

THE  
**SUMMERFIELD**  
CHARITABLE TRUST

**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 2023**



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

Registered charity number 802493

# Contents

About the Trust.....	3
Introduction from the Chair.....	6
About the Trustees .....	7
The Summerfield Charitable Trust Grants Paid Grouped by Scheme.....	9
The Arts, Museums and the Built Heritage.....	9
Community.....	11
Education, Sport & Recreation.....	12
The Environment and Natural Heritage.....	13
Vulnerable or Disadvantaged Sectors of Society .....	14
Summary of Applications Received and Grants Paid in 2023 .....	17

**Front cover: Tewkesbury Medieval Festival**

## 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 2023 £187,239 was awarded in 43 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 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.

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.

### 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 2024 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 2024 the Trustees will meet in March; other dates to be announced - 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 almost £190,000 was distributed by way of grants to a variety of good causes across the county with a real focus on the most disadvantaged in our communities.

During 2023 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 Trustees continue to review our strategy and, in the post-pandemic environment and with the continuing cost of living challenges, we agreed to continue to focus for 2024 on two core areas:

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

Having continued to review our strategy and how we can have the biggest impact on the county we have begun to work with the Gloucestershire Voluntary and Community Sector Alliance (GVCSA) and we aim to launch our new strategic approach in Spring 2024.

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 a great team of Advisers and professionals and by the always brilliant 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 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 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. Roger is CEO at CPRE, the countryside charity, campaigning for a thriving and beautiful countryside for everyone. He joined CPRE in May 2023 after over 15 years in leadership roles for environmental charities, most recently at Gloucestershire Wildlife Trust, the county's largest environmental charity where he was CEO for 10 years. Prior to that he was Deputy Director at the Soil Association where he was also Chair of the Food for Life Partnership and the Soil Association Land Trust which holds productive land in trust for future generations. He lives in Minchinhampton and is also a Trustee at Hawkwood College.

### **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**

<b>Applicant Project</b>	<b>Amount</b>
<b>CARDUCCI MUSIC TRUST</b>	<b>£3,000</b>
String Quartet 2.0 - workshops for secondary pupils to enable them to compose music for string quartet	
<b>FOREST OF DEAN SCULPTURE TRUST CIO</b>	<b>£3,000</b>
Donation to fund the making of an archive film in celebration of 40 years of the Forest of Dean Sculpture Trail	
<b>GLOUCESTER CIVIC TRUST LTD</b>	<b>£3,000</b>
Grant to enable local schoolchildren to have an interactive experience in Victorian School Room.	
<b>GLOUCESTER CULTURE TRUST</b>	<b>£7,000</b>
Grant to enable Gloucester communities develop cultural activities	
<b>LONDON SINFONIETTA</b>	<b>£1,500</b>
Funding for a project working with schools in Cheltenham	
<b>Longborough Festival Opera</b>	<b>£2,650</b>
SCT supported the education and outreach programme in Tewkesbury primary schools.	
<b>NEW BREWERY ARTS</b>	<b>£3,100</b>
Donation towards running costs of Craftival.	
<b>STROUD BOOK FESTIVAL</b>	<b>£5,000</b>
Grant to enable the recording and live streaming of the Festival's Digital Schools' Days	
<b>Total Awarded for the Arts, Museums and the Built Heritage</b>	<b>£28,250</b>



Above Picture: Playground Opera 2023, Longborough Festival Opera

## Community

Applicant Project	Amount
<b>BLEINGTON COMMUNITY SHOP LIMITED</b>	<b>£2,500</b>
Community owned business. SCT donated towards the cost of installing Solar Panels to help them become more environmentally sustainable.	
<b>GL4 CIC</b>	<b>£3,000</b>
A social enterprise providing a range of cultural activities for residents of Matson in Gloucester. SCT's grant to help run craft classes.	
<b>HORSLEY YOUTH CLUB</b>	<b>£1,000</b>
Horsley Youth Club Garden and Wild Space; SCT awarded a grant to help the Club establish a vegetable garden.	
<b>NAILSWORTH COMMUNITY WORKSHOP</b>	<b>£680</b>
Non-profit company provides free or affordable workshops. SCT grant to help instal a dust extractor to make the workshop environment more healthy.	
<b>THE HOLST BIRTHPLACE TRUST</b>	<b>£3,250</b>
The Trust has organized a range of events to celebrate the 50 <sup>th</sup> anniversary of the Museum. SCT made a grant towards the "Inspired by Holst" Playhouse/ Everyman project; supporting amateur writers who have written plays which have been inspired by Holst, to be performed on stage.	
<b>WOTTON COMMUNITY SPORTS FOUNDATION</b>	<b>£2,000</b>
The Foundation requested a donation towards the costs of installing a footbridge, which would ensure a more safe environment.	
<b>Total Award for Community</b>	<b>£12,430</b>



Above Picture: GL4 CIC, Craft Classes

## Education, Sport & Recreation

Applicant Project	Amount
<b>CHELTENHAM NORTH RUGBY FOOTBALL CLUB (CNRFC)</b>	<b>£5,000</b>
Grant to help them develop a new pitch	
<b>FRIENDS OF FOXMOOR</b>	<b>£1,500</b>
Donation towards the furnishings needed for a new Pastoral/SEND hub which is for children with special educational needs.	
<b>READ WITH ME CIC</b>	<b>£5,000</b>
To provide reading sessions for Year 7, secondary school pupils at Gloucester Academy	
<b>ROWAN GYMNASTICS CLUB</b>	<b>£5,000</b>
This Cheltenham based gym club appealed for funds to help upgrade their equipment.	
<b>TEWKESBURY MEDIEVAL FESTIVAL</b>	<b>£2,000</b>
SCT gave a grant towards the cost of hiring a marquee for Tewkesbury Medieval Festival 2023.	
<b>TEWKESBURY RUGBY FOOTBALL CLUB</b>	<b>£3,500</b>
The Club asked for funds to help instal a new irrigation system on their training pitch.	
<b>Total Awarded for Education, Sport and Recreation</b>	<b>£22,000</b>

Below Picture: The Cabin, Friends of Foxmoor



## The Environment and Natural Heritage

Applicant Project	Amount
<b>FRIENDS OF WESTONBIRT ARBORETUM</b>	<b>£10,000</b>
Silkwood Community Planting Project: Working with local community groups to engage them in conservation, tree planting, and on-going care.	
<b>MINCHINHAMPTON COMMUNITY HUB</b>	<b>£10,000</b>
Grant towards the purchase of a Heat pump.	
<b>THE CHANTRY CENTRE</b>	<b>£4,080</b>
Community centre in Dursley received a grant to support their energy efficiency project.	
<b>TRANSITION STROUD</b>	<b>£3,000</b>
Stroud Takes Action - Empowering local action on the climate and nature emergencies; SCT awarded a grant to fund the website redesign and launch.	
<b>WILD STROUD</b>	<b>£4,000</b>
Grant to support their work in introducing a Stroud Urban Corridor and Wildlife Gardens	
<b>Total Award for The Environment and Natural Heritage</b>	<b>£31,080</b>



Above Picture: Wild Stroud

## Vulnerable or Disadvantaged Sectors of Society

Applicant Project	Amount
<b>ACORNS CHILDREN'S HOSPICE CHARITABLE TRUST</b>	<b>£10,000</b>
10 days of specialist palliative care for life-limited or life threatened children from Gloucestershire at the Three Counties hospice in Worcester.	
<b>AGE UK GLOUCESTERSHIRE</b>	<b>£5,130</b>
Grant to cover printing costs of Grapevine Magazine which delivers social connection, purpose and platform for vulnerable older people.	
<b>BRAIN TUMOUR SUPPORT</b>	<b>£2,284</b>
Donation to help fund picnics in Cheltenham for those affected by brain tumours, in celebration of the charity's 20 <sup>th</sup> anniversary.	
<b>CHELTENHAM STREET PASTORS</b>	<b>£2,000</b>
Grant to help cover costs of this charity's Safe Space, where vulnerable people can access help.	
<b>CREATIVE SUSTAINABILITY CIC</b>	<b>£2,500</b>
Donation to support Creative Camping which aims to support disabled and non-disabled young people to become young leaders of inclusive and cohesive youth communities.	
<b>FARMS FOR CITY CHILDREN</b>	<b>£10,000</b>
SCT awarded a grant to help fund three, immersive and purposeful residential farm experiences for children from Gloucester at Farms for City Children's heritage farm, Wick Court, in Arlingham, Gloucestershire.	
<b>FRIENDSHIP CAFÉ</b>	<b>£5,000</b>
This charity received a grant to help run the St James' City Farm Lunch Club which provides vulnerable members of the community with a warm space and nutritious lunch whilst meeting others.	
<b>GLOUCESTER FOODBANK</b>	<b>£5,000</b>
Donation to help with costs of purchasing toiletries for the homeless.	

## 2023 Grants Summary

<b>GLOUCESTERSHIRE ANIMAL WELFARE ASSOCIATION AND CHELTENHAM ANIMAL SHELTER</b>	<b>£1,325</b>
Grant to support the HALT Project: a unique animal-assisted intervention programme that helps local 'at risk' young people, who face serious issues in their daily lives.	
<b>GLOUCESTERSHIRE HEALTH AND CARE NHS FOUNDATION TRUST CHARITIES</b>	<b>£6,750</b>
Donation towards the creation of the Sanctuary Garden: a women's garden at Wotton Lawn Hospital	
<b>GLOUCESTERSHIRE OUTWARD BOUND ASSOCIATION - AN OFFICIAL VOLUNTARY ARM OF THE OUTWARD BOUND TRUST</b>	<b>£4,000</b>
The Gloucestershire Outward Bound Association (GOBA) supports young people from Gloucestershire to go onto Outward Bound adventure courses. SCT's grant was to enable 8 young people to take part.	
<b>HOME-START COTSWOLDS</b>	<b>£5,000</b>
Home-Start Cotswolds supports families through challenging times. SCT gave a grant to fund the training of 5 volunteers who will support 5 families over 6 months.	
<b>JAMES HOPKINS TRUST</b>	<b>£10,000</b>
Donation towards the costs of providing overnight nursing respite care for life limited & life threatened young children in Gloucestershire	
<b>MONKSCROFT PASTORAL CARE PROJECT</b>	<b>£9,000</b>
Grant to support the Family Wellbeing Hub in Hester's Way Cheltenham which provides social, emotional and practical support for vulnerable families with young children.	
<b>NEWENT ASSOCIATION FOR THE DISABLED (NATD)</b>	<b>£7,000</b>
Donation to help purchase a minibus for the community transport scheme.	
<b>READ EASY CHELTENHAM &amp; GLOUCESTER</b>	<b>£1,465</b>
SCT's grant was to enable the charity to purchase 10 reading manuals and books for adults in Cheltenham and Gloucester needing to learn to read.	
<b>THE ALTUS SCHOOL</b>	<b>£2,500</b>
This school in Gloucester provides education for young people aged 5-16 years at risk of permanent exclusion from mainstream education. SCT made a donation to help fund the cost of creating a Sensory Room.	

## 2023 Grants Summary

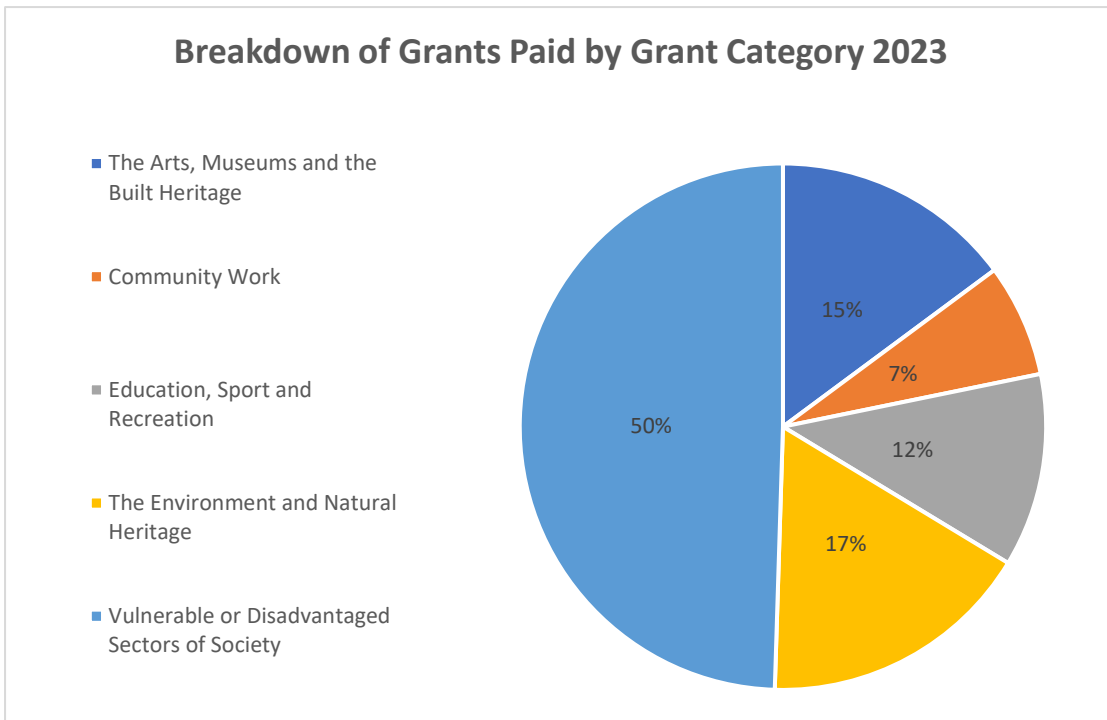
<b>THE CHURN PROJECT</b>	<b>£4,525</b>
Grant to support the weekly Friendship Café in Cirencester for isolated older people.	
<b>Total Award for Vulnerable or Disadvantaged Sectors of Society</b>	<b>£93,479</b>

## Summary of Applications Received and Grants Paid in 2023

	<u>2020</u>	<u>2021</u>	<u>2022</u>	<u>2023</u>
Number of applications considered by the Trustees	110	65	68	75
<b>Total grants paid</b>	<b>43</b>	<b>34</b>	<b>41</b>	<b>43</b>
Applications considered but the Trustees refused	66	30	27	32
Other applications considered – payment deferred	1	1	0	0
Applications refused by the Administrator – not eligible	2	3	5	4
<b>Total applications received</b>	<b>212</b>	<b>68</b>	<b>73</b>	<b>79</b>

### BREAKDOWN OF GRANT PAYMENTS 2023

<b>Grant Category</b>	<b>Amount Paid</b>	<b>No of Grants</b>
The Arts, Museums and the Built Heritage	<b>28,250</b>	<b>8</b>
Community Work	<b>12,430</b>	<b>6</b>
Education, Sport and Recreation	<b>22,000</b>	<b>6</b>
The Environment and Natural Heritage	<b>31,080</b>	<b>5</b>
Vulnerable or Disadvantaged Sectors of Society	<b>93,479</b>	<b>18</b>
<b>TOTAL</b>	<b>£187,239</b>	<b>43</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)



Follow us on Twitter: @SummerfieldNews