

THE
SUMMERFIELD
CHARITABLE TRUST

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

GRANTS PAID

1st January to 31st December 2017



www.summerfield.org.uk

Registered charity number 802493

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Front cover: the newly restored Lady Chapel roof in Gloucester Cathedral

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 2017 £578,167 was awarded in grants, including 5 pledges totalling £105,132 which will be paid over the next two years. 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. In 2017 a total of £578,167 was awarded to a wide variety of good causes; this sum included 5 pledges totalling £105,132 which will be paid over the next two years. Significant progress has been made on the restoration of Gloucester Cathedral's Lady Chapel, SCT's final payment of £179,500 was paid in April 2017.

Significant grants were made to: Friends of Corinium Museum in Cirencester for the new Discovery Centre; Tetbury Goods Shed for a new arts centre and the Cotswold Canal Trust was promised £40,000 towards the building of a new bridge. As agreed when Trust funds were merged with Summerfield's in 2015, two grants were made in the name of Grace Fry, one to the Asthma Relief Fund and one to Brain Tumour Support both for £5000.

We continue to support a Science and Literature Lecture at Cheltenham Festivals . The 2017 Summerfield Event at the Science Festival was on the theme of Our Future World: Populations and People: when Dallas Campbell joined forced-migration expert Alex Betts, gerontologist Sarah Harper and geographer Ben Rogaly to discuss refugees and baby boomers. The 2017 Summerfield Event at the Literature Festival was given by Sir Chris Bonington, the mountaineer. SCT also supported the Education Department's 'Reading Teachers, Reading Pupils' project, and we have agreed to fund it for the next two years.

We were pleased to welcome our team of advisers to the Museum in the Park, in Stroud to discuss grant-making in the county. Barbara Pond from Gloucestershire Rural Community Council addressed the meeting.

The Trustees continued their strategy to engage with the county's Leadership and welcomed Martin Surl, Chair of Police and Crime Commission for Gloucestershire to discuss common ground between the PCC Fund and SCT.

During the year, we have compiled a risk register, which we will review annually.

Smith & Williamson, our investment managers, continue to accrue an increase in the value of our fund, reaching over £10m this year. 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.

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. 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

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

About the Trustees

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 - 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. 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 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 Mondsong, singing with elderly care home residents.

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.

The Summerfield Charitable Trust

Grants Paid Grouped by Scheme

The arts, museums and the built heritage

Applicant Project	Amount
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CHELTENHAM FESTIVALS To support annual Lecture in Literature and Science Festivals, and education department	£25,000
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CHELTENHAM MUSIC SOCIETY Cheltenham Contemporary concerts	£1,000
CHIPPING CAMPDEN MUSIC FESTIVAL Youth Academy Orchestra	£3,000
CREATE GLOUCESTERSHIRE Art of Libraries - a project to encourage the use of libraries	£5,500
FOREST OF DEAN SCULPTURE TRUST To provide educational resources for local children	£4,000
GLOUCESTER CATHEDRAL For Project Pilgrim	£179,500
GLOUCESTER THEATRE COMPANY Training scheme for young local actors	£2,500

2017 Grants Summary

GLOUCESTERSHIRE COUNTY HISTORY TRUST To research and write new local histories of 9 parishes near Cirencester	£7,000
GLOUCESTERSHIRE HISTORIC CHURCHES TRUST To help the charity support the repair of historic churches in Gloucestershire	£10,000
GLOUCESTERSHIRE MUSIC MAKERS T/A THE MUSIC WORKS Gloucester Music Studio	£9,000
GLOUCESTERSHIRE SYMPHONY ORCHESTRA Gloucestershire Young Musician of the Year Award. SCT agreed a grant of £1500 for two years.	£1,500
GUST City Voices, a series of events during Gloucester History Festival	£3,500
HIDDEN GARDENS AND SCULPTURE OF RODBOROUGH Drop-In art workshops for children	£1,000



HOLST BIRTHPLACE TRUST To refurbish the Museum	£5,748
KINGSHILL HOUSE LTD	£3,300

2017 Grants Summary

Towards refurbishment of Arts Centre

LANGBOROUGH FESTIVAL OPERA £1,500

To provide workshops on the Magic Flute to N. Cotswolds schools.

ROYAL AIR FORCES ASSOCIATION, CHELTENHAM BRANCH £3,450

A donation towards an exhibition commemorating the RAF in Glos during WW1

RUSKIN MILL EDUCATIONAL TRUST £7,200

To refurbish the exhibition gallery

THE FRIENDS OF THE CORINIUM MUSEUM £20,000

New Discovery Centre



THE VALE COMMUNITY HOSPITAL LEAGUE OF FRIENDS LTD £2,000
Growing on Prescription allotments project

UPCLOSE PRODUCTIONS (TRADING AS OPERAUPCLOSE) £750
To fund educational workshops at Stroud Festival

WOTTON UNDER EDGE ARTS ASSOCIATION £800
Printing costs for spring Arts Festival

WYLDWOOD ARTS CIC £3,210
Young Producers: a unique piece of professional theatre that encapsulates the historical and cultural relevance of the Forest of Dean.

Total Awarded for the arts, museums and the built heritage £301,958

Community

Applicant Project	Amount
<p>ABBEY 900 (CIRENCESTER COMMUNITY DEVELOPMENT TRUST SCT awarded a donation towards the Abbey 900 Festival to celebrate Cirencester's heritage</p>	£5,000
<p>CHALFORD VILLAGE SHOP To establish a postal service in the community shop.</p>	£933
<p>COTSWOLD FRIENDS Funds to provide community activities in N. Cotswolds</p>	£7,000
<p>GLOUCESTERSHIRE MENTORING AND SUPPORT CIC (GMAS) Grant to help establish a community cafe in Springbank in Cheltenham</p>	£8,000
<p>HEMPSTED PLAYGROUP & TODDLERS Grant to help replace outside safety flooring</p>	£1,600
<p>HESTERS WAY PARTNERSHIP Parks for People Project</p>	£6,000
<p>LECHLADE MEMORIAL HALL AND RECREATION CHARITY To rebuild the hall following its demolition as a result of arson</p>	£10,000
<p>LYDBROOK MEMORIAL HALL AND RECREATION GROUND A grant to help redecorate Memorial Hall</p>	£1,000
<p>PAROCHIAL CHURCH COUNCIL OF HOLY APOSTLES To upgrade kitchen in church hall in Charlton Kings</p>	£6,000
<p>RUSCOMBE AND WHITESHILL VILLAGE SHOP ASSOCIATION Request for support in funding refurbishment of shop</p>	£3,500
<p>SEDBURY SPACE To remodel a former youth club</p>	£6,000
<p>SIDDINGTON VILLAGE HALL Request to support provision of new heating system</p>	£6,000
<p>TETBURY RAIL LANDS REGENERATION TRUST To make Tetbury Goods Shed into a community arts centre</p>	£30,000
<p>TEWKESBURY MEDIEVAL FESTIVAL Towards the Medieval Festival parade</p>	£2,000

THE FRIENDSHIP CAFE
Grant to support community work in Gloucester

£11,000



THOMAS GAZE MEMORIAL HALL TRUST
Refurbishment of Hall

£5,000

TOGETHER IN MATSON
Grant to help fund social and learning events for the community in Matson Gloucester

£5,000

TOM ROBERTS ADVENTURE CENTRE
Towards costs of new wash rooms

£6,000

Total Awarded for Community Work

£120,033

Education, Sport & Recreation

Applicant Project	Amount
CHALFORD HILL COUNTY PRIMARY SCHOOL PTA Request for help in refurbishing outdoor play area	£3,500
CHELTENHAM RUGBY CLUB To help build new changing rooms	£12,000
COBALT APPEAL FUND To provide an equipped conference room for medical professionals and community groups.	£10,000
CORAM LIFE EDUCATION GLOUCESTERSHIRE BRANCH Grant to help fund a mobile classroom offering workshops in health and wellbeing for children in Gloucestershire.	£3,750
FRIENDS OF BETTRIDGE AND BELMONT SCHOOL Cycling Initiative for children with disabilities	£3,500
GET UP AND GO GLOUCESTER Funds to support physical activity in Gloucester	£1,721



GLOUCESTERSHIRE WILDLIFE TRUST To support outdoor learning for children	£5,000
HARDWICKE PLAYGROUP To purchase electronic learning journals	£2,700
HATHERLEY & REDDINGS CRICKET CLUB	£3,000

2017 Grants Summary

New four lane cricket practise area	
HUNTLEY AND CHURCHAM YOUTH PROJECT Youth project specific for 14-17year olds	£2,000
LUMBS EDUCATIONAL FOUNDATION Annual award for individual educational bursaries	£7,500
NATIONAL TRUST Roman Villa Woodland classroom	£5,000
SAPPERTON VILLAGE HALL To renovate the roof of the village hall.	£500
TEWKESBURY CRICKET CLUB To re-tile pavilion roof and increase nets facility	£3,000
THE ROCK To fund the bike repair and maintenance project	£7,000
THE WOODEN SPOON CHARITY HITZ - to increase life skills and aspirations of young people in Glos.	£7,000
UNIVERSITY OF GLOUCESTERSHIRE, SCHOOL OF FINE ART Final bursary for student placement at The British School in Rome.	£2,500
WOOLASTON SCHOOL GARDEN To help purchase a polytunnel for school garden	£4,500
Total Awarded for Education, sport and recreation	£84,171

The Environment and Natural Heritage

Applicant Project	Amount
HAWKWOOD COLLEGE To fund new signage of the site.	£5,000
NOAH'S ARK CHILDREN'S VENTURE Installation of a bio-mass boiler	£8,000
THE CONSERVATION VOLUNTEERS To engage local community in caring for 3 orchards in Gloucester	£1,500
WOTTON UNDER EDGE SWIMMING POOL LIMITED To instal solar heating	£8,600
COTSWOLD CANALS TRUST A pledge was made towards the rebuild of the Walk Bridge over the Stroudwater Canal	£40,000
Total Awarded for The environment and natural heritage	£63,100

Vulnerable or disadvantaged sectors of society

Applicant Project	Amount
AGE CONCERN (FOREST OF DEAN) To provide kitchen equipment for a meals-on-wheels service	£3,360
AGE CONCERN ST HILDAS Grant towards lunch club costs for the elderly with learning difficulties in Gloucester	£4,162
ART SHAPE LIMITED To run an inclusive leadership course enabling disabled people to take part.	£5,000
ASTHMA RELIEF To provide nebulisers in Gloucestershire; in memory of the Grace Fry Trust	£5,000
BRAIN TUMOUR SUPPORT Grace Fry grant for support groups in Cheltenham and Gloucester	£5,000
CARERS GLOUCESTERSHIRE Supervision and travel expenses for volunteer counsellors	£7,500
CITIZENS ADVICE BUREAU (STROUD & COTSWOLDS) Grant awarded to support volunteer training	£6,780
COTSWOLD CRUSADERS BOCCIA CLUB To support an Ambassador programme to inspire disabled people to play Boccia	£3,500
CREATIVE SUSTAINABILITY CIC Grant to support wilderness camps for disabled and non-disabled teenagers.	£6,960
CROSSROADS CARE CENTRAL AND EAST GLOUCESTERSHIRE To provide arts activities for older people with disabilities in rural areas.	£5,000
FAMILY HAVEN To replace soft play conservatory roof	£12,000
FOREST UPCYCLING PROJECT Towards the purchase of a new van to provide employment for the disadvantaged.	£7,500
GLOUCESTER CHILD CONTACT CENTRE On-going running costs	£3,000
GLOUCESTERSHIRE RAPE AND SEXUAL ABUSE CENTRE	£9,758

2017 Grants Summary

Effective monitoring and outcome reporting to demonstrate effectiveness and support income generation strategy

HOP SKIP AND JUMP COTSWOLD	£5,000
Grant to refurbish the Cotswold Centre which provides respite care for children and young adults.	
LANGLEY HOUSE TRUST	£3,590
Equipment for therapeutic garden	
LITERATURE WORKS	£2,250
To support National Memory Project in Gloucestershire	
METHODIST HOMES	£850
Grant to buy musical instruments for residents of Brockworth House in Cheltenham, a home for those with severe dementia.	
MINDSONG - MUSIC FOR DEMENTIA	£8,000
To fund a new service of music therapy for couples in crisis.	
REVITALISE (FORMERLY WINGED FELLOWSHIP TRUST)	£1,250
Grant to support a holiday for disabled people and their carers who live in Gloucestershire.	
RONAN'S TRUST	£5,000
GROWING HOPE. a project to provide support to bereaved children through gardening.	
SCRUBDITCH CARE FARM	£20,000
SCT made a pledge towards the expansion of the Care Farm	
SPINAL INJURIES ASSOCIATION	£4,780
A grant for the peer support service in Glos.	
STROUDCO COMMUNITY INTEREST COMPANY LTD	£3,500
To help with re-location costs.	
TALL SHIPS YOUTH TRUST	£1,500
To attract young, disadvantaged people from Gloucestershire to take part in a tall ships voyage.	
TEENS IN CRISIS (TIC+)	£7,333
Towards Face to Face Counselling service for vulnerable young people and their families.	
THE FARM PROJECT CIC	£5,000
To support week-long visits from urban schools	
THE NELSON TRUST	£18,632
First payment of a two year grant to support young people's rural outreach project	
THE PRINCE'S TRUST	£5,000
The Get Started with Music programme	

2017 Grants Summary

THE READER To provide weekly shared reading groups for users of the Nelson Trust	£2,500
THE SOCIETY FOR MUCOPOLYSACCHARIDE DISEASES To provide advocacy and support to individuals with MPS	£2,200
WATERSHED RIDING FOR THE DISABLED To upgrade the facilities	£7,500
Total Awarded for Vulnerable or disadvantaged sectors of society	£188,405

Summary of Applications Received and Grants Paid 2017

	<u>2017</u>	<u>2016</u>
Number of applications considered by the Trustees	130	147
Total grants paid	96	91
Applications considered by the Trustees but refused	31	52
Other applications considered – payment deferred	3	4
Applications refused by the Administrator – not eligible	16	17
Total applications received	146	164

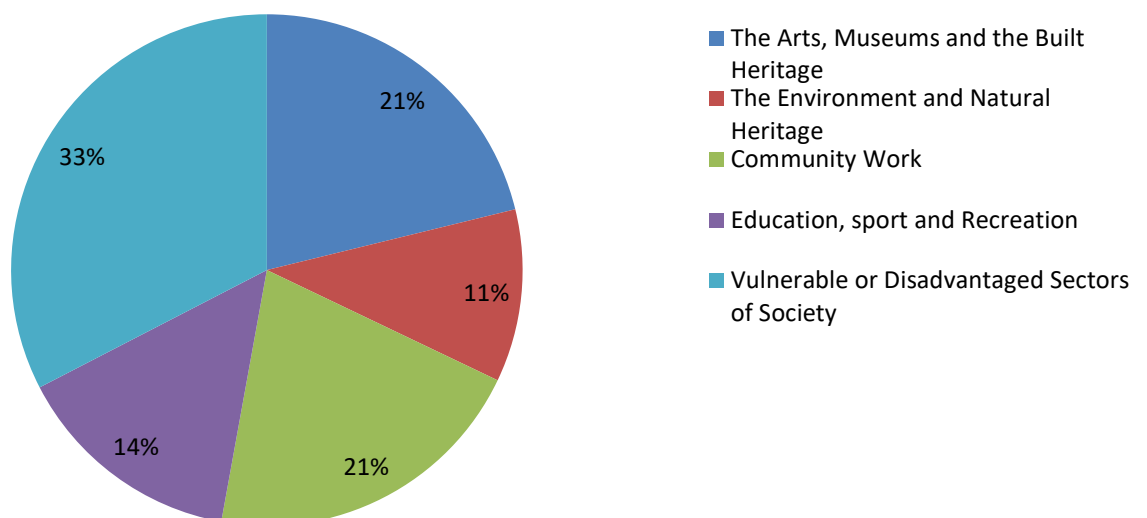
COMMITMENTS at 31st DECEMBER 2017

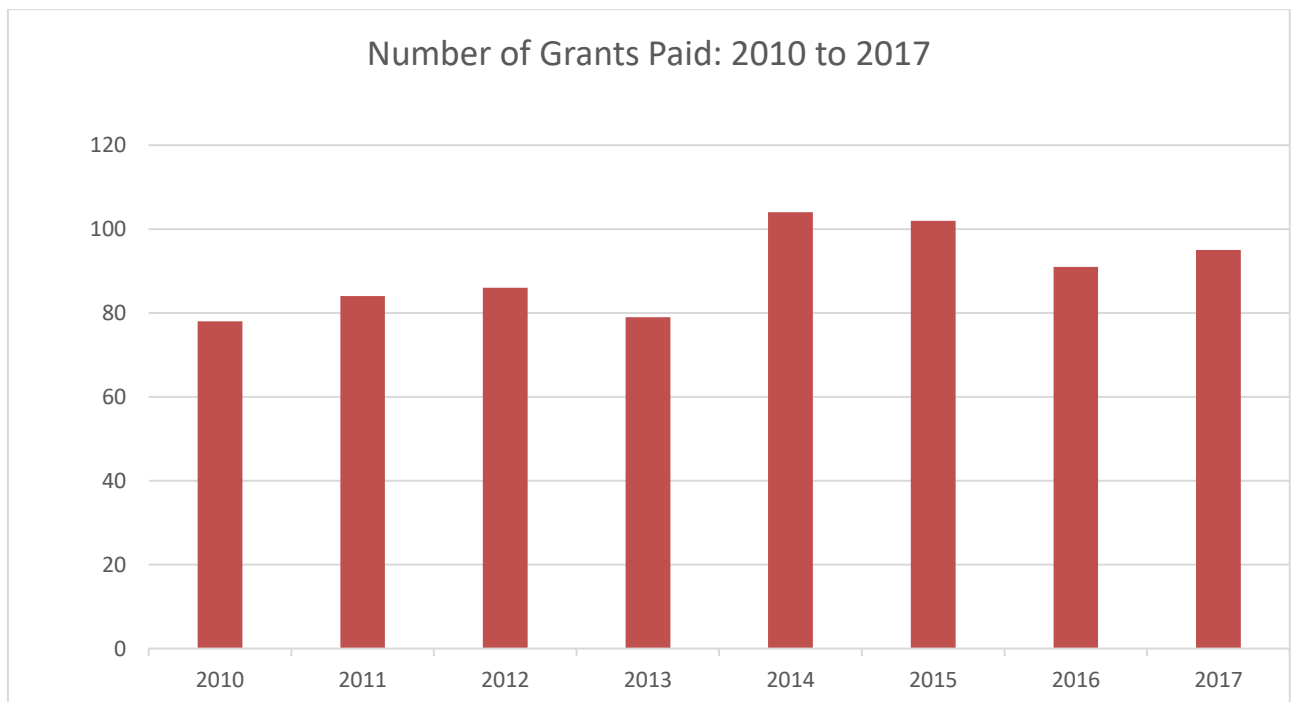
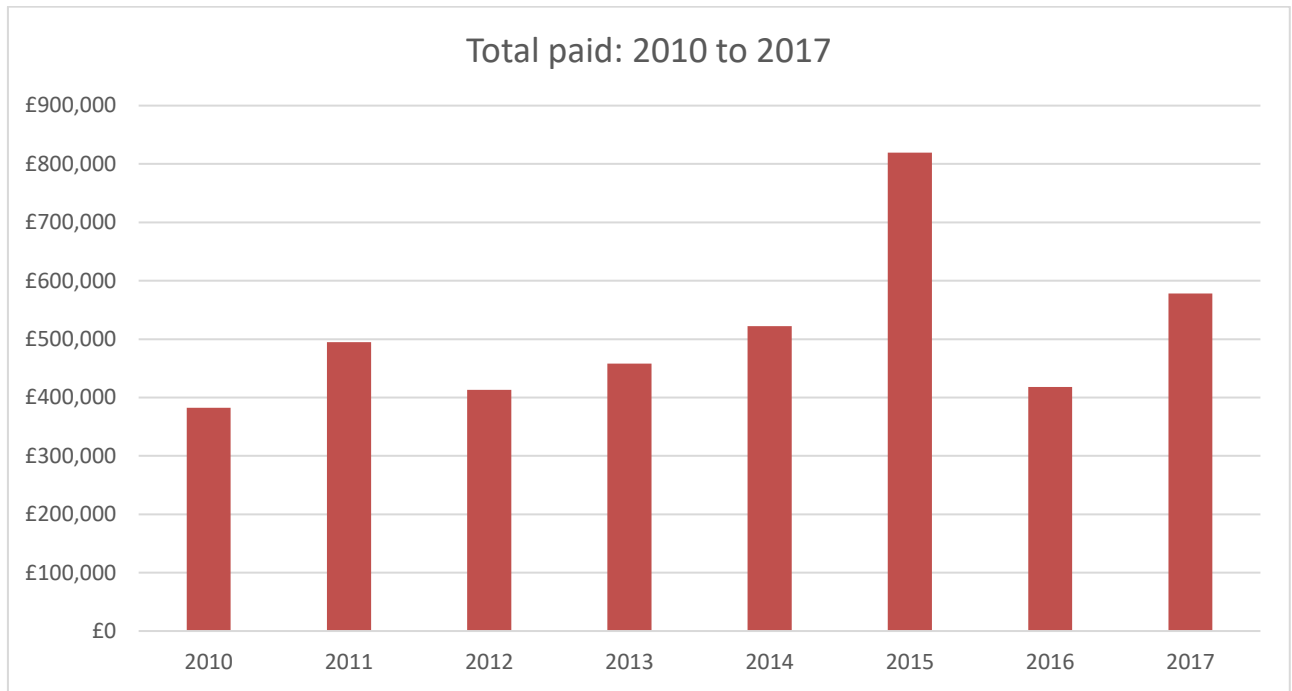
Organisation	Amount	Date Payable
Cheltenham Festivals	£25,000 x2	Jan 18 & 19
Cotswold Canal Trust	£40,000	Nov 18
Scrubditch Care Farm	£20,000	Nov 18
Nelson Trust	£18,632	July 18
Glos. Symphony Orchestra	£1500	July 18
TOTAL COMMITMENTS	£130,132	

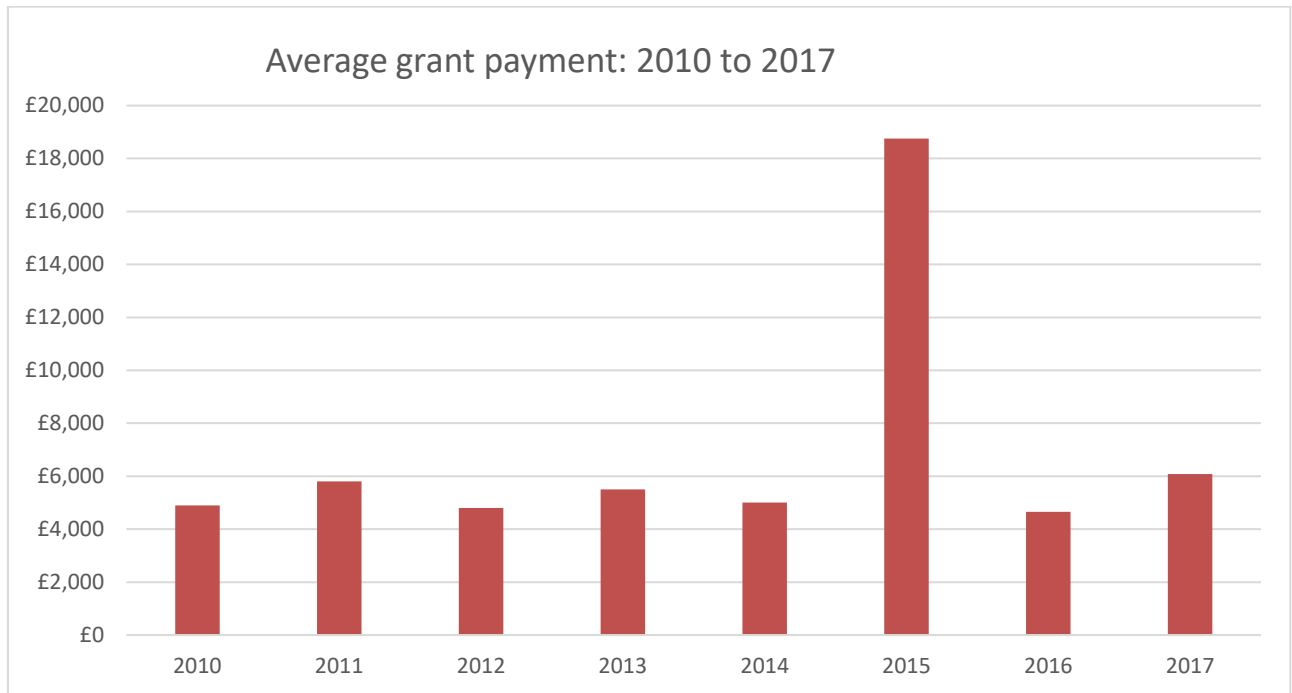
BREAKDOWN OF GRANT PAYMENTS 2017

Grant Category	Amount Paid	No. of Grants
The Arts, Museums and the Built Heritage	£301,958	23
The Environment and Natural Heritage	£63,100	5
Community Work	£120,033	18
Education, sport and Recreation	£84,171	18
Vulnerable or Disadvantaged Sectors of Society	£188,405	32
TOTAL	£757,667	96

Breakdown of Grants Paid by Grant Category 2017







SUMMERFIELD CHARITABLE TRUST

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