a grant application cover sheet. **A cover sheet must be completed and returned before an application can be submitted to the Trustees.** If you have any queries at any stage of the application process, you are welcome to email or telephone. Please note that we often ask one of our independent advisers to visit organisations who apply to the Trust. We aim to inform applicants of the Trustees' decisions as soon as possible after the quarterly meetings. We do not accept faxed or emailed applications.

Contact:

*Mrs Lavinia Sidgwick, Administrator
Summerfield Charitable Trust*

P.O.Box 4, Winchcombe, Cheltenham, Glos GL54 5ZD

Tel: 01242 676774 **Email:** admin@summerfield.org.uk

Web: www.summerfield.org.uk

Introduction

During 2006 the Summerfield Trust donated £434,169 to a wide variety of good causes. In line with our stated policy these grants were made exclusively to beneficiaries based in Gloucestershire. In this report there is an analysis of the grants, and this highlights the varying sizes of the grants.

This year we used the revised guidelines, which resulted from our strategic review held in 2005. We continue to encourage as diverse a range of applicants as possible, and we are keen to be involved in projects, both large and small, that are imaginative and to which we can make a significant contribution.

We conducted a review of our investment strategy in conjunction with our advisers. There has been a useful rise in the value of our investments.

We continued to give substantial support to the Arts, and during the year we gave £60,000 to University of Gloucestershire to improve their art gallery in their Pittville site in order that it can receive major touring exhibitions, house a permanent exhibition and be a showcase for the best contemporary art and design. The Summerfield lecture was given by Henry Porter on the subject of the erosion of civil liberties. This was an important contribution to a nationwide debate. We also made significant contributions to the restoration works at Berkeley Castle and Tewkesbury Abbey. We were also pleased to be able to help with major improvements to the hospices in Minchinhampton and the Forest of Dean.

The wide range of applicants creates a demanding level of understanding for the Trustees, combined with an ability to decide on the relative merits of different projects in different fields. They are greatly helped in this by our team of volunteer advisers, and our administrator, Lavinia Sidgwick. All of this has been done with a careful eye on controlling our running costs.

continued/...

Finally I would like to thank my co-trustees for the generous allocation of their time. They are all busy people with their own careers and yet they find the time to do this work with unfailing good humour. They help to make Gloucestershire a better place.

Charles M Fisher
Chairman of the Trustees

Trustees:

Mrs. Jamila Gavin
Dr. the Hon. Gilbert Greenall
Mrs. Jan Urban-Smith
Mr. Richard Wakeford

Advisers:

Anthony Boden
Caroline Barling
Alyson Gillespie
Paul Harper
Sisi Janes
Sue Kinder
Phillip Kingston
Ro Kaye

Mary Keen
Ros Leigh
Robin Lunn
Sally Mackie
Anthea Massey
Manny Masih
Jill Matley

Barbara McNaught
Diana Owen
Richard Owen
Tim Raphael
Jessica Russell
Lesley-Anne Sayers
Rosemarie Sollis

About the Trustees

CHARLES FISHER

Charles Fisher went to school in Cheltenham, and then graduated from Oxford University. He has pursued a career in business and was Chairman & Chief Executive of Sharpe & Fisher plc from 1989 to 1999. He is currently Chairman of Mowlem plc, and a director of a number of other major companies. He was also the Chairman of Cheltenham Arts Festivals Ltd from 1990 to 1995. He became Chairman of the Trustees in 1999.

JAMILA GAVIN

Born in India, Jamila Gavin has lived in Gloucestershire for over thirty years. First a piano scholar at Trinity College of Music, London, then in Paris, she finally joined the BBC and worked as P.A. Director for Music and Arts on Television. On moving to Gloucestershire she turned to writing children's books, and has since produced numerous stories and novels for the whole age range, as well as plays for the stage, radio and television. She was runner up for the Guardian Children's Fiction Award, has been shortlisted for numerous other awards, such as The Smarties Prize and the Carnegie Award, and was winner of the Whitbread Children's Book of the Year Award in 2000.

GILBERT GREENALL

Gilbert Greenall served in the army after going to Sandhurst. He subsequently trained as a doctor and was Senior House Officer at Cheltenham General Hospital. Since 1979 he has specialised in humanitarian emergencies and post conflict recovery, and is a member of the United Nations Disaster Assessment & Co-ordination team. He has led missions in many countries in recent years, including East Timor, Kosovo, Mozambique and Albania. He has also worked for the European Union and the Department for International Development.

JAN URBAN-SMITH

Jan Urban-Smith has lived and worked in Gloucestershire for the last 26 years. She has been an English teacher, Head of Sixth Form and Deputy Headteacher. She currently works as an adviser for the Local Education Authority.

RICHARD WAKEFORD

Richard Wakeford lives in Winchcombe and is a senior executive, with wide experience in rural and environmental issues. He is currently Head of the Scottish Executive Environment and Rural Affairs Department, having previously been Chief Executive of the Countryside Agency.

The Arts, Museums and the Built Heritage

BERKELEY CASTLE CHARITABLE TRUST £10,000	Towards the costs of repairing the decorative entrance to the 12th century Norman Keep.
BOX VILLAGE HALL MANAGEMENT COMMITTEE £500	Edward Payne Centenary Committee: exhibition and lecture.
CAMPBILL VILLAGE TRUST / TAURUS CRAFTS £5,000	Towards the costs of a sculpture show.
CHELTENHAM ARTS FESTIVALS LTD £3,500	Summerfield lecture, given by Henry Porter.
COTSWOLD LIVING £1,000	Exhibition and book to acknowledge and celebrate 70 years of Ray Finch, founder of Winchcombe pottery.
EUROPEAN BLUES ASSOCIATION £500	Guitar and Harmonica Workshops during Blues Festival in Gloucester.
FAIRGAME THEATRE £12,500	Theatre production inspired by Cheltenham's early Regency theatre. Grant used to involve various community groups.
GLOUCESTER CATHEDRAL £5,000	Towards the repair of the tomb of King Edward II.
GLOUCESTERSHIRE HISTORIC CHURCHES TRUST £5,000	Historic church preservation projects throughout Gloucestershire.
GLOUCESTERSHIRE PRINTMAKING CO-OPERATIVE £5,000	Donation made to buy a lithography press and a relief press for a community print programme.
GUILD OF HANDICRAFT TRUST £10,000	To relocate collection of early 20th century arts and crafts pieces to Court Barn, Chipping Campden.
ROSES THEATRE TRUST £5,000	To replace and improve cinema projection system
ST. MARY'S CHURCH, DYMUCK £1,000	Refurbishment of the Dymock Poets Exhibition at St Mary's Church, Dymock.

STROUDWATER TEXTILE TRUST
£3,600

Costs of workshops to take place during 2007 Textile Festival.

TAURUSVOICE
£5,000

Towards the costs of a local and national tour of Pinocchio, a musical.

TEWKESBURY ABBEY APPEAL TRUST
£10,000

Towards relaying pathway into the Abbey.

TRANS-FORMATIONS
(Host charity: Glos Resource Centre Ltd)
£5,000

Local company created a new dance combining classical Bharat Natyam and African folk dance techniques. SCT awarded a grant to support a county tour.

TWO'S COMPANY DANCE AND MUSIC (Host charity: Amadeus Orchestra)
£1,200

A performance of music and dance at the Pittville Pump Room in Cheltenham.

UNIVERSITY OF GLOUCESTERSHIRE
£60,000

To refurbish art-gallery at Pittville site.

Total – 19 grants
£148,800

THE ARTS, MUSEUMS AND THE BUILT HERITAGE

The Environment and Natural Heritage

**BRITISH TRUST FOR
CONSERVATION VOLUNTEERS**
£3,000

To purchase new equipment and a trailer.

SOIL ASSOCIATION
£4,200

To run farming workshops for Gloucestershire schools.

**ST DOMINIC'S CATHOLIC
CHURCH, DURSLEY**
£2,000

Heavy pruning of Leylandii boundary hedge around church premises.

**THE GAME CONSERVANCY
TRUST LTD.**
£4,000

Towards funding a grey partridge survey in the Cotswolds.

Total – 4 grants
£13,200

THE ENVIRONMENT AND NATURAL HERITAGE



The Game Conservancy Trust: Grey partridge survey in the Cotswolds

Community Work

BLEINGTON VILLAGE HALL £1,000	To replace heating system.
DRYBROOK METHODIST CHURCH £1,000	Refurbishment of church for community use.
FAIRFORD COMMUNITY CENTRE £15,000	Funds to complete extension to community centre.
FAMILY SPACE IN HESTERS WAY (Host charity: Spurgeon's Child Care) £2,500	To suport a befriending scheme for young mothers.
GLOUCESTERSHIRE NEIGHBOURHOOD PROJECTS NETWORK £20,000	Gloucestershire Gateway Project: grant awarded to help research the possibility of a social enterprise, motorway service scheme.
HOME-START (STROUD & DURSLEY) £3,000	Volunteer expenses to support young families under stress.
INSIDE OUT TRUST £3,500	Bicycle Repair Workshop in Gloucester Prison.
NATIONAL CHILDBIRTH TRUST (GLOUCESTER) £850	Display and security equipment to be used for fund raising sales.
NORTHLEACH COTSWOLD HALL £1,000	Upgrade of lavatories.
PARENTLINE PLUS (STROUD) £3,000	Pilot project to provide family support to inmates of Eastwood Park Women's Prison.
PODSMEAD NEIGHBOURHOOD PROJECT £3,000	Towards Family Support Service, this provides one-to-one support in the homes of vulnerable families.
POOLE KEYNES VILLAGE HALL £1,000	Building and refurbishment work to increase the capacity of the village hall.

PRIORS PARK NEIGHBOURHOOD PROJECT £5,000	Towards establishing a new Neighbourhood Project in Tewkesbury.
STROUD & DISTRICT CITIZENS ADVICE BUREAU £3,000	Purchase of IT equipment and software.
THE PRINCE'S TRUST £5,000	Development Award programme.
UPPER SLAUGHTER VILLAGE HALL £895	To install disabled lavatory.
VOLUNTEER CENTRE, CHELTENHAM £5,000	Volunteer Coordinators Forum: training for volunteer managers and co-ordinators.
WHADDON, LYNWORTH & PRIORS NEIGHBOURHOOD PROJECT £2,772	Art, craft and exercise classes for the over 50s.

**Total – 18 grants
£76,517**

COMMUNITY WORK

Education, Sport & Recreation

1ST SHARPNESS (ST ANDREWS) SCOUTS & GUIDES £2,000	Refurbishment of the Scouts H.Q. near Berkeley.
ALDERMAN KNIGHT SPECIAL SCHOOL £450	Dance Workshops for 15-16 year olds with special needs.
ASTON INGHAM CRICKET CLUB £6,000	Towards costs of building a new cricket pavilion.
CAM HOUSE SCHOOL BOYS FUND £2,400	Towards purchase of gardening equipment for horticulture project.
CHELTENHAM ARTS FESTIVALS LTD £30,800	To fund the development of the Education Department.
CLEEVE SCHOOL ENRICHMENT FUND £4,000	To purchase a grand piano for the new music room, in Cleeve school.
COALWAY RECREATION GROUND £3,000	To replace unsafe equipment in children's play area.
DRAKE MUSIC PROJECT £5,900	Charity was working in St. Rose's School in Stroud, using specialist and adapted computer/music technology teaching disabled children to make music.
DYMOCK CRICKET CLUB £569	Purchase of protective netting fence.
FRIENDS OF AMPNEY CRUCIS SCHOOL £2,500	Towards the creation of an arts / kitchen room at the school.
GLEVUM YOUTH MARCHING BRASS £2,200	Purchase of two new xylophones.
LUMBS EDUCATIONAL FOUNDATION £5,000	Continuation of bursary to support educational costs of people under 25 living in Gloucestershire.
LYDNEY YOUTH CAFE £1,420	Towards purchase of kitchen equipment.

STEAM MILLS UNDER FIVES
£7,000

To help buy a portacabin for a pre-school group in Cinderford.

STOW ON THE WOLD YOUTH CLUB
£10,000

Towards establishing an Internet Café.

UNIVERSITY OF GLOUCESTERSHIRE (ROME SCHOLAR)
£2,000

Annual grant for the scholar's bursary to attend the British School in Rome.

UNIVERSITY OF GLOUCESTERSHIRE ROWING CLUB
£1,700

To set up a rowing club for the University of Gloucestershire.

WITHINGTON C of E PRIMARY SCHOOL
£2,000

To update and improve outdoor activity area.

WOODCHESTER ENDOWED C of E PRIMARY SCHOOL
£5,000

To help build a new school hall.

YORKLEY STAR CRICKET CLUB
£1,000

To restore and improve cricket pavilion.

Total – 20 grants
£94,939

EDUCATION, SPORTS & RECREATION



Alderman Knight Special School:
£450 grant for dance workshops



Vulnerable or disadvantaged sectors of society

ARTS IN TRUST £5,000	Generations' project: performance and participatory events with patients in rehabilitation wards in Cheltenham & Gloucester hospitals.
CHELTENHAM HOUSING AID CENTRE £10,000	To set up training schemes for volunteers who advise the homeless.
CHURCH HOUSING TRUST £1,400	To install a keyfob entry system at Claremont House, a residential home for the elderly.
CLIC SARGENT £5,000	To support a CLIC Sargent nurse in Gloucester Royal Hospital
COTSWOLD CARE HOSPICE £10,000	Towards the redevelopment of a day care hospice.
CROSSROADS CARE (CHELTENHAM) £7,800	Support for carers of the terminally ill.
DEAN FOREST HOSPICE £5,000	Refurbishment of ground floor of day hospice in the Forest of Dean.
DOOR YOUTH PROJECT £5,000	'The Light at the Door' project: a mentoring programme for 11-25 yr olds in the Stroud district.
FURNITURE RECYCLING PROJECT £4,400	Start-up costs for opening a new furniture distribution site in Cheltenham.
GLOUCESTERSHIRE ACTION FOR REFUGEES AND ASYLUM SEEKERS £14,813	To employ an advice worker for refugees & asylum seekers.
GLOUCESTERSHIRE COUNTY ASSOCIATION FOR THE BLIND £2,000	Towards the costs of volunteer recruitment and their expenses.
GLOUCESTERSHIRE DOMESTIC VIOLENCE SUPPORT & ADVOCACY PROJECT £5,000	To establish support groups in Tewkesbury.
HOP, SKIP & JUMP (COTSWOLDS) £2,000	Towards refurbishment of play area for children with disabilities.

**MINCHINHAMPTON CENTRE
FOR THE ELDERLY**
£2,000

To purchase new equipment.

**NEWENT ASSOCIATION FOR
THE DISABLED**
£10,000

Extension to Day Centre for disabled and elderly people.

**SANCTUARY CARE /
SHAFTESBURY PLACE**
£10,000

To buy new minibus, for wheelchair users of residential home.

**WINCHCOMBE DAY CARE
FOUNDATION**
£1,300

To replace gas boilers in the day centre.

Total – 17 grants
£100,713

**VULNERABLE OR DISADVANTAGED SECTORS
OF SOCIETY**

STATISTICS:

Summary of applications received and grants paid 2006

	<u>2006</u>	<u>2005</u>
Number of applications considered by the Trustees	151	131
Total grants paid	78	70
Applications considered by the Trustees but refused	65	57
Other applications considered – decision deferred	8	5
Applications refused by the Administrator – not eligible	85	142
Total applications received	236	273

***GRANT COMMITMENTS AT 31/12/2006
(subject to final approval by the Trustees)***

<i>Budget date</i>	<i>No. of Grants</i>	<i>Amount</i>
2007	2	£10,000
TOTAL	2	£10,000

BREAKDOWN AND COMPARISON OF GRANT PAYMENTS 2006 and 2005

Category	2006			2005		
	Amount Paid	No. of Grants	Average Grant	Amount Paid	No. of Grants	Average Grant
The arts, museums and the built heritage	£148,800	19	£7,800	£54,500	11	£4,900
The environment and natural heritage *	£ 13,200	4	£3,300	£12,000	3	£4,000
Community Work	£ 76,517	18	£4,200	£95,900	21	£5,500
Education, sport and recreation **	£ 94,939	20	£4,700	£86,470	15	£5,700
Vulnerable or disadvantaged sectors of society	£100,713	17	£5,900	£108,025	20	£5,400
TOTAL	£434,169	78	£5,500	£356,895	70	£5,100

* This includes 1 grant commitment of £5,000 carried over from 2005

** Includes 1 grant commitment of £31,500 carried over from 2005

Figure 1: TOTAL GRANTS PAID – 8 year pattern

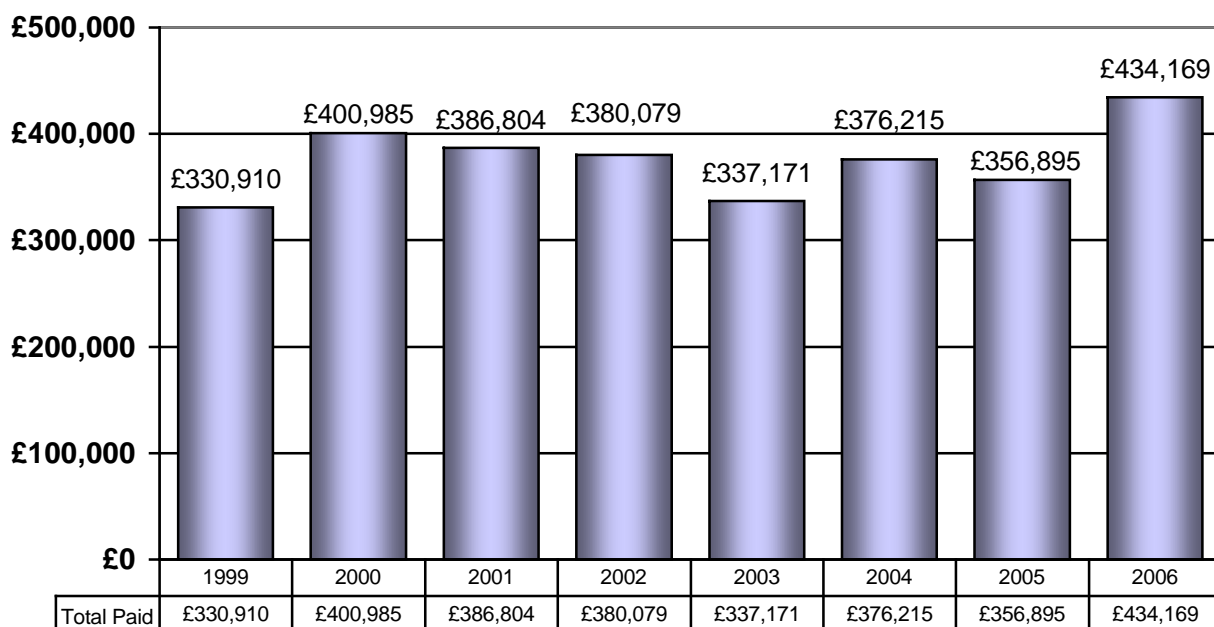


Figure 2: AVERAGE GRANT PAID – 8 year pattern

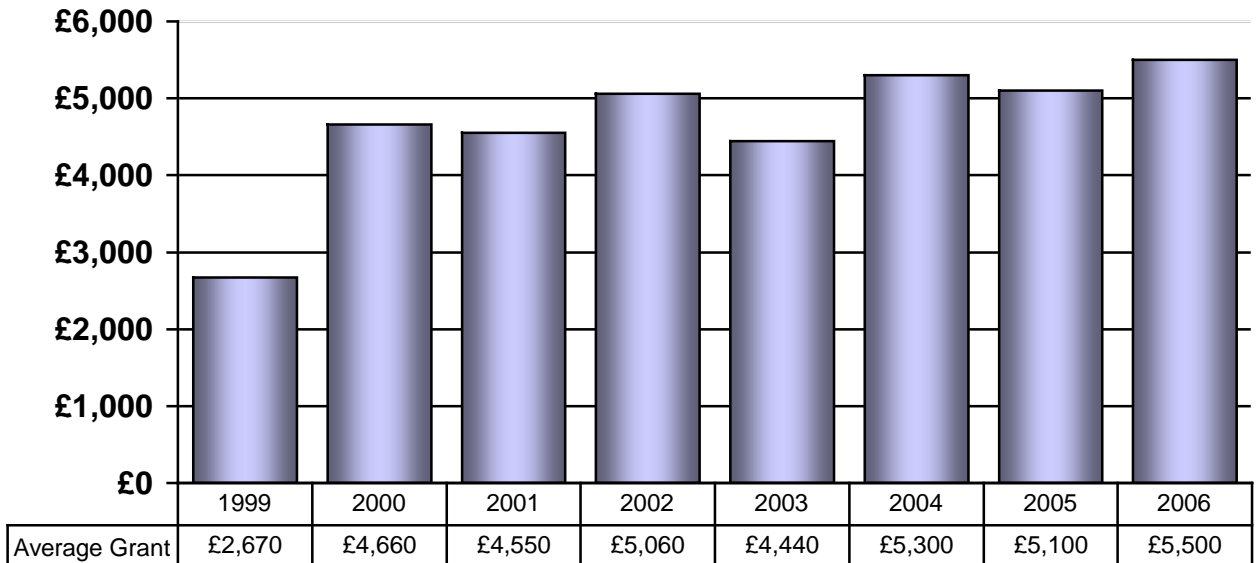


Figure 3: NUMBER OF GRANTS PAID – 8 year pattern

