



ANNUAL REVIEW

2019

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Front cover image

Clevedon Happy Companions with Julie Newman, Philanthropy Officer at Quartet Community Foundation

Registered with



FUNDRAISING
REGULATOR



UK COMMUNITY
FOUNDATIONS
GIVING FOR LOCAL GOOD

Registered Charity Number: 1080418

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Supporting local organisations

Southern Brooks Community Partnership

"Quartet are excellent at championing local philanthropy and funding pilot projects to test ideas. This is crucial for us enabling small-scale testing of projects and allowing us to prove the benefits of a project to secure future larger amounts of funding."



Thank you from our Chair and Chief Executive

It has been a great year for connecting people who care with causes that matter. Thanks to the increased commitment of the philanthropists that work with and through us, this has been a record-breaking year. We have been able to achieve our goal of a significant increase in philanthropy channelled through us with new funds set up, additions to existing funds and the growth in the total endowment:

- **we gave over £3.5 million in grants from funds we hold to 877 projects, reaching over 230,000 beneficiaries**

- **donations and income totalled over £8 million**

- **our endowment has grown to be £33.3 million at 31 March year end.**

There is, however, so much more to do. For many people in the West of England, life is hard and the continuing pressure on many sources of funding and support means that philanthropy is invaluable in giving everyone here a fair chance of a good life.

Thanks to a generous £1 million legacy gift from a local donor, we have established The Lasting Legacy Match – a new 1:2 match funding endowment challenge which will generate £3 million in new funding to support local charitable activity.

In this report you will read more about our activities and successes this year in inspiring philanthropy, grant-making and community leadership. We hope this will inspire you to work with us, so do contact us to get involved.

Sue Turner

Helen Wilde

Supporting
your philanthropy

Ian and Sarah Robinson

“Quartet assesses the needs of our local community that may not be on our ‘radar’.”

Connecting people who care with causes that matter

The latest figures show that across the country public donations are down, and that the gap between overall giving to small charities and big charities is growing as larger charities dominate legacy donations. Yet it is these small charities that local people in need turn to for help with a wide range of problems from feeding children during the school holidays to getting help for elderly relatives and everything in between. That's why we're here – to inspire philanthropy to support the small, local community organisations that offer vital, life-changing services to some of our most disadvantaged communities across Bristol, Bath & North East Somerset (B&NES), North Somerset and South Gloucestershire.

Changing lives - Grant-making

We connect our 268 fund holders to vital good causes that they care about, helping award £3.5 million of grant funding that changes local lives.

Giving to people in need - Philanthropy Services

Finding inspirational small local causes to support is difficult but this is what we do for our fund holders every day. Fund holders are inspired by our events and project visits throughout the year as well as the heartfelt thanks from organisations that value their support.

Standing up for what you believe in – Community Leadership

Shining the spotlight on the reasons that people struggle with disadvantage is an important part of our work. Through our research and community leadership we work to make life fairer for everyone.

Rugbytots session at First Steps Twerton Nursery, Bath

Supporting local people

Bath YMCA - £1,500 to support homeless young people

“Chrissy had a troubled start in life, and has been in care. At 18 she was given a flat, but struggled. She spent a few nights on the streets but is now planning on going to University.”



FareShare South West provides food for a breakfast club at Evergreen Primary Academy, Easton, Bristol

■ Changing local needs

Needs are growing across the area and small, local causes are struggling with increased demands and budget cuts. Our 2019 Vital Signs report highlights significant needs across the West of England and how this is impacting health and wellbeing. The report shows that local people want more investment for services for children and young people, which have been under huge strain, impacting on the next generation unfairly and limiting their life chances.

Vital Signs shows that local people are finding life difficult:

- 19,197 children in the West of England received free school meals in 2018. Holiday hunger is a growing issue: 73% of parents on low incomes say they can't always afford to feed their children during the school holidays.

- Growing up in poverty disadvantages children – in Bath and North East Somerset less than half (48.2%) of children age 5 with free school meal status achieve a good level of development.
- Low or no qualifications - in South Bristol only 15.7% of young people went into higher education, compared with 35.5% nationally. In Filwood, Bristol 6.6% of young people attend university compared with 100% in Clifton.
- Incidence of cancer is very high locally, with large swathes of the West of England in the worst 40% nationally. Areas of Hartcliffe, Avonmouth, Southmead, Hillfields, Patchway, Twerton/Whiteway and Weston-super-Mare are all among the worst 5% nationally for cancer incidences.

Supporting local organisations

Bath City Farm

“Quartet plays a vital role in having an overview of the third sector in B&NES; linking organisations together; helping new projects get off the ground; supporting sustainability within the third sector.”



Bristol Bears Community Foundation's Golden Memories programme in South Bristol

Highlights of the year

Thanks to your support this year we...



£3.5 MILLION
Gave over £3.5 million in grants— our highest ever grant-making total (2017/18 - £3.15 million)



Made a significant impact on more than **230,000** beneficiaries



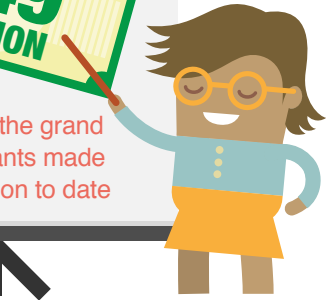
£8 MILLION
Received new donations and income worth over £8 million



877 GRANTS
Gave 877 grants ranging from £50 to £59,987



1,800 HOURS
Benefited from volunteer time given to Quartet this year



£49 MILLION
Achieved the grand total in grants made of £49 million to date

Supporting your philanthropy

Mark Hudson
 “Quartet has inspired my philanthropy and kept me in touch with moves to develop the community anchor organisations. Also it continues to keep me in touch with the charity scene in Bristol.”

■ Child's play – it's the SPICE of life

“Playing isn't just fun, it's also the best way for children to learn. By playing, children practise all the skills they need as they grow up. Research shows that play really is the SPICE of life and boosts Social, Physical, Intellectual, Creative and Emotional Development,” says Kirsty Wilson, from Children's Scrapstore.

Today's children only play outside half as much as their parents did and in 2015 only 23% of boys and 20% of girls aged 5-15 got enough physical activity.

Low family incomes, lack of opportunity, safety fears and too much screen time all contribute to children missing out on the serious learning that happens through play. For children play really is the work of childhood. It costs money to offer them safe play spaces, however funding cuts in 2018 left many local play organisations in crisis, threatening their ability to help our most disadvantaged children and young people.

Can you imagine communities without places to play? We certainly can't, so the good news is we've worked with the Pople Charitable Trust to support the Children's Scrapstore and LPW as part of 'Playful Bristol'.

David Pople from the Pople Charitable Trust which funded this vital work explained: “It's inspiring to see the difference play makes to the lives of disadvantaged children in Bristol, and to see the commitment of these play organisations. We're delighted to support their work from the Pople Charitable Trust.

“It's been fascinating to see what these play organisations do. It's given us further insight into the

pressures they are under and highlighted how our funding can make a difference to their longer-term sustainability.

“Quartet Community Foundation's advice and support has been invaluable as they support us to make sure our funds have maximum impact.”

Kirsty Wilson said: “This funding was amazing because it helped the Children's Scrapstore and LPW develop our long-term approach so that we can continue offering play opportunities to some of Bristol's most disadvantaged 5-11 year olds.”



Fund holders Chris and David Pople are inspired by visiting the Children's Scrapstore

Supporting local people

Street Space Knowle - £10,000 to tackle anti-social behaviour in Filwood, Bristol

“He hasn't turned into an angel overnight, but the change in his attitude is amazing.”



Rob Lear from the Bank of Ireland UK visiting the new garden at Woodlands Academy in Stockwood, Bristol

Business colleagues' choice helps children grow

"I love the garden," says a pupil of Woodlands Academy in Stockwood, Bristol. "There are loads of tadpoles in the pond, and I love playing in the den and with the musical instruments."

Woodlands Academy is set in the Stockwood housing estate in Bristol and the number of the school's pupils receiving free school meals is almost double the national average.

The children can spend quality time playing in the new garden thanks to a £4,537 grant through the Bank of Ireland UK Community Giving Fund.

The contribution from the Bank's fund means the garden now features a bespoke accessible workstation for children and people from the community to learn about plant propagation plus a sensory garden.

With a den, wildlife pond, giant marble run and much more the curious children have plenty of opportunities to learn about nature and enjoy playing in the new environment.

Rob Lear from Bank of Ireland UK said: "It has been inspiring to see and hear about the work the PTA do and how the garden project is benefiting children in the school. We're delighted to

have been able to support their work from our fund.

"Bank colleagues really enjoy getting involved and take an active role in choosing which projects to fund. We're motivated to see the difference grants from this fund can make to local communities. Quartet Community Foundation help us identify groups looking for support and offer us great support and guidance."

Any company interested in working with Quartet Community Foundation is welcome to contact Sue Turner on 0117 989 7700

Supporting local organisations

NAOS

"Quartet holds a pivotal role in the local community. It's always the first port of call when looking for smaller funds for our community projects. We've had much advice, guidance plus support with networking opportunities."

From student to CEO: meet Marc Hurr who turned an R W Barnes bursary into a thriving business

“ My Dad did not go to university and my Mum only got the opportunity to complete her degree in her 40s. I am very grateful to my parents who, through their hard work, were able to send myself and my two brothers to Uni.

Even with the loan, things were pretty thin on the ground and I had to live off giant value mega packs of pasta and questionably cheap £5 whole chickens for those four years of university.

The bursary - I remember the endless apprehension as I waited for my letter back to find out if I was approved, year after year. And the joy in finding out that yes, I was going to have some extra money to spend on something that could make my student life a little better.

This might sound silly, but receiving money from someone who I didn't know, and who didn't know me, made a great impression on me when I was younger. I felt looked out for.

I made two purchases with my R W Barnes Bursary money which made a significant difference to my university life and the years that followed: a city bicycle and my first laptop.

Eight months after my degree I began building my company from that laptop. Since I was the first engineer, most of the initial company infrastructure was built on there. Now, more than three years after we started, we have over 150 employees.

The company is a FinTech platform, part of a new wave of financial firms sometimes referred to as NeoBanks.

I like to think that once I have solved problems close to home I would help others who might be in a similar situation to the one I was in. Support for young people such as the R W Barnes Bursary and the Erasmus scheme dramatically improved my learning opportunities, and initiatives like these must continue with renewed support from those who most benefitted.

Take a look at Marc's company at www.linkedin.com/company/ibanwallet/

Marc Hurr, who received four years' support through the R W Barnes Bursary Scheme, talks about the difference this generous support made to him.



Supporting
your philanthropy

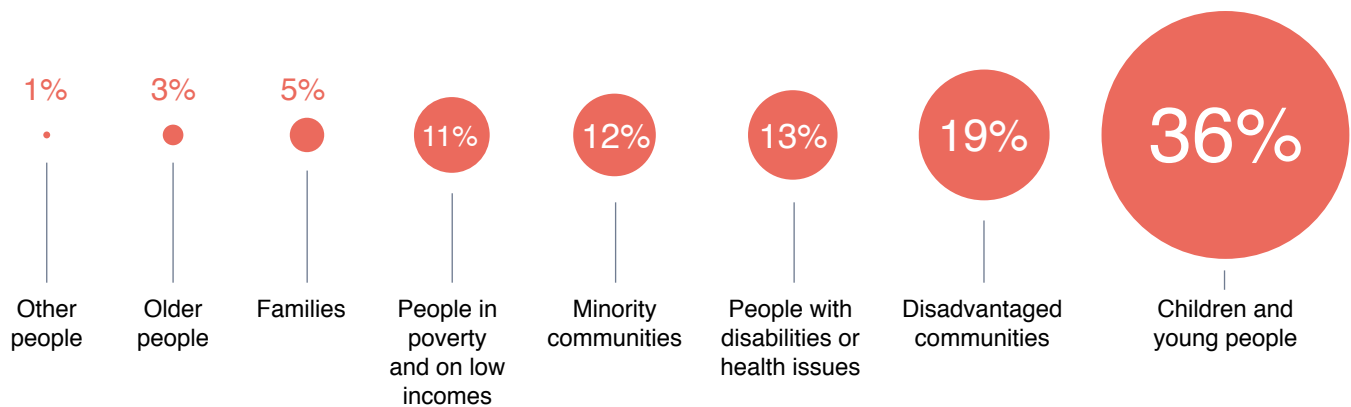
Chris May, founder and chair of the Maiden Foundation

“I have been impressed with the professionalism and reach of Quartet. It is possibly the best run charity in the South West. I am therefore delighted that we have been able to commission Quartet to manage some of our charitable funds and the recent fund matching offer was perfectly timed.”

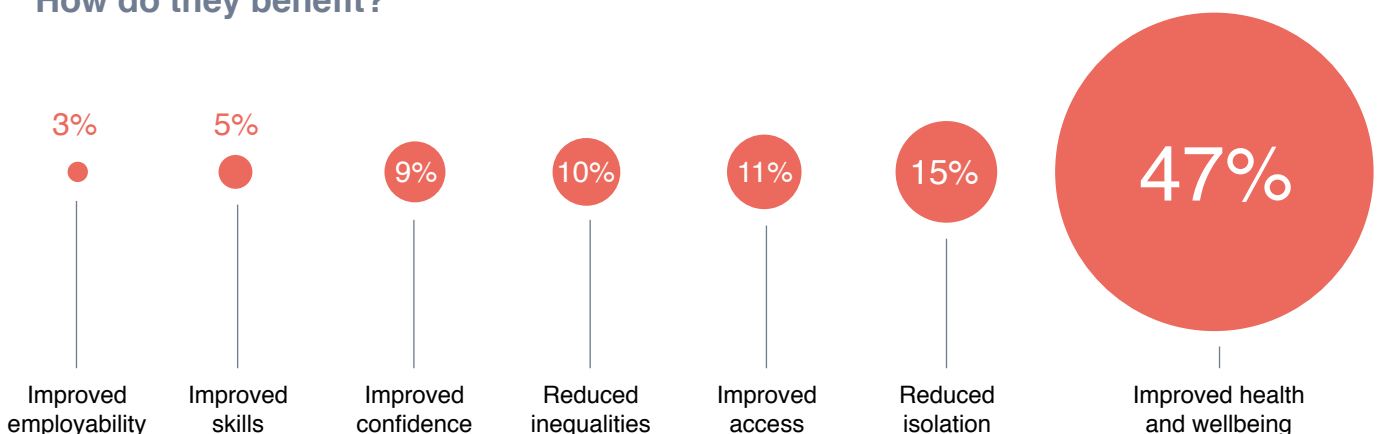
We make a positive impact... by working with a wide range of people and communities

Last year we awarded **877 grants**
to small, local causes across
the West of England

Who benefits from these grants?



How do they benefit?



Supporting local people

Live Music Now - £2,000 for music for children with Special Educational Needs

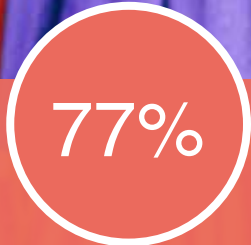
"Andrew's behaviour was often physically aggressive. Over the musician's residency Andrew's behaviour began to improve and he was able to learn the words and signs for a particular song which was sung each week."

We make a positive impact... by improving life for people in need in the West of England

How do grants help groups?

Bath carnival
dancers

Image Lucy Baker



Improved capacity
– grant helped the organisation
to deliver a project that meets
local need



Improved sustainability – grant
helped the organisation carry on
after Quartet’s support



Improved effectiveness – grant
helped the organisation achieve or
exceed their project expectations

Supporting
local organisations

Caring in Bristol

“Quartet is a critical friend for getting things off the
ground in the city and we hugely appreciate its role.”

We make a positive impact... by working with 268 fund holders to inspire philanthropy



Behind the Scenes
philanthropy event
at St Werburghs
City Farm

We
welcomed
549 people to
12 friendly
informative
philanthropy
events

4

£1 Million
gifts

Number of new funds established in 2018-19

It is thanks to hundreds of local philanthropists that we are able to make all these grants, connecting people who care to causes that matter.

It's been a very successful year for this, as you'll see here.

£2,232,192
put into 16 new
funds

Shared our news
and upcoming events
with fund holders, Friends
and supporters via

8

regular informative
ebulletins

Supporting your philanthropy

Neal Family Fund

"We continue to be inspired by Quartet. Behind the Scenes visits and opportunities to support projects from our fund keep us engaged."

We make a positive impact... by applying our learning and working with others

Funding the future

£400,000

donated/pledged by
local philanthropists +

£350,000

from the
National Lottery

By the end of
March 2019

£183,627

had already been
awarded to boost
community hubs

More larger grants

20%

of our discretionary
grants are under

£2,500

50% are

£2,500 - £5,000

30% are over

£5,000

Community leadership is a growing focus and we work with other organisations to support local needs and share the knowledge gathered from the grants we award and our Vital Signs research. For example, this year we have significantly increased collaboration with other funders to support older people, younger people and disadvantaged communities.

With the withdrawal of government support many local communities are increasingly needing additional support. Our recent research highlighted the importance of community hubs which needed support so we initiated the Funding the Future programme. We brought together local philanthropists and funders to secure £750,000 of new funding for vital community hubs and we're currently supporting eight disadvantaged communities to develop their own solutions.

In addition to small grants to small groups we now make larger grants so that groups can diversify their income and become more sustainable. Five years ago, only 17% of our discretionary grant-making was over £2,500; now 80% of our grants are larger than this.



Small, local causes that so often get overlooked by fundraisers were supported on the first ever Bristol Giving Day in October 2018

Our 2018 Vital Signs report shone a light on social needs in four communities: Barton Hill in Bristol; Twerton in Bath; the Bournville Estate in Weston-super-Mare and Patchway in South Gloucestershire



Supporting
local people

Grassroots Communities - £1,500 for a gardening project

"One of our residents 79 years of age said 'It helps bring people out who are on their own and brings the whole community together.'"

Support us

Never forget the local causes your care about

A gift in your Will to Quartet Community Foundation will ensure you keep on caring about the local causes that matter to you, forever.

Your gift will create your very own, permanent, personally-named 'Forever Fund'. Every year, your gift will earn returns which we donate to the specific local community causes you specify today.

www.quartetcf.org.uk/legacies

Set up your own fund

Imagine having your own charitable trust that transforms people's lives; now imagine the administrative burdens and having to say 'no' to those you cannot help. Having your own fund with Quartet gives you all the pleasure of giving without the burdens.

www.quartetcf.org.uk/create-fund

Support for your charitable trust

Whether you want to transfer a charitable trust to us or channel income through Quartet to hard-to-reach causes, you decide what you need us to do and we'll carry on the trust's good work.

ronnie.brown@quartetcf.org.uk

**BANES
Carers' Centre**

Supporting local organisations

Vision North Somerset

"Quartet Community Foundation is fundamental to our community and understanding local issues. The Foundation provides opportunities for charities like ours to grow and flourish."

Give meaning to your charity-business donations

Most businesses choose a brand-name 'charity of the year' but this doesn't help grass-roots organisations. Work with us to give real meaning and employee engagement to your charitable giving.

sue.turner@quartetcf.org.uk

Donate

Online www.quartetcf.org.uk/donate-now or by cheque payable to 'Quartet Community Foundation'.

Become a Friend of Quartet

Quartet's Friends make around £5,000 in grants annually plus enjoy regular philanthropy events.

www.quartetcf.org.uk/membership

We would love to talk to you – simply call us on 0117 989 7700 or email:

sue.turner@quartetcf.org.uk

ronnie.brown@quartetcf.org.uk

claire.wynnehughes@quartetcf.org.uk



Permanent endowment fund holders

£750,000 and above

Anonymous Community First Fund
 Arnos Vale Cemetery Fund
 Bank of Ireland UK/Bristol & West '97 Fund
 Bank of Ireland UK Community Giving Fund
 Biddle Trust Fund
 Eversea Community First Fund
 Young Bristol Challenge Fund

£500,000 - £749,999

AXA Fund (including Enterprise Fund)
 Barbara and Winifred's Fund
 John Pontin Trust

£250,000 - £499,999

Bristol Bordeaux Community First Fund
 Bristol Port Company Fund (including North Somerset)
 J & M Britton Charitable Trust
 Cowslip Green Fund
 Denman Charitable Trust Grassroots Fund
 Easton & Lawrence Hill Neighbourhood Management Fund
 Joan Hawkins Fund
 Kenny Family Community First Fund
 Lloyd Robinson Family Fund

Marjorie Edwina Whitlock Fund
 Needham Cooper Charitable Trust
 Betty & Miles Parsons Grassroots Fund
 Pople Charitable Trust
 Rolls-Royce Fund
 Sherwood Family Fund
 Society of Merchant Venturers Fund
 Stoke Park Group Friends' Fund

£100,000 - £249,999

Anderson Fund
 Ansty Fund
 Bank of Ireland UK/Bristol & West Endowment Fund
 Bath Half Marathon Fund
 John Bretten Grassroots Memorial Fund
 Bridge Foundation Fund
 Bridging Fund Community First Fund
 Bristol Association for the Care & Resettlement of Offenders
 Bristol Community & Voluntary Sector Fund
 Basil Brown Fund
 Churngold Environment Fund
 Jerry Cowhig Community First Fund
 Harry Crook Foundation
 Ben Durston Community First Fund

Fittleworth Grassroots Fund
 Friends of Quartet Community Foundation Fund
 Walter Hawkins Fund
 Hewlett Packard Bristol Fund
 Mark Hudson Fund
 John Laing Fund
 Mr & Mrs Richard Johnson Fund
 Kitale Community First Fund
 Laycock Family Grassroots Fund
 Learning & Skills Council West of England Fund
 McGreevy Fund
 Medlock Charitable Trust Community First Fund
 Mercers Company Fund
 North Somerset Realising Potential Charitable Fund
 Osborne Clarke Endowment Fund
 Rotary Club of Weston-super-Mare (including Claude Champion)
 John Spielman Fund
 St Mary's Tyndalls Park Trust Fund
 Thrings Solicitors Fund
 Tidmarsh Fund
 TLT Solicitors Fund
 University of the West of England Vice Chancellor's Fund

Supporting
your philanthropy

Cecilia Browne, Dan Hickey Fund

"It is always reassuring to know that good work is being done to meet the needs of those who are less fortunate in our society. Quartet does this which is inspiring."

16 Upper Horfield Neighbourhood
Grassroots Fund
Vice Chancellor's Fund
Wilde Family Fund

£50,000 - £99,999

Adrian Andrews Fund
Anonymous Fund
Anonymous Fund
Arden Fund
R W Barnes Bursary Fund
Bellevue Community First Fund
Bristol Airport Grassroots Fund
Bristol City Council Community
Safety & Environment Fund
Bristol Water Fund
Anthony & Gabrielle Brown Fund
Hugh and Judith Champion
Charitable Fund
Chapman Family Fund
Clerical Medical Investment
Group Fund
Courage Brewery Fund
Florence Denning Fund
Dulverton Fund
Durie Family Fund
Elizabeth Shaw Fund
E S & A Robinson Family Fund
Exploratory Fund
Andrew Fletcher
Grassroots Fund

Fund for Young People
Harptree Fund
High Sheriff's Fund
JP Morgan Fund for Education
KPMG Fund
Lee Family Fund
Nisbets in the Community Fund
Sheila Pollard Grassroots Fund
Peter Rilett Fund
Rose Bowl Fund
Sharp Family Fund
Tim Stevenson Fund
Diane & Murray Stewart Fund
Chris & Diana Sweeting Fund
Julian & Lindsay Telling Fund
University of the West of
England Endowment Fund
Verdon-Smith Family
Charitable Trust
Wards Solicitors Centenary Fund
Western Power Distribution
Community Fund
Sir John Wills Charitable Trust
Withy King Endowment Fund
Yates Family Charitable Fund
Youngwood Fund
Zair Family Fund

£25,000 - £49,999

25th Anniversary Fund
Andrew Addicott Community
First Fund
Armeno Fund
Roger & Affra Baird Fund

Charles Barcroft Fund
Bragg Family Fund
Bramble Fund
Bristol Young Professionals Fund
Bristol Junior Chamber of
Commerce Fund
Burke Family Fund
Business West Endowment Fund
Cadbury Fund
Chairman's Fund
Chantry Fund
Dr Catherine Chapman, née
Chambers Fund
Clarke Willmott Grassroots Fund
Bob Clements Education
Grassroots Fund
Cullum Family Fund
Dixon Family Fund
J R Dunn Fund
Ebb Fund
Farleigh Plain Community
First Fund
Future Publishing Fund
Harvest Charitable Fund
Harveys of Bristol Fund
Alfred Hill Fund
Hughes Family Fund
Johnstone Family Fund
Kaye Family Grassroots Fund
Lalonde Fund
Marlow Family Fund
Geoff & Jackie Matthews Fund
Mayden Foundation
Charitable Fund

Supporting local people

XTND-Improving Futures - £2,500 for activities on the Bournville Estate

"Kathy joined a parent group with her two children and joined more as her confidence grew. Now Kathy is actively co-leading groups and her increased confidence helped her get a paid role in education."

Mosaic Management
Consultancy Fund

Moss Family Fund

North Somerset Fund

David & Julia Norton Fund

Pamela's Grassroots Fund

Redcliffe Homes Fund

Tim & Liz Ross Fund

Tips & Wrinkles Fund

Saffery Champness Fund

Steel Charitable Trust

Stride Treglown Fund

Top Birds Fund

Unilever HPC Export Fund

Up to £25,000

Aird Family Community
First Fund

Alastair Sawday Publishing
Grassroots Fund

Allied Domecq Fund

Aviva Fund

Awdry Fund

AWW Fund

B&NES Fund

Churrgold Quay
Environment Fund

Claisse Family Fund

Colston's Girls' School Fund

Corixa Fund

Sue & John Cottrell Fund

Cussen Family Fund

Cryfield Community First Fund

Eupheus Fund

Roger Guck Bursary Fund

Henacre Charitable Fund

Housing & Homelessness
Community Fund

Idris Community First Fund

The Internal Comms Team Fund

Lions of Bath Grassroots Fund

Michael Lutley Fund

Marble Mosaic Fund

Mayor's Fund for Bristol

McArthur Fund

Helen Moss Grassroots Fund

Mulberry Community First Fund

Neal Family Fund

Pattersons Fund

Pendlebury/Tucker Community
First Fund

Red Trouser Quay
Environment Fund

Richardson Swift
Grassroots Fund

Ian and Sarah Robinson Fund

Rushmoor Grassroots Fund

The Serchio Fund

Jennifer Skellett Fund

Mary Smallwood
Grassroots Fund

Matthew Smallwood
Grassroots Fund

Paul & Amanda Smallwood
Grassroots Fund

Alan Stevenson Family Fund

Stobart Family Fund

Storvik Family Fund

Andrew Thornhill Fund

Stephen & Sally Trinder
Grassroots Fund

Whitaker-Sharp Fund

Whitewood Family Fund

Zetor Fund

Building to a Named Fund up to £15,000

Anonymous Fund

August 5th Fund

Bath Percent Club

BDO LLP Fund

Corrigan Associates Fund

Foster Family Community
First Fund

Freedom Fund

Hemming Family Fund

The Parklyn Fund

Tolchard Family Fund

Wesport Grassroots Legacy Fund

Willin Community First Fund

Supporting
your philanthropy

John Hughes

"Quartet are always inspiring."

Revenue funds

Over £100,000

Bristol City Council Youth Sector Support Fund

Henry Smith Charitable Trust Charity

Gannett Foundation Fund

The Grove Fund

Mohn Westlake Foundation Fund

Osborne Clarke Charitable Fund

Pople Charitable Trust Revenue Fund

£50,000 - £99,999

Bristol City Council Community Energy Fund

Building Stronger Britain Together Fund

DCMS Fund

Funding the Future Fund

Tampon Tax Fund

Wesleyan Foundation

Wessex Water Money Matters

£20,000 - £49,999

#iwill Fund

Anonymous Fund

Avon Ambulance Staff Benevolent Fund

Bath & West Community Energy Fund

Bristol Energy Cooperative

High Sheriff's Fund

North Somerset Community Partnership (NSCP) Fund

R W Barnes Bursary Fund

St James Trust

The Funding Network Bristol

Up to £20,000

Anonymous Fund

Bath & North East Somerset Smoke Free Revenue Fund

Bath Half Marathon Fund

Biscuit Fund

Bristol City Funds

Burges Salmon Charitable Trust Fund

Cobalt Fund

Coventry Building Society Community Fund

Dan Hickey Fund

Education for Refugees Fund

Up to £20,000 continued

Frances Goodchild Foundation

HAS Trust Charitable Revenue Fund

Hollingdale Fund

HPC Bristol Community Fund

HSWJ Fund

IOP Publishing Fund

James & Janice Fund

Mayor's Fund for Bristol

North Somerset Realising Potential - Community Transport Fund

Peggy Blunt Memorial Fund

Raj K Soni Legacy Fund

Rogerson Fund

Royal London

Rubicon Revenue Fund

Surviving Winter Appeal

The Mall's Fountain Charity Fund

Wessex Water Community Fund

Somer Valley Partnership Fund

Veale Wasbrough Vizards Fund

Supporting local people

Our Way Our Say - £5,000 for an intergenerational cookery project in South Ward

"97 year old Kitty met a local young parent and her three children during this cooking group. The mother now does Kitty's weekly shop and the children often pop round to put a smile on Kitty's face."

Our people

Staff photo front row left-right: Anne-Marie Rogers Marketing and Communications Executive, Emma Gregory Employer Engagement Executive, Andy O’Sullivan Philanthropy Officer, Deb Joffe Philanthropy Officer, Grace Thompson Administration Apprentice.

Back row left-right: David Triggles-Wells Programmes Manager, Ronnie Brown Philanthropy Director, Claire Wynne Hughes Philanthropy Executive, Sue Turner Chief Executive, Sarah Crispin Finance Manager, Diane Kent Operations Manager, Julie Newman Philanthropy Officer, Lucy Gilbert Head of Policy, Tracey Hill Finance Officer.

Joined after April 2019

Luke Boulton Philanthropy Officer

On maternity leave

Sabita Ravi Philanthropy Officer

Volunteers and paid interns

This year we have been supported by our fabulous volunteers including Nikola, Katie, Isobel, Claire and Bailey. As well as our paid interns Charlotte, Ifigenia, Jonathan, Lucy and Sophie.



Supporting
your philanthropy

Andrew King, St James Trust
“Funding the Future is a great idea.”

Our Trustees



Helen Wilde
Chair – Board of Trustees



Jonathon Baker



Sue Blatchford
Chair – Finance & Investment Committee
(from June 2019)



Merlyn Ipinson-Fleming
Chair - Governance, HR & Operations Committee



Chris Johnson



Annie Kilvington
Chair – Philanthropy & Marketing Committee



William Lee



Trevor Leonard
Chair – Finance & Investment Committee
(to June 2019)



Pat Meehan



Bina Shah



Ben Silvey
Chair - Programmes Committee



Julian Telling



Jo Turner

Many thanks...

Thank you to John Cullum who retired in September 2018 having completed his two terms as a trustee. We also appreciate all the commitment shown by William Lee and Trevor Leonard who both retired in September 2019.

This year we also said goodbye to Robert Bourns who stepped down as a trustee in May 2019; his energy and commitment made a huge difference to the foundation.

We thank them all for their considerable contribution to Quartet.

Supporting local people

Marmalade Trust - £1,500 to provide companionship on Christmas Day

“Since Michael’s wife died he spent Christmas Day alone. He enjoyed the company on Christmas Day this year and was introduced to one of the volunteers who helped him find lots of activities in his local area.”

Our people

Patrons

Peaches Golding OBE Lord-Lieutenant for Bristol

Annie Maw Lord-Lieutenant for Somerset

Thank you to Dame Janet Trotter OBE DBE CVO, patron of Quartet up until she retired as Lord Lieutenant of Gloucestershire in October 2018

President

Trevor Smallwood OBE DL

Vice-Presidents

Will Bee

Gillian Camm DL

Geoff Matthews

Chris Curling

Mary Prior MBE DStJ JP

Professor Murray Stewart

Sir James Tidmarsh KCVP MBE JP

Lady Paula Wills

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Liz Carter

Jeff Durant

Quentin Elston

Jo Grant

Bryony Johnstone

Chris Keeling-Rowe

Matthew Lee

Alan Lewis

Peter Marlow

Martin Mohan

Jules Moore

Jane Moss

Hilary Neal

Poku Osei

Benjamin Péan

Kannan Siva

Robert Skinner

Supporting
local people

Carers Centre B&NES - £4,556 towards art workshops for young carers

10 year old Abdel enjoys the weekly sessions: "It's fun and you learn lots of art and make lots of creative things. It helps take my mind off all the chores I do at home."

Financial information

Trustees' Statement and notes

The summarised financial statements are not the full annual report and financial statements but a summary of information derived from both the charity's Statement of Financial Activities and the charity's Balance Sheet.

The full annual report and financial statements, from which the summarised financial statements are derived, were approved by the trustees on 30 September 2019 and copies have been filed with the Charity Commission and with the Registrar of Companies.

The independent auditors have issued an unqualified report on the full financial statements and on the consistency of the Report of the Trustees with those financial statements.

The statement in the independent auditors' report, under section 496 of the Companies Act 2006, was unqualified. The full independent auditors' report contained no statement under sections 498(2)(a) or 498(3) of the Companies Act 2006.

The full annual report and financial statements are available free of charge from Quartet Community Foundation, Royal Oak House, Royal Oak Avenue, Bristol BS1 4GB or by email from info@quartetcf.org.uk or can be downloaded from the Charity Commission website.

Helen Wilde
Chair of Trustees
2 October 2019

Supporting local people

Jump Start Fitness - £2,000 towards activity sessions for children living in Bristol's tower blocks

"Really positive things happened to Kai since he's come: he's much better at home. He's learned about physical activity and how to play different games. It's a breath of fresh air, I can't say enough to praise it."

Summary financial statement

Financial activities for year ended 31 March 2019

	Unrestricted revenue funds	Restricted revenue funds	Endowment funds	2019 Total	2018 Total
	£	£	£	£	£
Income and endowments from:					
Donations and legacies					
Donations and gifts	790,214	2,600,210	4,646,922	8,037,346	3,481,247
Gifts in kind	29,345	-	-	29,345	43,085
Other trading activities					
Consultancy and other income	51,251	-	-	51,251	47,485
Investments					
Investment properties	48,368	31,918	4,067	84,353	85,731
Investment income	80,105	444,078	-	524,183	574,148
Total income and endowments	999,283	3,076,206	4,650,989	8,726,478	4,231,696
Expenditure on:					
Raising funds					
Communications and publicity	114,846	-	-	114,846	114,532
Consultancy	38,580	-	-	38,580	45,065
Community Leadership - New	24,329	-	-	24,329	-
Donor services	136,611	-	-	136,611	114,719
Employer Engagement Project - New	63,758	-	-	63,758	-
Fund development	36,344	-	76,413	36,344	82,188
Investment management costs	4,174	-	-	4,174	90,172
Investment properties	13,143	-	-	13,143	21,918
Charitable activities					
Draw-downs	-	-	151,136	151,136	208,006
Grants payable	171,474	3,407,044	-	3,578,518	3,146,923
Support costs of grants programme	263,576	85,974	-	349,550	222,544
Total expenditure	866,835	3,493,018	227,549	4,587,402	4,046,067
Net (expenditure)/income before gains and losses	132,448	(416,812)	4,423,440	4,139,076	185,629
Net gains on investments	50,413	338,156	1,435,582	1,824,151	439,069
Net income	182,861	(78,656)	5,859,022	5,963,227	624,698
Transfers between funds	20,340	(12,858)	(7,482)	-	-
Net movement in funds	203,201	(91,514)	5,851,540	5,963,227	624,698
Reconciliation of funds:					
Total funds brought forward	321,653	2,135,944	27,449,833	29,907,430	29,282,732
Total funds carried forward	524,854	2,044,430	33,301,373	35,870,657	29,907,430

Supporting
local people

Juice Community Project - £6,000 towards community support in Cadbury Heath

“A local couple living in over 50’s accommodation were very concerned about litter. As a result of the survey they contacted us and will be helping to run the weekly litter picking group.”

Balance sheet

As of 31 March 2019

	£	2019 £	2018 £
Fixed assets			
Tangible fixed assets		117,949	128,661
Investments			
Property		824,600	716,100
Other		30,924,500	26,606,352
		31,867,049	27,451,113
Current assets			
Debtors	1,422,278		268,808
Cash at bank and in hand	3,158,524		2,599,226
	4,580,802		2,868,034
Liabilities			
Creditors: amounts falling due within 1 year	(577,194)		(411,717)
Net current assets		4,003,608	2,456,317
Net assets		35,870,657	29,907,430
Funds			
Capital funds			
Endowment funds		33,301,373	27,449,833
Revenue funds			
Restricted funds		2,044,430	2,135,944
Unrestricted funds		524,854	321,653
Total charity funds		35,870,657	29,907,430

Supporting local people

Somer Valley Foodbank - £3,500 towards cost of foodbank's van and warehousing

"The volunteers at the foodbank were so lovely, they listened to me and made me feel human again. It was the first place I didn't feel judged."

A word from the Annual Review sponsors

“The most noteworthy thing about gardeners is that they are always optimistic, always enterprising, and never satisfied. They always look forward to doing something better than they have ever done before.”

– *Vita Sackville-West*
(1892 - 1962)

CCLA

INVESTMENT FOR COMMUNITY FOUNDATIONS
SUPPORTING COMMUNITIES

CCLA Investment Management Limited and CCLA Fund Managers Limited
are authorised and regulated by the Financial Conduct Authority.

Supporting
local people

Tribe of Doris - £1,375 to enable refugees and asylum seekers to attend a summer school

“The atmosphere of the whole festival was great. Generally I am a shy person, especially in English, but I became more confident at Doris.”

A word from the Annual Review sponsors

Tell us where you need to go.
We'll help you get there.

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from charity specialists.

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The value of investments and income arising from them may fall as well as rise and you might get back less than you originally invested.

Rathbone Investment Management Limited is authorised by the Prudential Regulation Authority and regulated by the Financial Conduct Authority and the Prudential Regulation Authority.

In Memoriam

We'd like to take this opportunity to pay our respects and give grateful thanks for the lives of:

Ron Barnes	Quartet fund holder
Kate Johnson	Quartet fund holder
Roy Proctor	Quartet supporter
Robert Huddleston	Quartet supporter
Norman Golding	Quartet supporter
Leonard Pearcey	Friend of Quartet
Robert Symons	Friend of Quartet

Supporting local people

Clevedon Happy Companions £1,700 to publicise and expand the club

A 93 year old member said: "I don't want to go home, it's quiet there on my own, I like it here with my friends where we laugh."

Our grateful thanks

Grant panels

We are extremely grateful to the members of the following grant distribution panels for their time and support:

Bristol Youth & Community Action (BYCA)
 Comic Relief Local Communities
 Community Games
 Dan Hickey Fund
 Funding the Future
 Mall Fountain Fund
 Megawatt Community Energy Fund
 North Somerset Grants Panel
 Raj K Soni Legacy Fund
 Somerset Crimebeat Fund
 Stoke Park Group Friends' Fund
 The Funding Network

Individuals and organisations

Thank you to all the people and organisations who have given their time and support this year

Bank of Scotland
 BurleighCreate
 Bristol Business Network/
 The West of England Initiative
 Business West
 Circle 2 Success
 Clevedon Hall
 Guild of Guardians
 Eversea, Clevedon
 Hartnell Taylor Cook
 lonet
 Lockleaze Community Hub
 Osborne Clarke
 PricewaterhouseCoopers LLP
 Simon Norris
 The Bristol Hotel
 Triodos Bank
 TLT LLP
 Veale Wasbrough Vizards
 Voluntary Action North Somerset

Professional Advisers

Registered Auditors

PricewaterhouseCoopers LLP
 2 Glass Wharf
 Bristol BS2 0FR

Legal Advisers

Osborne Clarke
 2 Temple Back
 East Temple Quay
 Bristol BS1 6EG

Veale Wasbrough Vizards

Narrow Quay House
 Narrow Quay
 Bristol
 BS1 4QA

Investment Managers

Smith & Williamson
 Portwall Place
 Portwall Lane
 Bristol
 BS1 6NA

Rathbones

Finsbury Circus
 London EC2M 4ET

CCLA

Senator House
 85 Queen Victoria Street
 London EC4V 4ET

Bankers

Bank of Scotland
 Glass House
 Cabot Circus
 Bristol BS1 3BX

Supporting
 local people

Bluebell £30,000 to support families
 affected by ante and post-natal depression

“Without Bluebell, it scares me writing this, I don't think I'd be here today.
 It's my second hit of PND and I didn't think I was worthy of recovery.”

Gifts in Wills

Ron Barnes (1944 – 2018) helped change the future for young people needing a helping hand. A gift in your Will to Quartet Community Foundation will ensure you keep on caring about the local people and causes that matter to you, forever.

Somerset business man, a scientist with diverse business interests, **Ron Barnes** was passionate about giving young people opportunities. In his lifetime he gave **277 grants worth £266,540** to help students with their university studies. Through a gift in his Will we will carry on this work forever.