

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 2008



Registered charity number 802493

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Front cover Photo

"The Frog Prince" – a musical production by Red Dog Productions for children aged between 3-6 (see page 7)

Photograph by Ali Heywood

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 2008 £367,297 was distributed in a total of 70 grants, from £300 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 only very rarely supported. They must be residents of Gloucestershire. Trustees request individuals to use a specialist charity to sponsor their application.

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.

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 should be verified via our website or by email / telephone before you submit your application.

TO APPLY: Applicants must read the website and download a grant application cover sheet. A concise explanation of the application (no more than one side of A4) should be 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 before submission. 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

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Registered Charity number 802493

Introduction

During 2008 the Summerfield Trust donated £367,297 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.

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.

During the year we conducted a review of our investment managers and following a series of interviews we moved the management of our investments to Smith & Williamson.

Along with markets in general our investments have dropped sharply in value, and at the year end were valued at £6,934,670 compared to £9,122,050 at the end of 2007. Investment income has remained at previous levels, but this may reduce in 2009, if some companies reduce their dividends, and if interest rates remain at current low levels.

2008 saw the opening of the refurbished Summerfield Gallery at the Pittville Campus of the University of Gloucestershire. This provides a light and modern exhibition space which was needed in Cheltenham. We were pleased that it was used in December for an exhibition of photographs by Sam Taylor-Wood in aid of Maggie's Centres, which is another charity we have supported.

We decided during the year that we would donate our collection of paintings from the Rome Scholars awards to the University of Gloucestershire. These paintings are now hanging in the Oxstalls campus in Gloucester.

The Art Gallery and Museum in Cheltenham have developed plans for a major expansion of its exhibition space, and improvement to its facilities, in conjunction with the Borough Council. The Art Gallery had close links with our founder, Ron Summerfield, and we decided as part of our 20th year since the creation of the Trust, to pledge £750,000 to this major development. Fortunately we placed this money in a cash deposit before the main downturn in markets.

The Trustees are greatly helped in assessing applications by our team of volunteer advisers. We held a useful seminar at the Pittville Pump Room and Brian Whittaker of the Llankelly Chase Charity came to give us his insights into the techniques needed for making assessments.

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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.

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

ADVISERS

Caroline Barling
Anthony Boden
Sue Edwards
Alyson Gillespie
Sisi Janes
Ro Kaye

Sue Kinder
Robin Lunn
Sally Mackie
Anthea Massey
Jill Matley
Barbara McNaught
Diana Owen

Richard Owen
Jessica Russell
Lesley-Anne Sayers
Rosemarie Sollis
Guy Wareing

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 Loumin Estates Ltd and of Country Homes and Gardens 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 30 years. She has been an English teacher, Head of Sixth Form and Deputy Headteacher. Currently she manages the Health and Well-being team for the county which is a partnership between NHS Gloucestershire and the County Council.

RICHARD WAKEFORD

Richard Wakeford lives in Winchcombe and is a senior executive, with wide experience in rural and environmental issues. He is currently Director General, Environment for the Scottish Government, having previously been Chief Executive of the English Countryside Agency.

The Arts, Museums and the Built Heritage

ANGLO-ASIAN CULTURAL CENTRE £3,000	Towards costs of an art exhibition in Gloucester of a Chinese calligraphy artist.
CHELTENHAM BACH CHOIR £500	Towards performance costs in Tewkesbury Abbey.
CHELTENHAM FESTIVALS LTD £32,000	To cover costs of creating a new website and the Summerfield Lecture.
ELECTRIC CINEMA COMPANY £2,000	Towards phase three of refurbishment project of the community cinema in Wotton-under-Edge.
EVERYMAN THEATRE £5,000	Grant to replace boilers and refurbishment of dressing rooms.
FRIENDS OF ST LAWRENCE'S CHURCH, WYCK RISSINGTON £3,000	Restoration project to re-roof 13th century church.
GLOUCESTERSHIRE PRINTMAKING CO-OPERATIVE £5,000	The Co-Operative, in Stroud, provides specialist printmaking facilities for professional artists and promotes the activity of fine art printmaking. Grant towards contingency funding for technicians
JENNER APPEAL TRUST £2,000	To purchase camera equipment to enable the Museum in Berkeley to make digital records of its collection.
KINGSHILL HOUSE £5,000	Arts centre in Dursley. Grant to help refurbish a room to be used for art classes and dance workshops.
PCC OF WINCHCOMBE, GRETTON, STANLEY PONTLARGE £5,000	To repair bellcote and restoration of the seventeenth century bells in Stanley Pontlarge church, near Winchcombe.
PLAYHOUSE THEATRE CHELTENHAM £10,000	Grant towards major refurbishment of the theatre
RED DOG PRODUCTIONS LTD £2,000	Towards production costs of the Frog Prince, a play with music for children aged between 3-6.
ST. LAWRENCE'S CHURCH, CHELTENHAM £3,000	Towards major repairs to church roof.

2008 Grants Summary

**SUNDIAL THEATRE,
CIRENCESTER
£2,000**

To purchase a new Yamaha grand piano.

**THE GARDENS GALLERY
£2,000**

Start up costs for a new Gallery in Cheltenham

**THE STROUD PERFORMING
ARTS CENTRE
£2,000**

Re-decoration of foyer and repairs to guttering and stonework

**WYCHWOOD FESTIVAL
£2,000**

Towards the costs of a programme of arts workshops during Festival in Cheltenham.

**Total - 17 grants
£85,500**

THE ARTS, MUSEUMS AND THE BUILT HERITAGE

The Environment and Natural Heritage

GLOS GEOLOGY TRUST
(Host charity: Glos Assoc. for
Voluntary & Community Action)
£2,975

To create and improve wildlife habitat in the nature reserve
at Huntley Quarry.

**LOWER SLAUGHTER
COMPOSTING CLUB**
£2,000

To cover the hire costs, over two years, of a heavy duty
shredder.

STROUD VALLEYS PROJECT
£7,500

Biodiversity Project: habitat creation events for volunteers

**THE FRIENDS OF JENNER
GARDENS**
£10,000

To regenerate Cheltenham Chapel Graveyard and Jenner
Gardens

Total - 4 grants
£22,475

THE ENVIRONMENT AND NATURAL HERITAGE

Community Work

**BROCKWORTH COMMUNITY
PROJECT**
£2,000

To support a youth Fair Shares scheme for one year.

**CINDERFORD AREA
NEIGHBOURHOOD
DEVELOPMENT INITIATIVE**
£3,000

Repeat grant towards salary of assistant manager.

FAIR SHARES
£2,000

To develop a series of cluster groups to generate participation in time banking in the North Cotswolds

FAMILY HAVEN
£7,000

To improve gas supply to this centre for vulnerable families in Gloucester

**FURNITURE RECYCLING
PROJECT**
£10,000

Support costs of running a delivery service of furniture to low income households throughout Gloucestershire.

**GRETTON VILLAGE
ASSOCIATION**
£5,000

Village hall refurbishment and extension.

**NATIONWIDE COMMUNITY
LEARNING PARTNERSHIP**
£545

Charity based in Gloucester, provides parenting education to pregnant and young teenage parents. Grant to train a tutor in baby massage.

NELSON TRUST
£15,000

Young People Turnaround research programme in Stroud for young people with alcohol and substance misuse problems.

NORTH NIBLEY VILLAGE HALL
£3,000

To improve village hall.

**SEVERN AREA RESCUE
ASSOCIATION**
£10,000

Construction of boatshed, drying room and control room.

ST. DAVID'S CENTRE
£10,000

Grant to repair flood damage and rebuild community centre in Moreton in Marsh.

Total - 13 grants
£77,545

COMMUNITY WORK

Education, Sport & Recreation

BISLEY WITH LYPIATT PARISH COUNCIL £2,000	Towards construction of a community tennis court.
BLAKENEY UNDER FIVES £500	Grant towards playscheme during the summer holidays.
CHELTENHAM SEA CADETS £1,000	Towards transport costs of cadets for training purposes.
CIRENCESTER OPEN AIR SWIMMING POOL £3,000	Emergency funding for filter replacement.
DRAKE MUSIC PROJECT £10,000	New initiative at St. Rose's School in Stroud to develop resources which will enable physically disabled children and young people to achieve academic qualifications in music.
GYMNATION £5,000	A community gym and a "Friendship Cafe" for the black and ethnic minority communities of Gloucester. This was second tranche of co-ordinator's salary.
LUMBS EDUCATIONAL FOUNDATION £5,000	Educational grants for students in financial difficulties living in Gloucestershire.
LYDNEY RECREATION TRUST £5,000	Grant to refurbish new skateboard park.
NATIONAL STAR COLLEGE £15,000	Towards the building of a new creative arts centre.
PRESTBURY & PITTVILLE YOUTH £2,000	The Great Outdoors healthy living project.
THE CENTRE FOR THE SPOKEN WORD £2,000	Darwin Project: working with schools in Gloucestershire to celebrate the Darwin Bicentenary in 2009.
UNIVERSITY OF GLOUCESTERSHIRE (ROME SCHOLAR) £2,000	Annual grant for a scholar's bursary to attend the British School in Rome.

Total - 12 grants
£52,500

EDUCATION, SPORT & RECREATION

Vulnerable or disadvantaged sectors of society

BREAM VOLUNTARY CAR SERVICE £3,000	One-off grant towards running costs for service in the Forest of Dean.
CHAMWELL HOLIDAY PLAYScheme £3,500	Grant to help take severely disabled children on holiday.
CHELtenham HOUSING AID CENTRE £20,000	Towards salary of new advice worker assisting those who are recovering from drug or alcohol dependency.
CIRENCESTER OPPORTUNITY GROUP £2,000	Music therapy sessions for pre-school children with learning difficulties.
CITIZEN ADVOCACY TRUST, GLOUCESTERSHIRE £5,000	To create a new advocacy post for specialist cases in child protection.
COTSWOLD 92 CLUB £577	Outings for elderly people living in Moreton in Marsh.
COTSWOLD VILLAGES OLD PEOPLE'S HOUSING ASSOCIATION £2,000	Grant to replace patio area.
CROSSROADS CARE (CHELTENHAM) £5,000	One-off support for the carers of the terminally ill.
CROSSROADS CARING FOR CARERS (FOREST OF DEAN) £6,000	Grant to help establish a friendship group.
DOOR YOUTH PROJECT £10,000	Towards mentoring service for disadvantaged young people in Stroud.
FRIENDS OF AMBERLEY SCHOOL £6,000	To create a rest and recovery room for children with severe emotional and behavioural difficulties living in Stroud.
FRIENDS OF MILESTONE SCHOOL £10,000	To build a training and support unit for staff, parents and local community groups attached to this special school in Gloucester.
GLEVUM FARM TRUST £15,000	To create a resource centre for offenders, ex-offenders and drug addicts, near Tewkesbury.

GLOUCESTERSHIRE DEAF YOUTH CLUB £5,000	Salary for co-ordinator
GLOUCESTERSHIRE NEIGHBOURHOOD PROJECTS NETWORK £5,000	Grant to support “Good Morning Gloucestershire”, a telephone support service for elderly and vulnerable people.
GUILD OF DISABLED HOMEWORKERS £2,000	Charity in Nailsworth. Donation towards publicity campaign and to help buy display units for haberdashery equipment.
SALTER'S HILL CHARITY £10,000	Charity in Newent provides homes for adults with learning disabilities. Grant towards the building costs of an office extension.
SOUTH CERNEY NATIONAL ANGLING FESTIVAL £2,000	To support costs of annual angling festival for people with a disability.
ST. VINCENT'S CENTRE £1,000	Centre in Cheltenham provides therapeutic day care for adults with severe and multiple disabilities. Donation towards the purchase of equipment for the sensory garden.
STOW DISABILITY ASSOCIATION £1,200	Annual costs of art classes for elderly and disabled in Stow on the Wold.
STROUD & DISTRICT MENCAP SOCIETY £3,000	To install a bathroom for physically disabled residents of care home in Stroud.
THE FRIENDS OF ALDERMAN KNIGHT SPECIAL SCHOOL £1,000	Towards taking children with special needs on adventure, outward bound course.
THE LIONS CLUB OF CHELTENHAM £10,000	New holiday caravan for use by disadvantaged people.
THE VICTORIA CENTRE £1,000	To subsidise the costs of meals for elderly people living in Lydney, Forest of Dean.
Total - 24 grants £129,297	VULNERABLE OR DISADVANTAGED SECTORS OF SOCIETY

Total grants paid 2008 – 70
£367,297

Summary of applications received and grants paid 2008

	<u>2008</u>	<u>2007</u>
Number of applications considered by the Trustees	151	150
Total grants paid	70	79
Applications considered by the Trustees but refused	70	70
Other applications considered – decision deferred	11	1
Applications refused by the Administrator – not eligible	61	80
Total applications received	212	230

BREAKDOWN OF GRANT PAYMENTS 2008 and 2007

Category	2008			2007		
	Amount Paid	No. of Grants	Average Grant	Amount Paid	No. of Grants	Average Grant
The arts, museums and the built heritage	£ 85,500	17	£5,000	£ 45,920	14	£3,280
The environment and natural heritage	£ 22,475	4	£5,600	£ 12,000	2	£6,000
Community Work	£ 77,545	13	£6,000	£ 35,473	11	£3,200
Education, sport and recreation	£52,500	12	£4,400	£104,333	22	£4,700
Vulnerable or disadvantaged sectors of society	£129,297	24	£5,400	£199,402	30	£6,600
TOTAL	£367,297	70	£5,200	£397,128	79	£5,000

Figure 1: TOTAL GRANTS PAID – 10 year pattern

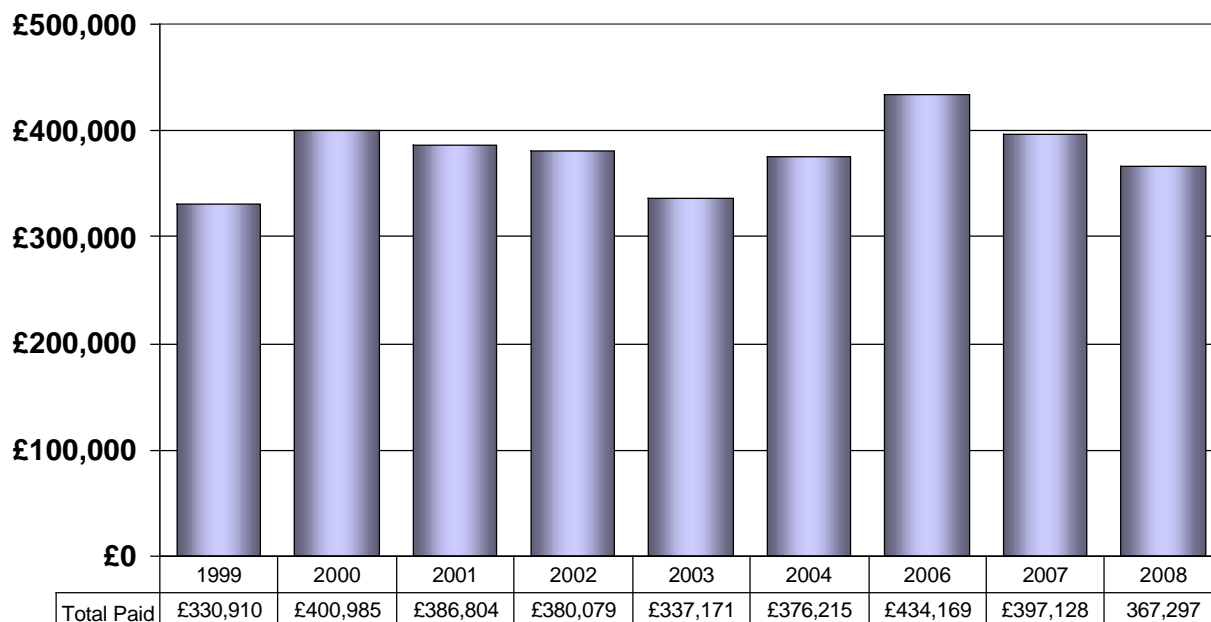


Figure 2: AVERAGE GRANT PAID – 10 year pattern

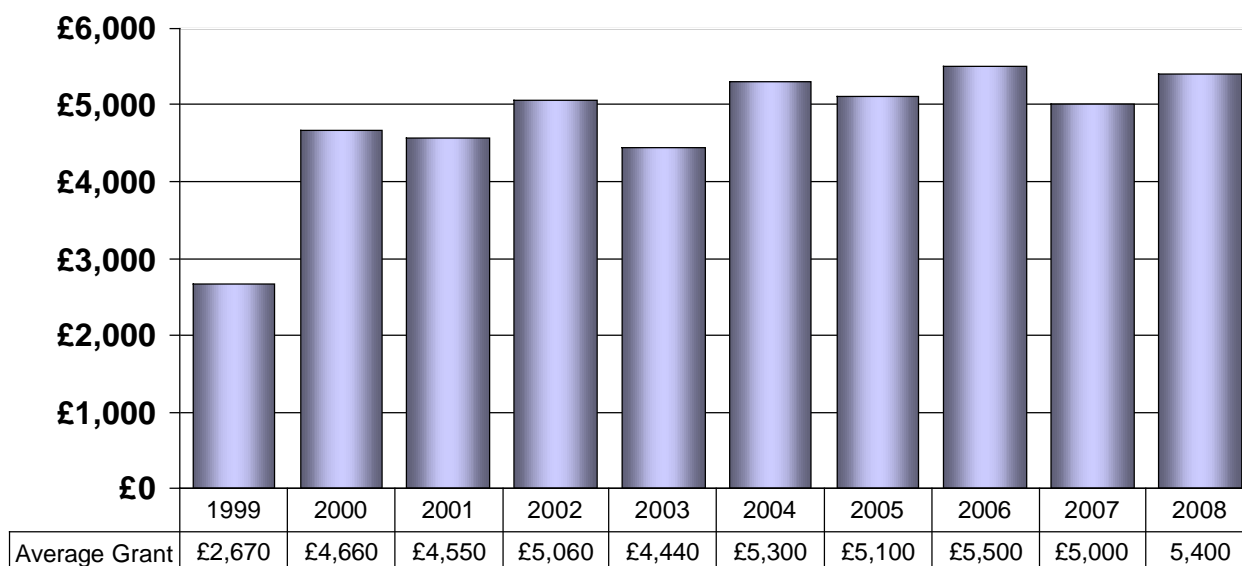


Figure 3: NUMBER OF GRANTS PAID – 10 year pattern

