

THE
SUMMERFIELD
CHARITABLE TRUST

TRUSTEES:

Vanessa Arbuthnott

Antonia Shield

Kate Hicks Beach

Roger Mortlock

David Owen

GRANTS PAID

1st January to 31st December 2022



www.summerfield.org.uk

Registered charity number 802493

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Front cover: **Stroud Valleys Tree Planting Project**

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 2022 £194,296 was awarded in 41 grants. 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 2023 (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 2023, 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 2023 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 2023 the Trustees will meet in February, May, September and December - 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

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 £194,296 was distributed by way of grants to a variety of good causes across the county. It was agreed that the Grace Fry award of £10,000 to the Maggie's Cancer Care Trust would be the last grant made in her name.

During 2022 the trustees have continued to focus grants in those areas where we feel there is the most acute need for support – whether that be to help the most deprived communities in Gloucestershire, improve our natural environment, support community cohesion or invest in the arts.

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

Strategy:

The Trustees continue to review our strategy and, in the light of the Covid pandemic and the emerging cost of living crisis, and agreed to further focus on two key areas for 2023:

- 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 2023 we expect to distribute most of our grants at less than £10,000 with one or two larger grants during the year.

We will continue to review our strategy during 2023 and intend to publish a new strategic approach by the Summer.

Thank you

I would like to thank my fellow trustees, Kate, Nessa, Roger and Antonia who ensure that we provide grants to the right recipients through their challenge, commitment and good humour. We also continue to be supported by an outstanding team of Advisers who have 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; Julia Hurrell; Wendy James; Sue Kinder ; Nicky Lawson; Barbara McNaught; Frank McDermot; Sally Mackie; Kate Macduff ; Karen Randall; Katharine Tetley; Alistair Watson, Mayrick Brentnall.

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.

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 works for the Gloucestershire based charity Mindsong, as Director of Volunteer-led Services, and runs a programme of singing groups, recruiting, training and supporting volunteers to sing regularly with care home residents living with mid to late stage dementia. She 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 before moving to university in Liverpool to study Business & Economics. 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 and Director of Economy & Environment for Gloucestershire County Council. He lives north of Cheltenham with his wife, Laura, their four daughters and their dog.

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 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
CHELTENHAM FESTIVALS	£5,000
Using culture to increase engagement with young people & local community organisations serving marginalised groups & piloting a free tickets scheme.	
THE CHELTENHAM TRUST	£2,400
SCT awarded a grant to support two exhibitions held at The Wilson in Cheltenham: Break the Cycle & Lifelines, both of which focused on climate responsibility.	
THE STROUD SUBSCRIPTION ROOMS TRUST	£7,000
The Reinstatement of the Sub Rooms iconic balcony in Stroud town centre for the benefit of the community.	
Total Awarded for the Arts, Museums and the Built Heritage	£14,400



The Wilson, Cheltenham

Community

Applicant Project	Amount
ASTHMA RELIEF	£3,800
Grant to help the charity provide nebulisers to a wide range of organisations in Gloucestershire.	
BROCKWEIR AND HEWELSFIELD PLAY AREA	£5,000
Helping children recover from the impacts of the pandemic through play	
COTSWOLD FRIENDS	£7,000
Donation to support Men in Sheds project in the N. Cotswolds which was part of their community activities programme.	
GL11 COMMUNITY PROJECT	£3,050
This charity provides activities, support and advice to residents of GL11. SCT's grant was given to support those having difficulties post-Covid.	
GLOUCESTER COMMUNITY BUILDING COLLECTIVE	£5,000
GCBC works with local residents to encourage community activities. SCT's grant was to support work being done in Tuffley.	
ST MICHAEL'S CORNERSTONE TRUST	£3,550
Grant to support the Holiday@Home project, providing activities and healthy meals for children living in the Whaddon area of Cheltenham.	
Total Award for Community	£27,400



Bell Rope Holder by Cotswold Friends

Education, Sport & Recreation

Applicant Project	Amount
1ST WOOTTON-UNDER-EDGE SCOUT GROUP	£4,000
Grant to help create an all-weather Headquarters, activity centre and camping facility.	
Active Training & Education (ATE)	£2,000
12 month play residency in a primary school in Thrupp to support post-pandemic social recovery.	
GLOUCESTERSHIRE ACADEMY OF MUSIC	£20,000
Donation to help a fund raising appeal to purchase the Barbican House in Gloucester which will be used as a centre for music and the arts.	
GLOS GUIDE ASSOC KNOWN AS GIRLGUIDING GLOUCESTERSHIRE	£5,000
Grant to help create a low ropes course at Deer Park.	
REDMARLEY TENNIS CLUB	£1,000
Grant towards installing floodlights at the club so it can be used more.	
THE 2874 TRUST	£4,000
Charity based at Winchcombe Railway station, providing volunteers with training in Heritage Engineering Skills.	
Total Awarded for Education, Sport and Recreation	£36,000

Redmarley Tennis – Mixed Doubles under Floodlights



The Environment and Natural Heritage

Applicant Project	Amount
CAMPAIGN TO PROTECT ENGLAND - GLOUCESTERSHIRE BRANCH	£3,000
SCT gave a grant to help the charity fund the planting of 4km of new hedgerows beside the Glos and Sharpness canal.	
KEMERTON CONSERVATION TRUST	£2,500
Grant towards the acquisition of 16 acres of rare flood meadow in Upham Meadow SSSI, near Tewkesbury	
KINGSHILL Arts & Meeting Centre	£5,510
This charity in Dursley was running a community climate action project. SCT's grant was given to help create an allotment for local residents.	
STROUD VALLEYS PROJECT LTD	£8,000
Grant to help the Planting for Progress project, which enlists volunteer teams to help plant trees.	
VISION 21 (GLOUCESTERSHIRE)	£7,500
Donation to support the Planet Cheltenham Hubspace plan.	
Total Award for The Environment and Natural Heritage	£26,510



Vision 21 – Plant Cheltenham Hubspace Appeal

Vulnerable or Disadvantaged Sectors of Society

Applicant Project	Amount
BAG BOOKS	£3,000
The charity provides multi-sensory books for disabled children. This grant was to enable them to deliver workshops in three Gloucestershire schools.	
CARING FOR COMMUNITIES	£4,000
Grant to support frailty prevention courses for over 65s living in Tewkesbury.	
FAIR SHARES GLOUCESTERSHIRE	£8,500
SCT's grant was given to help this Gloucester based charity provide weekly workshops for disadvantaged young people; helping them to develop skills and support networks.	
FAMILY SPACE IN HESTERS WAY LTD	£1,878
Family Space is a community support charity based in West Cheltenham. SCT awarded a grant to help fund their Covid 19 recovery work for early years children.	
FOODCYCLE	£2,000
Donation to help Gloucester charity provide community meals in St. John's Northgate Methodist church	
FOOTSTEPS COUNSELLING & CARE	£6,000
Charity based in Cheltenham offering person-centred counselling to anyone affected by pregnancy-related or fertility issues, traumatic birth; or baby loss. SCT awarded a grant to help them recruit and train more volunteer counsellors.	
GINGERBREAD, THE CHARITY FOR SINGLE PARENT FAMILIES	£1,000
Grant to help the peer support friendship group provide support, share information and reduce isolation in Cheltenham.	
GLOUCESTER CITY MISSION	£8,000
The charity works with homeless people; SCT's grant was to help them upgrade their training centre and restore their wellbeing garden.	
GLOUCESTERSHIRE NIGHTSTOP	£5,000
Donation to help the charity provide emergency and extended accommodation for young homeless people in Gloucester.	
GLOUCESTERSHIRE YOUNG CARERS	£10,000

2022 Grants Summary

Grant to help fund activity respite days for young carers of a family member	
HAPPY DAYS CHILDREN'S CHARITY	£1,008
Grant to enable 143 children from Cheltenham to attend a theatre performance.	
INSIGHT GLOUCESTERSHIRE	£3,000
Grant to support the charity in establishing a lunch club for the blind living in Cheltenham	
LINC – THE LEUKAEMIA & INTENSIVE CHEMOTHERAPY FUND	£5,000
To provide emotional support to Glos residents suffering from leukaemia and other blood cancers.	
LISTENING POST CHRISTIAN COUNSELLING SERVICE	£3,500
Grant to help meet increased demand since 2020 with counselling sessions.	
NOWANS COMMUNITY TRUST/LIVES OF COLOUR	£4,000
Grant towards the stage and audio costs for the Lives of Colour Festival.	
PBC FOUNDATION	£600
Primary Biliary Cholangitis, a rare, progressive and autoimmune liver condition with no known cause or cure. SCT's grant was made to help with the costs of providing their quarterly magazine 'The Bear Facts', to sufferers in Gloucestershire	
RE-ENGAGE	£1,500
To provide social opportunities that tackle the crisis of loneliness in older people living in Gloucestershire.	
SCRUBDITCH CARE FARM	£8,000
SCT made a donation towards the creation of a wildlife pond with a platform for use by children and young people with learning disabilities.	
TALL SHIPS YOUTH TRUST	£1,500
Transformational voyages for disadvantaged young people from Gloucestershire.	
THE MUSIC WORKS	£10,000
SCT awarded this grant to help run IncDrop. the music club for young people with disabilities.	
THE PEAK ACADEMY	£2,500
This is a special school in Dursley for very vulnerable young people. SCT awarded a grant to help with resources for exciting breaktime activities.	
Total Award for Vulnerable or Disadvantaged Sectors of Society	£89,986



Landscaping at Scrubditch Care Farm

Grants awarded in the name of Grace Fry

Funding was received in 2014 and 2022 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
Maggie's Cancer Care	£10,000	2022
TOTAL COMMITMENTS	£59,858	

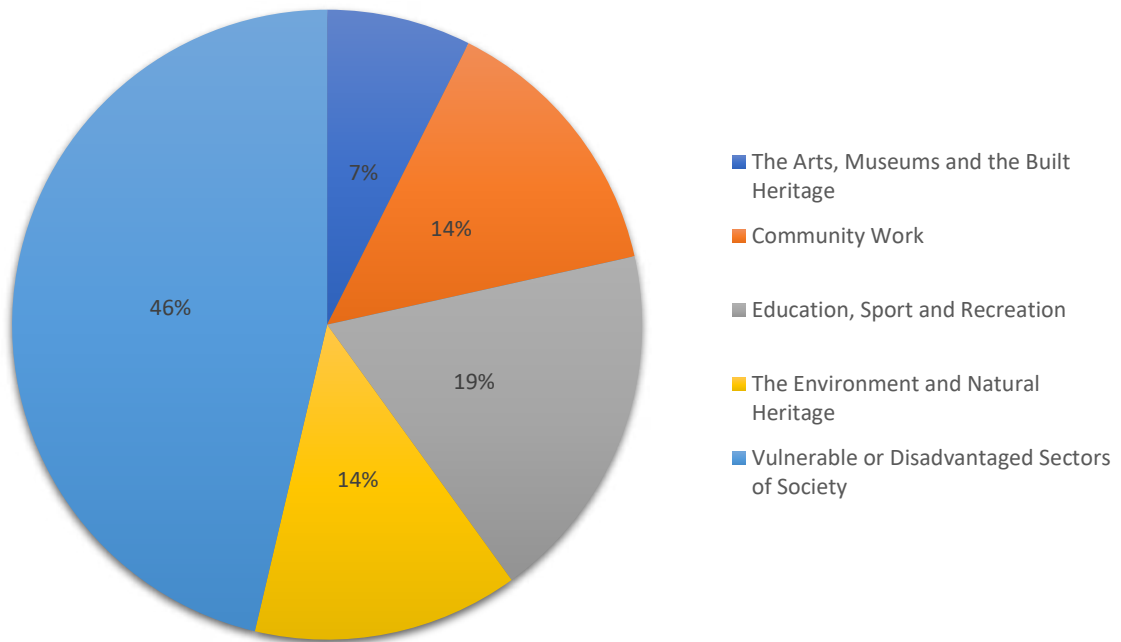
Summary of Applications Received and Grants Paid in 2022

	<u>2019</u>	<u>2020</u>	<u>2021</u>	<u>2022</u>
Number of applications considered by the Trustees	119	110	65	68
Total grants paid	77	43	34	41
Applications considered but the Trustees refused	39	66	30	27
Other applications considered – payment deferred	3	1	1	0
Applications refused by the Administrator – not eligible	0	2	3	5
Total applications received	119	212	68	73

BREAKDOWN OF GRANT PAYMENTS 2022

Grant Category	Amount Paid	No of Grants
The Arts, Museums and the Built Heritage	14,400	3
Community Work	27,400	6
Education, Sport and Recreation	36,000	6
The Environment and Natural Heritage	26,510	5
Vulnerable or Disadvantaged Sectors of Society	89,986	21
TOTAL	£194,296	41

Breakdown of Grants Paid by Grant Category 2022



SUMMERFIELD CHARITABLE TRUST

PO BOX 287, CIRENCESTER, GLOUCESTERSHIRE, GL7 9FB

Tel: 01285 721 211

Email: admin@summerfield.org.uk

Website: www.summerfield.org.uk



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