

THE  
**SUMMERFIELD**  
CHARITABLE TRUST

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

## GRANTS PAID

*1<sup>st</sup> January to 31<sup>st</sup> December 2016*



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

Registered charity number 802493

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

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

# The Summerfield Charitable Trust - Grants Awarded Grouped by Scheme

## The arts, museums and the built heritage

Applicant Project	Amount Awarded
CHELTENHAM FESTIVALS Summerfield Lectures at Science and Literature Festivals 2016 and linked education work.	£20,000
GLOUCESTER ACADEMY OF MUSIC To help fund a part time development Director	£7,813
GLOUCESTERSHIRE LIBRARIES Grant to support library events to celebrate Shakespeare week in March 2016	£2,000



GUST Grant to support the Gloucester History Festival in September 2016	£7,000
GLOUCESTERSHIRE HISTORIC CHURCHES TRUST To help the charity support the repair of historic churches in Gloucestershire	£10,000
LANGBOROUGH FESTIVAL OPERA Grant to support the introduction of opera to rural primary schools	£1,000
SHAKESPEARE SCHOOLS FOUNDATION 2016 Shakespeare Schools Festival in the Roses Theatre, Tewkesbury	£1,000

## 2016 Grants Summary

STOW & DISTRICT CIVIC SOCIETY	£650
Wool, War & Wonders: the story of Stow. SCT awarded a grant to support this Museum event	
STROUD FESTIVAL LTD	£2,500
SCT supported the Big Read with Ian McEwan and a children's event with Jamila Gavin at the first Stroud Book Festival in November	
THE MUSIC WORKS	£8,000
Grant to help upgrade SoundSpace – a music performance space in the Forest of Dean	
THE SCHUMACHER INSTITUTE	£375
To support an art-walk from the source of the Thames to Iran	
<b>Total Awarded for the arts, museums and the built heritage</b>	<b>£60,338</b>

### Community Work

Applicant Project	Amount Awarded
BLEDINGTON AND FOSCOT COMMUNITY ASSOCIATION LTD	£5,000
Towards re-roofing community hub	
BLOCKLEY TODDLER GROUP	£1,361
To install a new storage shed	
COMMUNITY ROOTS CIC	£3,000
Workshops for residents of Hesters Way in Cheltenham to learn new skills, to enable them to volunteer in community activities.	
EDGE VILLAGE INSTITUTE	£6,000
Grant to help install a new floor and ceiling.	
FRAMPTON COMMUNITY ASSOCIATION	£2,500
Grant to help install a new kitchen	
GL11 COMMUNITY PROJECT	£9,450
Grant to help train vulnerable adults in kitchen skills for the cafe in Cam, near Stroud.	
GLOUCESTERFM (GFM)	£1,500
Grant to community radio to support the training of black and minority ethnic local residents to enable them to find work or volunteering opportunities.	
LANSDOWN HALL & GALLERY	£5,000
To upgrade main hall lighting of community venue in Stroud.	
NORTH NIBLEY CHAPEL	£3,000
Grant to help purchase furniture for community space	
PINEHOLT VILLAGE HALL (HUCCLECOTE PARISH COUNCIL)	£6,000
Remodelling and extending Pineholt Village Hall	

## 2016 Grants Summary

SANDHURST VILLAGE HALL COMMITTEE New boiler	£1,500
ST MARGARET'S HALL USER'S GROUP To build a new annex to the Up Hatherley village hall	£5,000
ST MICHAEL'S CENTRE (BISHOP'S CLEEVE) To help fund new entrance lobby and storage extension of community building	£5,000
<b>Total Awarded for Community Work</b>	<b>£54,311</b>

## Vulnerable or disadvantaged sectors of society

Applicant Project	Amount Awarded
ACTIVE GLOUCESTERSHIRE Grant to launch Special Olympics in Gloucestershire for people with disabilities.	£4,000



ALL PULLING TOGETHER COMMUNITY ASSOCIATION New equipment & furniture for community centre in Stonehouse.	£3,653
ALLSORTS GLOUCESTERSHIRE To support sports activities for disabled children in the county.	£5,000
CHELTENHAM HOUSING AID CENTRE The Doorway project - teaching life skills to those with addictions.	£10,000
CITIZENS ADVICE BUREAU (FOREST OF DEAN) Grant to cover training costs of debt advisers.	£9,230

## 2016 Grants Summary

CLIC SARGENT SCT's Grace Fry grant to help families in Gloucestershire cope with cancer.	£6,000
CROSSROADS CARE (FOREST OF DEAN) Activity groups for those with dementia in the Forest of Dean	£5,000
FAMILY LIVES Support for vulnerable families in the Forest of Dean	£10,000
GLOUCESTER AND FOREST ALTERNATIVE PROVISION SERVICE BARK – a creative project using street art to bring the Forest of Dean community together	£5,000
GLOUCESTERSHIRE CREDIT UNION LTD Volunteer Training and Support	£3,500
GLOUCESTERSHIRE GATEWAY TRUST SCT agreed a loan of £15,000 to support the New Era project which will help to develop community activities at the two service stations.	£15,000
GLOUCESTERSHIRE YOUNG CARERS Donation towards transport costs for young people in Gloucester	£6,597
GREAT WESTERN AIR AMBULANCE CHARITY Critical care missions in Gloucestershire	£3,828
HOME-START COTSWOLDS LTD Volunteer Preparation course in Cirencester and Stow	£3,000
HOME-START STROUD DISTRICT Pilot project for prenatal mothers	£5,000
JAMES HOPKINS TRUST To help provide nursing respite care to life-limited children under 6	£8,000
LEONARD CHESHIRE DISABILITY To purchase 4 specially adapted bikes for people with disabilities.	£5,000
LILIAN FAITHFULL HOMES Towards building a new day care centre in Cheltenham for those with dementia	£5,000



## 2016 Grants Summary

LISTENING POST CHRISTIAN COUNSELLING SERVICE To train Listening Post counsellors in suicide prevention	£3,000
LONGFIELD HOSPICE CARE SCT's Grace Fry grant to support the hospice at home service	£6,000
NATIONAL INSTITUTE OF CONDUCTIVE EDUCATION Grant to fund Life Beyond Diagnosis outreach service in Cheltenham	£3,000
OPENUP MUSIC To fund a residency of 12 musicians at the National Star College.	£4,000
ORCHARD TRUST To make the footpath network around the site near Lydbrook accessible to wheelchair users.	£5,000
QUENINGTON SCULPTURE TRUST Education workshops for children with special needs	£2,000
ST PAUL'S OLD SCHOOL TRUST (CHELTENHAM) To replace windows in community building	£5,000
STROUD COURT COMMUNITY TRUST To buy a range of multisensory equipment and a flexible and durable sound system.	£3,000
STROUD VALLEYS CREDIT UNION / SAVE'N'BORROW Grant to help update IT system	£3,500
THE LEUKAEMIA & INTENSIVE CHEMOTHERAPY FUND To upgrade the 8 en-suite shower rooms into wet rooms for easier patient access	£20,000
THE PEAK ACADEMY To build an adventure playground for vulnerable children in Dursley.	£6,000
THE RIDGE ACADEMY Bug Club - on-line reading group for disadvantaged children in Cheltenham.	£3,000
WINSTON'S WISH To help fund the Christmas Gathering	£2,000

YOUNG GLOUCESTERSHIRE  
Mobile one-stop advice provision to 14-25 year olds in rural areas.

£6,500



YOUTH EDUCATION SERVICE  
To provide essential skills classes to disadvantaged adults in Moreton in Marsh

£2,500

**Total Awarded for Vulnerable or disadvantaged sectors of society**

**£187,308**

## Education, sport and recreation

### Applicant Project

### Amount Awarded

CHELTENHAM SEA CADETS  
Grant towards the purchase of a new mini bus

£3,000

CHELTENHAM SILVER BAND  
Grant to help purchase childrens' instruments

£3,000

CHESS IN SCHOOLS AND COMMUNITIES  
To support chess being taught in 3 schools in Gloucestershire

£2,500

CIRENCESTER COMMUNITY DEVELOPMENT TRUST (PHOENIX FESTIVAL)  
Infrastructure costs for the Phoenix Festival

£6,690

CLEEVE SCHOOL ENRICHMENT FUND  
To help provide a dedicated IT facility for the sixth form.

£2,000

## 2016 Grants Summary

DRYBROOK RUGBY FOOTBALL CLUB LTD Grant to upgrade mens' toilets in clubhouse.	£2,500
DYMOCK CRICKET CLUB Donation towards phase two of the club's regeneration programme	£4,000
ELMTREE COMMUNITY PLAYGROUP Grant to help with costs of moving to new premises in Bishops Cleeve	£2,000
FESTOMANE LTD To support the costs of having a mobile planetarium at Festomane 2017 in Stroud.	£1,000
GOTHERINGTON PARISH COUNCIL To build a new sports pavilion	£3,000
HAPPY DAYS CHILDREN'S CHARITY Day trips for special needs children in Gloucestershire	£1,000
HARTPURY VILLAGE HALL To install gym equipment in village hall	£1,000




HORSLEY PLAYGROUP Grant towards the purchase of a new book case.	£240
IT SCHOOLS AFRICA To buy equipment for Cheltenham Warehouse	£6,000
LUMBS EDUCATIONAL FOUNDATION Annual award for individual educational bursaries	£7,500
LYDNEY BOWLING CLUB Pavilion refurbishment to provide disabled access.	£3,000
LYDNEY CRICKET CLUB Grant to help repair roof of cricket club	£2,500

## 2016 Grants Summary

MEDICINE UNBOXED Annual event in Cheltenham exploring medicine, science, politics and the arts.	£ 5,000
PATA (GLOUCESTERSHIRE) Donation towards the costs of training staff in Gloucester for Out of School Groups	£3,000
PUDDLEDUCKS PLAYGROUP To upgrade toilet facilities and install a disabled toilet in Chalford village hall.	£5,000
RODBOROUGH PLAYGROUP To provide weekly forest school sessions	£2,000
SEVERNSIDE COMPOSERS ALLIANCE Composing in education project for Gloucestershire schools.	£3,000
STROUD VALLEYS PROJECT Grant towards the Wild Classrooms project giving outdoor learning opportunities to children	£5,000
TEWKESBURY IN BLOOM Outdoor interpretation board to explain the 1471 Battle of Tewkesbury	£600
TWYNING SHORT MAT BOWLS CLUB To purchase an electric handling / storage unit.	£1,000
UNIVERSITY OF GLOUCESTERSHIRE, SCHOOL OF FINE ART Bursary for student placement at The British School in Rome.	£2,500
VINEY HILL CHRISTIAN ADVENTURE CENTRE Request for a grant to buy equipment to enable more local youngsters to access outdoor activities	£3,000
<b>Total Awarded for Education, sport and recreation</b>	<b>£81,030</b>

## The environment and natural heritage

Applicant Project	Amount Awarded
<p>BUTTERFLY CONSERVATION</p> <p>Grant to help Butterfly Conservation carry out habitat work to ensure the species Large Blue &amp; Duke of Burgundy continue to thrive in the Painswick Valley.</p>	£5,000
	
<p>ENGLISH BICKNOR C OF E PRIMARY SCHOOL</p> <p>To make a new pond and natural environment area to extend the outdoor opportunities of this school.</p>	£5,000
<p>FARMS FOR CITY CHILDREN</p> <p>Grant to help purchase specialist tools; protective clothing and interpretation signage for ancient orchards in Wick Court, near Arlingham.</p>	£3,900
<p>FRIENDS OF WESTONBIRT ARBORETUM (FOWA)</p> <p>Developing family trails through the Arboretum</p>	£6,000
<p>INTERCLIMATE TRUST (ICT)</p> <p>Climate Voices: providing 'real-world' forums for students at Cheltenham schools to develop skills in debate and action for their own sustainable, low-carbon future.</p>	£4,000
<p>MINCHINHAMPTON COMMITTEE OF COMMONERS</p> <p>To install cattle grids on Minchinhampton Common</p>	£7,000
<p>STROUD COMMUNITY AGRICULTURE</p> <p>The SCA starter farm is an educational initiative aimed for entrant organic/biodynamic growers to train them in running their own business. SCT awarded them a grant towards the purchase of farm machinery.</p>	£4,000
<b>Total Awarded for The environment and natural heritage</b>	<b>£34,900</b>

## Summary of Applications Received and Grants Paid 2016

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

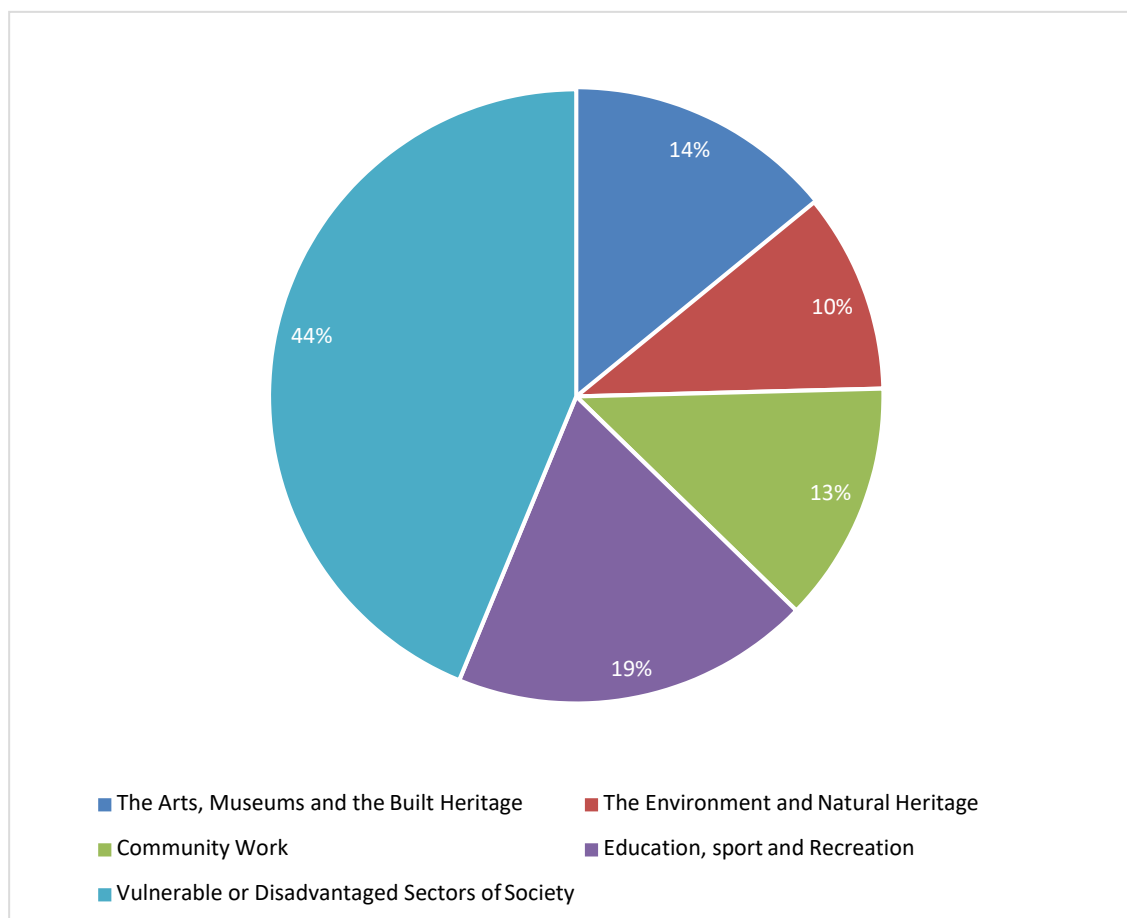
### COMMITMENTS at 31<sup>st</sup> DECEMBER 2016

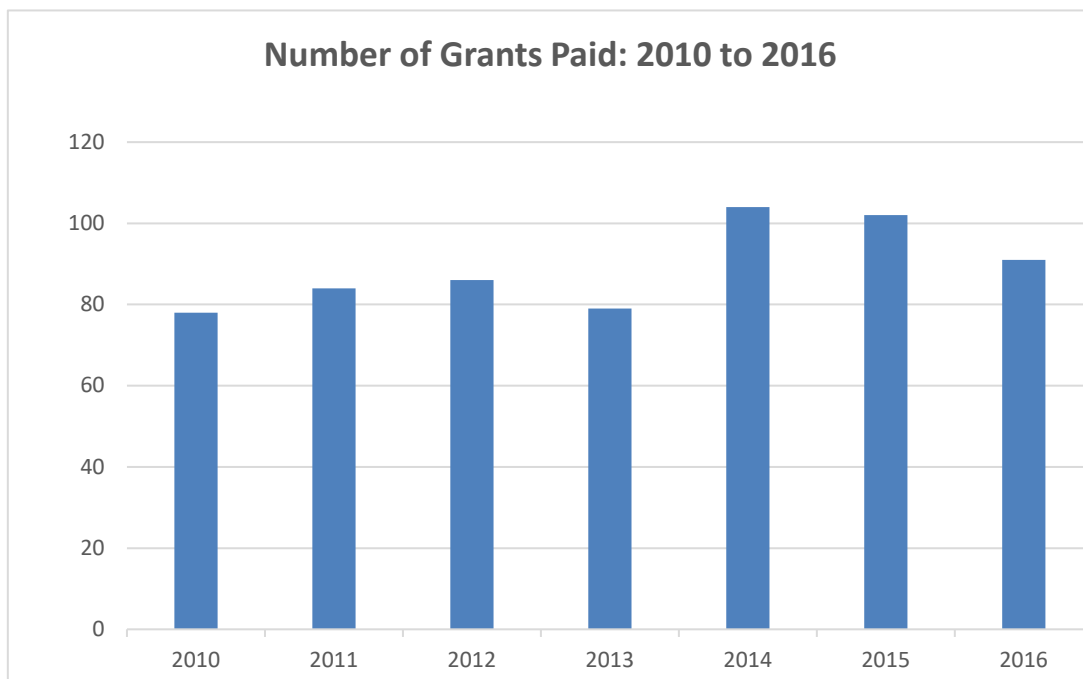
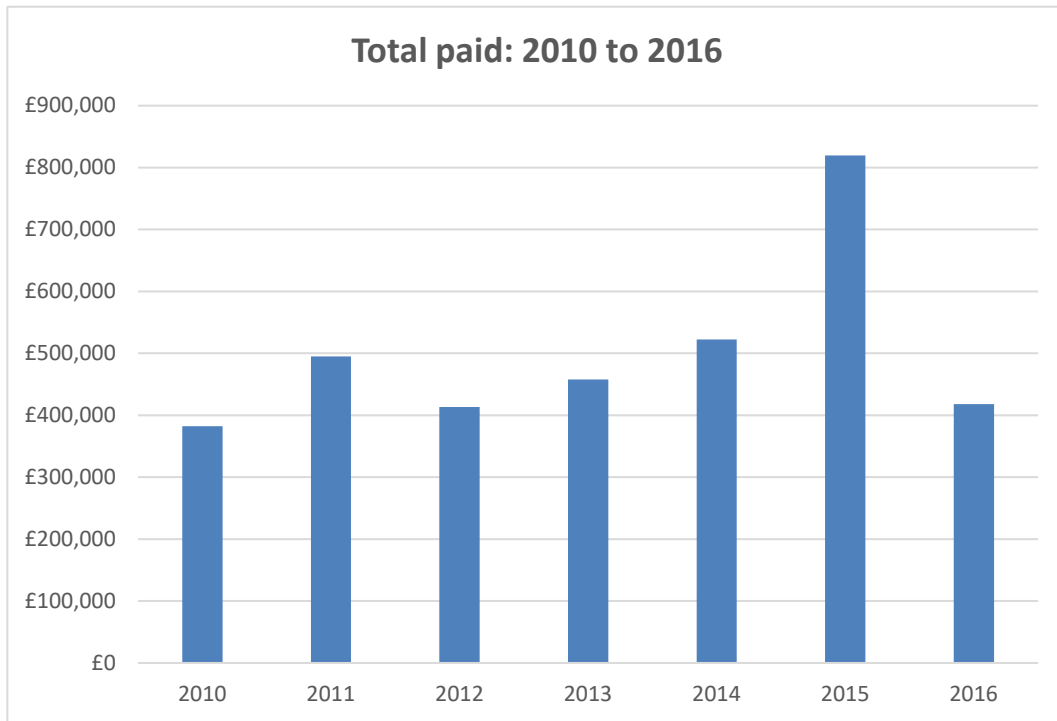
Organisation	Amount	Date Payable
	£	
	£	
	£	
TOTAL COMMITMENTS	£	

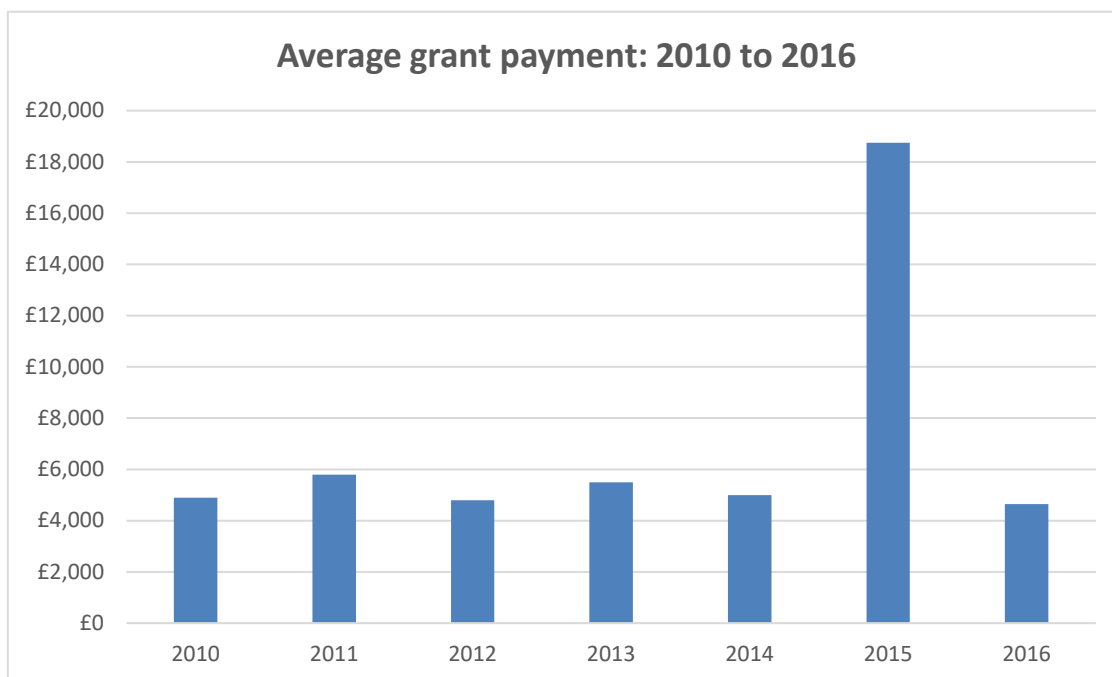
## BREAKDOWN OF GRANT PAYMENTS 2016

Grant Category	Amount Paid	No. of Grants	Average Grant
The Arts, Museums and the Built Heritage	£ 60,338	11	£5,485
The Environment and Natural Heritage	£ 44,900	8	£5,620
Community Work	£ 54,311	13	£4,175
Education, sport and Recreation	£ 81,030	27	£3,000
Vulnerable or Disadvantaged Sectors of Society	£ 187,308	33	£5,675
<b>TOTAL</b>	<b>£ 427,887</b>	<b>92</b>	<b>£4,650</b>

## 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](mailto:admin@summerfield.org.uk)

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



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