

THE
SUMMERFIELD
CHARITABLE TRUST

TRUSTEES:

Vanessa Arbuthnott

Antonia Shield

Kate Hicks Beach

Roger Mortlock

David Owen

GRANTS PAID

1st January to 31st December 2020



www.summerfield.org.uk

Registered charity number 802493

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Front cover: Winstone Learning Centre, in the Corinium Museum, Cirencester.

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 2020 £560,565 was awarded in 43 grants, plus pledges totalling £5,000 which will be paid in 2021. 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 2021 (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.

Focus for 2021:

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 2021, 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.

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

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 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 £560,565 was distributed by way of grants to a variety of good causes across the county.

Grants included the final payment of £170,000 to Sue Ryder for their Hospice at Home project; £100,000 to Young Gloucestershire for their building development in Gloucester Docks; and £13,000 to the Gloucester Foodbank to buy a delivery van.

The 2020 Grace Fry grant was awarded to the Wellchild Charity for the second year, for their work in caring for seriously ill children. A Centenary Hornbeam tree has been planted in Imperial Gardens, Cheltenham in memory of Ron Summerfield with an SCT plaque.

The Trust has continued to use our website, social media, networks and public events to promote its profile. These include a sponsored event at the Cheltenham Science Festival which was given this year by Brian Cox on Black Holes. At the Literature Festival the Summerfield Lecture was “People Like Us” given by Hashi Mohamad, both of which were delivered online.

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 2021:

- 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 2021 we expect to distribute most of our grants at less than £10,000 with one or two larger grants during 2021.

Thank you

This year long-standing trustee James Millar retired. James played a significant role in supporting good causes across the county and was a champion of environmental causes – he is already sorely missed. In November, Antonia Shield (Managing Partner of BPE Solicitors) joined the trustee team and brings a fresh perspective to the Trust, and a family connection to our founder, Ron Summerfield.

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. 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 First Local Enterprise Partnership. He is currently a director of Gloucestershire Voluntary & Community Sector Alliance and Gloucestershire Enterprise Limited and is a member of the International Advisory Group of the Economic Development Council. He lives in Stroud with his two teenage 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

2020 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

Applicant Project	Amount
CARDUCCI MUSIC TRUST	£4,000
Grant to support “New Music, New Places” a music project presenting concerts of accessible contemporary classical music in a wide range of settings to reach new audiences.	
CHELTENHAM FESTIVALS	£25,000
SCT continued to support the Reading Teachers = Reading Pupils educational project. We also sponsored the Brian Cox Black Holes event at the Cheltenham Science Festival and Hashi Mohamad at the Literature Festival.	
CHELTENHAM HEBREW CONGREGATION	£2,500
Grant to help fund repairs to the Cheltenham Synagogue.	
HAWKWOOD CENTRE FOR FUTURE THINKING (Stroud)	£8,870
Re-imagining Resilience: grant to fund a pilot on-line programme focused on engaging communities of Gloucestershire.	
JENNER APPEAL TRUST (Berkeley)	£4,000
The Chantry is the former home of Edward Jenner, pioneer of vaccination, and now open to the public as Dr Jenner’s House, Museum and Garden. SCT awarded a grant to help with urgent repairs to the Chantry roof.	
NEW BREWERY ARTS	£6,667
In 2018 SCT agreed to give this Cirencester arts centre an annual grant for three years towards their exhibition programme.	
SOLDIERS OF GLOUCESTERSHIRE MUSEUM	£1,800
Grant to support a museum display entitled 'Sacrifice and Courage'.	
STRIKE A LIGHT (Gloucester)	£8,000
Grant to this arts charity to enable it to take world class performances into the heart of communities in Gloucester.	

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STROUD SUBSCRIPTION ROOMS TRUST £25,000

SCT awarded a grant to help relaunch Stroud's Subscription Rooms; it was used specifically to instal a new acoustic system.

WOTTON ARTS PROJECT £1,500

This charity operates a 'not for profit' community arts centre in the Chipping Hall, Wotton-under-Edge. SCT agreed a grant to help with refurbishment costs.

WOTTON UNDER EDGE ARTS ASSOCIATION 1,000

Grant to help provide arts events for the residents of Wotton under Edge and the surrounding rural area.

Total Awarded for the Arts, Museums and the Built Heritage £88,337



Cheltenham Literature Festivals – Reading Teachers = Reading Pupils



The Brewery Arts – John Barleycorn exhibition

Community

Applicant Project	Amount
AGE UK GLOUCESTERSHIRE	£5,000
Grant to help charity provide support to older people in Gloucestershire during the pandemic.	
BRAIN TUMOUR SUPPORT	£2,500
Donation to help charity continue it's brain tumour support services in Cheltenham.	
COTSWOLD FRIENDS	£7,000
Grant to support the charity's community activities programme in the more rural areas of the county.	
CROSSROADS GLOUCESTERSHIRE	£530
This charity supports vulnerable and older people living in the Forest of Dean. SCT awarded a grant to fund their project collecting stories and pictures to create a record of the cultural history of the Forest of Dean.	
GARDNERS LANE & OAKWOOD FEDERATION	£5,400
This charity works with children aged 0 – 11 years old and their families across the urban and rural districts of Cheltenham and Tewkesbury. SCT's grant was given to help them refurbish the Hesters Way Children's Centre in Cheltenham	
Total Awarded for Community Work	£20,430



Cotswold Friends – Men in Sheds

Education, Sport & Recreation

Applicant Project	Amount
ARCHWAY SCHOOL	£6,500
Donation towards the refurbishment of the school's swimming pool	
LUMB'S EDUCATION FOUNDATION	£7,500
To support young people, with permanent addresses in Gloucestershire, with educational/vocational studies for legitimate financial need.	
Total Awarded for Education, Sport and Recreation	£14,000

The Environment and Natural Heritage

Applicant Project	Amount
SPECIES RECOVERY TRUST	£1,200
Protecting Cosnard's Net-winged Beetle	
STROUD DISTRICT ACTION ON PLASTIC	£5,000
Plastic Free Community Hub & Toolkit for Gloucestershire Communities	
Total Award for The Environment and Natural Heritage	£6,200



Cosnards – The Species Recovery Trust

Vulnerable or Disadvantaged Sectors of Society

Applicant Project	Amount
<p>ABBEYFIELD GLOUCESTERSHIRE SOCIETY LIMITED</p> <p>Grant to help provide elderly residents with improved communication via access to ipads and smart TV'S</p>	£998
<p>AYLBURTON PARISH COUNCIL</p> <p>Grant for foodbank in Coleford</p>	£800
<p>CHELTENHAM HOUSING AID CENTRE</p> <p>SCT made a donation towards the costs of providing Life Skills workshops to people who were living in supported housing and were ready to move on into independent living accommodation.</p>	£5,000
<p>COMMUNITY CONNEXIONS, GLOUCESTERSHIRE</p> <p>This community transport charity provides transport to those who have no other means of transport. SCT awarded a grant to help purchase an accessible car - one which had been modified to accommodate a wheelchair plus a carer.</p>	£2,000
<p>COTSWOLD GROUP, RIDING FOR THE DISABLED</p> <p>Grant to support the RDA's COVID-19 Emergency Fund Appeal.</p>	£2,000
<p>DURSLEY OPEN DOOR</p> <p>This charity operates as a social club for adults with learning and/or physical disabilities. SCT awarded a grant to help facilitate the weekly social gatherings.</p>	£1,600
<p>GLOUCESTER FOODBANK</p> <p>Grant to enable the foodbank to purchase a van to collect and distribute food</p>	£13,000
<p>GLOUCESTERSHIRE BIKE PROJECT</p> <p>To provide free bicycles for vulnerable and disadvantaged young people in Gloucestershire</p>	£1,500
<p>HOME-START COTSWOLDS</p> <p>Home-Start Cotswolds' mission is to offer friendship and support to parents to give their children the best possible start in life. SCT gave a grant to enable them to provide their volunteer training course on-line.</p>	£2,000

2020 Grants Summary

INSIGHT GLOUCESTERSHIRE	£5,693
Grant to enable this charity to provide computer training for people with sight loss	
JAMES HOPKINS TRUST	£50,000
This was the second tranche of the grant SCT awarded to this Gloucestershire based charity to help them provide nursing respite care for severely disabled, life limited & life threatened young children who live in the county.	
LILIAN FAITHFULL CARE	£3,990
Grant to help this care home purchase Ipads for residents to ensure that they get regular contact from their families during Covid.	
LIVING PAINTINGS	£1,000
Living Paintings supports blind and partially sighted children, young people and adults by enabling them to borrow Touch to See books from their free library service.	
NELSON TRUST	£13,517
This was the third tranche of a grant agreed to support the Trust's young people's rural outreach project which aims to engage young women and girls in an early, educative intervention which encourages them to understand risk, promote wellbeing, protect themselves from abuse and exploitation, and make life choices that support their personal growth.	
NEWENT ASSOCIATION FOR THE DISABLED	£10,000
Grant towards the purchase of a new minibus to benefit wheelchair users who have difficulty accessing transport in rural areas.	
PBC FOUNDATION	£500
Primary Biliary Cholangitis is a rare, progressive and autoimmune liver condition. SCT awarded a grant to enable the charity to provide a self-management and empowerment workshop for PBC sufferers in Gloucestershire	
SPINAL INJURIES ASSOCIATION	£3,000
Donation towards the cost of delivering peer support by telephone and online to individuals affected by spinal cord injury living in Gloucestershire during the pandemic.	
SUE RYDER	£160,000

2020 Grants Summary

This was the final tranche of a three-year grant promised in 2018 towards the running of the Hospice at Home service.

DOOR YOUTH PROJECT £8,000

Grant to help provide resources to support disadvantaged young people directly to reduce social isolation and increase wellbeing during the Coronavirus crisis.

FAMILY HAVEN £12,000

This charity, based in Gloucester, helps vulnerable families with children under the age of five. SCT awarded a grant towards the costs of repairing the gutters and chimneys of the building.

THE MUSIC WORKS £30,000

Donation to help create a new Community Music Studio & Young People's Hub in Gloucester

WELLCHILD £5,000

This was the second 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.

YOUNG GLOUCESTERSHIRE

This grant was used by Young Gloucestershire to purchase the Old Docks Office, in Gloucester Quays. This property will enable them to provide more services to meet the needs of young people in a new way. It will also provide YG with an element of sustainability as they have a guaranteed space that they can use for years to come. £100,000

Total Award for Vulnerable or Disadvantaged Sectors of Society £431,598



Young Gloucester – The Old Docks Office and outdoor space



The Nelson Trust display stand

Grants awarded in the name of Grace Fry

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

Organisation	Amount	Date Payable
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
TOTAL COMMITMENTS	£49,858	

Summary of Applications Received and Grants Paid in 2020

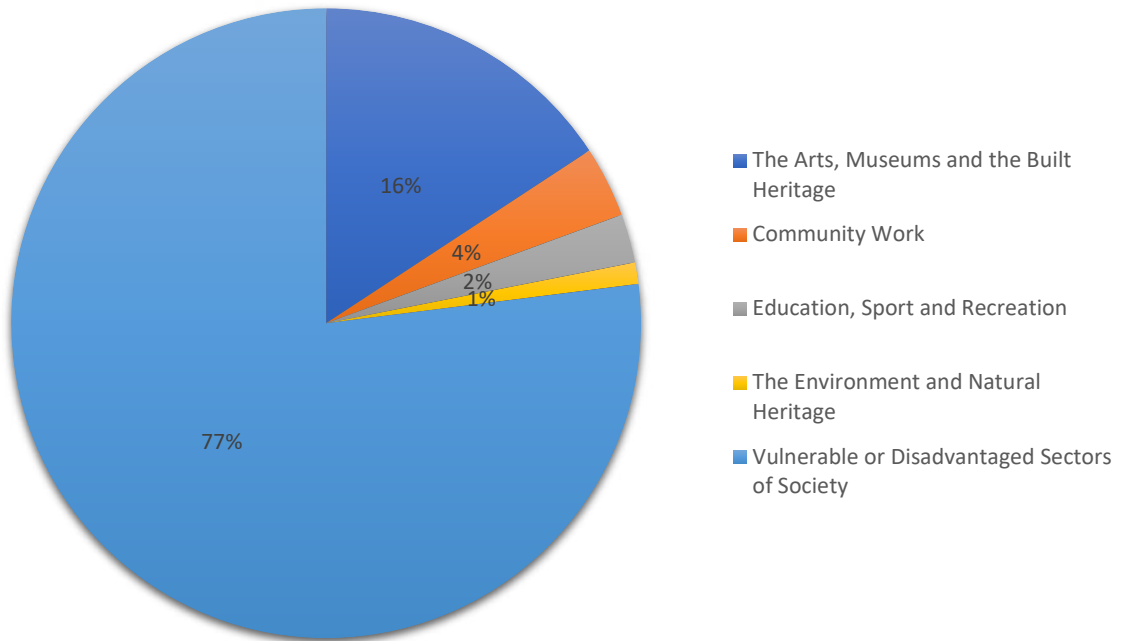
	<u>2017</u>	<u>2018</u>	<u>2019</u>	<u>2020</u>
Number of applications considered by the Trustees	130	147	119	110
Total grants paid	96	109	77	43
Applications considered but the Trustees refused	31	33	39	66
Other applications considered – payment deferred	3	5	3	1
Applications refused by the Administrator – not eligible	16	2	0	2
Total applications received	146	149	238	222

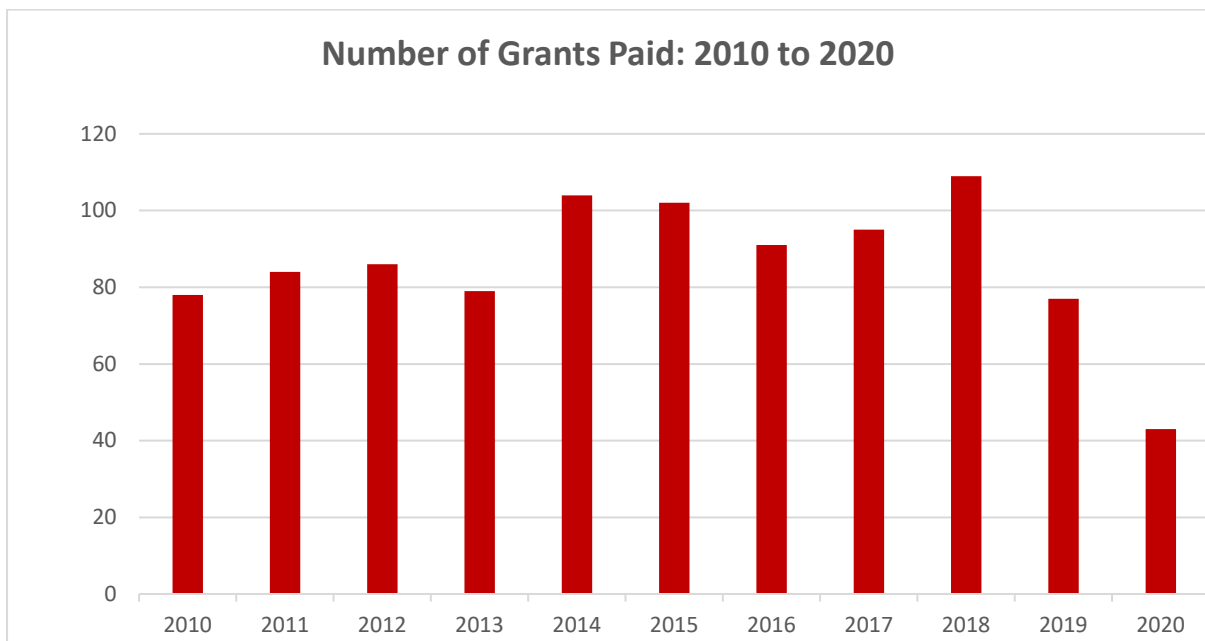
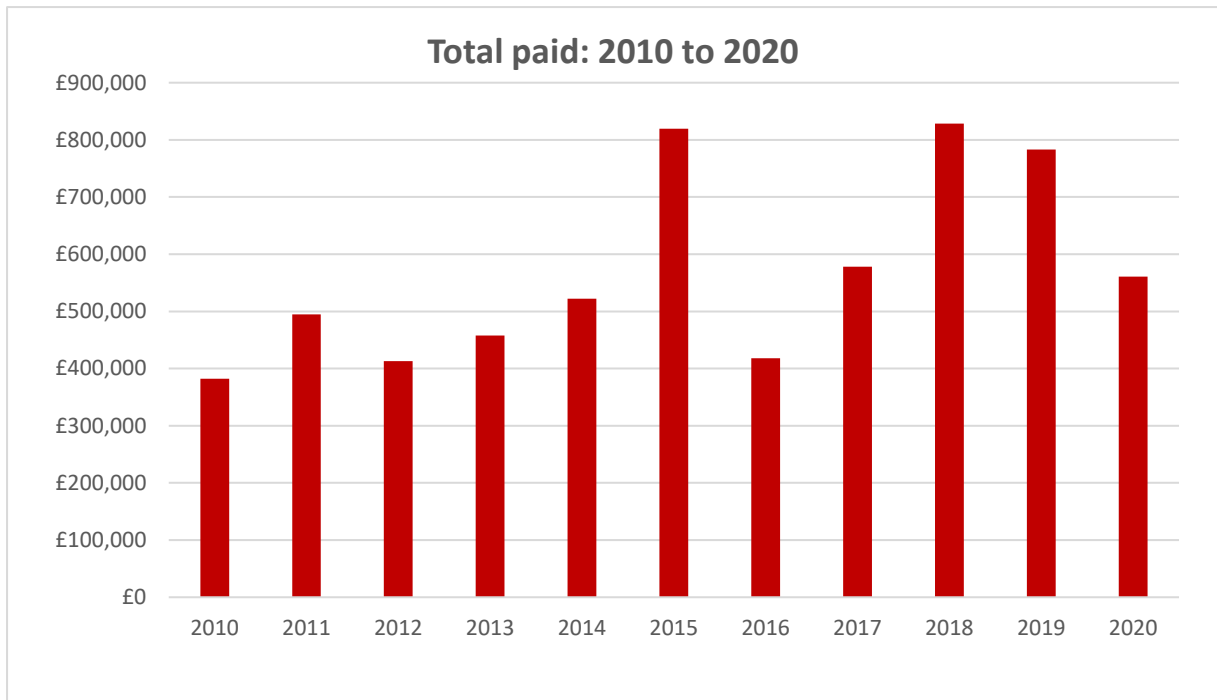
COMMITMENTS at 31st DECEMBER 2020		
Organisation	Amount	Date Payable
Wellchild	£5,000	2021
TOTAL COMMITMENTS	£5,000	

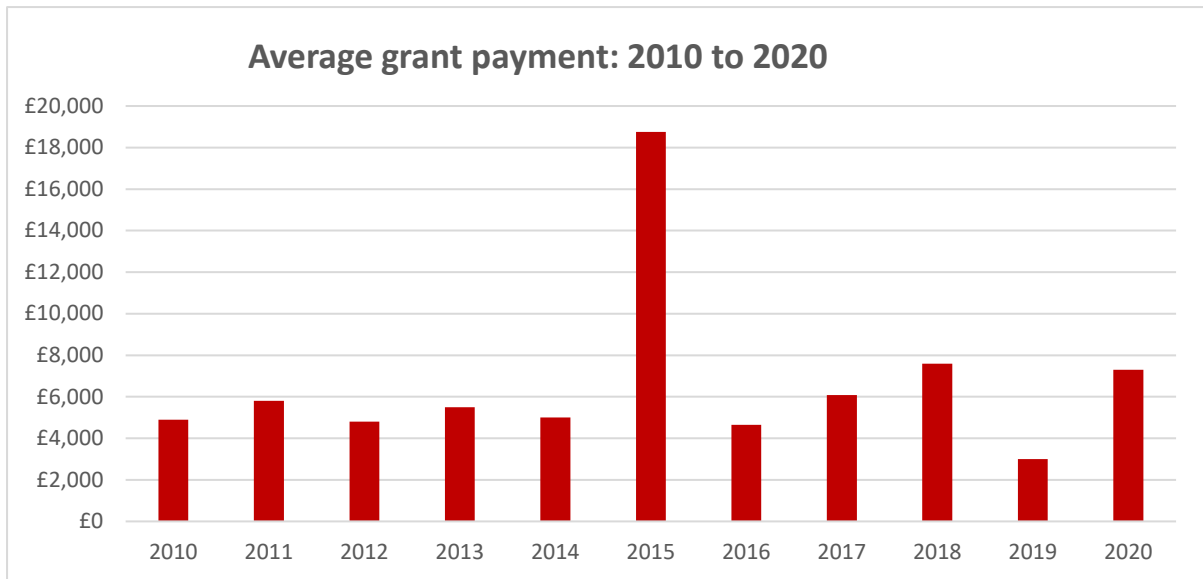
BREAKDOWN OF GRANT PAYMENTS 2020

Grant Category	Amount Paid	No of Grants
The Arts, Museums and the Built Heritage	88,337	11
Community Work	20,430	5
Education, Sport and Recreation	14,000	2
The Environment and Natural Heritage	6,200	2
Vulnerable or Disadvantaged Sectors of Society	431,598	23
TOTAL	£560,565	43

Breakdown of Grants Paid by Grant Category 2020







SUMMERFIELD CHARITABLE TRUST

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