



Quartet  
Community  
Foundation

Bristol  
North Somerset  
South Gloucestershire  
Bath & North East Somerset

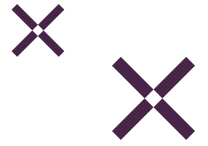
Local philanthropy for  
the West of England

Annual Report 2024

# Reflections: A year in review




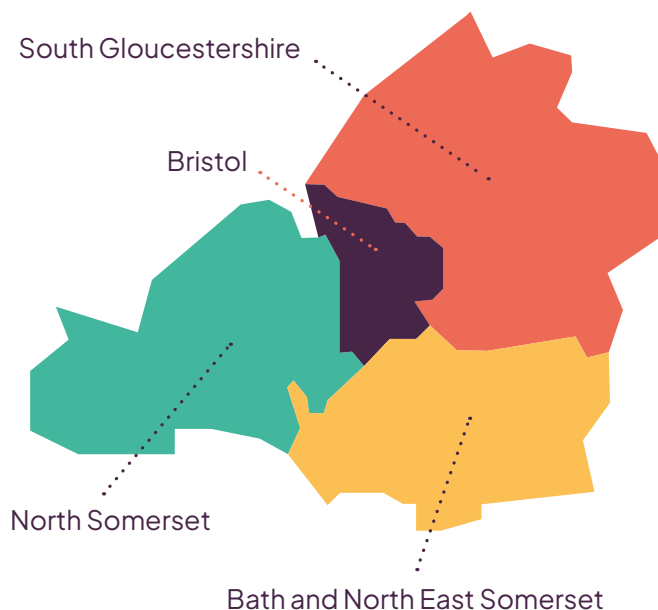
# Contents



Welcome .....	3
Our funding .....	4
Our impact: building lasting relationships .....	6
Our impact: collaborative funding .....	8
Our impact: climate and nature .....	10
Our fund holders .....	12
Q&A with fund holder Chris May .....	14
The value of professional advice .....	16
Leaving a legacy .....	17
ProHelp .....	18
In memoriam .....	19
Our funds .....	20
Get involved .....	24
The Quartet team .....	25

**Quartet Community Foundation supports charitable organisations across the West of England.**

**80% of VSCE sector organisations are small or micro, with annual incomes under £100,000 but they receive just 3.6% of the sector's annual funding.**



Quartet Community Foundation serves as a crucial bridge between donors and the local community, channelling generous contributions to address the most pressing needs and empower underserved communities. By understanding the unique challenges and opportunities locally we are grateful to be the recipient of grants that promote inclusion and address the root causes of inequality.”

**– Julian House**

# Welcome

**Since our founding in 1987, we have been fortunate to receive support from individuals, businesses and organisations committed to making a difference in our community. Their generosity has allowed us to award over £76 million in grants to thousands of charitable organisations. We remain dedicated to guiding our fund holders and ensuring their charitable contributions reach the causes they care about most. Our mission is simple: to make local philanthropy easy, inspiring and accessible, and to encourage others to join in this important work.**

The West of England is home to hundreds of exceptional local charities and community groups, all providing essential support and opportunities to those they serve. Our goal is to ensure these organisations have access to the resources they need to thrive. From August 2023 to July this year, we awarded grants totalling £4.9 million to more than 880 local groups, helping them continue their vital work.

At the heart of our efforts is the understanding that building trusted, long-term relationships — both with our fund holders and with the communities

we serve — is key to achieving meaningful change. While we know systemic inequality in our region cannot be solved overnight, we are proud that our endowment fund acts as a vital community asset, designed to meet both the present and future needs of the area.

We are especially grateful for the 12 new funds, 2 legacies, and to the 81 existing fund holders who have contributed to their funds in the last 12 months. Thanks to their trust and support, our endowment fund has grown to circa £64 million, a reflection of the confidence our supporters have in our mission.

We know many people care deeply about their communities, whether they work for a local charity or want to help fund this important work. Our role is to act as an inspiring and effective bridge between the two, and we are deeply thankful to everyone who helps us make a lasting impact.

— Sue Mountstevens OBE, Chair

— Ronnie Brown, Interim CEO



Quartet is a vital part of the local funding community. Their localised knowledge and experience is much appreciated within the local third sector community, and the level of support and approachability within the team is second to none.”

— Oasis Hub, Bath



# Our funding

Over the last 12 months, local charitable organisations have continued to report a rising demand for services and a competitive funding environment, especially when it comes to staffing and running costs. Our open grants programmes were so oversubscribed this year that we could fund less than half of the requests for support that we received.

Providing funding for small, locally-based charitable organisations will always be at the heart of what we do. In the last 12 months, 93% of our funding went to organisations with annual incomes under £1m, with over three-quarters supporting organisations with incomes under £500,000 per year. Small grants have sustained vital services, covered running costs, tested new ideas and helped groups leverage significant additional funding: last year, every pound of Quartet’s funding helped groups unlock an additional £2 from other sources.

Total value of grants awarded  
2023–2024

£4.9m

Total number of grants  
awarded 2023–2024

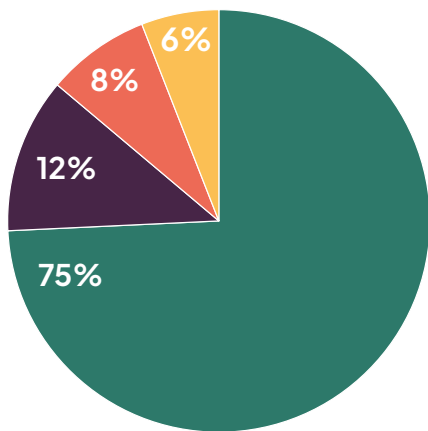
987

Average value of  
each grant

£5,049

All numbers and financials from August 23 to July 24.

Size of grants awarded



% grants awarded by theme



78%

of our funding went to organisations with incomes under £500,000 per year

93%

to organisations with incomes under £1m per year

### Supporting stability through the provision of larger, multi-year grants

We are increasingly offering larger or multi-year grants with around 8% of our grants worth £10,000 or more this year, and we awarded 19 multi-year grants worth £898,972 in total. These larger grants help to provide stability and reduce the fundraising burden on local organisations.

### Strategic grant-making for greater impact

Our Resilience and Sector Development Grant Programmes are the main ways we foster the strategic development of local organisations and sectors. Our Sector Development Programme, helping organisations work more effectively together, has given out £142,466 this year, and our Resilience Programme, for individual organisational development, has distributed £270,000.

### Ensuring fairness and transparency in our grant making

When competition for funding is so strong, it becomes even more important that we ensure Quartet's funding is easy to access, fairly distributed and as effective as possible. So this year we signed up to the IVAR Commitment to Open and Trusting Grantmaking, which is helping us test new ways we can develop and improve in this area. We have already made steps to increase diversity in our decision-making panels by involving more people with relevant lived and learned experience. As in previous years, we use research and learning to focus our funding where the need is greatest and where it will have maximum impact. We add to our knowledge by seeking feedback from the groups that apply to us and by carefully reviewing where our funding has and hasn't gone. Importantly, we listen to what local organisations are telling us they need.



Quartet Community Foundation plays a massive part in making ideas a reality, especially those bringing solutions to local issues. Coming from the local community, this includes piloting projects, supporting community engagement and action. The foundation also supports the most valuable long-term projects and continuation. They really know the communities in the region, staying in touch not with just the groups and organisations they fund, but also with other funders ensuring quality of provision and ensuring baseline standards are met.”

– Goska Ong, Centre Director, St Werburghs Community Association

# Our impact: **building lasting relationships**

**Developing long-standing relationships with charities can be transformational, both for the organisations and for the funder. Through dialogue and deepening trust, the funding relationship can be effective, joyful and affirming on all sides.**

Nobody understands this better than Steve and Emma Patch, Quartet fund holders of The Grove Fund. Established in memory of Lynn Patch, Steve's wife and Emma's mum, The Grove Fund is dedicated to her wish to help women and children who find themselves vulnerable due to domestic violence or abuse. Steve and Emma made their first grant from the fund in 2018 to domestic abuse charity Next Link, beginning a run of six grants over six years which have kickstarted three important strands of Next Link's work.

Next Link provides domestic abuse support services across Bristol, South Gloucestershire and North Somerset. These include safe houses, group support work, community and outreach services and a range of co-located services in Health, Housing and Children and Family Services. But commissioning funds only the most essential services for people at the highest risk. It doesn't cover work on areas like prevention and recovery.

Next Link's CEO, Sarah O'Leary, says it's this additional support that can make all the difference.

The first three grants from The Grove Fund helped Next Link establish a peer-support service for survivors. With very long waiting lists for counselling, Next Link found there was no appropriate support their clients could receive quickly. The peer-support service creates an immediate safe space for women to share their experiences and become less isolated. Facilitated by professionals but led by survivors, the service builds support networks for women that extend beyond the sessions. This pilot project was so successful it went on to receive long-term funding from the Ministry of Justice; this was only possible because of the initial funding from Emma and Steve.

**“Philanthropic funding is so valuable because it lets us innovate and explore new ways of working: we can respond to survivors' ideas about what would help them and demonstrate the impact of a new service, which can then lead to longer-term, sustainable funding as a commissioned service.”**

**Sarah O'Leary, CEO, Next Link**

**From left to right: Sabita Ravi (Quartet), Steve Patch (fund holder), Sarah O'Leary (Next Link), Sarah Smith (Next Link), Lauren Slack (Next Link), Emma Patch (fund holder).**





Following the success of the peer support project, Emma, Steve and Next Link discussed the gaps in support for children and the need for a specialist children's worker in South Gloucestershire, the next project funded by The Grove Fund. This new service offers one-to-one support for children affected by domestic abuse, and has since led to a wider, government-funded programme.

Emma and Steve now fund Next Link's in-house counselling service. Providing counselling in-house means that women can be supported as soon as

they seek help, and the holistic support they receive gives women the best chance of recovery. Sarah thinks this more joined-up approach helps break negative cycles, ultimately leading to prevention.

Developing this trusted, long-term relationship has made a real difference to the lives of many local women and children. This approach in pairing charities with people who care passionately is at the heart of what we do at Quartet.



**Emma and Steve understand the issues on a level that most people don't. They trust our expertise, they ask the right questions. We love it when they come and visit us. It's a relationship that feels really special."**

**– Sarah O'Leary, CEO, Next Link**



**I think it's true to say that without grant funding, these innovative projects would struggle to demonstrate how successful they can be. And that's why we've continued to offer our support. It's seeing the results first-hand and knowing that the money really does make a difference. Through building a relationship with Next Link, we know that they are a steady pair of hands with the experience and expertise needed to make a real difference. If they can't get the statutory funding needed, that's where Quartet and funds like ours can step in."**

**– Steve and Emma Patch,  
Quartet fund holders**

# Our impact: collaborative funding

**A recurring theme we hear from local organisations is how much of their time is spent making grant applications to lots of different funders for relatively small amounts of money. This results in insecure income and a huge amount of time spent raising money rather than helping people.**

Funders can help relieve this burden by working more closely together, offering larger amounts and a single application process to help groups secure the funding they need from different sources in one application. This is exactly the approach we have taken with the Bristol Older People's Funding Alliance.

This Alliance of over a dozen other local funders interested in supporting work with older people tries to ensure that funding for this sector is as joined-up and effective as possible.

Informed by recent national research pointing to growing inequalities among older people and the rising number of people struggling in later life, the Alliance looked into the evidence locally. This revealed that community-based advice services were serving a significant, and increasing, number of older people, many of whom were in or at risk of poverty.

These advice organisations are based at the heart of communities: they are well-known, trusted and close to home, so older people are most likely to go to these organisations to seek help. Older people have been using these advice services for help to maximise their income, understand their benefits entitlement, get help managing debts and switch to cheaper utility providers – all the things that research highlights as important for improving the lives of older people who are struggling financially. But these organisations can find it hard to secure funding for the ordinary running costs of key services like these.

So, several members of the Alliance pooled resources to form the Older People's Advice Fund and with one application process, three local advice services – South Bristol Advice Services, St Pauls Advice Centre and North Bristol Advice Centre – are each receiving grants of £17,500 a year for three years, a total of £52,500 for each organisation. In this way the Pargiter Trust Fund, held at Quartet, the Cote Charity, the Anchor Society and the Grateful Society are all working together to make it easier for these organisations to sustain their advice services for older people. The grants will support older people to receive timely support with managing debts and maximising their income, helping to reduce insecurity among those in or at risk of poverty.







“

”

The saddest change in recent times is to the number of older clients requiring help with Discretionary Housing Payments, help with lowering their water bills and requiring help from the foodbank. It is likely the next few years will show some of the highest figures of older clients dealing with debt due to the cost-of-living crisis and soaring fuel costs. Many of the clients we see had been employed in low-paid jobs and have no private or work pensions, or very small ones, or struggling on basic state pension, or on the border for eligibility for Pension Credit.”

– South Bristol Advice Services

Collaboration among organisations is crucial to discovering innovative and enhanced ways to support older people in maintaining independence, health, and social inclusion. As a Quartet fund holder of the Pargiter Trust, we have actively partnered with Quartet and other charitable organisations over the past year to achieve this goal. Our efforts have led to a more integrated approach in addressing the specific needs of older people, and given us a stronger, more unified voice.”

– Sue Gardiner, Quartet fund holder, Pargiter Trust

**Working in partnership has enabled us to offer larger grants for a longer time period, giving these organisations the security of longer-term funding and reducing the burden on them to make multiple applications. This is better for everybody. And so Quartet will continue to dedicate time to working in partnership and collaborating with other funders as a core strand of our approach and value.**

# Our impact: climate and nature

There are increasingly urgent calls worldwide for us all to take more action on climate change. Experts now have ample evidence that people already facing disadvantage will be those most affected by the negative effects of a warming planet.

At a local level, there is so much to do to support, engage and prepare our communities so that the inequalities we see now aren't made worse by climatic changes in the future. Funding work to tackle climate change, enhance nature and protect local communities falls squarely within our goal of a fairer, greener West of England for everyone.

And so Quartet is signatory to the Funder Commitment on Climate Change. This makes us part of a movement of 135 funders across the country that have each agreed to play our part in tackling the causes and impacts of climate change.

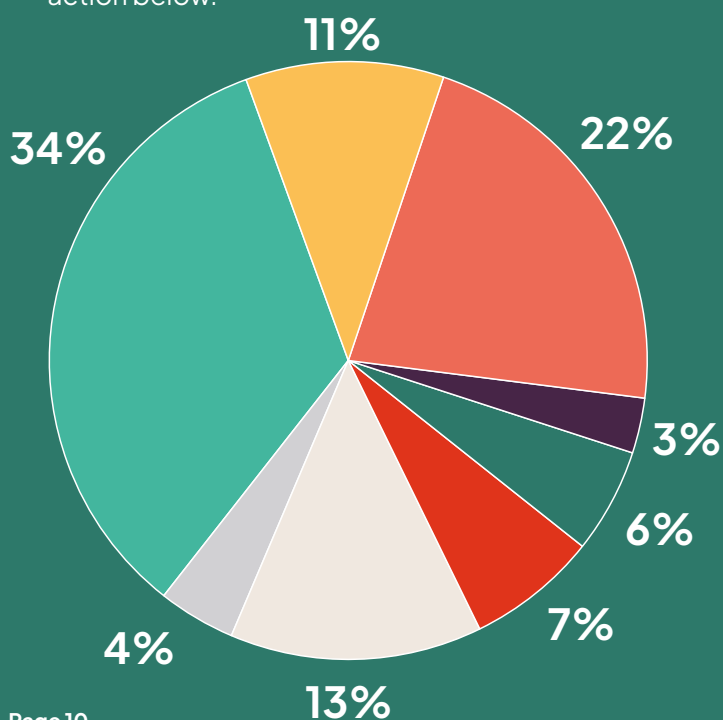
Each year we report publicly on our progress on meeting the six commitments we signed up to, and we'll share three of the ways we're taking action below.

## Grant-making

In the last financial year, we gave out £602,199 in 131 grants that would have a positive impact on climate and nature. This represents 15.1% of our grant-making total in the West of England last year.

The largest share, at more than a third (34%) of our funding, has gone towards helping local people to access natural spaces. This includes projects that offer people therapeutic time in nature, trips to the countryside for inner-city children, forest schools and supporting people to get out into green spaces like parks. Creating or enhancing green spaces comes second at 22%, which includes activities like community gardening, wild flower meadows and conservation projects. And third is measures to reduce energy use at 13%, including increasing the energy efficiency of buildings and giving people advice on how to reduce energy costs at home.

The spread of organisations and work that has received funding demonstrates the breadth of ways that philanthropy can play a significant role in helping local people engage with issues around climate and nature.



## Grant spend by category





Images: The Haven, Bristol

## Case study: The Haven, Bristol

A grant of £5,000 from Bristol City Council’s Social Action Small Grants Programme is delivering social and nature-based activities for people with lived experience of addiction, mental health issues, trauma and social isolation. It aims to address the social needs of people while exploring ways to grow and use plants to enhance health and wellbeing. This project will focus on increasing participants’ capacity to grow, cook and share healthy, fresh and nutritious food whilst building individual, social and collective resilience.

### Operations

In March 2024, staff and trustees came together to review our progress on our commitments so far and to decide our next steps. We are fortunate to own Royal Oak House, the building where our office is based, and so our operations form an important part of the action we are taking. Anyone who has visited our office will know that Royal Oak House is a big glass and concrete box. We have set out a range of ways that our building could become more climate and nature-friendly, and we are investigating the costs involved in making it happen. In the meantime, we’ve made other adjustments such as changing our procurement practices and energy supplier, and moving our publications to a primarily digital, rather than printed, format.

### Investments

Quartet holds an endowment fund worth circa £64 million, made up of the combined funds of our 294 endowment fund holders. How this fund is invested has by far the biggest impact on our environmental footprint. Fortunately, Quartet has a responsible investment policy which is under very regular review. We have worked with our investment managers and finance committee to ensure that our investments meet high ethical standards without damaging the income on the fund, which is used for grant-making. A key area of focus has been to progressively reduce our direct exposure to oil and gas companies over recent years. Currently only 0.4%\* of our endowment is now invested directly in fossil fuels.

\*As at August 2024.

# Our fund holders

**Our work with our fund holders forms the bedrock of our philanthropy advice service. Our 336 fund holders come from a range of different backgrounds – from organisations and institutions, such as local authorities and health bodies, to businesses, individuals and families. Many of them give through us during their lifetimes whilst others remember us in their will.**

All our fund holders bring their own charitable interests, priorities and knowledge to their giving through Quartet, and we feel privileged to support, shape and share their ambitions.

We work in partnership with all our fund holders to make our communities a better place for everyone.

In this review we shine a light on a few of our donors, sharing why they choose to give through us, the causes that matter to them and the impact that they wish to make through their philanthropy.

There is a full list of our fund holders from page 21. We would love you to join us and this community of like-minded people, all of whom care deeply about the West of England.



## Shakespeare at the Tobacco Factory Fund

**Aim:** bursaries to enable training, study or development in the performing arts and to promote greater access and diversity for actors and theatre creatives.

**Age of fund**

**2+ years**

**Value**

**£82k**

“As a theatre company we received some grants to support work with young people in our local community. When we took the difficult decision to bring our touring productions to a close, we contacted Quartet for some advice about how to create a lasting legacy for the theatre company. They gave us peace of mind and relieved the burden of being a trustee through the Revitalising Trust Transfer programme. We are delighted that we are able to continue to support actors and creative practitioners in Bristol and its surrounds.”



### Ian and Sarah Robinson Fund

**Aim:** to help young people realise their potential.

**Age of fund**

**8+  
years**

**Value**

**£118k+**

“We’ve been fortunate in our lives and, having lived in Bristol a long time, we’ve seen the range of challenges faced by the city. We set up our fund as a way of giving something back, particularly to young people. We learn from Quartet’s knowledge of the issues and expertise in assessing grant applications.

We appreciate the dialogue and advice offered by Quartet. We value our relationship and the flexibility about how we can allocate funds. We know that small local charities can make a real difference. Quartet enables us to identify needs and support groups that we can’t reach ourselves.”



### Bath & North East Somerset NHS Community Investment Fund

**Aim:** to provide crisis funding to improve people’s mental health and physical wellness.

**Age of fund**

**1+ year**

**Value**

**£100k**

“We wanted to use existing mechanisms to get funds to people as quickly as possible. Quartet had the knowledge and expertise to help us do this through setting up a revenue fund with them.

We were able to make meaningful grants to local organisations providing crisis funding to individuals and groups facing the cost-of-living crisis. And, through working with Quartet, we were able to support some of the harder to reach communities across B&NES. By providing this support we hoped to avert larger issues further down the line.”



### Saffery Grassroots Fund

**Aim:** for general charitable purposes.

**Age of fund**

**16+  
years**

**Value**

**£30k+**

“Our Bristol Saffery office is very people focused and we wanted to reflect that in our charitable giving. Quartet provides a framework for us to do that and we really appreciate how they connect us to local organisations where our funding can have a lasting benefit for the community.

Supporting smaller local charitable organisations allows us to see first-hand how our donations are making a positive impact in the local community.”

# Q&A with fund holder **Chris May**



Chris May has three passions: using data to improve health outcomes, helping those around him to thrive, and chocolate. Chris's commitment to helping others began long before we had the pleasure of supporting him with his charitable aims. He set up Maiden over 20 years ago and subsequently had enormous success with the company's provision of specialist technology that supports healthcare services. It was his passion to help people thrive that brought him to Quartet, and in 2019 he took advantage of match funding to set up the Maiden Foundation Charitable Fund. Five years later the fund is continuing to provide financial support for small charitable organisations across B&NES and Bristol, where Chris and the Maiden team live and work.

## Q Why did you choose Quartet?

There are so many charities doing excellent work across our region, but I was not in the best position to know them all or determine where the greatest need was. The Quartet team has expert knowledge in this area so it made sense to delegate the distribution of some charitable funds to them.

## Q Describe your experience of working with Quartet?

From the start I was really impressed with their professionalism. I have worked with lots of charities, but Quartet stood out with their quality of output.

## Q What inspires your funding?

Wanting to give back has become a bit of a cliché but it's nevertheless true. As a successful business we pay a lot of tax but there are so many areas that public spending doesn't touch, and it is great to be able to see the impact your giving has at close quarters.

## Q What would you say to anybody thinking about local giving?

We give both directly and through the Quartet fund. I would advise everyone to give with a match fund. Either join one or start one. It's so powerful in not only doubling the money collected, but doing it faster.

## Funding impact

### The Urban Garden, Community Interest Company (CIC), Bath Horticultural training with qualification to support pathway to employment

There is strong evidence indicating that horticultural therapy is a fantastic way to help people who are suffering from mental distress. A grant enabled The Urban Garden (CIC) to partner with the charity Grow for Life to offer training and qualifications for people suffering with mental distress.



When I first contacted the Urban Garden, I had very low morale. I found social situations difficult and I hoped to find some help with my mental health and to return to employment. I was looking for somewhere that could teach me a new skill or interest.

The Urban Garden were very welcoming and kind. They suggested I join a small midweek group, which was great because it wasn't overwhelming. From there I went on to join the gardening therapy group and then moved onto The Urban Garden course. Throughout the 6-week course I thoroughly enjoyed learning and started to become more sociable. The work placements helped me to feel okay to be myself and take my time. I enjoyed listening to other people and learning. It gave me a new outlook and energy.

The Urban Garden took me on a pathway back to well-being that I could not have found elsewhere. I feel incredibly grateful that I was able to go there, and it gave me back a confidence and interest in life."

– Urban Garden participant

### Fosse Way School, Bath Internship to support preparation for life after school.

Across England only 4.8% people with learning difficulties are currently in paid employment. A grant to Fosse Way School part-funded a one year 'transition to work' internship for young people with special needs to help them prepare for employment or further training based at the Royal United Hospital (RUH). The internship programme 'DFN Project SEARCH', in collaboration with the RUH, provided support for pupils during their introduction to the workplace, with a real prospect of gaining employment at the end of the programme.

Working with specialist teaching staff and job coaches, over 60% of graduates moved into full-time permanent employment and over 70% gained some form of employment. The internship successfully empowered young people at Fosse Way School to enter the workplace with confidence.

One intern with a diagnosis of Autism had been through two years of sixth form at Fosse Way School. His mum worried about his ability to hold down a job because of his reaction to stressful situations. During the internship the job coach spent one-to-one time with him talking through his feelings of being overwhelmed and his response to shut down or running away. He carried out three job placements during his time on the programme, with his final placement at a Bath-based organisation. This led to an interview, and he successfully secured a full-time position there.



60% of graduates moved into full-time permanent employment



70% gained some form of employment

# The value of professional advice



**Financial, wealth and tax advisers can play an important role in supporting their clients with their philanthropic aims. Evidence shows that people receiving philanthropy advice tend to give more to charitable causes.**

Philip Chapman, a financial advisor with Kellands, shares his experience of supporting clients who want to give to charity. Philip also holds a fund with Quartet, set up in memory of his late wife Alyson.



I came into a fortunate position through my inheritance and when Philip told me about Quartet, I thought it sounded good. I wanted to give locally as my family came from here and it makes me feel more connected to Bristol. With Quartet, I like that I get to hear about different organisations. I can watch their progress and see the impact of my support through visits and events. I've had a very positive experience."

**Fund holder, A&J Fund**

## How did your relationship with Quartet begin?

My relationship goes back to the 1990s when a trustee of Quartet introduced me to the foundation. I kept in touch over the years and recently set up my own fund. I also referred a client who has set up their fund with Quartet.

## How does charitable giving connect with the advice you provide your clients?

I see advising clients about charitable giving as part of my role. Some want their giving simplified and others want to do some good now because they're not thinking about stewardship for the next generation. They're often looking to me as their trusted adviser to guide them.

Timing is crucial and in my experience this comes when you know your client well. Once we have established that their financial future is secure, we can then discuss charitable giving.

I think having our family fund gives me personal experience to draw from. Quartet was there when I needed some support so I feel confident referring my clients. The key word is trust between all parties.

## What has been your experience of referring to Quartet?

I mentioned Quartet to a client who was thinking of making some charitable gifts as I felt they matched her needs. I personally introduced her to Quartet and stepped back once the relationship was established. One of the huge benefits of setting up a fund for her was seeing the good that it was doing.

For more information about how we can help you support your clients, please contact Angela Emms – [angela.emms@quartetcf.org.uk](mailto:angela.emms@quartetcf.org.uk) or visit our website to find out more.





# Leaving a legacy



Gordon and Beryl Cole have known about Quartet – and the wider community foundation network – for many years. They have both been actively involved in a range of community initiatives over the years, bringing a huge amount of “pro bono” energy to lend their skills and experience as trustees to various community organisations. Gordon has served on the management committees of many local organisations including Citizens Advice Bureau and Barton Hill University Settlement, and as a trustee of several others including Gloucestershire Community Foundation.

Originally, they had intended to leave a legacy to Quartet as their way of continuing to make a positive long-term contribution to their local community. However this year they decided to set up a fund during their lifetime as well, so they could see and enjoy the results of their giving now. And they have already made an early grant from their fund to Brain Tumour Support which supports people and their families living in Bristol and South Gloucestershire who are affected by a brain tumour diagnosis.

We had intended to make a legacy donation, but we also took the opportunity of downsizing to set up the fund now and we plan to add to it as and when we can. We see having an endowment as a more strategic planned way of giving, rather than just being reactive, which in the longer term has a much greater impact.”

– Gordon Cole,  
Quartet fund holder



For more information on legacy donations, please contact Claire Wynne Hughes – [claire.wynnehughes@quartetcf.org.uk](mailto:claire.wynnehughes@quartetcf.org.uk) or visit our website to find out more.

There are times when the organisations we support need more than funding. Our ProHelp service matches charitable organisations with businesses and individuals who want to share their expertise and time to make a social impact where it's needed most.

Now in its fourth year, ProHelp has successfully matched over 200 charities and community groups with over 4,000 hours of professional advice and services at a total value equivalent to over £500,000.

Between April 2023 and March 2024:

## 55+

organisations supported

## 1,500

skilled volunteering hours

## £170k

worth of pro bono support

## ProHelp support for Bristol Dementia Action Alliance (BDAA)

With an estimated 5,000 people living with dementia in Bristol, BDAA not only supports people and their carers, but they are also driving change to make Bristol a dementia aware city.

BDAA contacted ProHelp and requested some Microsoft Teams training to help the team improve how they collaborate.

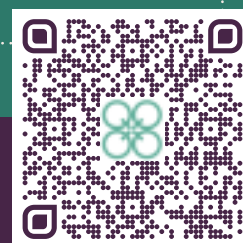
Wessex Water has a long-standing relationship with Quartet and is also one of our ProHelp partners. Kevin and Mike from the company's IT department were keen to make good use of their specialist knowledge and training skills. They volunteered to deliver a half day training session to enable the charity to work more effectively.

**Wessex Water**  
YTL GROUP



“Volunteering through ProHelp was straightforward and well organised so we could focus on helping the team at BDAA. We had a really successful training session with a lovely group of people who were hungry for knowledge and really appreciated us helping them.” Mike Caplin, Wessex Water

“We are so grateful to Wessex Water's IT colleagues for providing us with Microsoft Teams training which has greatly improved how we can collaborate and communicate as a team. As a small charity, we rely on the kindness of individuals and organisations to help us support people in Bristol living with, or affected by, dementia.” Samantha Rock Cooper, BDAA



If you'd like to find out more about our ProHelp service and how to get involved, scan the QR code or contact John Stienlet at [john.stienlet@quartetcf.org.uk](mailto:john.stienlet@quartetcf.org.uk).

# In memoriam

We were very sad to learn about the passing of several Quartet fund holders during the last 12 months including:

Charles  
Barcroft

Roger  
Baird

David  
Parkes

Phoebe  
Winch

Anthony  
McGreevy

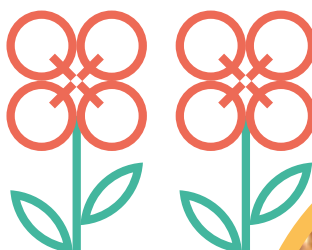
## Next generation philanthropy

**David Parkes was a supporter of our work almost from the beginning. He and his wife Audrey set up the Cowslip Green Fund with Quartet in 1992, which has continued to build over subsequent years and is now worth over £300,000.**

David had a particular interest in projects in North Somerset, where he lived, and helped us to develop our work in this area, making grants worth almost £90,000 in the past 20 years. He and Audrey were regular attendees at all our events and more recently came along with their daughter, Catharine, to our annual celebrations.

Before he died David was keen to ensure that the next generation of family members would be engaged in local philanthropy and, with the agreement of David and Audrey, we put in place succession planning arrangements.

Although David is sadly no longer with us, our relationship with the family continues through Catharine, who is actively involved in making grants from the fund. Most recently she agreed a grant to Severn Vineyard, which offers free children's clothing, bedding and equipment to families in need and in crisis in South Bristol.



I'm very pleased to be working with Quartet supporting projects and issues my father cared about and learning about the tremendous work that is going on in and around Bristol. I hope to start getting more involved and attending some of the Behind the Scenes events."

– Catharine, David's daughter



David Parkes

# Our funds

## Revenue funds

### £500,000 and above

- Bristol City Council Health and Wellbeing Fund

### £250,000 – £499,999

- Bristol City Council Youth and Play Support Fund
- Osborne Clarke Charitable Fund
- The Grove Fund
- Wessex Water (Donor Directed) Fund

### £100,000 – £249,999

- Commissioner's Crime Prevention Fund
- Community Investment Fund B&NES
- Quartet Sector Development Fund
- The Origin Foundation
- Wessex Water Community Fund

### £50,000 – £99,999

- Older People's Advice Fund
- Pargiter Trust Fund
- Preventing Victims Fund
- R W Barnes Bursary Fund
- Red Trouser Fund
- The Jack Baylis Fund
- Watson Family Revenue Fund
- Wesleyan Foundation
- Wessex Water Environment Fund

### £20,000 – £49,999

- Bath and West Community Energy Fund
- Bristol Community Health Fund
- Ella Rose Fund
- Farscape Family Fund
- Haywood Village Charitable Fund
- High Sheriff's Fund
- Lord Lieutenant for Bristol's Fund
- Megawatt Community Energy Fund

- Pople Charitable Trust Revenue Fund
- R S Bellevue Fund
- TAP for Bristol Fund
- Wessex Water Avonmouth Fund

### Up to £20,000

- ALF Revenue Fund
- Bath and North East Somerset Community Wellness Fund
- Bath Half Marathon Fund
- Biscuit Fund
- Bristol City Council Youth Sector Support Fund
- Bristol City Funds
- Burges Salmon Charitable Trust Fund
- Cost of Living Fund
- Dan Hickey Fund
- Delegated Services Fund
- Education for Refugees Fund
- Frances Goodchild Foundation
- Future Publishing Grassroots Fund
- HAS Trust Charitable Revenue Fund
- Hollingdale Fund
- ICB BANES Vaccine Inequalities Programme Fund
- Mayor's Fund for Bristol
- North Somerset Realising Potential - Community Transport Fund
- Peggy Blunt Memorial Fund
- Rogerson Fund
- Sovereign Housing Community Fund
- Surviving Winter Appeal
- Swiss Life Empowering Places Revenue Fund
- Te Puke Fund
- The Brocklebank Fund

## Endowment funds

### £5m and above

- Bank of Ireland UK Community Giving Fund
- North Somerset Community Partnership Fund

### £1m – £4.9m

- Arnos Vale Cemetery Fund
- Bank of Ireland UK/Bristol and West '97 Fund
- Barbara and Winifred's Fund
- Bristol Community Health Bursary Fund
- Celtic Connection Fund
- Eversea Community First Fund
- R W Barnes Bursary Fund
- Sherwood Family Fund
- Stephen and Sally Trinder Grassroots Fund
- Young Bristol Challenge Fund

### £500,000 – £999,999

- AXA Fund
- Betty and Miles Parsons Grassroots Fund
- Biddle Trust Fund
- Joan and Walter Hawkins Fund
- John Pontin Trust
- Kenny Family Community First Fund
- Pople Charitable Trust
- The Bristol Port Company Fund
- Tredwin and Pennington Family Fund
- Wormhole Fund

### £250,000 – £499,999

- Audrey Heckels Fund
- Bath Half Marathon Fund
- Brian and Katie Lovering Family Fund
- Bristol Bordeaux Community First Fund
- Cowslip Green Fund
- Denman Charitable Trust Fund
- Eastside Neighbourhood Endowment Fund
- Harry Crook Foundation
- HAS Trust Endowment Fund
- J and M Britton Charitable Trust
- Lloyd Robinson Family Fund
- Marjorie Edwina Whitlock Fund
- Needham Cooper Charitable Trust
- Osborne Clarke Endowment Fund
- Rolls-Royce Fund

- Society of Merchant Venturers Fund
- Thrings Solicitors Fund
- Upper Horfield Neighbourhood Grassroots Fund
- Watson Family Endowment Fund

### £100,000 – £249,999

- 1 in 4 People Ltd
- Anderson Fund
- Andrew Fletcher Grassroots Fund
- Ansty Fund
- Bank of Ireland UK/Bristol and West Endowment Fund
- Basil Brown Fund
- Ben Durston Community First Fund
- Bristol Association for Care and Resettlement of Offenders
- Bristol Community and Voluntary Sector Fund
- Chapman Family Fund
- Chris and Diana Sweeting Fund
- Crazy Diamond Fund
- Dunton Fund
- Finn Family Fund
- Fittleworth Grassroots Fund
- Friends of Quartet Community Foundation Fund
- Fund for Young People
- Hewlett-Packard Bristol Fund
- High Sheriff's Fund
- Hugh and Judith Champion Charitable Fund
- Ian and Sarah Robinson Fund
- Into the Arts Fund
- Jerry Cowhig Community First Fund
- John Bretten Grassroots Memorial Fund
- John Laing Fund
- John Spielman Fund
- Julian and Lindsay Telling Fund
- Kitale Community First Fund
- Laycock Family Grassroots Fund
- Learning and Skills Council West of England Fund
- Mark Hudson Fund
- McGreevy Fund
- Medlock Charitable Trust Community First Fund
- Mercers Company Fund
- Mr and Mrs Richard Johnson Fund
- North Somerset Realising Potential Charitable Fund
- Red Trouser Fund
- Rotary Club of Weston-super-Mare (including Claude Champion)

- RWK Goodman Fund
- Sharp Family Fund
- Sheila Pollard Grassroots Fund
- St Mary's Tyndalls Park Trust Fund
- Stoke Park Group Friends' Fund
- The Bridging Fund Community First Fund
- The Margaret Cooper Fund
- Tidmarsh Fund
- TLT Solicitors Fund
- University of the West of England Vice Chancellor's Fund
- Verdon-Smith Family Charitable Trust
- Wilde Family Fund
- Woodside Fund
- Yates Family Charitable Fund
- Youngwood Fund

### £50,000 – £99,999

- 25th Anniversary Fund Community First Fund
- A&J Fund
- Adrian Andrews Fund
- Alfred Hill Fund
- Anthony and Gabrielle Brown Fund
- Arden Fund
- Bellevue Community First Fund
- Bristol Airport Grassroots Fund
- Bristol City Council Community Safety and Environment Fund
- Bristol Water Fund
- Churngold Environment Fund
- Clerical Medical Investment Group Fund
- Courage Brewery Fund
- Diane and Murray Stewart Fund
- Douglas Family Charitable Fund
- Dr Catherine Chapman, née Chambers Fund
- Dulverton Fund
- Durie Family Fund
- E S and A Robinson Family Fund
- Elizabeth Shaw Fund
- Exploratory Fund
- Florence Denning Fund
- Harptree Fund
- Harvest Charitable Fund
- Hutchen Charitable Fund
- JP Morgan Fund for Education
- KPMG Fund
- Lee Family Fund
- Maiden Foundation Charitable Fund
- Moss Family Fund

- Nisbets in the Community Fund
- Peter Rilett Fund
- Rose Bowl Fund
- Shakespeare at the Tobacco Factory
- Sheridan Family Fund
- Sir John Wills Charitable Trust
- Stride Treglown Fund
- The YP2 Fund
- Tim Stevenson Fund
- University of the West of England Endowment Fund
- Wards Solicitors Centenary Fund
- Western Power Distribution Community Fund
- Zair Family Fund

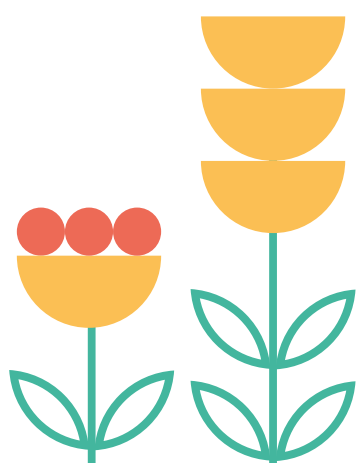
### £25,000 – £49,999

- Andrew Addicott Community First Fund
- Andrew Thornhill Fund
- Armeno Fund
- Bob Clements Education Grassroots Fund
- Bramble Fund
- Bristol Junior Chamber of Commerce Fund
- Bristol Young Professionals Fund
- Burke Family Fund
- Business West Endowment Fund
- Cadbury Fund
- Chairman's Fund
- Chantry Fund
- Charles Barcroft Fund
- Churngold Quay Environment Fund
- Claisse Family Fund
- Clarke Willmott Grassroots Fund
- Corixa Fund
- Cryfield Community First Fund
- Cullum Family Fund
- Cussen Family Fund
- Dan Hickey Endowment Fund
- David and Julia Norton Fund
- Dean Beesley Family Fund
- Dixon Family Fund
- Ebb Fund
- Egginton Family Fund
- Farleigh Plain Community First Fund
- Future Publishing Fund
- Geoff and Jackie Matthews Fund
- George Dibdin Fund
- Gollop Cripps Family Fund
- Harbil Fund
- Harveys of Bristol Fund

- Haywood Village Charitable Fund
- Helen Moss Grassroots Fund
- Hughes Family Fund
- J R Dunn Fund
- Jennifer Skellett Fund
- Johnstone Family Fund
- Kaye Family Grassroots Fund
- Lalonde Fund
- Marlow Family Fund
- Masters Family Fund
- Michael Lutley Fund
- Mosaic Management Consultancy Fund
- Mulberry Fund
- Neal Family Fund
- Pamela's Grassroots Fund
- Pendlebury/Tucker Community First Fund
- Redcliffe Homes Fund
- Roger and Affra Baird Fund
- Safestore Charitable Fund
- Saffery Fund
- Steel Charitable Trust
- Stobart Family Fund
- Sue and John Cottrell Fund
- Sunflower Fund
- The Corrigan Fund
- The Pat and Paul Johnson Charitable Trust Fund
- The Serchio Fund
- Tim and Liz Ross Fund
- Tips and Wrinkles Fund
- Top Birds Fund
- Unilever HPC Export Fund
- Y Deri Charitable Fund
- Yorkshire Pudding Fund

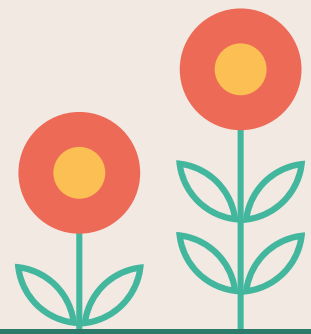
### Up to £25,000

- Aird Family Community First Fund
- Alan Stevenson Family Fund
- Alastair Sawday Publishing Grassroots Fund
- Allied Domecq Fund
- Alyson Chapman Fund
- August 5th Fund
- Aviva Fund
- Awdry Fund
- AWW Fund
- B&NES Fund
- Bath Percent Club
- Bragg Family Fund
- Bristol Social Responsibility Trust Fund
- Eupheus Fund
- Foster Family Community First Fund
- Freedom Fund
- Gordon and Beryl Cole Fund
- Hemming Family Fund
- Henacre Charitable Fund
- Housing and Homelessness Community First Fund
- Idris Community First Fund
- Janet Parsons Orchard Fund
- Lions of Bath Grassroots Fund
- Mary Smallwood Grassroots Fund
- Matthew Smallwood Grassroots Fund
- Mayor's Fund for Bristol
- McArthur Fund
- Montpelier High School Fund
- Parklyn Fund
- Pattersons Fund
- Paul and Amanda Smallwood Grassroots Fund
- Richardson Swift Grassroots Fund
- Roger Guck Bursary Fund
- Rushmoor Grassroots Fund
- Storvik Family Fund
- The Internal Comms Team Fund
- Tolchard Family Fund
- Wesport Grassroots Legacy Fund
- Whitaker-Sharp Fund
- Whitewood Family Fund
- Willin Community First Fund
- Zetor Fund



Thank you to our 5 additional anonymous fund holders.

# Get involved



Our work is underpinned by our extraordinary supporters, and there are many ways you can make a difference, whether that is financial support, sharing your time and expertise, or referring us to someone you know.

## Become a fund holder

Local charitable groups are deeply embedded in our communities and understand best how to support them. Becoming a donor enables you to build a long-term relationship with us and the community organisations you care about.

Contact:  
Ronnie Brown or Sabita Ravi

## Donate to an existing fund

You can donate to one of our collective giving funds at any time. Each has specific aims that helps to address the many issues facing our communities. You can select the fund/s you care about and donate a monthly or single donation on our website, [www.quartetcf.org.uk/donate](http://www.quartetcf.org.uk/donate).

Contact:  
Claire Wynne Hughes, Leiza McLeod  
or Luke Boulton

---

## Professional advisors

Referring a client to us can help to enhance your client relationship and provide added value to the services you offer. With your customer insight and our expertise there is a great opportunity for us to make a difference and increase local charitable donations.

Contact:  
Angela Emms

## ProHelp volunteers

There are times when the organisations we support need something other than funding, such as HR, design or legal advice. Our ProHelp service matches charitable organisations with businesses and individuals who want to share their time and expertise.

Contact:  
John Stienlet


---

## Trustees and committee members

If you are enthusiastic about philanthropy and enjoy setting strategic direction, a role as a trustee or committee member could be right for you. If you have skills, knowledge or experience relevant to our work and are keen to advocate for us to the wider community we'd love to hear from you.

Contact:  
Aidan Woodburn

### Help spread our message

 Sign up to our newsletter

   Follow us on social media

Remember to like and share our message far and wide!



# The Quartet team

We have a talented and dedicated team here at Quartet, and we are very grateful to many other people outside the team who contribute hugely to our work. Our Board of Trustees, grant panel members, committee members and other volunteers all bring a great deal of expertise and experience to what we do. Thank you to everyone involved.

CEO (Interim)	Ronnie Brown	<a href="mailto:ronnie.brown@quartetcf.org.uk">ronnie.brown@quartetcf.org.uk</a>
Philanthropy	Andrew O'Sullivan	<a href="mailto:andrew.osullivan@quartetcf.org.uk">andrew.osullivan@quartetcf.org.uk</a>
	Angela Emms	<a href="mailto:angela.emms@quartetcf.org.uk">angela.emms@quartetcf.org.uk</a>
	Claire Wynne Hughes	<a href="mailto:claire.wynnehughes@quartetcf.org.uk">claire.wynnehughes@quartetcf.org.uk</a>
	David Triggie-Wells	<a href="mailto:david.triggie-wells@quartetcf.org.uk">david.triggie-wells@quartetcf.org.uk</a>
	John Stienlet	<a href="mailto:john.stienlet@quartetcf.org.uk">john.stienlet@quartetcf.org.uk</a>
	Julie Newman	<a href="mailto:julie.newman@quartet.cf.org.uk">julie.newman@quartet.cf.org.uk</a>
	Laura Murgatroyd	<a href="mailto:laura.murgatroyd@quartetcf.org.uk">laura.murgatroyd@quartetcf.org.uk</a>
	Leiza McLeod	<a href="mailto:leiza.mcleod@quartetcf.org.uk">leiza.mcleod@quartetcf.org.uk</a>
	Liz Alcock	<a href="mailto:liz.alcock@quartetcf.org.uk">liz.alcock@quartetcf.org.uk</a>
	Lucy Gilbert	<a href="mailto:lucy.gilbert@quartetcf.org.uk">lucy.gilbert@quartetcf.org.uk</a>
	Luke Boulton	<a href="mailto:luke.boulton@quartetcf.org.uk">luke.boulton@quartetcf.org.uk</a>
	Rowena Knight	<a href="mailto:rowena.knight@quartetcf.org.uk">rowena.knight@quartetcf.org.uk</a>
	Sabita Ravi	<a href="mailto:sabita.ravi@quartetcf.org.uk">sabita.ravi@quartetcf.org.uk</a>
Marketing	Kelly Rogers-Smedley	<a href="mailto:kelly.rogers-smedley@quartetcf.org.uk">kelly.rogers-smedley@quartetcf.org.uk</a>
	Jane Quan	<a href="mailto:jane.quan@quartetcf.org.uk">jane.quan@quartetcf.org.uk</a>
Operations	Aidan Woodburn	<a href="mailto:aidan.woodburn@quartetcf.org.uk">aidan.woodburn@quartetcf.org.uk</a>
	Michelle Evans	<a href="mailto:michelle.evans@quartetcf.org.uk">michelle.evans@quartetcf.org.uk</a>
	Charlene Lawrence	<a href="mailto:charlene.lawrence@quartetcf.org.uk">charlene.lawrence@quartetcf.org.uk</a>
Finance	Sarah Crispin	<a href="mailto:sarah.crispin@quartetcf.org.uk">sarah.crispin@quartetcf.org.uk</a>
	Tracey Hill	<a href="mailto:tracey.hill@quartetcf.org.uk">tracey.hill@quartetcf.org.uk</a>
	Cathy Swift	<a href="mailto:cathy.swift@quartetcf.org.uk">cathy.swift@quartetcf.org.uk</a>

We extend our heartfelt gratitude to Suzanne Rolt, Emma Travis-Neale, Stephen Robins and Nicola Fox for their contributions to Quartet over the past year. We wish them all the best in their future endeavours.



### **Quartet Trustees**

Sue Mountstevens OBE (Chair)  
Nick Lee (Deputy Chair)  
Lauren Couch  
Raj Kakar-Clayton  
Matt Crossman  
Oliver Delany OBE  
Matthew Lee  
Ella Patel  
Kristen Pye  
Junior Sheikh  
Dan Wood

With thanks to Saida Bello, Sue Blatchford, Caroline Hagen, Chris Johnstone, Ben Silvey and Jo Turner for their contributions as a trustee over the last year. We wish you every future success.

### **Quartet President, Vice Presidents and Patrons**

Trevor Smallwood OBE DL, President  
Peaches Golding OBE, Patron  
Will Bee, Vice President  
Chris Curling, Vice President  
Geoff Matthews, Vice President  
Mary Prior CVO MBE, Vice President  
Professor Murray Stewart, Vice President  
Sir James Tidmarsh KCVO MBE JP, Vice President  
Lady Wills, Vice President

### **Grant Panels**

Bank of Ireland Community Fund  
Bath and West Community Energy Fund  
Bath Half Marathon  
Bristol Local Food Fund  
Bristol One City Social Action Small Grants  
Bristol City Funds City Lab  
Wessex Water Foundation Community Fund  
Wessex Water Foundation Environment Fund  
North Somerset Community Partnership Grant  
Megawatt Community Energy  
Resilience Programme  
Bristol Youth and Play Support  
Stoke Park Group Friends Fund  
Commissioners Crime Prevention Fund  
Bristol Youth and Community Action (BYCA)  
Steering Group  
BCH/NSPC Professional Development Bursary

### **In-kind support**

Bank of Scotland for banking services  
Business West for membership  
CMS for property legal services  
Osborne Clarke for legal services  
Paragon Costs Solutions for meeting spaces  
Rathbones for meeting spaces



“

Quartet is an accessible starting point for grassroots organisations. They are a trusted player with a crucial role in bridging the relationship between funders and the public.”

– **Sophia Foster, The Haven**



### Bristol office

Royal Oak House  
Royal Oak Avenue  
Bristol BS1 4GB  
0117 989 7700

### Bath office

Northgate House  
Bath BA1 1RG  
01225 420300

[quartetcf.org.uk](https://quartetcf.org.uk)  
[info@quartetcf.org.uk](mailto:info@quartetcf.org.uk)

### Professional advisers

#### Independent auditors

- Bishop Fleming

#### Legal advisors

- Osborne Clarke
- Veale Wasborough Vizards

#### Investment managers

- Cazenove Capita
- CCLA
- Rathbones

#### Bankers

- Bank of Scotland



# In View

## Health and wellbeing

Setting the scene for local charitable giving

Scan the QR code or visit [quartetcf.org.uk](https://quartetcf.org.uk) to read our latest insights report.

