

THE
SUMMERFIELD
CHARITABLE TRUST

TRUSTEES:
Vanessa Arbuthnott
Edward Gillespie OBE
Kate Hicks Beach
David Owen
James Millar

GRANTS PAID

1st January to 31st December 2016



www.summerfield.org.uk

Registered charity number 802493

CONTENTS

2-3 About the Trust: What we fund and how to apply

4 Introduction

5-6 About the Trustees

7 Grants Paid: List of beneficiaries

7-8 The arts, museums and the built heritage

9 Community work

10-12 Vulnerable or disadvantaged sectors of society

13-14 Education, sport & recreation

15 The environment and natural heritage

16-18 Summary and statistics

Front cover Photograph: Children from the Chipping Camden School participating in Longborough Festival Opera's Marriage of Figaro Workshop.

Photo Credit: Longborough Festival Opera

About the Trust

The Summerfield Charitable Trust (SCT) was established by Ronald Summerfield, a Cheltenham antique dealer, shortly before his death in 1989. The board of five Trustees has discretion as to which charitable uses to apply the funds. The Trust is administered by Mrs Lavinia Sidgwick.

In 2016 £417,887 was distributed in a total of 91 grants, from £500 upwards. A copy of the latest Trust accounts is available upon request.

What we fund and how to apply

We 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.

See our funding criteria below, or view our Grants Paid pages for more information on current and past projects we have funded.

Geographical Area

Charities and organisations applying to the Trust must be based in the six district councils of Gloucestershire (i.e. Cheltenham, Gloucester, Stroud, Tewkesbury, Cotswolds or Forest of Dean); or they must be engaged in a project that is of specific benefit to residents within the county.

Viewed especially favourably are:

- The arts, museums and the built heritage;
- The environment and natural heritage;
- Community work;
- Education, sport and recreation;
- Vulnerable and disadvantaged sectors of society.

Applicants are asked to show they have considered:

- The impact of their projects upon 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.

** Charities which can form partnerships to work together, particularly those needing funds for capital expenditure, will be exempt from VAT payments.*

Building Improvements

If you are applying for funds for a new building, or to make alterations to an existing building, you need to note that SCT is supportive of measures which reduce running costs, improve a building's 'performance', and improve facilities for users/staff. Your application would need to give a full explanation of what measures you have considered on:

- Sustainability;
- Building design and management;
- Ease of use.

In addition it is essential that you explain the ownership of the building and the nature of the agreement between the owner and the charity / organisation raising funds for the improvements.

Organisations we will fund:

- **Registered charities.**
- **Charitable Incorporated Organisations.**
- **Community Groups, Not-for-profit limited companies and Voluntary Groups:** Applications will only be accepted if supported by a letter of endorsement from a registered charity.
- **Community Interest Companies:** Applications must include a letter of endorsement from a registered charity, and a copy of audited accounts including a breakdown of salary costs.

We do not fund:

- medical research;
- private education;
- animal welfare appeals;
- fund trips abroad;
- projects that have already taken place.

Staff Costs: Recurring staff costs will NOT be supported. The Trustees will only occasionally consider funding staff/salary costs for limited periods. Bids for such funding should indicate clearly how, at the earliest opportunity, it is intended that such staff costs will be sustainably supported. We may also, in some circumstances, agree to fund a one-off project that has a proportion of staff costs in the overall budget.

Individuals: Applications from individuals are no longer accepted. Should an individual resident of Gloucestershire require financial support for educational needs, they are recommended to contact the Lumb's Education Trust. SCT awards an annual grant to Lumbs to enable it to support local residents on SCT's behalf. Write to: Mrs Margaret Wanless, Lumbs Education Trust, 4 Manor View, Cold Pool Lane, Up Hatherley, Cheltenham, GL51 6HZ.

Churches: Appeals from churches for renovation are not currently accepted. SCT awards an annual grant to Gloucestershire Historic Churches Trust to enable it to support the repair and improvements of buildings used for Christian worship throughout Gloucestershire. You are advised to contact GHCT via their website: [Gloucestershire Historic Churches Trust](#).

Repeat Grants: 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.

HOW TO APPLY

The Trustees meet quarterly - usually in January, April, July, and October - to consider all applications received prior to the deadline dates (*see website*), and **prefer to support projects that will take place, or start, within six months of receiving the grant.** It is therefore important when applying to be clear about time scales and confident they will fit in with the timing of the quarterly meetings.

WE HAVE A TWO-STAGE APPLICATION PROCESS. Before completing the online application we strongly advise that you view the [What We Fund](#) and [Grants Paid](#) pages on our website to ensure that your project is eligible and meets with our funding criteria.

www.summerfield.org.uk

Email: admin@summerfield.org.uk Tel: 01285 721 211

Introduction

The work of the Trust continues to play a significant part in maintaining and enhancing the quality of life in Gloucestershire. A total of £417,887 was awarded by way of 91 grants and four pledges totaling £58,000 were made to a wide variety of good causes. The second tranche of £179,500 to the restoration of Gloucester Cathedral's Lady Chapel, granted in 2015, was not paid during the year but will be requested once the work has commenced.

Significant grants were made to: Cheltenham Festivals to support a Science and Literature Lecture and their education programme for four years and LINC (Leukaemia & Intensive Chemotherapy Fund) £20,000 to upgrade their facilities.

The 2016 Summerfield Event at the Science Festival was on the theme of “Who Wants to Live Forever” debated by Professor Aubrey de Grey and Sarah Harper. The 2016 Summerfield Event at the Literature Festival was How To Live Better: a discussion about where we draw our inspiration for ways to live between Michael Puett, a Harvard professor of Confucianism, the philosopher Julian Baggini and journalist Ritula Shah expert on Jainism. SCT also supported the Education Department’s Young Writers project.

As agreed when Trust funds were merged with Summerfield's in 2015, two grants were made in the name of Grace Fry, £6,000 to the Longfield Hospice home service and £6,000 to CLIC Sargent for family support.

The level of grants was the lowest since 2012 following advice from investment managers Smith & Williamson on the potential volatility of the markets in connection with the referendum in July and the US Presidential election in November. Unexpected outcomes to both and the positive reactions of the markets resulted in the value of investments reaching a value of over £9m at the year end.

The profile of the Trust continues to grow due to media coverage of the high level of grants received, good attendances at events sponsored by the Trust and the ease of access for applicants to the updated website.

The Trustees continued their strategy to engage with the county's Leadership and welcomed Alex Chalke MP for Cheltenham to their July meeting.

We are an experienced and well-organised grant-making charity, keen to encourage those looking to make donations or leave legacies for the benefit of the county. Our Trustees are not remunerated for the time and expertise which they give to managing the Trust. David Owen, Chief executive of Gloucestershire First the regional Local Enterprise Partnership and a recognised ambassador for the county, joined the Board of Trustees in January 2016. The Trustees look forward to the challenges and opportunities that lie ahead, working with the outstanding administration and advisers, who add their expertise to the Trustee's decision making on applications.

Edward Gillespie

Chairman of the Trustees

About the Trustees



TRUSTEES: Edward Gillespie OBE, Kate Hicks Beach, David Owen and James Millar

The board of five Trustees has discretion as to which charitable uses to apply the funds.

VANESSA ARBUTHNOTT

Vanessa Arbuthnott is from Cumbria, having gained a degree in nursing and SRN she became an intensive care nurse. Having married she retrained with a PGCE to become a primary school teacher in London. After having children, she attended art school to study surface print, which led to her starting her own fabric mail order company in 2000. In 2012 she created an artist residency in her house; she and her students take art classes out to vulnerable groups in the community. This work has given her an insight into needs in Gloucestershire.

EDWARD GILLESPIE OBE - Chairman of the Trustees

Edward Gillespie was educated at Tonbridge School and the University of York where he gained a degree in Politics. He retired in November 2012 from a career of managing racecourses, including Cheltenham for over 30 years. In January 2015 he was awarded an OBE for his services to racing. He continues to work within racing and to chair the Pony Racing Authority. He has served on the Board of The Everyman Theatre, which he chaired for ten years, and was Chair of Gloucester Cathedral Council. He is on the Board of Cheltenham Festivals and is Chair of the Music Festival. He is an Honorary Fellow of the University of Gloucestershire, a Deputy Lieutenant of Gloucestershire and an Honorary Freeman of the Borough of Cheltenham.

KATE HICKS BEACH

Kate lives near Cirencester. She went to Northleach Grammar School and gained a degree in Sanskrit and Religion at Edinburgh University, before going to the Royal Scottish Academy of Music to study singing. For twenty-five years she has worked as a professional singer, teacher and choir leader. Kate was on the board of the Gloucestershire Historic Churches Trust and was a Trustee of Home-Start Cotswolds. She works part time at Farmor's School in Fairford and runs a 70 strong community choir in Coln St. Aldwyns. She also works as a Volunteer Coordinator for the Gloucestershire based charity Mindsong, singing with elderly care home residents and in particular those with dementia

JAMES MILLAR

James became a trustee in 2010 and lives near Painswick. An experienced commercial lawyer who has practised in Scotland, England and USA, for the past 25 years he has founded and managed entrepreneurial private companies in the commercial and environmental sectors. James has served on the boards of various national organisations including the Lighting Association and the Federation of Small Businesses (FSB). He currently sits on a variety of business, environment and charity boards including Keep Britain Tidy and Road Safety Trust. He is a Fellow of the Royal Geographical Society (FRGS) and of the Royal Society for the Encouragement of Arts, Manufacture and Commerce (FRSA).

DAVID OWEN

David was born and brought up in Gloucestershire, studying at Brockworth School, before gaining a degree in Business Studies from Liverpool John Moores University. He spent ten years in the North West working across the education sector and as MD of a start-up, high-growth, training business. For the last fifteen years he has worked in Gloucestershire, first as Director of Enterprise and Innovation at the University of Gloucestershire and now as Chief Executive of GFirst Local Enterprise Partnership. He is currently a director of Gloucestershire Voluntary & Community Sector Alliance, South West Investment Group and Gloucestershire Enterprise Limited and is a member of the International Advisory Group of the Economic Development Council. He lives in Stroud with his author wife and two daughters.



ADVISERS:

Erica Crichton Miller; Alyson Gillespie; Carina Greenwood; Julia Hurrell; Sue Kinder; Sally Mackie; Jill Matley; Barbara McNaught; Diana Owen; Richard Owen; Richard Taylor; Katharine Tetley; Ety Wateridge; Laura Watts; Kate McDuff and Anthony and Sally Robinson.

Summary of Applications Received and Grants Paid 2016

	<u>2016</u>	<u>2015</u>
Number of applications considered by the Trustees	126	142
Total grants paid	91	101
Applications considered by the Trustees but refused	31	41
Other Applications considered – payment deferred	4	0
Applications refused by the Administrator – not eligible	8	9
Total applications received	169	151

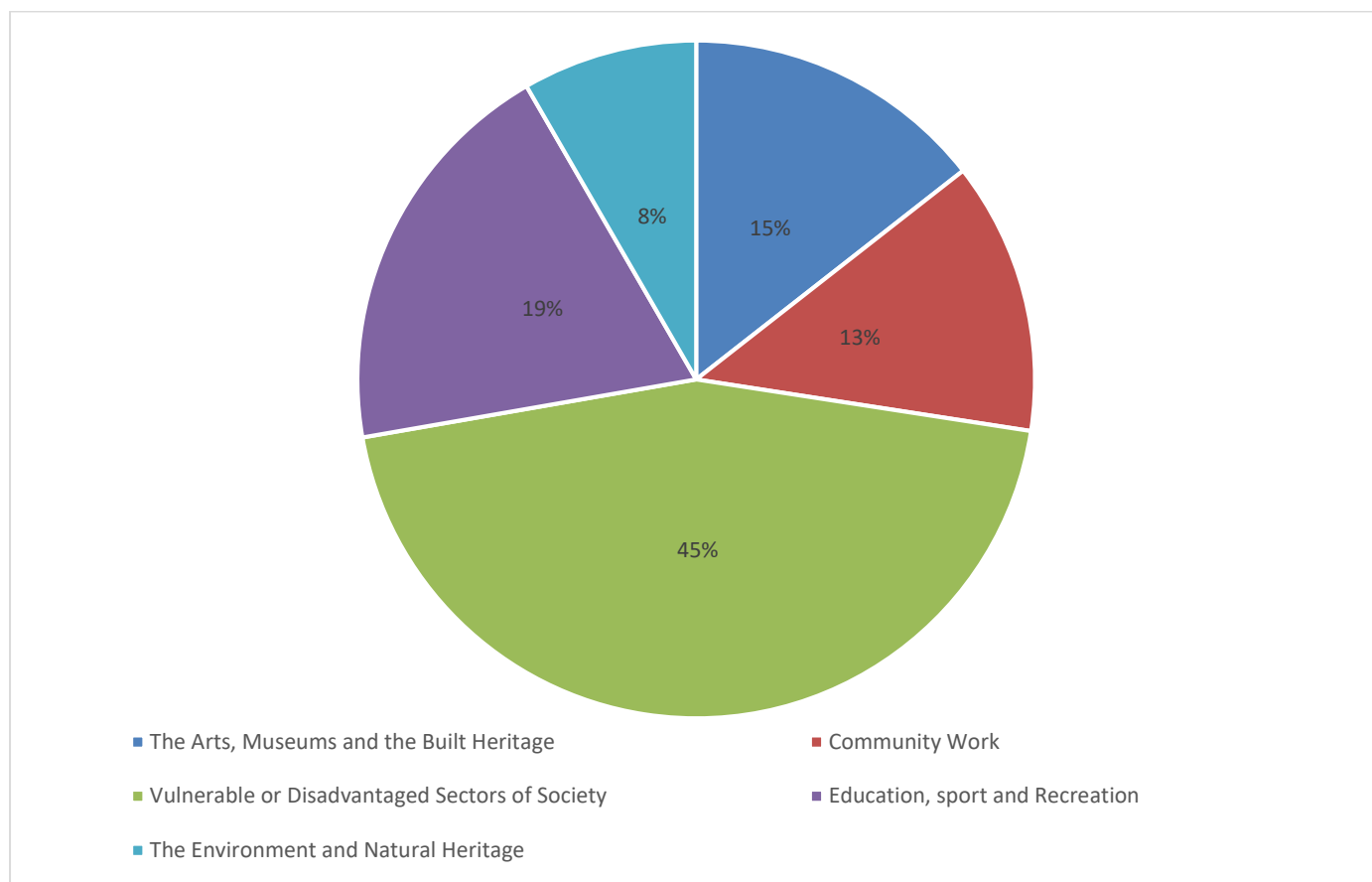
COMMITMENTS at 31st DECEMBER 2016

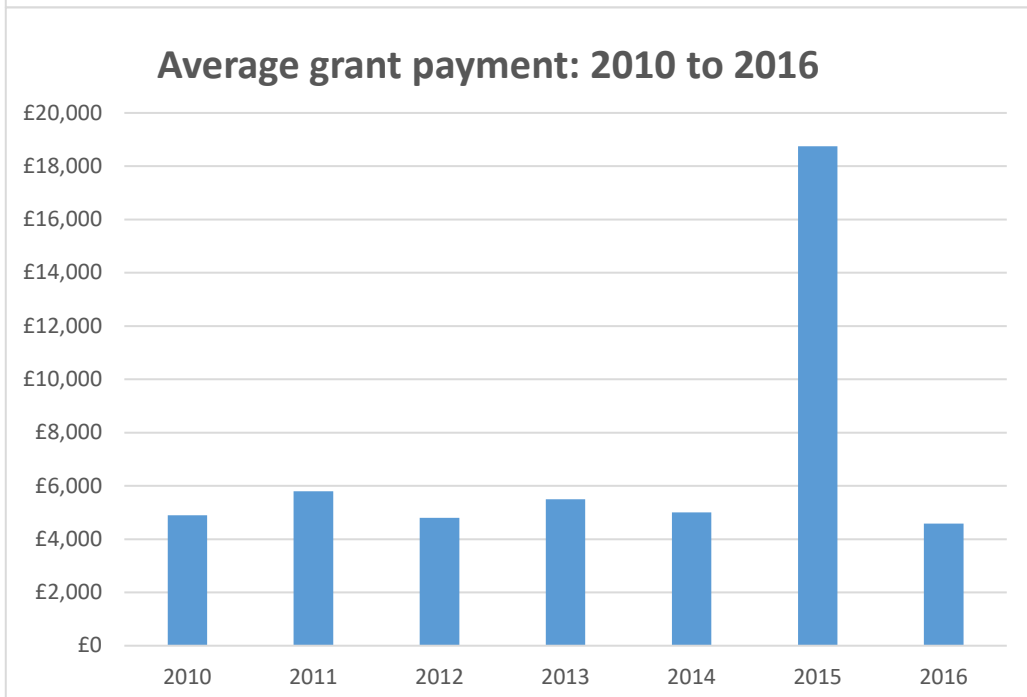
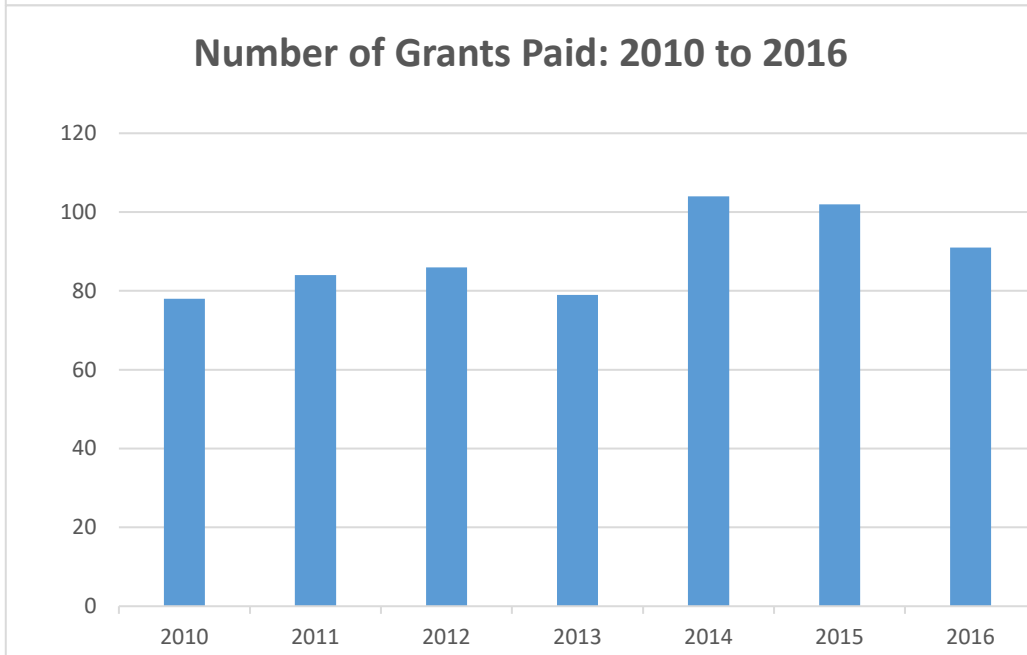
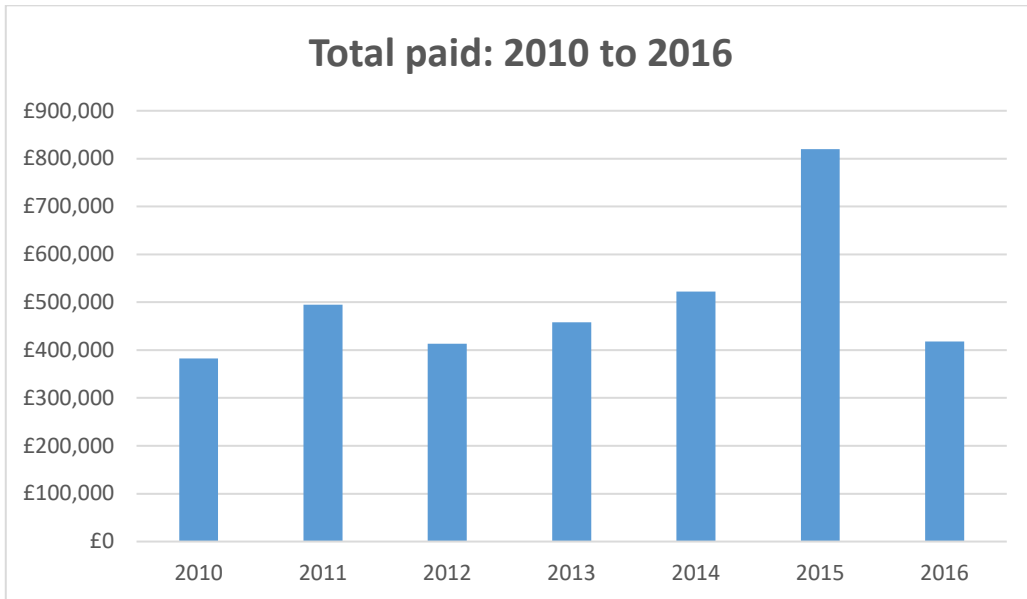
Organisation	Amount	Date Payable
Cheltenham Festivals	£25,000	January 2017
Corinium Museum	£20,000	To be confirmed
Princes Trust	£5,000	To be confirmed
Noah's Ark Children's Venture	£8,000	To be confirmed
TOTAL COMMITMENTS	£58,000	

BREAKDOWN OF GRANT PAYMENTS 2016

Grant Category	Amount Paid	No. of Grants	Average Grant
The Arts, Museums and the Built Heritage	£ 60,338	11	£5,485
Community Work	£ 54,311	13	£4,175
Vulnerable or Disadvantaged Sectors of Society	£ 187,308	33	£5,675
Education, sport and Recreation	£ 81,030	27	£3,000
The Environment and Natural Heritage	£ 34,900	7	£4,985
TOTAL	£ 417,887	91	£4,590

Breakdown of Grants Paid by Grant Category 2016





SUMMERFIELD CHARITABLE TRUST

PO BOX 287, CIRENCESTER, GLOUCESTERSHIRE, GL7 9FB

Tel: 01285 721 211

Email: admin@summerfield.org.uk

Website: www.summerfield.org.uk



Follow us on Twitter: @SummerfieldNews