

THE
SUMMERFIELD
CHARITABLE TRUST

Trustees:
Charles M. Fisher
Jamila Gavin
Edward Gillespie
Jan Urban-Smith
Richard Wakeford

GRANTS PAID

1st January to 31st December 2009



Registered charity number 802493

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Front cover Photo:

Art therapy group at Uplands Care Service (see page 14).

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 2009 £1,153,312 was distributed in a total of 49 grants, from £150 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.

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 Lumbs to enable it to support residents of the county 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 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 should read the information listed on the website and download a grant application cover sheet. **A concise explanation of the application (no more than one side of A4) must be sent to me by email.** However you must also 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, P.O.Box 4, Winchcombe, Cheltenham, Glos GL54 5ZD

Tel: 01242 676774

Email: admin@summerfield.org.uk

Web: www.summerfield.org.uk

Registered Charity number 802493

Introduction

2009 was the twentieth anniversary of the founding of the Summerfield Trust. Our administrator, Lavinia Sidgwick, edited a booklet to commemorate the anniversary, and it is pleasing to note that during those twenty years we have donated nearly £7 million, through over 2000 separate grants, to a wide variety of good causes in Gloucestershire.

We are an experienced and well organised grant making charity, and we are keen to encourage anyone who wishes to donate or leave money to charity to consider using the Summerfield Trust as a suitable method for doing this.

We continue to encourage as diverse a range of applicants as possible within Gloucestershire, 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.

This was exemplified by two of the grants which we made during 2009. We committed the Trust to making a grant of £750,000 in 2011 towards the extension and refurbishment of the Cheltenham Art Gallery and Museum. This bold scheme will transform the Museum, and allow it to display more of its collection. This grant would have particularly pleased our founder, Ron Summerfield, and celebrates the twentieth anniversary.

We also made a significant grant to the Gloucestershire Gateway Trust. This new charity has been created to partner a commercial organisation in establishing a motorway services close to Gloucester on the M5. If it succeeds in its planning application, the Gateway Trust will receive a share of the turnover for many years ahead, and will use this income to donate to good causes in Gloucestershire. Besides this aspect, we liked the potential for job creation, the commitment to local sourcing of farm produce, and the exceptional green design of the buildings.

Besides these major initiatives, we made a total of 47 grants to other charities, as set out in this report. These include two grants of £50,000 each to the Everyman Theatre and the Cotswolds Maggie's Cancer Centre. We have also been a long term supporter of the Cheltenham Festivals – especially the Literature Festival, which this year featured a sell-out "Green Day" of themed events helping people to understand more about forests, food, climate change and other topical challenges.

As previously reported, we changed our investment manager to Smith & Williamson, and I am pleased to report that they achieved a performance gain of 26% during 2009. This meant that our total investments at the year-end comfortably exceeded £9 million.

Our Trustees are not remunerated for the time and expertise which they give to managing the Trust. To reflect this, and to encourage the inflow of fresh thinking, they are expected to serve for a period of ten years. As a result of

this policy, Dr. Gilbert Greenall retired during the year. He has made an outstanding contribution to the Trust both in directing our investment strategy, and in using his wide-ranging knowledge to guide and select our donations. We will miss his original thinking, and are hugely grateful for his contribution to the Trust. In his place we welcome Edward Gillespie and look forward to working with him.

At the end of 2010 both myself and Richard Wakeford will have completed our time as Trustees. I am very grateful to my co-Trustees, and to Lavinia Sidgwick, and to our volunteer advisers for their hard work and commitment. Through the Trust they all make a significant contribution to improving life in Gloucestershire.

Charles M Fisher
Chairman of the Trustees

ADVISERS

Caroline Barling
Anthony Boden
Sue Edwards
Alyson Gillespie
Sisi Janes
Sue Kinder

Robin Lunn
Sally Mackie
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.

EDWARD GILLESPIE

Edward Gillespie was educated at Tonbridge School and the University of York where he gained a degree in Politics. He has managed racecourses since he was 21 and has been Managing Director at Cheltenham Racecourse since 1980. He is on the Jockey Club Racecourses Board and Chairman of the British Horseracing Authority Jump Racing Development Group. Since moving to Gloucestershire, he has served on the Cheltenham Festivals Board and is a Board member of The Everyman Theatre, which he chaired for ten years. He chairs Gloucester Cathedral Council and the Board of Gloucestershire Tourism. He is an Honorary Fellow of the University of Gloucestershire, a Deputy Lieutenant of Gloucestershire and an Honorary Freeman of the Borough of Cheltenham.

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 civil servant, with wide experience in rural and environmental issues. He is currently Director General, Rural Futures, having previously been Chief Executive of the English Countryside Agency, after 20 years experience in Whitehall culminating in a spell in the Cabinet Office.

The arts, museums and the built heritage

| | |
|--|---|
| BETHESDA METHODIST CHURCH £5,000 | To support installation of solar PV system on church roof. |
| CHELTENHAM ART GALLERY & MUSEUM £750,000 | Grant awarded, payable in 2011, for the construction of a new wing. |
| CHELTENHAM FESTIVALS LTD £55,000 | Education work; the Summerfield Lecture given by Oleg Gordievsky and the Green Day. |
| EVERYMAN THEATRE £50,000 | Restoration of historic ceiling murals in the main auditorium. |
| GLOUCESTER CATHEDRAL £3,000 | Sculpture exhibition in 2010 exhibiting artists such as Sir Eduardo Paolozzi, Damien Hirst, Sarah Lucas and Lyn Chadwick. |
| GLOUCESTERSHIRE HISTORIC CHURCHES TRUST £5,000 | To support grants made to Christian churches in Gloucestershire for repairs and improvements. |
| SHAKESPEARE SCHOOLS FESTIVAL £500 | To support seven Gloucestershire schools to take part in the Shakespeare Schools Festival. |
| ST PETER'S CHURCH (CLIFFORD MESNE) £2,000 | To convert an old coal store at the back of the church into an accessible w.c. |
| ST. MARY'S CHURCH, (BROMESBERROW) £5,000 | Major refurbishment of spire and roof. |
| STROUD SCHOOL OF SAMBA £500 | To purchase new samba instruments. |

2009 Grants Summary

**THE CENTRE FOR THE
SPOKEN WORD**
£2,000

River Severn Project: a multi-arts event which toured the county.

**TONGUES OF FIRE YOUTH
THEATRE**
£3,000

To produce The Lion, the Witch and the Wardrobe, with a cast of young people, at the Picturedome in Gloucester.

WOTTON HERITAGE CENTRE
£1,700

Improvement project to update facilities.

Total - 12 grants
£132,700 paid
£750,000 promised

THE ARTS, MUSEUMS AND THE BUILT HERITAGE

The Environment and Natural Heritage

COTSWOLD TREE WARDENS Recruitment and training of tree wardens in the Cotswolds.
£2,000

Total - 1 grants
£2,000

THE ENVIRONMENT AND NATURAL HERITAGE

Community Work

| | |
|---|---|
| CAMBRAY BAPTIST CHURCH FABRIC COMMITTEE £1,000 | To refurbish church kitchen. |
| ENGLISH BICKNOR VILLAGE HALL £2,000 | To improve village hall. |
| FOREST OF DEAN COMMUNITY RADIO £2,000 | Training of volunteers to enable them to produce a monthly radio programme on volunteering. |
| GLOSAID YOUTH ACTION £5,000 | To employ a support worker to train young volunteers. |
| GLOUCESTERSHIRE CHINESE COMMUNITY ASSOCIATION £2,000 | To provide art and craft lessons and activities to the elderly Chinese community. |
| GLOUCESTERSHIRE GATEWAY TRUST £101,482 | Grant to help purchase land for new motorway services station. |
| GYMNATION £5,000 | Third tranche of co-ordinator's salary. |
| HOME-START STROUD AND DURSLEY £2,000 | To provide support to volunteers working with low income families. |
| HORSLEY VILLAGE HALL £2,000 | To create disabled access between new pavilion and village hall. |
| PRIORS PARK NEIGHBOURHOOD PROJECT £7,000 | Funding for salary of project co-ordinator. |
| RANDWICK VILLAGE HALL & PLAYING FIELDS COMMITTEE £2,000 | To provide disabled access w.c. |

RENDCOMB VILLAGE HALL
£2,000

Refurbishment of village hall.

ST. ANDREW'S CHURCH,
CHURCHDOWN
£3,000

To help create purpose-made youth centre.

TAYNTON AND TIBBERTON
VILLAGE HALL
£5,000

To improve entrance to village hall and upgrade changing room.

Total – 14 grants
£141,482

COMMUNITY WORK

Education, Sport & Recreation

| | |
|--|---|
| AVENING PLAYGROUP £2,000 | To replace old play equipment. |
| BICKNOR BEARS DAY CARE CENTRE £5,000 | To equip a new pre-school day centre. |
| CHELTENHAM RUGBY CLUB £3,000 | To refurbish new clubhouse |
| FRIENDS OF COLN HOUSE SCHOOL £3,400 | To develop horticultural project. |
| FRIENDS OF NORTON SCHOOL £900 | To help primary school buy a greenhouse. |
| LUMBS EDUCATIONAL FOUNDATION £7,000 | Educational grants to local students. |
| SOLDIERS OF GLOUCESTERSHIRE MUSEUM £6,000 | I.T. project to improve access to collection. |
| UNIVERSITY OF GLOUCESTERSHIRE (ROME SCHOLAR) £2,000 | Scholarship for the British School in Rome. |
| Total – 8 grants £29,300 | EDUCATION, SPORT & RECREATION |

Vulnerable or disadvantaged sectors of society

| | |
|--|--|
| COBALT APPEAL FUND £10,000 | Cobalt Breast Clinic: towards establishing a centre of excellence. |
| FRIENDS OF NAZARETH HOUSE £5,000 | To extend car park at Nazareth Care Home. |
| FRIENDS OF PATERNOSTER SCHOOL £500 | Residential trip for children with severe learning difficulties. |
| GLOUCESTERSHIRE ASSOCIATION FOR THE BLIND £2,000 | To establish a transcription service for blind and partially sighted in Gloucestershire. |
| GLOUCESTERSHIRE DOMESTIC VIOLENCE SUPPORT & ADVOCACY PROJECT £5,000 | To provide advice, support and advocacy to victims of domestic abuse. |
| INISHFREE £3,000 | Capital costs for horticulture programme for people in recovery from addiction. |
| MAGGIE KESWICK JENCKS CANCER CARING CENTRES TRUST £50,000 | Capital grant for the construction of Maggie's Cotswolds. |
| MYASTHENIA GRAVIS ASSOCIATION £150 | To hold a social event for sufferers of myasthenia gravis who live in Gloucestershire. |
| RESTHAVEN HOME OF HEALING £6,000 | Refurbishment of nursing home. |

**ST. VINCENTS AND ST
GEORGES**
£2,180

Towards the purchase of a greenhouse for centre for adults with severe and multiple disabilities.

UPLANDS CARE SERVICE
£7,000

To include arts therapy in day care provision for the elderly.

**WINCHCOMBE DAY CARE
FOUNDATION**
£5,000

Replacement minibus.

WINSTON'S WISH
£2,000

To support grief support programme for children in Gloucestershire.

Total - 13 grants
£97,830

**VULNERABLE OR DISADVANTAGED SECTORS OF
SOCIETY**

Summary of applications received and grants paid 2009

| | <u>2009</u> | <u>2008</u> |
|--|-------------|-------------|
| Number of applications considered by the Trustees | 124 | 151 |
| Total grants paid | 48 | 70 |
| Applications considered by the Trustees but refused | 69 | 70 |
| Other applications considered – decision deferred | 5 | 11 |
| Applications refused by the Administrator – not eligible | 54 | 61 |
| Total applications received | 176 | 212 |

COMMITMENTS at 31st DECEMBER 2009

| Organisation | Amount awarded | Date Payable |
|---------------------------------|----------------|--------------|
| Cheltenham Art Gallery & Museum | £750,000 | 2011 |

BREAKDOWN OF GRANT PAYMENTS 2009 and 2008

| Category | 2009 | | | 2008 | | |
|--|-----------------|---------------|---------------|-----------------|---------------|---------------|
| | Amount Paid | No. of Grants | Average Grant | Amount Paid | No. of Grants | Average Grant |
| The arts, museums and the built heritage | £132,700 | 12 | £11,060 | £ 85,500 | 17 | £5,000 |
| The environment and natural heritage | £ 2,000 | 1 | £2,000 | £ 22,475 | 4 | £5,600 |
| Community Work | £141,482 | 14 | £10,100 | £ 77,545 | 13 | £6,000 |
| Education, sport and recreation | £ 29,300 | 8 | £3,600 | £ 52,500 | 12 | £4,400 |
| Vulnerable or disadvantaged sectors of society | £ 97,830 | 13 | £7,500 | £129,297 | 24 | £5,400 |
| TOTAL | £403,312 | 48 | £8,400 | £367,297 | 70 | £5,200 |

Figure 1: TOTAL GRANTS PAID – 11 year pattern

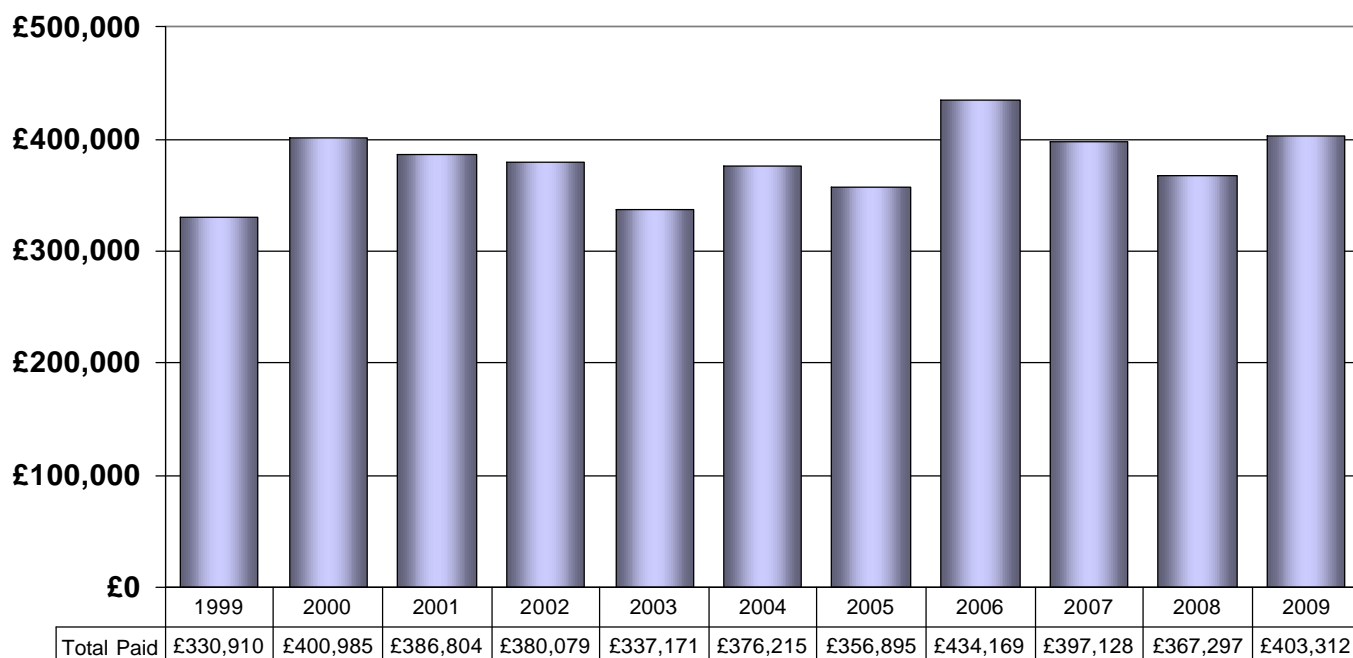


Figure 2: AVERAGE GRANT PAID – 11 year pattern

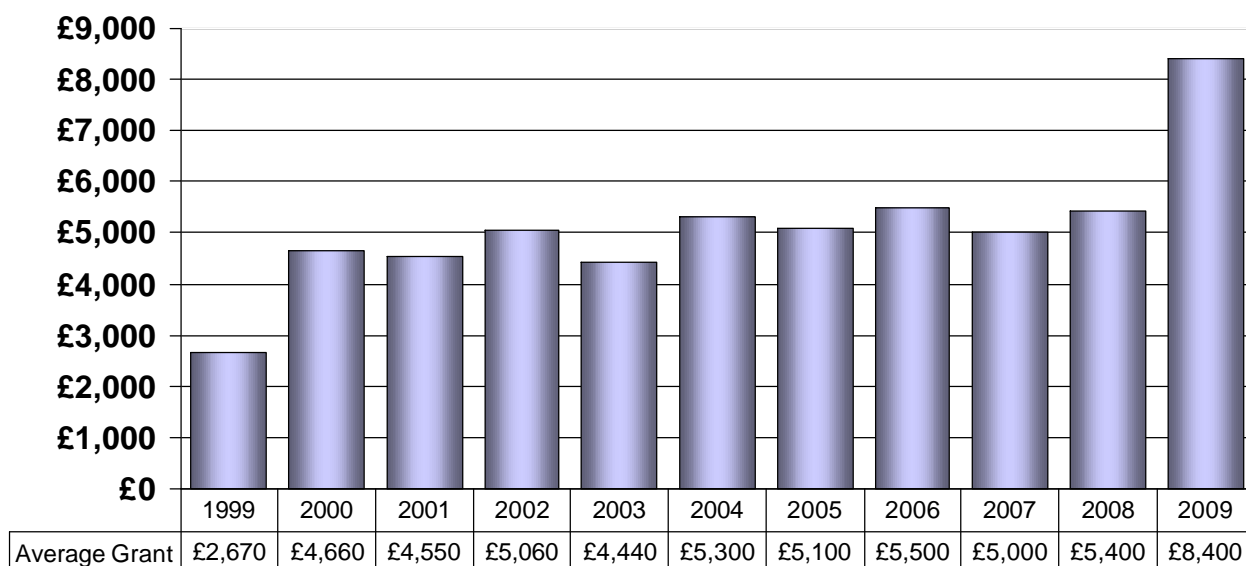


Figure 3: NUMBER OF GRANTS PAID – 11 year pattern

