



**TRUSTEES:**

***Vanessa Arbuthnott***

***Antonia Shield***

***Kate Hicks Beach***

***Roger Mortlock***

***David Owen***

## **GRANTS PAID**

**1<sup>st</sup> January to 31<sup>st</sup> December 2021**



**[www.summerfield.org.uk](http://www.summerfield.org.uk)**

**Registered charity number 802493**

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Front cover: COTSWOLD CONSERVATION BOARD

## 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 2021 £259,516 was awarded in 34 grants, plus pledge totalling £20,000 which will be paid in 2022. 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.

However, like many grant-giving Trusts, the income we have to distribute to charities has been reduced in the last year due to the impact of COVID-19. As a consequence we will have a particular focus to our grant giving in 2022 (see below) and will be making a smaller number of grants this year. We anticipate that most of our grants will be under £10,000, with only one or two larger grants.

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.

If you are applying from a charity based outside Gloucestershire, we will want to see evidence of strong engagement with people and organisations in the county.

Applications are considered in the following categories:

- The arts, museums and the built heritage (see **Buildings Improvement** section below);
- The environment and natural heritage;
- Community work;
- Education, sport and recreation;
- Vulnerable and disadvantaged sectors of society.

**However, in 2022, the focus for our grant giving will be on:**

- Recovery from the impacts of the COVID-19 pandemic and support for the most vulnerable and disadvantaged communities in Gloucestershire
- Projects that improve our environment and/or address the impacts of the climate emergency

**All applicants are asked to show they have considered:**

- The impact of your 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.

*\* Where charities can enter into collaborative arrangements/partnerships to work together, particularly when seeking funds for capital expenditure, we would suggest advice is taken on the potential to benefit from VAT relief on transactions between the collaborators.*

### **Buildings Improvement**

For 2021 we are unlikely to support applications for routine repairs or for new capital projects unless there is a very strong argument that the project needs to happen this year.

If you still want to apply 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.

### **Environmental Impact**

We believe we all have a responsibility to protect the environment for the future generations, and this includes the projects and communities we support. Through our grant programme we want to inspire community groups to make their own contribution to reduce their environmental impact, especially in reducing carbon emissions, the main driver of climate change.

We would like you to consider in your application what steps you have taken to consider your environmental impact. This could include reducing waste, saving energy, reducing the impact of events, or thinking differently about travel. We realise that for some projects this is harder than others, but we would like you to demonstrate that you have considered your environmental impact.

### **Organisations we will fund:**

#### **Registered charities.**

- **Charitable Incorporated Organisations.**

- **Community Groups, Not-for-profit limited companies and Voluntary Groups:** applications will only be accepted 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.

### Donations are NOT given to:

- **Medical research;**
- **Private education;**
- **Animal welfare appeals;**
- **Fund trips abroad;**
- **Projects that have already taken place.**
- **Individuals:** applications from individuals are not accepted
- **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.

### A note on staff costs

Your application may include staff costs where they are required to deliver your project, but applicants will need to demonstrate how staff and core costs will be maintained beyond the grant funding.

## HOW TO APPLY

During 2022 the Trustees will only meet three times in March, June, 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 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](http://www.summerfield.org.uk)

Email: [admin@summerfield.org.uk](mailto:admin@summerfield.org.uk) Tel: 01285 721 211

## ***Introduction from the Chair***

In these extraordinary times the Trust continues to play a significant part in maintaining and enhancing the quality of life in Gloucestershire. A total of £259,516 was distributed by way of grants to a variety of good causes across the county.

Grants included a pledge of £20,000 to the Gloucester Academy of Music for the purchase of a new centre in Gloucester, which will be paid when the total amount is raised.

The 2021 Grace Fry grant of £5,000 was the final payment of the award to Wellchild Charity for their work in caring for seriously ill children.

The Trust has continued to use our website, social media, networks and public events to promote its profile.

### **Strategy:**

The Trustees reviewed our strategy in the Autumn, in the light of the Covid pandemic, and have agreed a renewed focus on two key areas for 2022:

- Recovery from the impacts of the COVID-19 pandemic and support for the most vulnerable and disadvantaged communities in Gloucestershire
- Projects that improve our environment and/or address the impacts of the climate emergency

In 2022 we expect to distribute most of our grants at less than £10,000 with one or two larger grants during 2022.

### **Thank you**

We continue to be supported by an outstanding team of Advisers who, due to circumstance, we have not been able to physically meet with this year. They have, however, continued to provide enormous assistance to Trustees in our decision making.

And finally, the Trust would not operate in the efficient and effective way it does without the efforts of Lavinia and Wendy who continue to ensure that applicants are supported as far as possible in making bids for funding and ensuring that grants are distributed to good causes as quickly as possible.

**David Owen**  
Chairman of the Trustees

**ADVISERS:** Brendan Conboy; Emma Crichton-Miller; Julia Hurrell; Wendy James; Sue Kinder ; Nicky Lawson; Barbara McNaught; Frank McDermot; Sally Mackie; Kate Macduff ; Karen Randall; Katharine Tetley; Alistair Watson.

## About the Trustees

**The board of six 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.

### **KATE HICKS BEACH**

Katrina Hicks Beach 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 runs a programme of Mindful Singing Groups for the Gloucestershire based charity Mindsong, recruiting, training and supporting volunteers to sing regularly with care home residents living with mid to late stage dementia. She works part time at Farmor's School in Fairford and runs a 70 strong community choir in Coln St. Aldwyns.

### **ROGER MORTLOCK**

Roger Mortlock joined Summerfield's board of Trustees in May 2019. He is CEO of the Gloucestershire Wildlife Trust, the county's largest environmental charity with 28,000 members and over 60 nature reserves. He joined GWT in 2013 from the Soil Association where he was Deputy Director and Chair of the Food for Life Partnership. He is also Chair of the Soil Association Land Trust which holds productive land in trust for future generations and a Trustee of the Bat Conservation Trust and Hawkwood College. He is Vice Chair of the Gloucestershire Local Nature Partnership. He has a particular interest in ecological land management, and programmes that connect people and nature, especially in relation to health and wellbeing.

### **DAVID OWEN - Chairman of the Trustees**

David Owen was born and brought up in Gloucestershire, studying at Brockworth School, before gaining a degree in Business Studies from Liverpool John Moores University and later a masters in Leading Change. 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 twenty 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 the Gloucestershire Nature and Climate Fund, Gloucestershire Enterprise Investments, and is an advisor to Government on the Future Flight Advisory Board. He lives in Stroud with his partner, Laura, and their four daughters.

### **ANTONIA SHIELD**

Antonia Shield joined The Summerfield Trust board of Trustees in November 2020. Antonia is Managing Partner of BPE Solicitors in Cheltenham having previously spent 10 years heading up the

## **2021 Grants Summary**

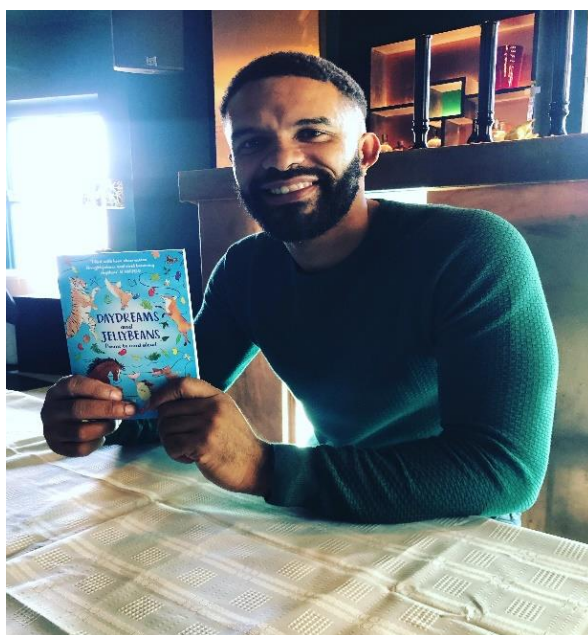
firm's large property team. Antonia has undertaken a wide range of commercial property work throughout her career including development and regeneration projects. Antonia did her first degree in Architectural History and she remains passionate about the built environment both historic and contemporary, enjoys art, antiques and gardening.



## ***The Summerfield Charitable Trust Grants Paid Grouped by Scheme***

### **The Arts, Museums and the Built Heritage**

<b>Applicant Project</b>	<b>Amount</b>
<b>GLOUCESTERSHIRE SYMPHONY ORCHESTRA</b>	<b>£1,200</b>
Grant to support the Gloucestershire Young Musician of the Year award, which aims to encourage and promote young musicians in the county. The 2021 award was given to Darcy Beck an outstanding talent on the marimba, who gave a wonderful performance in Cheltenham Town Hall on the day of the award.	
<b>Longborough Festival Opera</b>	<b>£1,000</b>
Grant given to support the 'Playground Opera' to perform 'Hansel and Gretel' in the playgrounds of 8 Gloucestershire schools throughout June 2021, reaching over 1,000 pupils between the ages of 8 and 14.	
<b>STROUD BOOK FESTIVAL</b>	<b>£4,000</b>
Grant to the 2021 Stroud Book Festival to cover the costs of the Schools Day, which was a day of virtual events that local and regional primary schools accessed remotely.	
<b>Total Awarded for the Arts, Museums and the Built Heritage</b>	<b>£6,200</b>



**Stroud Book Festival**  
Alex Wharton



Cheltenham Town Hall Concert

Darcy Beck

## Education, Sport & Recreation

Applicant Project	Amount
<b>CIRENCESTER OPPORTUNITY GROUP</b>	<b>£1,596</b>
Grant to support the provision of weekly swimming lessons for disadvantaged children in the hydrotherapy pool at Paternoster School.	
<b>COTSWOLD LAKES TRUST</b>	<b>£5,000</b>
Grant towards the costs of running an education project during 2021 to help young people form lasting connections with the natural environment, enjoy the outdoors and engage with nature so that they have a healthy respect for their local environment and drive sustainable behaviour.	
<b>COTSWOLD CONSERVATION BOARD</b>	<b>£3,000</b>
SCT supported the rural skills programme which ran 56 courses last year in spite of covid, training 530 people in 13 skills: horse logging, dry stone walling; bird identification and creating a woodland wildlife area.	
<b>FRIENDS OF GASTRELLS SCHOOL</b>	<b>£3,000</b>
Friends of Gastrells (FoG) School is a voluntary-run registered charity set up by parents of the children with specialist education needs. They requested a grant towards purchasing new laptops.	
<b>GLOS &amp; FOREST ALTERNATIVE PROVISION SCHOOL – RAIKES CENTRE</b>	<b>£700</b>
GFAPS is a facility for children aged 4-16 years unable to attend mainstream schools due to permanent exclusion or risk of exclusion for	

behavioural or safety reasons. The Raikes Centre supports children from the most deprived parts of Gloucester. It has very limited outdoor space so it wanted a permanent, outdoor table tennis table, which pupils can also use during the holidays.

**GOALS BEYOND GRASS**

**£2,000**

The Gloucestershire Powerchair Football League is run by this charity. SCT awarded a grant to help enable people of all ages with a disability within Gloucestershire to participate and compete within Gloucestershire's very own first Powerchair Football League.

**Total Awarded for Education, Sport and Recreation**

**£15,296**



**Cotswold Conservation Board**  
HAF – making bread

# The Environment and Natural Heritage

## Applicant Project

## Amount

### STRIKE A LIGHT

£6,750

Strike a Light is an arts and community focused charity based in Gloucester. "I stand for what I stand on" is a climate justice and performance project led by a group of young climate activists from Gloucester. SCT was asked to support a day long youth symposium event in October 21, bringing together young activists from across the county to gather, network, be inspired and feel connected with each other.

### TEWKESBURY NATURE RESERVE LTD

£7,920

The charity requested a grant to help develop the reserve as a valuable educational resource for better understanding of nature through immersion in an attractive outdoor setting. This will have health and wellbeing co-benefits.

### THE REWILD PROJECT CIC

£2,500

The Rewild Project CIC is a Community Interest Company based in the Forest of Dean specialising in environmental education and ecological restoration. SCT awarded a grant towards the building of an eco round house to be used as a covered space for community volunteer days, home education groups, workshops for disadvantaged groups, meetings, etc, over the winter and rainy days.

### WILD DURSLEY – CIC

£2,888

Reconnecting Nature On the Edge: A grant was made to help with the creation of a species rich wildflower meadow at St George's Church, Cam in the Forest of dean.

### Total Award for The Environment and Natural Heritage

£20,058



Strike A Light



# Vulnerable or Disadvantaged Sectors of Society

## Applicant Project

## Amount

### @ THE ROCK

**£5,337**

The Rock is a registered CIO, community youth centre based on Christian values located in a former church hall in Cheltenham. Staff had noticed a considerable increase in the number of young people suffering from mental health problems after the Covid-19 lockdown and so requested a grant to help fund well-bring workshops.

### ACTIVE IMPACT CIO

**£5,000**

This was SCT's second grant to support "You're Welcome" Gloucestershire's online inclusive activities directory; offering information and activities to help disabled people throughout the county.

### ALLSORTS GLOUCESTERSHIRE

**£3,000**

Allsorts is a charity based in Stroud providing support for families who have disabled children. SCT awarded a grant to support the Allsports project which provides sports and activities for disabled children aged 0-25 in Gloucestershire; funds were needed to help re-open their sports clubs which had been closed since March 2020 as a result of covid.

### CHELtenham YMCA

**£1,750**

SCT agreed a grant to cover the costs of providing mental health first aid training to 28 Housing Support Workers, who were facing extreme difficulties during the covid crisis

### COBALT HEALTH (COBALT)

**£15,000**

Cobalt is a medical charity that works in partnership with the NHS to improve the lives of people affected by disease, including cancer and dementia. It is based in Cheltenham and provides state-of-the-art imaging technology. SCT's donation was towards the purchase the very latest digital PET/CT technology.

### CREATIVE SUSTAINABILITY CIC

**£1,500**

Creative Camping – SCT supported the nature based outdoor activities and a two week 'day camp' in August and September, at Longney Orchard on the banks of the Severn. Young people took part in walks, yoga and tai chi, green woodwork, the Hawk Walk, story telling, fireside music and singing, outdoor cooking and a range of creative activities.

### GREAT WESTERN AIR AMBULANCE CHARITY

**£5,325**

Grant to help purchase new flight helmets for GWAAC's critical care team

## 2021 Grants Summary

### **HOME-START STROUD AND GLOUCESTER** **£5,000**

The charity received a large increase in the number of referrals since the easing of the last 2021 lockdown restrictions. Throughout the pandemic they provided virtual groups, telephone support, delivery of food parcels and activity packs. SCT helped with the large increase in costs this generated.

### **INFOBUZZ LTD** **£3,600**

Infobuzz supports Gloucestershire families and children at times of crisis. SCT gave a grant to help provide child counselling for those with mental health difficulties triggered by the Covid-19 pandemic.

### **KIDSOUT** **£1,500**

KidsOut is a charity which aims to provide a minimum of thirty-two fun days for disadvantaged children living in refuges or safe houses in Stroud. SCT agreed a grant to help provide Toy Boxes and Fun Days for children fleeing domestic violence.

### **MAGGIE'S CANCER CARING CENTRES TRUST** **£25,000**

The Maggie's centre in Cheltenham has seen a significant increase in the numbers of people accessing support over the last couple of years and so it was decided that the centre needed an extension to provide additional space.

### **NOAH'S ARK CHILDREN'S VENTURE** **£2,500**

This charity based outside Northleach provides Forest School Residential for disadvantaged children and young people. During covid it lost a significant amount of income and so SCT agreed a grant to help cover the cost of the residential.

### **NORTH AND WEST GLOUCESTERSHIRE CITIZENS ADVICE** **£10,000**

As a result of the pandemic and the growing demand for support services CAB needed to increase capacity by recruiting 25 more volunteers and having additional supervision in place to train and support them. Funds were needed to support the costs of this.

### **PRIDE IN GLOUCESTERSHIRE** **£1,200**

The primary aim of the PRIDE event is to connect the LGBTQ+ community from across the county by providing a safe space where they can socialise and access support and advice groups whilst providing a visibility to help breakdown discrimination from the wider community. SCT awarded a grant towards organisation costs for Pride in Gloucestershire 2021 which took place in September in Gloucester.

<b>READ WITH ME CIC</b>	<b>£4,500</b>
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Read with Me is a CIC which provides trained volunteers to hear children read in primary schools in Gloucestershire. Due to growing demand from schools in the most disadvantaged areas they needed financial help to recruit and train 80 new volunteers.

<b>SEVERN WYE ENERGY AGENCY</b>	<b>£5,000</b>
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Severn Wye Energy Agency is a charity that aims to advance education in relation to energy conservation, usage and production, relieve poverty and protect public health by promoting efficient use of energy and to promote sustainable development for the benefit of the public. SCT's grant was to help provide winter care packages for those experiencing fuel poverty or other energy-related issues.

<b>ST ROSE'S SPECIAL SCHOOL</b>	<b>£100,000</b>
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St Roses is a non-maintained Catholic day and residential specialist school for children aged between 2 and 25 years with a range of physical disabilities, sensory, learning and communication difficulties (including autism) and complex health needs. In 2020 in launched a fundraising appeal to build a modern residential facility to be known as Quentin House, where students can be away from school in a fit-for-purpose space to learn independent living skills and provide for social gatherings and free activity.

<b>STROUD COURT COMMUNITY TRUST</b>	<b>£9,750</b>
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This is a residential home for those with autism. 34 full time residents live in small group homes, in a village type setting. The 17-acre site has a swimming pool with sensory lighting and sound system, a sensory garden, a poly tunnel, two greenhouses and raised beds for horticultural activities. SCT awarded a grant towards the costs of building a multi-use modular eco building for the benefit of residents.

<b>WINSTON'S WISH</b>	<b>£3,000</b>
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SCT supported the provision of bereavement support to grieving children and young people in Gloucestershire.

<b>WELLCHILD</b>	<b>£5,000</b>
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This was the final tranche of SCT's commitment made in 2019 of £5,000 p.a. for three years towards the Helping Hands Garden and Bedroom transformation programme.

<b>YOUNG LIVES VS CANCER</b>	<b>£5,000</b>
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The Cancer Costs project aims to help families in Gloucestershire meet the extra costs they face as a result of their child's cancer treatment. SCT's grant was used to help families with their increased travel costs.

Total Award for Vulnerable or Disadvantaged Sectors of Society

£217,962



**GWAAC Airbase**

Specialist Paramedic's Critical Care, Dan Davis and Dee Dale with Critical Care Doctor Julian Thompson



**St Rose's Special School**

Quentin House - a new modern residential facility



## Grants awarded in the name of Grace Fry

**Funding was received in 2014 and 2020 with a commitment to make an annual award**

<b>Organisation</b>	<b>Amount</b>	<b>Date Payable</b>
Asthma Relief Fund	£5,000	2017
Brain Tumour Support	£5,000	2017
Teenage Cancer Trust	£3,000	2018
Great Oaks Dean Forest Hospice	£2,500	2018
HOPE'S Children & Young Peoples Support Service	£3,558	2018
Longfield Hospice Care	£8,800	2018
Charlton Rovers AFC	£7,000	2018
Wellchild Charity	£5,000	2019
Wellchild Charity	£5,000	2020
Wellchild Charity	£5,000	2021
<b>TOTAL COMMITMENTS</b>	<b>£49,858</b>	

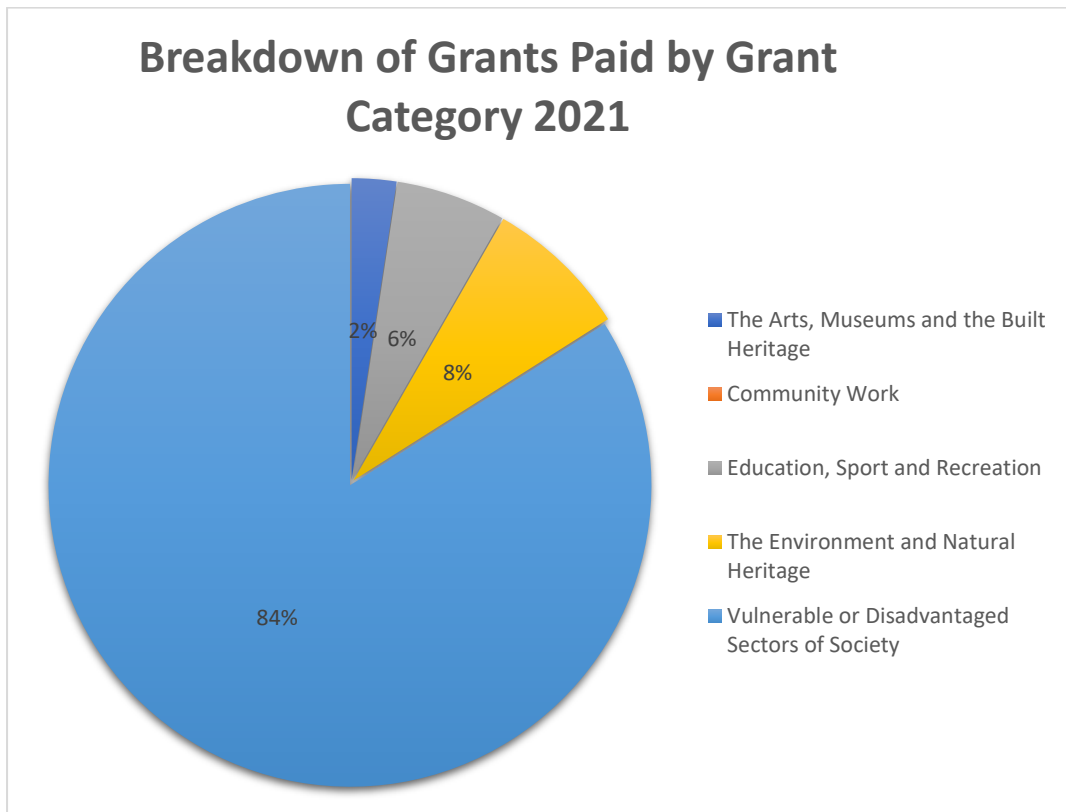
## Summary of Applications Received and Grants Paid in 2021

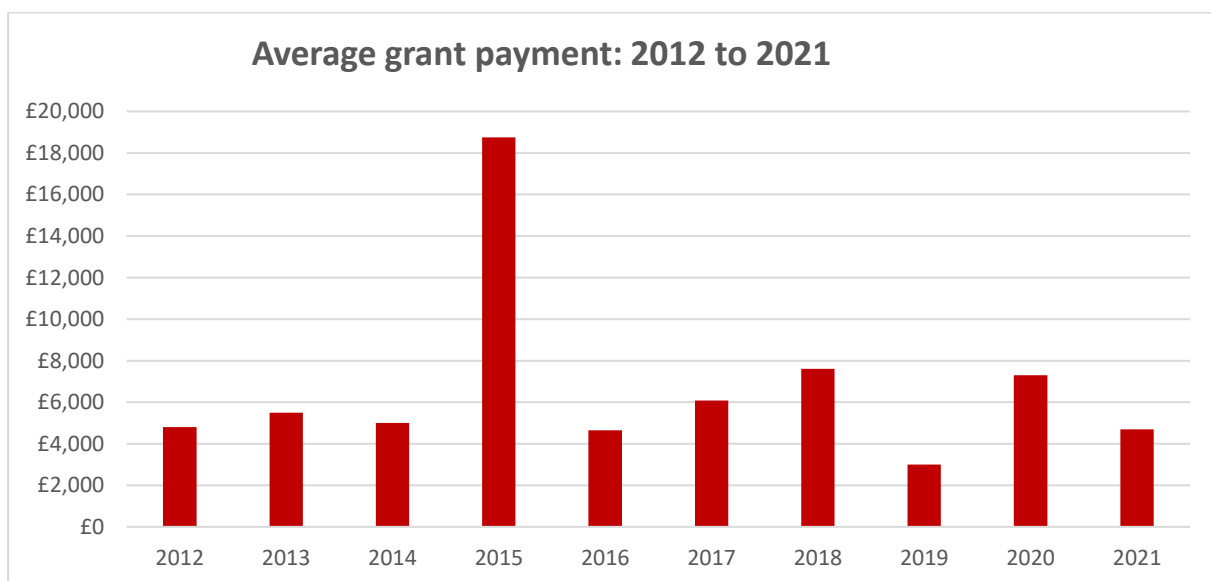
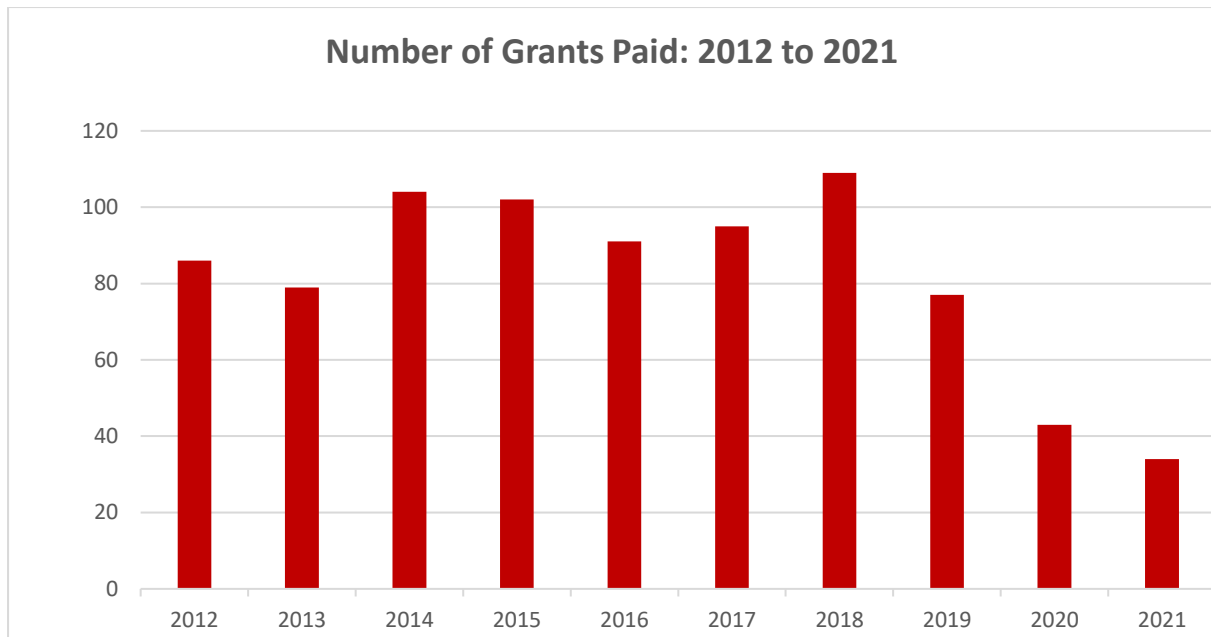
	<u>2018</u>	<u>2019</u>	<u>2020</u>	<u>2021</u>
Number of applications considered by the Trustees	147	119	110	65
<b>Total grants paid</b>	<b>109</b>	<b>77</b>	<b>43</b>	<b>34</b>
Applications considered but the Trustees refused	33	39	66	30
Other applications considered – payment deferred	5	3	1	1
Applications refused by the Administrator – not eligible	2	0	2	3
<b>Total applications received</b>	<b>149</b>	<b>119</b>	<b>212</b>	<b>68</b>

<b>PLEDGES at 31<sup>st</sup> DECEMBER 2021</b>		
<b>Organisation</b>	<b>Amount</b>	<b>Date Payable</b>
Gloucestershire Academy of Music	£20,000	
<b>TOTAL COMMITMENTS</b>	<b>£20,000</b>	

### BREAKDOWN OF GRANT PAYMENTS 2021

<b>Grant Category</b>	<b>Amount Paid</b>	<b>No of Grants</b>
The Arts, Museums and the Built Heritage	<b>6,200</b>	3
Community Work		
Education, Sport and Recreation	<b>15,296</b>	6
The Environment and Natural Heritage	<b>20,058</b>	4
Vulnerable or Disadvantaged Sectors of Society	<b>217,962</b>	21
<b>TOTAL</b>	<b>£259,516</b>	<b>34</b>





## **SUMMERFIELD CHARITABLE TRUST**

PO BOX 287, CIRENCESTER, GLOUCESTERSHIRE, GL7 9FB

**Tel:** 01285 721 211

**Email:** [admin@summerfield.org.uk](mailto:admin@summerfield.org.uk)

**Website:** [www.summerfield.org.uk](http://www.summerfield.org.uk)



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