

THE
SUMMERFIELD
CHARITABLE TRUST

TRUSTEES:

Jamila Gavin

Edward Gillespie

Anthony McClaran

James Millar

Jan Urban-Smith

GRANTS PAID

1st January to 31st December 2011



www.summerfield.org.uk

Registered charity number 802493

CONTENTS

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

2011 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 Photographs

Clockwise from top left:

DOOR YOUTH PROJECT – Training for young people in Stroud; WOODCHESTER MANSION TRUST – Roof repairs; CHURN NEIGHBOURHOOD PROJECT – Befriending scheme for elderly in Cirencester; CHIPPING CAMPDEN RECREATION GROUND – New teen area of playing field.

About the Trust

The Summerfield Charitable Trust (SCT) 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 2011 £495,933 was distributed in a total of 85 grants, from £500 upwards. A copy of the latest Trust accounts is available upon request.

Charities applying to the Trust must 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 ask applicants to show they have considered:

- The impact of their project on the environment;
- Planning for long term self sufficiency, including training of staff or volunteers;
- 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: for Medical research; for private education; for animal welfare appeals; to fund trips abroad; for projects that have already taken place.

Appeals from churches: Appeals from churches are no longer considered; applicants are advised to apply to the Gloucestershire Historic Churches Trust to whom the Summerfield Trust makes an all-inclusive grant.

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.

Charities that 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.

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

2011 was an exceptionally challenging year for many charities as they adjusted to the current economic climate. Furthermore, many local authority services, that residents take for granted, were faced with reductions in funding. The work of the Summerfield Charitable Trust proved to be of particular value in helping to maintain the quality of life in Gloucestershire and the trustees have been active in searching for ways to grow our effectiveness by attracting new investments by way of donations and legacies.

Our investments continued to be managed by Smith & Williamson, ending the year at approximately £8.3m. 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 2011 SCT awarded grants of £495,933 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 85 grants as set out in this report. These include significant grants to Woodchester Mansion for their renovation needs, Westonbirt Arboretum for a major re-landscaping project; Cheltenham Citizens Advice Bureau to enable them to expand to other market towns; a further grant to the Nelson Trust for an outreach worker at the ISIS women's centre; and a grant to the Ruskin Mill Educational Trust for their woodland kitchen.

In 2002 trustees bought a violin for a gifted young musician, Matthew Elston who lived in Bishops Cleeve on the condition that he would make annual payments for it. We were very pleased to receive the final payment from Matthew for his violin and are delighted that his musical career has blossomed; he is now a member of the BBC Concert Orchestra.

The Summerfield lecture was given by Alistair Hignell, focussing on his fight against MS, which threatened to curtail his outstanding career as a sports broadcaster. This proved to be an exceptional presentation in a successful Literature Festival.

We paid the first tranche of the promised grant to the Cheltenham Art Gallery & Museum of £375,000 in September 2011, this will be followed by the second payment on 30 April 2012. It is making good progress with the building work and is due to re-open in 2013.

The University has relocated its art department to the Hardwicke site in Cheltenham. They have not experienced a drop in student numbers for any of its courses and the BA Fine Art degree will continue. Regarding the partnership between the University and the A G & M; it was agreed that the £60,000 grant SCT made to the University (for the Pittville Gallery) will be forwarded to the AG & M in March 2012. In return it is agreed

that the AG & M will host 3 external shows: the Jerwood; Open West and the Illustration show but they will not host the student shows, these will take place in the Hardwick campus.

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 Charitable Trust. Our Trustees are not remunerated for the time and expertise which they give to managing the Trust. We have been spreading the word about the Trust in order to encourage donations and /or legacies and have entertained local solicitors at a lunch at the Cheltenham Racecourse to encourage this. We also hosted a lunch with other Gloucestershire-based administrators and trustees of local grant-making organisations to explore this strategy further.

The Trustees are mindful that Local Authority funding cuts and financial difficulties are being experienced by many charities and threatening the future of previously funded services such as libraries and youth centres. We anticipated an increase in the number of applicants which has not materialised. Our concern is that charities may be reluctant to embark on project fundraising for fear of not being able to sustain on-going costs.

I am very grateful to my co-Trustees, to Lavinia Sidgwick, and to our advisers for their hard work and commitment. We were very sorry to hear of Dr Phillip Kingston's death in the autumn. He was a respected consultant haematologist at Gloucester Royal and a wise and enthusiastic adviser for the Trust. Julia Hurrell has kindly agreed to join the team of advisers with particular focus on applications from the City of Gloucester.

I have no doubt that 2012 will prove equally challenging for the many people who give so tirelessly of their time on behalf of charities in Gloucestershire. We shall continue to do everything possible to maximise the effectiveness of the Trust whilst being mindful of our long-term role as grant givers in the county.

Edward Gillespie
Chairman of the Trustees

ADVISERS

Caroline Barling
Anthony Boden
Sue Edwards
Alyson Gillespie
Julia Hurrell
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 Boards of Cheltenham Festivals and The Everyman Theatre, which he chaired for ten years. He chairs Gloucester Cathedral Council and, as a Board member of the Local Enterprise Partnership, 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 ,

Anthony 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

James lives in Painswick. For the past 20 years he has founded 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. James is a Fellow of the Royal Geographical Society (FRGS) and a Fellow of the Royal Society for the Encouragement of Arts, Commerce and Manufacture (FRSA), as well as an active contributor to a number of environmental charities and sustainability fora.

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. Until recently she managed 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

ARMONICO CONSORT £1,000	Music project in Great Western Court Day Centre in Gloucester to celebrate the Queen's Jubilee.
ARTS IN RURAL GLOUCESTERSHIRE £3,500	A scheme to provide training for young people aged between 14-26 to enable them to programme, host and manage live arts events.
CHELTENHAM FESTIVALS LTD £10,000	Summerfield Lecture during this year's Literature Festival was given by Alistair Hignell. The grant also supported the Festival's education work.
CHELTENHAM FILM FESTIVAL £3,000	To support a Women in Film event at the Festival in November.
CHELTENHAM MUSIC SOCIETY £1,000	To promote a series of concerts of contemporary chamber music.
CINDERFORD MUSIC FESTIVAL £500	Music festival and family fun day.
CITY OF LONDON SINFONIA £3,000	To support a concert commemorating the centenary of the British Antarctic Expedition.
COLEFORD FESTIVAL OF WORDS £1,000	To support local diary workshops for schoolchildren.
FAIRGAME THEATRE £2,500	Arabian Nights: community arts project in Gloucester.
GLOUCESTER MUSIC SOCIETY £1,000	To support a concert of a new song cycle featuring the Dymock poets.
GLOUCESTERSHIRE HISTORIC CHURCHES TRUST £6,000	To help the charity award grants for the repair of historic churches.

**LLANTHONY SECUNDA
PRIORY
£15,000**

Grant to cover a geophysical survey and further archeological research at the medieval priory in Gloucester.

**MINDSONG
£5,000**

To provide music therapy to those who have dementia and are living in care homes.

**PHOTOSTROUD
£1,200**

PhotoStroud put on a programme of events, based in Stroud, to celebrate the life and work of the Spanish poet and dramatist, Federico Garcia Lorca, on the 75th anniversary of his assassination in the Spanish Civil War.

**ROSES THEATRE TRUST
£2,000**

To replace cinema sound system.

**TEWKESBURY BATTLEFIELD
SOCIETY
£5,000**

To erect two, five metre high, oak horse sculptures, representing victory and defeat, to commemorate the Battle of Tewkesbury 1471 during the Wars of the Roses.

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

Towards a production of Achilles, a new musical to be performed by Gloucester young people.

**WOODCHESTER MANSION
TRUST
£20,000**

Towards roof repairs and installation of new visitor interpretation facilities.

**TOTAL – 18 grants
£83,700**

THE ARTS, MUSEUMS AND THE BUILT HERITAGE

Additional grant payments in 2011

**CHELTENHAM ART GALLERY
& MUSEUM
£375,000**

In 2009, trustees marked the Trust's twentieth anniversary by agreeing a special one-off grant of £750,000 towards the major redevelopment of the Art Gallery & Museum. This work began early in 2011, and so the first tranche was released.

The Environment and Natural Heritage

CLEEVE COMMON BOARD OF CONSERVATORS £1,500	Towards conservation work to restore heathland on Cleeve Hill.
COTSWOLD CANALS TRUST £25,000	To help install a hydro power scheme to utilise surplus water flowing down the Stroudwater canal.
CRANHAM COMMON TRUST £5,000	Erection of fencing to improve grazing on Cranham Common.
FRIENDS OF WESTONBIRT ARBORETUM £50,000	To improve current layout of parking and visitor centre.
Total - 4 grants £81,500	THE ENVIRONMENT AND NATURAL HERITAGE

Community Work

BOYS BRIGADE 1ST TEWKESBURY CO. £3,000	To repair a local community hall in Newtown, outside Tewkesbury.
BROCKWORTH COMMUNITY PROJECT £10,000	Salary for co-ordinator of young volunteers.
CHANGING TUNES £4,000	To provide music sessions to prisoners in HMP Gloucester.
CITIZENS ADVICE BUREAU (CHELTENHAM, CIRENCESTER & TEWKESBURY) £13,000	Replacement of essential computer equipment.
DOWN HATHERLEY VILLAGE HALL £2,000	To help install energy conservation systems in village hall.
DURSLEY TABERNACLE UNITED REFORMED CHURCH £1,000	To install disabled access to community rooms.
FAMILY LIVES £10,000	To pilot a partnership between Parentline Plus and CiNCH (Children in Need of Counselling Help) to provide a programme of family support services throughout the county.
FOREST OF DEAN ALLOTMENT ASSOCIATION £2,500	The provision of water harvesting systems and power tools for community allotment project.
FURNITURE RECYCLING PROJECT £10,000	Towards recycling of electrical goods in Gloucester.
GL COMMUNITIES £3,500	To support the Dig Deep project, a work placement scheme in decorating, carpentry and landscaping for 16-25 year olds living in Gloucester City.
GL11 COMMUNITY PROJECT £20,000	To fund the salary for the project manager of Dursley community centre over 3 years.
GLOUCESTERSHIRE WARWICKSHIRE RAILWAY CHELTENHAM AREA GROUP £2,000	To provide a tarmac surface to the platform to improve disabled access.

GYMNATION £9,000	Funds to help revitalise the St James City farm in Gloucester.
HALL OF FRIENDSHIP £2,000	To convert a working men's club into a meeting room and coffee shop in Weston Sub Edge.
HOME-START COTSWOLDS LTD £3,000	To run a volunteer training course in Cirencester and Stow on the Wold.
PRIORS PARK NEIGHBOURHOOD PROJECT £7,000	Towards the co-ordinator's salary in order that she can maintain and build services to make the Project more financially stable.
SEVERN AREA RESCUE ASSOCIATION £2,000	Equipment needed for rescue boat.
ST BRIAVEL'S ASSEMBLY ROOMS CHARITABLE TRUST £10,000	Match funding to release a grant from the local RDPE for renovation of village hall, in the Forest of Dean.
ST. JOHN AMBULANCE £4,000	To train volunteers in emergency medical care for those living in rural locations in the county.
STONEHOUSE PARTNERSHIP £2,500	Towards the first year of running costs for a new community service.
ULEY PLAYING FIELD ASSOCIATION £3,000	To help replace the 1960s sports pavilion.
UPTON ST LEONARDS PARISH COUNCIL £3,000	To replace play equipment on recreation ground.
Total – 22 grants £126,500	COMMUNITY WORK

Education, Sport & Recreation

BARNARDO'S £4,112	To support a motor mechanic training programme for young people in Gloucester.
CHRISTIAN ADVENTURE CENTRE £7,000	To refurbish existing stable block for use as a learning centre for disabled students in Lydney.
CIRENCESTER OPPORTUNITY GROUP £1,500	Music therapy sessions for children with special needs.
DRAKE MUSIC PROJECT £10,000	Ramp It Up programme of music education for disabled children living in Cirencester, Gloucester and Coleford.
ELIZABETH FARMOR TRUST £500	Grant to support Farmor's School in Fairford to purchase extra musical instruments.
EUROPEAN BLUES ASSOCIATION £1,000	Music and performing arts workshops for ethnic minority pupils in Gloucester schools.
FRIENDS OF ENGLISH BICKNOR CE PRIMARY SCHOOL £3,000	To construct outdoor stage area on school field in Forest of Dean.
FRIENDS OF HORSLEY PRIMARY SCHOOL £2,000	Joint project between village school and local church to create a multi-purpose hall in the church nave.
GLOUCESTERSHIRE EAST DIVISION GIRL GUIDES £1,500	To damp proof the Guide house in Northleach.
IT SCHOOLS AFRICA £10,000	Charity based in Cheltenham, runs a training service for unemployed people to process re-cycled computers which are then distributed to African schools.
LECHLADE MEMORIAL HALL & RECREATION GROUND £2,000	To resurface all weather sports pitch.
LUMBS EDUCATIONAL FOUNDATION £7,000	Bursaries to residents of the county needing help with further educational costs.

MORETON IN MARSH BOWLING CLUB £3,000	To help fund the relocation of the bowling club.
MULBERRY TREE EARLY YEARS GROUP £3,000	To cover the costs of turning an ex fire engine into a classroom for a Steiner school in Cromhall.
QUEDGELEY WANDERERS FOOTBALL CLUB £10,000	To construct a multi-purpose building for a range of sporting activities for use by the local community.
REDMARLEY PARISH COUNCIL £2,000	To create a basketball area on the playing field.
RUSKIN MILL EDUCATIONAL TRUST £20,000	To rebuild woodland kitchen and classroom for students with learning difficulties in Nailsworth.
SHERBORNE PLAYING FIELDS COMMITTEE £500	To upgrade the sports playing field changing rooms.
UNIVERSITY OF GLOUCESTERSHIRE (ROME SCHOLAR) £2,000	Summerfield bursary for art student to attend the British School in Rome.
WHADDON, LYNWORTH & PRIORS NEIGHBOURHOOD PROJECT £1,725	Towards community led football tournament for Cheltenham children during the summer holidays.
Total – 20 grants £91,837	EDUCATION, SPORT & RECREATION

Vulnerable or disadvantaged sectors of society

CASTLE GATE FAMILY TRUST £7,000	Towards funding the salary of a family play worker who cares for children during domestic prison visits in Gloucester prison.
CHARLOTTE'S TANDEMS £1,000	Charity based in Dursley, which provides tandems for disabled people.
COTSWOLD 92 CLUB £1,000	Outings for the elderly and disabled living in or near Moreton in Marsh.
COTSWOLDS DOWNS SYNDROME GROUP £2,000	Grant awarded to take a group of children with Downs Syndrome to Exmoor for an activity holiday.
CREATIVE SUSTAINABILITY CIC £7,000	Organisation based in Stroud which organises three residential summer camps for disabled and non-disabled young people.
FAMILY HAVEN £6,000	The Family Haven provides support ,information, shelter and food to vulnerable, young families in Gloucester. This grant was to help with repair work to the building.
GLOUCESTERSHIRE YOUNG CARERS PROJECT £7,500	To provide transport for young carers to enable them to attend social activities.
GUIDEPOSTS TRUST £1,000	Grant to cover activities, room hire and volunteer expenses to enable social groups for young people with learning disabilities in Stroud, Cheltenham and the Forest of Dean.
HOPE FOR TOMORROW £5,000	To refurbish mobile chemotherapy unit, which tours the county enabling people to access their chemotherapy sessions nearer to home.
INISHFREE £2,000	Stroud based centre for recovering alcoholics: grant to purchase woodworking machinery for the production of beehives and toys.
JAMES HOPKINS TRUST £7,500	Grant to help provide nursing respite care for severely disabled and life limited children aged under six.
KITTY BARRON GROUP FOR DISABLED RIDERS £1,000	To extend kitchen / storage area at the Camp Riding Centre for people with disabilities. This grant was returned as the project had to be cancelled.

MAGGIE KESWICK JENCKS CANCER CARING CENTRES TRUST £8,000	Centre based in Cheltenham which provides courses, workshops and group activities to cancer patients and their carers.
NELSON TRUST £30,000	Second tranche of a three-year grant for the salary of an outreach worker, based in Gloucester, who supports women with complex needs and are at risk of offending.
SALVATION ARMY, GLOUCESTER £2,000	To create a new commercial kitchen to cater for increasing numbers of clients.
SPINAL INJURIES ASSOCIATION £2,396	To provide a support service to newly injured patients and their families in Gloucestershire hospitals.
STROUD COURT COMMUNITY TRUST £5,000	Upgrading residential home for people with autism.
STROUD VALLEYS PROJECT £5,000	The charity works with the local community to improve the environment and natural heritage of the Severn Vale. Grant for training project for volunteers with mental health problems.
SUE RYDER FOUNDATION £5,000	To purchase new equipment for the Day Care centre.
TAX VOLUNTEERS £5,000	National charity providing a tax advice service for pensioners on low incomes living in the county.
YOGA FOR THE SPECIAL CHILD: SOUTH WEST £2,000	After-school yoga club for children with disabilities living in Stroud.
Total - 21 grants £112,396	VULNERABLE OR DISADVANTAGED SECTORS OF SOCIETY

Summary of applications received and grants paid 2011

	<u>2011</u>	<u>2010</u>
Number of applications considered by the Trustees	131	128
Total grants paid	85	78
Applications considered by the Trustees but refused	40	48
Other applications considered – decision deferred	6	2
Applications refused by the Administrator – not eligible	51	54
Total applications received	182	182

ADDITIONAL PAYMENTS & RECEIPTS IN 2011

Organisation	Amount Paid	Received (returned grants)
Cheltenham Art Gallery & Museum: First instalment of a special one-off grant of £750,000 awarded in 2009 toward capital costs.	£375,000	
Kitty Barron Group for Disabled Riders: A grant was awarded early in 2011 but was later returned due to the project being cancelled.		£1,000
The Marah Trust: Returned from a grant of £7,000 made in 2008.		£2,620

COMMITMENTS at 31st DECEMBER 2011

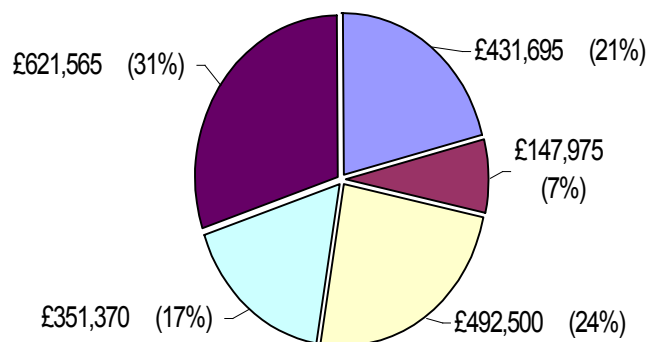
Organisation	Amount	Date Payable
Cheltenham Art Gallery & Museum	£375,000	2012
Nelson Trust	£ 30,000	2012

BREAKDOWN OF GRANT PAYMENTS 2011

Grant Type	Amount Paid	No. of Grants	Average Grant
The arts, museums and the built heritage	£83,700	18	£4,650
The environment and natural heritage	£81,500	4	£20,375
Community Work	£126,500	22	£5,750
Education, sport and recreation	£91,837	20	£4,590
Vulnerable or disadvantaged sectors of society	£112,396	21	£5,350
TOTAL	£495,933	85	£5,830
Additional Grant Payments 2011 not included above:			
Cheltenham Art Gallery & Museum	£375,000	1	
TOTAL GRANT PAYMENTS 2011	£870,993	86	

5 Year Breakdown of Grants Paid 2007 to 2011

Total Amount Paid = £2,045,105
Total Number of grants = 362



- Arts, museums & the built heritage
- Environmental & natural heritage
- Community work
- Education, Sport & Recreation
- Vulnerable or disadvantaged sectors of society

Figure 1: TOTAL GRANTS PAID – 5 year pattern

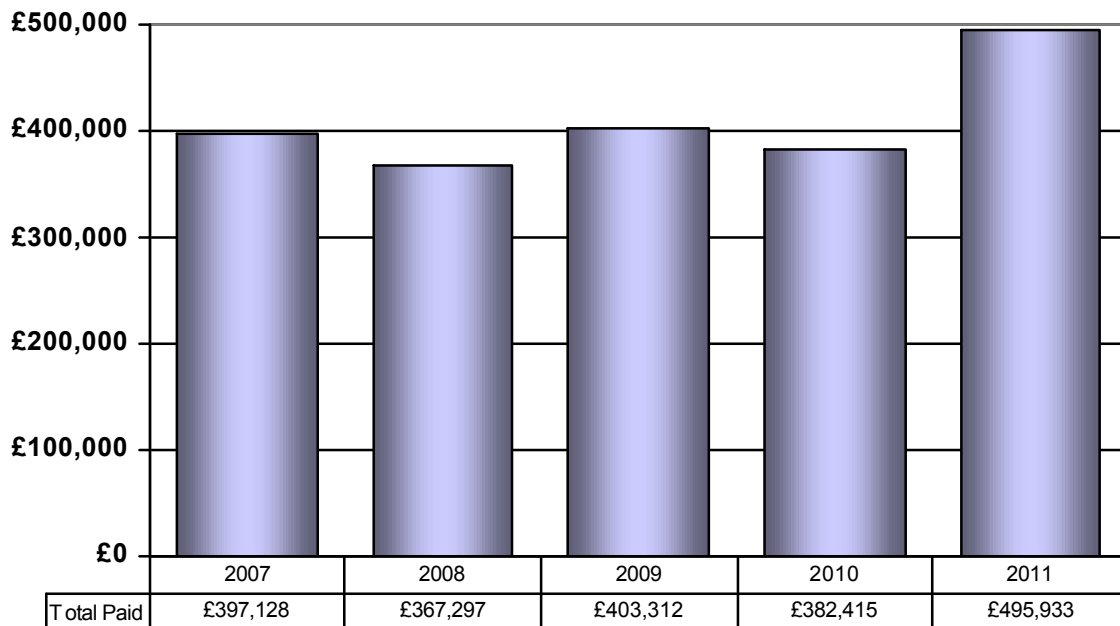


Figure 2: NUMBER OF GRANTS PAID – 5 year pattern

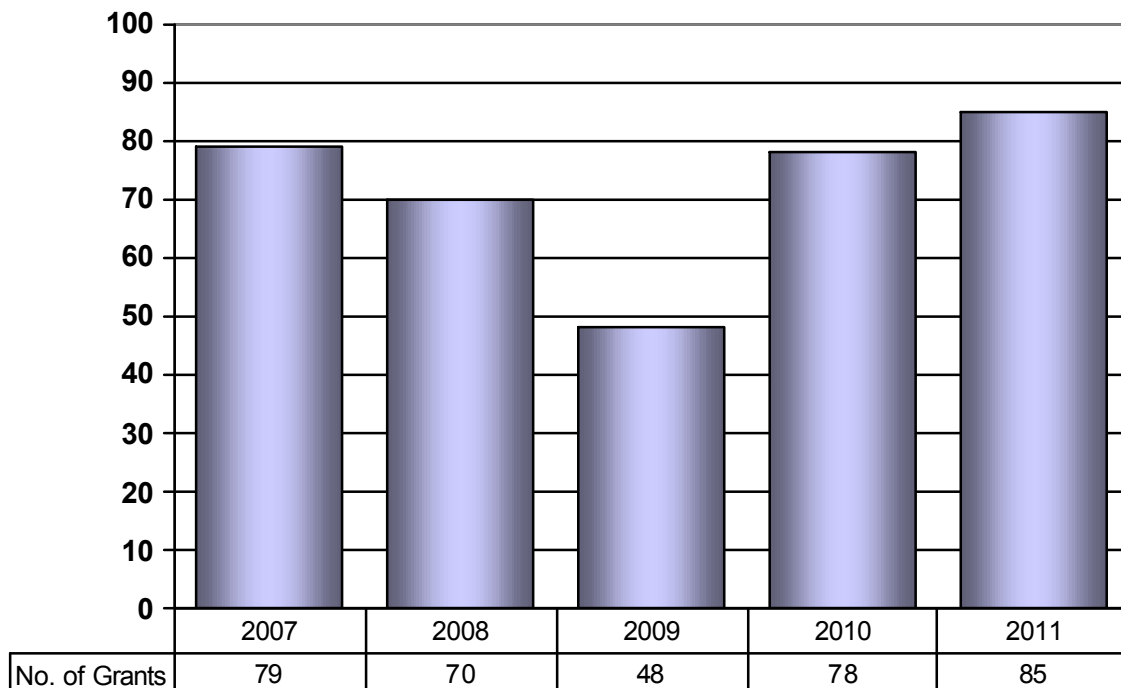
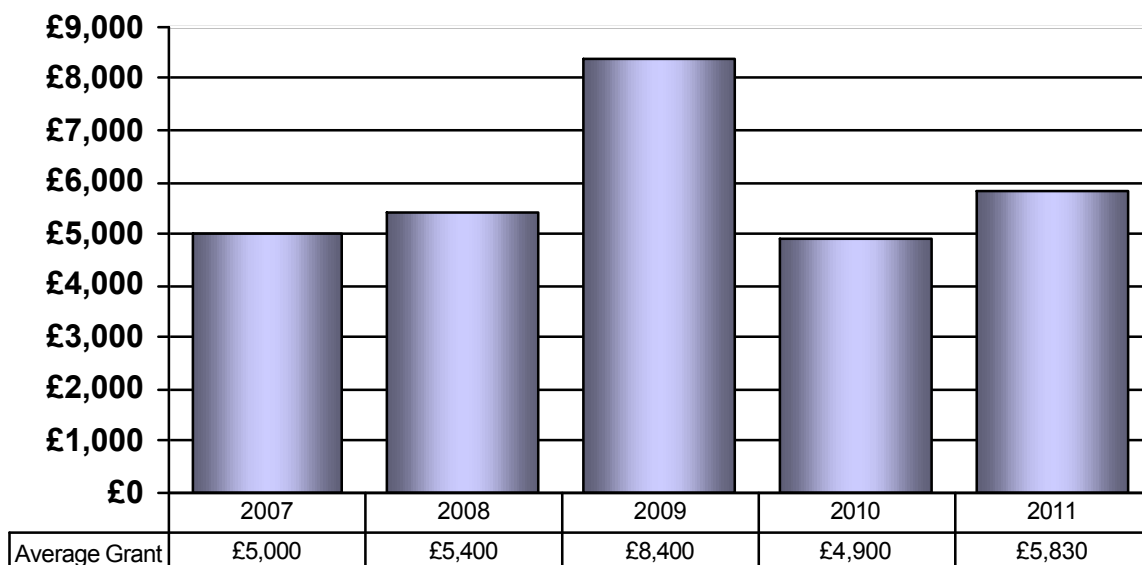


Figure 3: AVERAGE GRANT PAID – 5 year pattern



Summerfield Charitable Trust

P.O.Box 4

Winchcombe

Cheltenham

Gloucestershire

GL54 5ZD

Tel: 01242 676664 - **Email:** admin@summerfield.org.uk

Website: www.summerfield.org.uk