

THE
SUMMERFIELD
CHARITABLE TRUST



TRUSTEES:
Jamila Gavin
Edward Gillespie
Anthony McClaran
James Millar
Jan Urban-Smith

GRANTS PAID

1st January to 31st December 2010



Registered charity number 802493

CONTENTS

- 3 About the Trust
- 4 Introduction
- 6 The Trustees

2010 Grants Paid: List of beneficiaries

- 7 The arts, museums and the built heritage
- 9 The environment and natural heritage
- 10 Community work
- 12 Education, sport & recreation
- 14 Vulnerable or disadvantaged sectors of society
- 16 **Summary and statistics**

Front cover Photo:

Gloucester Cathedral - "Crucible" was a major exhibition of past and contemporary sculpture which was staged inside and outside Gloucester Cathedral during the autumn of 2010 in partnership with the Pangolin Foundry. SCT awarded a grant in 2009 towards the exhibition.

© Steve Russell Studios, Nailsworth, Glos.

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 2010 £382,415 was paid in a total of 78 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;
- The outcomes of the project or service.

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 2011. 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.** If appropriate, I will then encourage you to 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

Introduction

It is a privilege to succeed Charles Fisher as Chairman of the Summerfield Charitable Trust. Having lived in Gloucestershire for over 30 years and having managed the Racecourse since as far back as the auction of the artefacts of Ron Summerfield, in vast marquees, I am constantly reminded of the Trust's impact on our quality of life.

Charles made a quite outstanding contribution through a period in which the Trust supported a vast range of good causes in the county. Most recently, these enabled Gloucestershire Gateway Trust to gain planning approval this year for the innovative motorway services station and Cheltenham Art Gallery and Museum to make an application for funding for a redevelopment project befitting the 21st Century.

Richard Wakeford also retired as a trustee under the 10-year policy and we are enormously grateful for his contribution, particularly with regards to environmental applications. 'Green Day' at the Literature Festival was a fine example of Richard's creative thought.

During 2010, we welcomed Anthony McClaran and James Millar as new Trustees.

Our investments continued to improve during the year, under management by Smith & Williamson, ending the year comfortably above £9m. This bodes well for the immediate and medium term future as the Trust seeks to continue its significant impact across the full scope of its grant-making categories and, if possible, maintain the value of the portfolio for the longer term.

During 2010 the Summerfield Trust paid £382,414 to a wide variety of good causes. We continue to encourage a diverse range of applicants 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 made a total of 78 grants as set out in this report. These include a significant grant of £30,000 for three years to the Nelson Trust to support their new women's centre in Gloucester and £30,000 to the National Star College towards their new work-skills centre. The Summerfield lecture was given by David Willetts on his thesis that the 'baby boomer' generation continue to reap the benefits of their age and are disbenefitting those born more recently, a subject that served as a reminder for the Trustees to discern need from want.

Cheltenham Art Gallery and Museum has kept the Trust apprised of progress with project fundraising. This led to a deferment of the grant being approved by Trustees to prevent a commitment for temporary closure before full funding was secured. The University confirmed their decision to sell the Pittville campus and thus force the closure of the Summerfield Gallery in 2011. There is a continuing dialogue regarding the Trust's grant, which, it is hoped, will connect with the new Art Gallery.

We are an experienced and well-organized 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. Our Trustees are not remunerated for the time and expertise which they give to managing the Trust.

I am very grateful to my co-Trustees, and to Lavinia Sidgwick, and to our volunteer advisers for their hard work and commitment. Sadly one of our most longstanding advisers, Lesley- Anne Sayers, died very unexpectedly in the spring. She had been a ballerina and then an academic and was passionate about the arts in all forms. She was a wise adviser to us for many years and we miss her imaginative reports and enthusiasm for the arts in Gloucestershire. Trustees agreed to award a donation towards a scholarship fund set up in her name to support the study of scenography.

At the year-end, Trustees were mindful that Local Authority funding cuts and financial difficulties being experienced by many charities are likely to make the legacy of Ron Summerfield ever more important to the life of Gloucestershire.

Edward Gillespie
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
Rosemarie Sollis
Guy Wareing**

About the Trustees

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.

ANTHONY McCLARAN lives in Cheltenham. He took up post as Chief Executive of the Quality Assurance Agency on 1 October 2009, after nearly six years as Chief Executive at UCAS. He is a director of the Inspiring Futures Foundation, and was recently appointed Chair of the new All Saints Academy in Cheltenham. Anthony also sits on the Board of the Gloucestershire Development Association. He is a Fellow of the Chartered Management Institute, a Freeman of the Company of Educators and a member of the Honourable Company of Gloucestershire.

JAMES MILLAR

Lives in Tetbury. For the past 20 years, he has founded, managed and run entrepreneurial private companies in the commercial/environmental sector. He is also an experienced lawyer and for over 10 years practised in Scotland, England and the USA. He is a Fellow of the Royal Geographical Society (FRGS) and of the Royal Society for the Encouragement of Arts, Commerce and Manufacture (FRSA) as well as a number of environmental charities.

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.

The arts, museums and the built heritage

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|--|---|
| ART SHAPE LIMITED £20,000 | To help launch an arts-based training programme for care workers in residential homes. |
| CARDUCCI MUSIC TRUST £2,875 | Education and outreach programme connected to the Carducci Festival at Highnam near Gloucester. |
| CHELTENHAM FESTIVALS LTD £5,000 | Summerfield lecture given by David Willetts M.P. and to support a sign-language interpreter at various events. |
| CHELTENHAM YOUTH CHOIR £1,500 | To help establish a youth choir in Cheltenham. |
| FRIENDS OF NAUNTON PARK £500 | To create a public sculpture in Naunton Park in Cheltenham. |
| GLOUCESTERSHIRE HISTORIC CHURCHES TRUST £5,000 | To support grants made to Christian churches in Gloucestershire for repairs and improvements. |
| NATIONAL TRUST £20,000 | Restoration and revival of Chedworth Roman Villa, including a new education centre. |
| PCC FOR ST. BARTHOLOMEW'S & ST. ANDREW'S £5,000 | Project to preserve and develop a neglected stone cottage at the top of Chosen Hill, near Gloucester, as a visitor's centre. |
| QUENINGTON SCULPTURE TRUST £1,000 | Funding for special needs art workshops during the biannual Sculpture show. |
| RED DOG PRODUCTIONS LTD £2,000 | "The Great Bear of the North": a collaborative performance project working with a charity known as the Five Valleys Foyer which works with homeless young people in Stroud. |
| STROUD PERFORMING ARTS CENTRE £3,500 | To purchase replacement chairs. |
| STROUD PHOTO AGES (via host charity: Stroud Valleys Project) £500 | A community photographic project. |
| STROUDWATER TEXTILE TRUST £4,000 | International exchange to bring a family of S. Indian textile artists to Stroud. |

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|--|---|
| THREE CHOIRS FESTIVAL (GLOUCESTER) £5,000 | Outreach and community work associated with the Three Choirs Festival. |
| TRANS-FORMATIONS <i>(via host charity: GARAS)</i> £1,500 | Community Arts project in Gloucester |
| WINCHCOMBE FESTIVAL OF MUSIC AND ARTS £2,500 | Towards Festival costs. |
| WINCHCOMBE TEAM OF PARISHES £500 | To perform a miracle play in Winchcombe. |
| WOODCHESTER MANSION TRUST £2,500 | Towards roof repairs and installation of new visitor interpretation facilities. |
| WOTTON ELECTRIC CINEMA COMPANY <i>(via host charity: Wotton-under-Edge Recreational Trust)</i> £1,000 | To update computer equipment. |
| TOTAL – 19 grants £83,875 | THE ARTS, MUSEUMS AND THE BUILT HERITAGE |

The Environment and Natural Heritage

**BRITISH TRUST FOR
CONSERVATION
VOLUNTEERS**
£5,000

To support the Green Gym in Gloucester and to fund a new Green Gym within the NHS.

**FRIENDS OF LECKHAMPTON
HILL & CHARLTON KING'S
COMMON** (via host charity:
Farming & Wildlife Advisory Group)
£10,000

To restore historic boundary wall on Charlton King's common.

GLOBAL DIMENSION TRUST
£2,000

To fund an event for secondary schools to create awareness of the career opportunities in the green economy.

**GLOUCESTERSHIRE WILDLIFE
TRUST**
£3,000

To provide training to local volunteers in surveying, monitoring and conservation techniques.

**TOM ROBERTS ADVENTURE
CENTRE**
£10,000

To install a biodigester on the site of youth camps in the Forest of Dean.

Total - 5 grants
£30,000

THE ENVIRONMENT AND NATURAL HERITAGE

Community Work

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|---|--|
| ABBEY FIELDS COMMUNITY CENTER £5,000 | To replace windows of community centre in Winchcombe. |
| ASHLEWORTH MEMORIAL HALL £2,000 | To re-equip Memorial hall kitchen. |
| BLEDINGTON PARISH COUNCIL £2,000 | Towards a new playground for the village. |
| BLOCKLEY COOPERATIVE ASSOCIATION LTD (via host charity: <i>Abacus Charitable Trust</i>) £5,000 | To help move the community hub to a purpose built hall. |
| CHELTENHAM HEBREW CONGREGATION £2,000 | Towards renovating the cemetery. |
| CHELTENHAM STREET PASTORS (via host charity: <i>Ascension Trust</i>) £5,000 | Start-up grant to support this new charity providing support to people on the streets late at night. |
| CITIZENS ADVICE BUREAU (STROUD & DISTRICT) £10,000 | To support a year of training to volunteer advisers. |
| COTSWOLD COUNCIL FOR VOLUNTARY SERVICES £9,000 | To assist mental health patients to take up volunteering. |
| CROSSROADS CARE (FOREST OF DEAN) £3,000 | Second grant for Friendship Group. |
| DOOR YOUTH PROJECT £10,000 | To support training programme for young people in Stroud. |
| FAMILY SPACE IN HESTERS WAY £5,000 | “Time Out for Mums” group in Cheltenham. |
| GLOUCESTERSHIRE ASSOCIATION FOR VOLUNTARY & COMMUNITY ACTION £5,000 | Grant to enable small, rural, voluntary and community groups to access training bursaries. |

2010 Grants Summary

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|--|---|
| GLOUCESTERSHIRE NIGHTSTOP £7,000 | Donation towards costs of finding emergency accommodation for young homeless people. |
| GLOUCESTERSHIRE RESOURCE CENTRE £4,000 | Out of school creative club for children. |
| GOOD VIBRATIONS £2,500 | To support gamelan courses in Eastwood Park and Gloucester Prison. |
| MINSTERWORTH VILLAGE HALL £2,000 | Towards disabled access and energy saving measures. |
| MITCHELDEAN & DISTRICT COMMUNITY ASSOCIATION £4,500 | Towards installation of new ceiling and new lights. |
| PAGANHILL MAYPOLE VILLAGE HALL £2,000 | To improve and enhance the exterior and interior of the village hall. |
| RUDFORD AND HIGHLEADON VILLAGE HALL £4,000 | To rebuild village hall after arson attack. |
| ST PETER'S PARISH SOCIAL CENTRE, GLOUCESTER £5,000 | To purchase fireproof curtains and blinds. |
| ST. ANDREWS UNITED REFORMED CHURCH £10,000 | Essential refurbishment and maintenance work to the hall of St. Andrew's in Cheltenham. |
| THE PRINCE'S TRUST £7,500 | To support a two week full time skills development course in construction for young people in Gloucester. |
| Total – 22 grants £111,500 | COMMUNITY WORK |

Education, Sport & Recreation

| | |
|--|---|
| BLAKENEY UNDER FIVES (via host charity: Blakeney Room to Grow) £400 | After school workshops with primary school children |
| CHINESE CHILDREN & PARENTS ASSOCIATION (via host charity: Cheltenham VCA) £500 | Chinese New Year Community Day to be held in February 2011 in Cheltenham. |
| CHIPPING CAMPDEN PLAYING FIELD & RECREATION GROUND £4,000 | To equip teen area of playing field. |
| GLOUCESTERSHIRE GUIDE ASSOCIATION £1,500 | Towards Centenary Show. |
| INFOBUZZ LTD £5,000 | Sex and relationship education support programme for young people. |
| LESLEY-ANNE SCHOLARSHIP FUND £500 | Donation made towards scholarship set up in memory of Lesley Anne Sayers for the study of Scenography, the study and creation of stage design for ballet and dance. |
| LUMBS EDUCATIONAL FOUNDATION £7,000 | To enable LEF to award bursaries to residents of the county needing help with education. |
| MORETON IN MARSH PLAYING FIELD £5,000 | To rebuild changing rooms after arson attack. |
| NATIONAL STAR COLLEGE £30,000 | Towards building a new Work-Skills Centre at the College. |
| NORTHWAY INFANTS HOME & SCHOOL ASSOCIATION £5,000 | To refurbish a redundant kitchen to make a community facility in Tewkesbury. |
| STROUD SEA CADETS £2,000 | New Minibus. |
| UNIVERSITY OF GLOUCESTERSHIRE (ROME SCHOLAR) £2,000 | Scholarship for the British School in Rome. |

**WINCHCOMBE WALKERS ARE
WELCOME
£500**

Winchcombe Walking Festival in 2010: three days of guided walks plus evening entertainment.

**YOUNG GLOUCESTERSHIRE
£10,000**

To provide activities to young people living in rural towns with no youth work provision.

**Total – 14 grants
£73,400**

EDUCATION, SPORT & RECREATION

Vulnerable or disadvantaged sectors of society

| | |
|---|---|
| ALLSORTS £3,000 | Outings for parents of special needs children based in Stroud and District. |
| CHAMWELL HOLIDAY PLAYScheme (via host charity: Spring Centre) £500 | Towards cost of a holiday for children with profound learning difficulties living in Gloucester. |
| CHURN NEIGHBOURHOOD PROJECT £3,000 | Befriending schemes aimed at reducing isolation of elderly people in Cirencester. |
| FAIR SHARES £2,000 | To set up time banking scheme for older people in Bourton on the Water. |
| FRIENDS OF THE SAMARITANS £1,000 | To cover costs of Cheltenham Beer Festival, which raises money for the Samaritans. |
| GLOUCESTER BLAZERS WHEELCHAIR BASKETBALL CLUB (via host charity: Lydney Youth Café) £3,000 | To purchase three junior sports wheelchairs. |
| GLOUCESTERSHIRE M.S. INFORMATION & THERAPY CENTRE £2,000 | To purchase new equipment. |
| GLOUCESTERSHIRE RURAL COMMUNITY COUNCIL £5,000 | People for You, a service providing social life to elderly, isolated and vulnerable people. |
| HEADWAY COTSWOLD TRUST £10,000 | To refurbish a new centre for those with acquired brain injury. |
| HOME FARM TRUST £5,000 | Reed Bed Sewage System at Frocester Manor near Stroud, residential home for people with learning difficulties. |
| LIVE MUSIC NOW! SOUTH WEST £5,000 | To provide a series of participatory music performances for people with dementia living in residential homes in the county. |
| MILESTONE HOLIDAY ACTIVITY SCHEME £500 | Holiday activities for children with severe disabilities living in Gloucester. |

NELSON TRUST
£30,000

First instalment of a three-year grant for the salary for an outreach worker, based at the newly established ISIS women's centre in Gloucester, to support women with complex needs who are at risk of offending.

SHANNON TRUST
£1,000

Project to help teach vulnerable prisoners at HM Gloucester Prison how to read.

SPECAL
£3,000

Towards day care service for vulnerable people with dementia living in the Cotswolds.

STROUD BERESFORD GROUP
£3,140

To replace computers and software for charity working with victims of domestic abuse.

WATERSHED RIDING FOR THE DISABLED
£5,000

To create new access and upgrade stables near Cirencester.

WELL CHILD
£1,500

Helping Hands Project organises practical work such as decorating and gardening either in the homes or the schools/centres for ill or disabled children.

Total - 18 grants
£83,640

VULNERABLE OR DISADVANTAGED SECTORS OF SOCIETY

Summary of applications received and grants paid 2010

| | <u>2010</u> | <u>2009</u> |
|--|-------------|-------------|
| Number of applications considered by the Trustees | 128 | 122 |
| Total grants paid | 78 | 48 |
| Applications considered by the Trustees but refused | 48 | 69 |
| Other applications considered – decision deferred | 2 | 5 |
| Applications refused by the Administrator – not eligible | 54 | 54 |
| Total applications received | 182 | 176 |

COMMITMENTS at 31st DECEMBER 2010

| Organisation | Amount awarded | Date Payable |
|---------------------------------|----------------|--------------|
| Nelson Trust | £ 30,000 | 2011 |
| Nelson Trust | £ 30,000 | 2012 |
| Cheltenham Art Gallery & Museum | £750,000 | 2012 |

BREAKDOWN OF GRANT PAYMENTS 2010 and 2009

| Category | 2010 | | | 2009 | | |
|--|-----------------|---------------|---------------|-----------------|---------------|---------------|
| | Amount Paid | No. of Grants | Average Grant | Amount Paid | No. of Grants | Average Grant |
| The arts, museums and the built heritage | £83,875 | 19 | £4,400 | £132,700 | 12 | £11,000 |
| The environment and natural heritage | £30,000 | 5 | £6,000 | £ 2,000 | 1 | £2,000 |
| Community Work | £111,500 | 22 | £5,060 | £141,482 | 14 | £10,100 |
| Education, sport and recreation | £73,400 | 14 | £5,200 | £ 29,300 | 8 | £3,600 |
| Vulnerable or disadvantaged sectors of society | £83,640 | 18 | £4,640 | £ 97,830 | 13 | £7,500 |
| TOTAL | £382,415 | 78 | £4,900 | £403,312 | 48 | £8,400 |

Figure 1: TOTAL GRANTS PAID – 10 year pattern

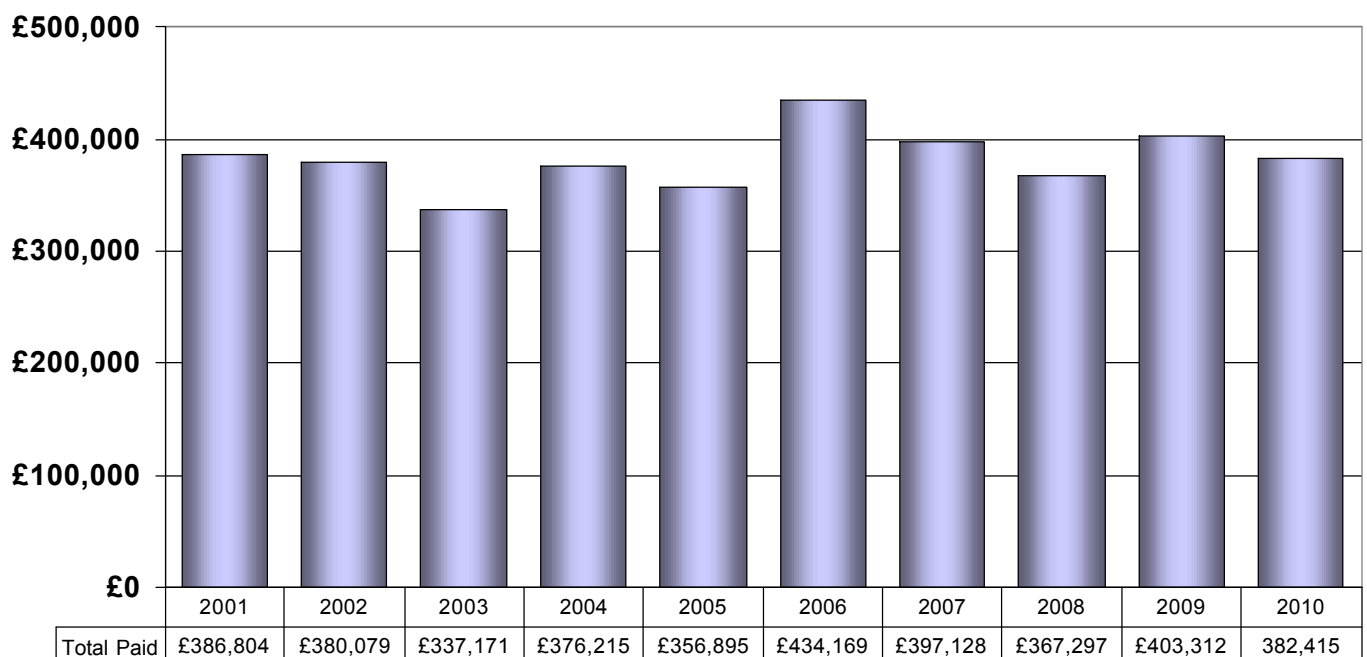


Figure 2: AVERAGE GRANT PAID – 10 year pattern

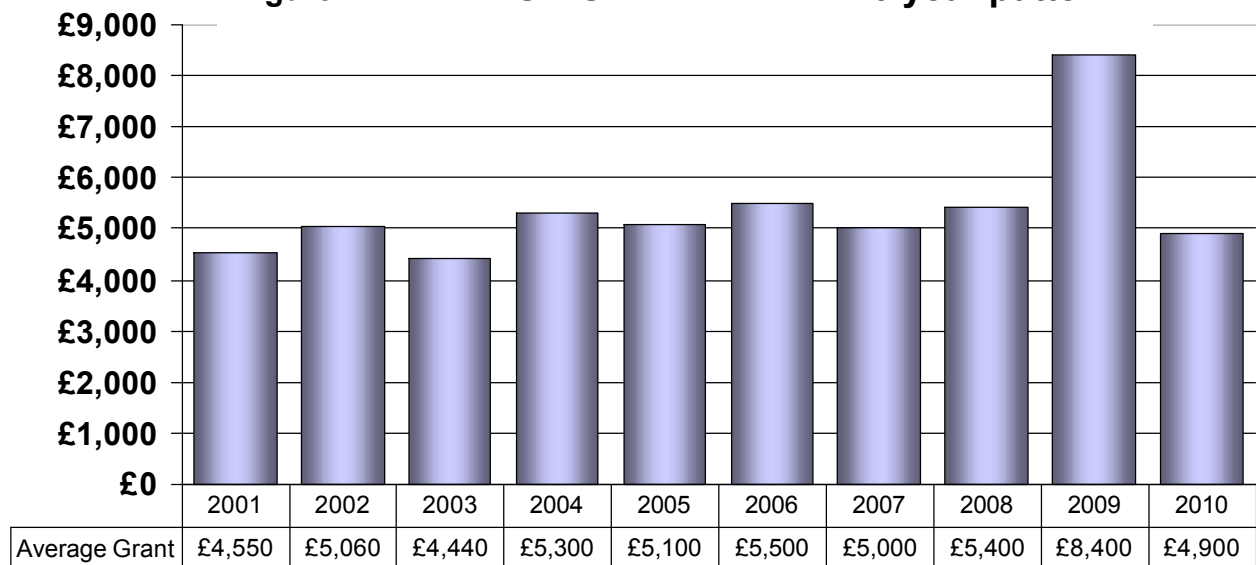


Figure 3: NUMBER OF GRANTS PAID – 10 year pattern

