



Quartet  
Community  
Foundation

Bristol  
North Somerset  
South Gloucestershire  
Bath & North East Somerset

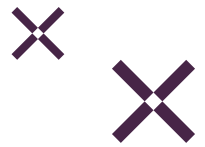
Local philanthropy for  
the West of England

Annual Report 2025

# Reflections: A year in review



# Contents



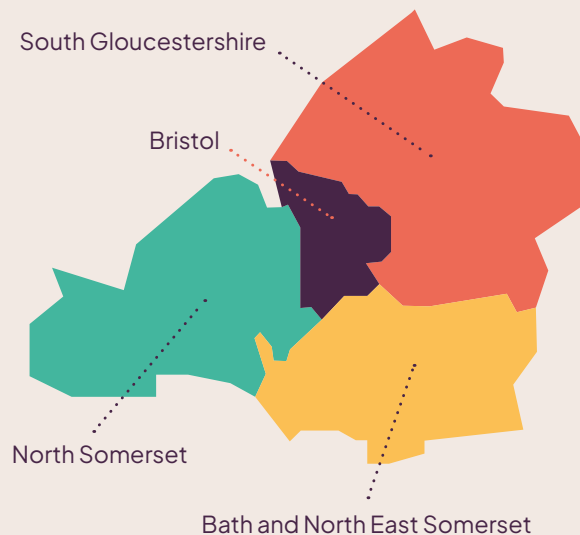
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## About us

**We are proud to serve the West of England as the region's local community foundation. We're dedicated to driving lasting, positive change by connecting people who care with causes that matter.**

Our expert philanthropy team works closely with local donors to support the issues and communities they're passionate about. Guided by deep local insight, we help ensure that charitable giving reaches the places where it can make the greatest impact.

Thanks to the generosity of our donors, we typically award around £5 million every year to charitable organisations across the region. These grants empower groups to continue their vital work, whether that's tackling local challenges, enhancing community spaces or providing essential support and opportunities to those in need.



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# Welcome

## Sue Mountstevens – Chair of Trustees

We welcomed Anna Smith as CEO in January this year. She joined at a good time! This summer, we celebrated the landmark of awarding £80 million in grants to communities over our 37-year history. Earlier in the year, we were fortunate to receive a generous legacy of £1 million from the Scantlebury family. This donation is being used, as the family wished, to match funding from existing donors, boosting its impact and encouraging new donors to Quartet. You can read more about the Scantlebury Challenge on pages 10–11.

We couldn't reflect on the year without mentioning Ronnie Brown, our Philanthropy Director, who retired in June after 31 years at Quartet. Ronnie was not only synonymous with Quartet for his passion, relationships and knowledge, he was also instrumental in the growth of our endowment from £1 million to £64 million.

Beyond Quartet, our region has seen big changes. Helen Godwin was elected as the new WECA Mayor, bringing fresh energy to transport, skills, economic development and planning. Meanwhile, Integrated Care Boards overseeing access to primary and secondary healthcare, have merged into larger geographic areas, focusing on key priorities including prevention. We want to bring our expert knowledge to these opportunities to support key areas including the prevention of ill health and the future of young people.

## Anna Smith – CEO

It has been a real pleasure joining the Quartet team this year. From the start, I've been inspired by the generosity of individuals and organisations, and by the incredible impact their giving has on communities across the West of England. I have worked in and around Bristol for many years running front line services in the fields of domestic abuse, street sex work and drug and alcohol misuse, supporting people facing profound disadvantage. I know that the voluntary sector continues to face challenges. Charities' 2025/26 budgets have been hit hard by rising salary expectations and NI contributions. This is doubly challenged by the growing demand for services – the result of the rising cost of living. We recognise these challenges for charities across the West of England, covering vastly differing areas, and we continue to work closely with our donors to highlight local needs and consider the benefits of multi-year funding for the sector.

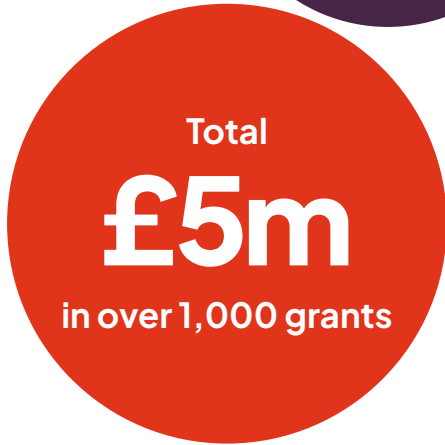
Above all, we're here to help people to give back, to inspire and connect our generous fund holders with charities doing vital work, where it will have the most impact and support people to live full lives.



# Our funding

Thanks to our generous donors, we've been able to support some extraordinary work by fantastic organisations this year. But like last year, the external environment in which our charity sector operates remains challenging. The picture is still one of high demand for charities' services, driven in part by cost-of-living hardship in communities and squeezed services in the wider landscape. This and a reduction in funding sources elsewhere has resulted in a high and competitive demand for grant funding.

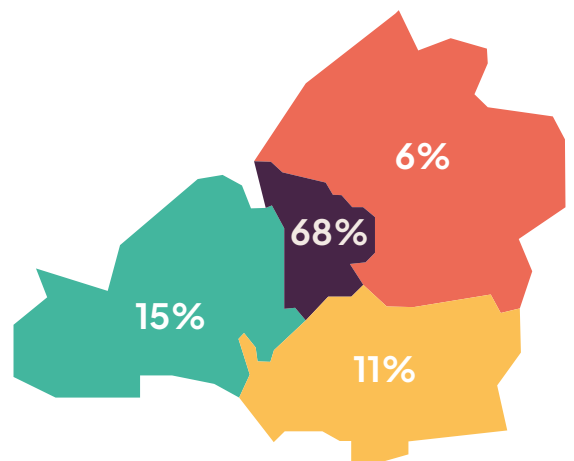
Our funding has continued to be in demand: in the 12 months from August 2024 to July 2025, we gave out almost £5m in over 1,000 grants. But we had to say no to nearly £3.2m worth of applications, often only due to having limited funding available. As a grant-maker, we're committed to the principles of open and trusting grant-making set out by the Institute for Voluntary Action Research. So this year we have continued simplifying our application process and finding ways to be even more accessible and transparent, so that every application to Quartet has the greatest chance of success.



## Top impact themes (% of funding)



## Funding to West of England organisations



This year we've continued offering three types of grants to meet local VCSE sector needs: grants for activities and services, funding to help organisations become more resilient, and support for organisations to do more strategic work that can benefit their wider sector.

### Activities and services

Funding for community activities and services is central to Quartet's work. Thanks to our donors, we support a wide range of initiatives across the West of England. For example, Wanted not Wasted in Weston-super-Mare received £5,000 for after-school sessions for disadvantaged children aged 5-16. 75% of attendees made new friends, felt calmer and happier, and learned to trust others more.

*"Many grant-making bodies are very prescriptive about what organisations must do to secure their funds, and expect organisations to constantly be setting up new projects. Quartet is invaluable for grassroots organisations who know what their community needs and just want to deliver it consistently."*

**– Helen Roy, Wanted Not Wasted**

### Developing resilience

Since launching in 2021, our Resilience Grant Programme has given out £1.6m in 180 grants to help local organisations to develop and strengthen. Grantees report increased financial and organisational resilience as a result of their grants, with groups securing an average of £1.49 in additional funding for every pound we gave them.

Last year, a grant of £9,862 helped Home-Start Bristol and South Gloucestershire, a charity helping families who need extra support, to upgrade their IT and data systems. The grant enabled them to develop robust systems for tracking their activities and demonstrating their impact.

### Strategic sector development

Our Sector Development grants enable strategic work that has benefit beyond a single organisation. To date we've awarded £579,436 to 20 organisations or partnerships spanning 12 VCSE sectors like health, advice, or children and young people. Many awards have been multi-year grants. End-of-grant reports received so far show that the funding has been very successful at strengthening partnerships, influencing wider systems and developing key projects. Organisations that have reported back have, on average, leveraged a further £7.56 for every £1 of this funding.

The West of England Rural Network, for example, has received a grant of £17,445 to strengthen and empower rural communities across Bath & North East Somerset, South Gloucestershire and North Somerset. The project will identify and communicate the particular needs of rural communities who are disadvantaged by where they live, and will develop effective plans for representing rural issues and supporting community development.



This project has enabled us to be more efficient, which has helped with our capacity. Being able to more clearly demonstrate the number of families we are working with and the difference we make to their lives has since helped us to secure further funding, including an increase in our grant from South Gloucestershire Council."

**– Terri Fletcher, Home-Start Bristol & South Gloucestershire**

# Q&A with the Multicultural Friendship Association



Triliria Newbury, Chairperson, Multicultural Friendship Association

## Q What does the Multicultural Friendship Association (MFA) do?

The MFA welcomes people from diverse backgrounds to Weston-super-Mare and the surrounding area. Through friendship and support, we aim to promote integration and to create a feeling of worth and purpose within our community.

We all need to feel that we belong and that we matter to someone.

## Q Why do you work with Quartet?

Our group would not have survived without the staunch support of Quartet. By funding local community-orientated groups such as ours, Quartet provides much-needed backing and endorsement. We are always met with encouragement, flexibility and a friendly, 'can do' attitude. This means we are never afraid to ask!

## Q What are the challenges being faced in your community?

In an increasingly remote society, we face the challenges of loneliness and isolation. These can, in turn, lead to fear, anxiety and even long-term ill health.

Additionally, we're living in a world in which opinions, behaviour and attitudes can be very volatile. The MFA works to provide a safe and welcoming space - somewhere to find friendship and, we hope, a more balanced approach.

## Q What has the funding that you have received from Quartet enabled you to achieve?

We have been able to continue our work in the local community. This includes our fortnightly drop-in, trips and events to celebrate our diverse cultures, providing information and guidance, or just being a 'listening ear'.

The funding has also given us a base to work from. This has enabled us to work with and support other groups, as well as giving us the confidence to plan ahead.



### What are your aspirations for MFA?

We would like to expand on what we can offer, and also to become better known within the community.

To have a chance of achieving this, we would benefit from a permanent base, an office and storage space. We would also need to attract more (and younger!) volunteers.



### How important is giving locally?

Groups like ours would find it hard to keep going without local giving.

We are all volunteers and, as such, competing for funding against much larger, national groups would be a tall order.

The beauty is in the word 'local' - where immediate issues are more easily understood.



# A spotlight on our fund holders

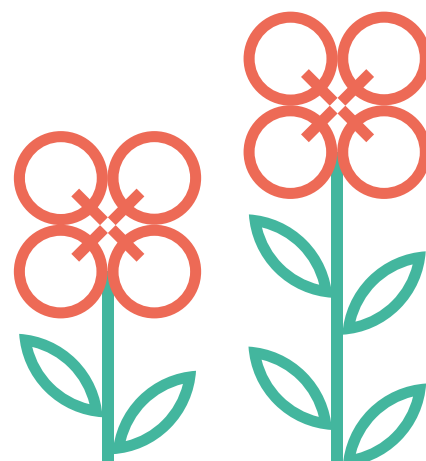
**We couldn't do what we do without our fund holders. From individuals and families to businesses and public bodies, they all share a commitment to making a difference locally.**

Some give generously during their lives, others leave behind a legacy, but all make a lasting difference. Each brings unique values and experiences that shape their giving.

We work closely with every fund holder to ensure their support creates a meaningful, lasting impact across the West of England.

In this review, we're proud to share a few fund holder stories - what inspires them, how they give, and their connection with Quartet.

Thinking about supporting local charities? We'd love to chat. Contact Sabita Ravi, [sabita.ravi@quartetcf.org.uk](mailto:sabita.ravi@quartetcf.org.uk).



**Aim:** A permanent fund supporting young people who face barriers to education and opportunity.

**Age of fund:** 7 years +

**Value of fund:** £31,000+



## Eupheus Fund

*"We first discovered Quartet through my former workplace, which had a fund.*

*We've always supported causes close to our hearts, but for our son's 16th birthday, we decided to set up a fund instead of giving gifts. He was keen to support others and learn more about the world beyond his own.*

*Our connection with Quartet has grown into something that feels like family. I've never worked with such a close-knit, caring team.*

*To anyone considering setting up a fund: do it! You don't need to be wealthy, just willing. We've worked hard and lived well, and giving back feels deeply rewarding."*

**— Bina, Alexander and Steve, fund holders**

**Aim:** A permanent fund supporting skills, digital inclusion, and wellbeing for the Haywood Village community in Weston-super-Mare.

**Age of fund:** 1 year +

**Value of fund:** £40,000+



## Haywood Village Fund

In 2024, housing developer Persimmon and North Somerset Council launched the Haywood Village Endowment Fund with £43,000 from developer contributions. The group has also committed to annual top-ups, ensuring long-term investment in local projects.

*“This fund helps build stronger connections between new arrivals and long-time residents – making Haywood Village an even better place to live.”*

— **Councillor Mike Solomon,**  
**North Somerset Council**

**Aim:** A giving circle supporting women and girls in and around Bath.

**Age of fund:** Originally launched over six years ago, the fund has recently partnered with Quartet.



## Bath Women’s Fund

Bath Women’s Fund is a giving circle bringing people together to learn, connect, and take action for women and girls – who as a group receive less than 2% of national charitable funding.

Members give from £25 a month, vote on an annual theme, and decide how funds are distributed. Since 2019, they’ve grown to 80 members and awarded £123,000 to 17 local organisations.

*“Quartet handles donations, Gift Aid, and grant-making, so we can focus on growing the fund and supporting our community.”*

To learn more visit [www.bathwomensfund.org.uk](http://www.bathwomensfund.org.uk)

**Aim:** A flow-through fund supporting voluntary and community groups in Patchway and nearby areas.

**Age of fund:** 8 years +



## Jack Baylis Trust Revenue Fund

The late Jack Baylis was a leading Bristol property developer, known for building over 1,000 homes and major sites like The Mall and The Venue at Cribbs Causeway. He and his late wife, Brenda, had deep ties to Patchway and were passionate about supporting local charities.

The Jack Baylis Trust Fund was set up with Quartet in 2017 to fulfil the wishes of Jack and Brenda, with annual donations to this fund for supporting local charities in this part of Bristol.

*“Our relationship with the Quartet team has been excellent – we’d wholeheartedly recommend them to anyone considering a charitable fund.”*

— **Trustees, Jack Baylis Trust**

# A legacy of giving

## The Scantlebury Challenge

**Paddy Scantlebury's brother was a long-term supporter of Quartet, giving us small donations over several years. On his death, his executors permitted us to use the legacy left by him in his Will to launch The Lasting Legacy Challenge in 2019, a matched endowment challenge, which inspired over £3m in donations and created 14 new endowment funds. The challenge brought in more funding to local charities in our region, supporting immediate needs and also securing resources for the longer term.**

When Paddy sadly died last year, her executors in continuation of a family tradition, agreed to us launching another matched endowment challenge with her £1m gift to Quartet. The Scantlebury Challenge provides an opportunity for new and existing donors to gain an additional 50% match on their donations (see opposite page for details). Launched in April this year, we are delighted to have already matched over half of Paddy's gift, bringing in much needed resources to the voluntary sector in our region.

### Real stories, real impact: Foster Family Fund

**One of our fund holders, Neil Foster, took advantage of the Scantlebury Challenge to add to his fund with us.**

Neil was a teacher for nearly forty years, living and working in North Somerset since 1985. Teaching in a Clevedon school for 27 of those years means he has got very used to former pupils approaching him when he leaves the house! As a teacher, Neil met and supported many pupils and families who were struggling socially and financially; this showed him the challenges that some people in the local area were facing and made him want to give back. He became involved with local charity Clevedon YMCA as their Chair of Trustees where he was passionate about supporting children and young people not in education or training.

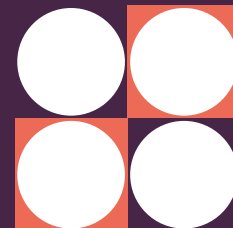
As part of fundraising for the charity, he remembers meeting Quartet and receiving funding to launch a range of new projects, including the successful horticulture project 'In it to Grow'. "The funding and advice we

received from Quartet was invaluable," Neil recalls. "It gave us the confidence to connect with other funders and the local council."

Neil retired from teaching in 2012 and used a lump sum from his pension to take advantage of the Community First matched challenge that Quartet was running at the time to establish his permanent endowment fund.

Even from the early days, Neil wanted to grow his fund over time: "I always had in mind that I wanted to give more when I first started, especially if I were to come into an inheritance." So when Neil sadly lost his father last year, he chose to use his inheritance to add to his fund as he had initially planned, boosting his gift further through the Scantlebury Challenge.

We will continue to work with Neil to make grants to causes that are close to him, particularly offering support to organisations working with young people and their mental health.



## Amplify your giving through the Scantlebury Challenge

Whether you're new to Quartet or already hold a fund, the Scantlebury Challenge offers a fantastic opportunity to make your giving go further:

- **New donors:** We'll match any donation between £25,000 and £200,000 with an extra 50% to help you set up your endowment fund. Pledges can be made now and must be donated by 31st March 2027.
- **Existing fund holders:** We'll match additions to your fund between £10,000 and £100,000 with an extra 50%.
- **Gift Aid:** Available for immediate distribution as grants to local charities.



I've never wanted to own a yacht or have the finest things in life. Being a teacher showed me how much some local families struggle. I'm so grateful for the financial security I have and the stability it has brought my mental health and freedom in life, and I would like that for other people."

– Neil Foster

To find out more contact Anna Smith, CEO [anna.smith@quartetcf.org.uk](mailto:anna.smith@quartetcf.org.uk), or Sabita Ravi [sabita.ravi@quartetcf.org.uk](mailto:sabita.ravi@quartetcf.org.uk).

Alternatively, you can call the office on **0117 989 7700**.

# Funding and ProHelp in action

TLT and St Pauls Advice Centre

## ProHelp – Skilled pro bono volunteering

In addition to funding local charities, we offer a skilled volunteering service that connects organisations in need of expert support with professionals willing to share their time and knowledge. Through ProHelp, businesses and individuals can make a meaningful, lasting impact, helping strengthen the voluntary groups that deliver vital services across our region.

## Participant insights

Late last year, we were fortunate to benefit from a research project by Emily Perkin, a PhD researcher at Bayes Business School. This external study highlighted a range of positive outcomes for those who have both provided and received professional support through ProHelp.

The feedback was overwhelmingly positive. Participants described the experience as professionally and personally rewarding, with recipients highlighting the high-quality support they received which they wouldn't have been able to afford otherwise. Providers felt proud to contribute to meaningful causes, and many said it was a genuinely fulfilling experience. What stood out was how ProHelp is helping to build lasting, respectful relationships between the charity and commercial sectors based on shared purpose and mutual respect.

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

**300+**  
organisations  
supported\*

**5,700+**  
skilled volunteering  
hours\*

**£700k+**  
worth of pro bono  
support\*



*\*from 1 September 2020.*



St Pauls Advice Centre Opening: Egeran Gibril (Advice Worker), Roger Griffith MBE, Pauline Sandell (Chair of Trustees), Rob France (Executive Director).

## Grant funding and pro bono making an impact

Law firm TLT believes that community is central to their people-first culture, and they've proudly partnered with Quartet for over 21 years. This partnership reflects a shared commitment to social justice and sustainable change. Through their charitable fund and the support of our ProHelp service, this collaboration has helped strengthen local charities and extend pro bono legal support to groups that might not otherwise be able to afford legal services.

This year they helped St Pauls Advice Centre move to new premises when the building they called home in the heart of St Pauls was no longer suitable.

For over five decades, St Pauls Advice Centre has been a trusted source of support for residents in St Pauls, Ashley, and East Bristol, offering essential advice on debt, immigration, and welfare rights. Their mission to combat poverty and inequality by equipping individuals with the knowledge and skills to access their rights and fulfil their responsibilities has made a lasting impact on the local community.

Through our ProHelp service, TLT provided pro bono legal support to surrender the lease on St Pauls Advice Centre's old property, as well as advising on the lease for their new premises at Junction 3 Library in Easton. This support has saved the charity the cost of paying for legal conveyancing, and TLT also supported with a grant of £2,500 from their fund to help them with their moving costs.

"TLT were amazing. The speed, expertise, diligence and scrutiny TLT applied were excellent and we are very grateful. We'd also like to extend our gratitude to Emma Barrow, TLT Trainee Solicitor, whose attention to detail was second to none."

– **Cas Brooks, Deputy Executive Director, St Paul's Advice Centre**

"By combining financial grants with pro bono legal support through Quartet, we can offer a more holistic and impactful form of assistance to local charities. This approach enables us not only to address immediate operational needs, such as relocation costs, but also to empower organisations with the legal confidence and strategic clarity they need to thrive. It has also enhanced our firm's visibility within the local community and encouraged more colleagues to engage in similar initiatives."

– **Deborah Sheldon, Partner at TLT and Pro Bono Champion**

# Our collaborations

**Part of the role of a community foundation is to ensure that our work makes a positive contribution to our wider region. Given the complexity of needs, knowledge and activities locally, working in partnership with others can produce better outcomes.**

As usual, this year we've been part of a range of partnerships, forums and working groups. These help us collaborate with other organisations to listen, learn and take collective action. Some examples this year include the West of England Impact Alliance, funding surgeries with infrastructure organisations Black South West Network and Voluntary Action North Somerset, and more. Opposite we share some notable partnerships we've been involved in this year.



## Tech4Good South West

This year we've continued our partnership with regional network organisation Tech4Good South West. They bring together people working in tech with charities, funders, and community leaders. Their work helps tech-based solutions support charitable objectives and fosters digital inclusion across the south west. In May, we jointly convened a session for Bath Digital Festival on bridging Bath's digital divide, and in October we co-hosted an event exploring the role of women in tech and philanthropy.

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We also recently partnered with Tech4Good South West on a digital skills survey for the local VCSE sector. The survey provided insights on the sector's existing level of digital skills, and the barriers organisations face in making the most of the digital world. The results are helping inform the advice we provide and our grant-making priorities. You can find results highlights in our latest In View report.

## Bristol Climate & Nature Partnership



This year, in collaboration with Bristol Climate & Nature Partnership, we undertook research to determine the potential interest in and support for funding local community climate and nature action. In conversation with philanthropists, funders, and local businesses we explored ways this might be delivered and enhanced. Our results revealed an appetite for more cross-sector collaborative working and a desire among some philanthropists for strategic funding conversations. Thank you to everyone who gave their time to take part, and we will be sharing next steps in the development of this project in the coming months.

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## Co-funding 3SG

Bath and North East Somerset Third Sector Group CIO (3SG) is a member-led network for the VCSE sector, connecting and advocating for the sector locally. Last year they received £40,000 over 2 years from Quartet's Sector Development programme, co-funded by Quartet and the Cobalt Trust, with 1:1 matched funding agreed from the Bath-based funder St John's Foundation. The funding is covering salary costs for a key role, freeing staff capacity to focus on projects and strategy. Multi-year, core funding gives organisations the security to retain skilled staff and the time to focus on delivering their mission. Only halfway through the grant, the funding has already enabled them to establish closer strategic relationships with key bodies in the region, deliver the B&NES Volunteer Fair and develop a new organisational strategy.



I'd like to thank Quartet, St John's and the Cobalt Trust for your faith in 3SG. You've been great supporters and it would be incredibly challenging to do this without you."

– **Becky Somerset,**  
**Director, 3SG**

# Q&A with RWK Goodman



Mollie Mountford, Senior Digital Communications Executive

## Q How do you work with Quartet?

We're proud of our longstanding commitment to supporting local causes that matter to our colleagues. Our partnership with Quartet reflects that commitment. Over the last 21 years, our fund with Quartet has made a meaningful impact across the West of England.

## Q What made you decide to start a fund with Quartet?

We started a fund with Quartet in 2004, driven by a shared commitment to supporting the communities where we live and work. As a firm, we recognised that Quartet's deep local knowledge and targeted grant-making could help us make a meaningful and lasting impact across Bath and North East Somerset, Bristol, North Somerset, and South Gloucestershire. By establishing an endowment fund, we ensured that our support would be sustainable and long-term. The fund has grown steadily and now exceeds £137,000, which supports causes such as bereavement services, mental health support for LGBTQ+ youth, and family outreach programmes.

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

Charitable giving is a meaningful and strategic part of the advice our Private Client Team provides at RWK Goodman. Whether clients are writing wills, setting up trusts, or planning their estates, we help them explore how philanthropy can reflect their values. Our long-standing partnership with Quartet allows us to offer clients a trusted route to impactful giving. Through Quartet, clients can establish legacy funds that support causes close to their hearts, with the assurance that their wishes will be honoured and adapted to future needs.

## Q What has been your experience of working with Quartet?

One of the key advantages of having an established fund with Quartet is the trust we've built through their professionalism and the tangible impact we've witnessed from our contributions. Quartet works closely with us to match our interests with the communities that we care about. We benefit from their expert knowledge of local grassroots charities and their due diligence on organisations they support with funding.

**rwk  
goodman**



# Listening to you: Your feedback

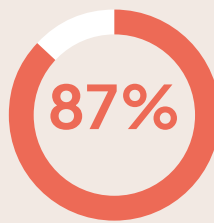
To support effective local philanthropy, we regularly gather feedback on our services. Your insights help us improve and focus our efforts. If you haven't had a chance to share your thoughts, please reach out to our team. Here are some highlights from this year's feedback.

## Fund holder survey

We were so pleased that the results of this year's survey of our fund holders indicate a positive experience of working with Quartet.



of fund holders report being 'very satisfied' with the service they receive.



of those who attended our events rated them highly.

*"Staff have been very welcoming, approachable and knowledgeable, and we feel that the right level of communication is provided by Quartet to fund holders."*

**Fund holder**

Our communications are generally rated 'good' or 'excellent', but we learnt that not everyone sees our social media posts.

## Anonymous applicant survey

After applying for funding, applicants share anonymous feedback through a survey. We use this to improve accessibility and transparency in our application and decision-making processes.



This year, applicants rated us **4.6 out of 5** as a funder overall.



Most applicants who contacted us reported a positive or very positive experience.

*"Difficult to say how it could be improved. The guidance was clear, the questions were clear and easy to complete. The contact we had with Quartet was very positive."*

**Applicant**

## Grant panel members

Each year, people with relevant professional or lived experience volunteer on our grant panels, helping ensure our funding is effective and impactful. All panel members who gave feedback this year rated their experience as 'good' or 'excellent'.

*"Quartet staff do a fantastic job of preparing all the paperwork in advance which makes it really accessible as a panel member."*

**Panel member**

# Our funds



## Revenue funds

### £500,000 and above

- Bristol City Council Health and Wellbeing Fund

### £250,000 – £499,999

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

### £100,000 – £249,999

- Bristol City Council – Sparking Social Action in Recovery
- Commissioner’s Crime Prevention Fund

### £50,000 – £99,999

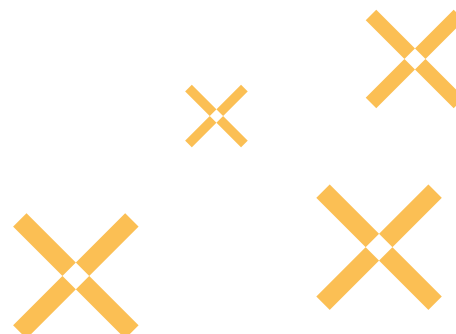
- Jackson Family Fund
- Older People’s Advice Fund
- Pargiter Trust Fund
- R W Barnes Bursary Fund
- Red Trouser Fund
- The Jack Baylis Trust Revenue Fund
- The Origin Foundation
- Watson Family Revenue Fund
- Wessex Water Community Fund
- Wessex Water Environment Fund

### £25,000 – £49,999

- Bath and West Community Energy Fund
- Bristol Community Health Fund
- Ella Rose Fund
- Genge Fund
- High Sheriff’s Fund
- Lord Lieutenant for Bristol’s Fund
- Megawatt Community Energy Fund
- Pople Charitable Trust Revenue Fund
- R S Bellevue Fund
- Wessex Water Avonmouth Fund

### Up to £25,000

- Bater Family Fund
- Bath Half Marathon Fund
- Bath Women’s Fund
- Biscuit Fund
- Burges Salmon Charitable Trust Fund
- Delegated Services Fund
- Education for Refugees Fund
- Frances Goodchild Foundation
- Hollingdale Fund
- HWBNSSG
- HWNS
- ICB BANES Vaccine Inequalities Programme Fund
- Miss Gladys Jones Charitable Trust
- North Somerset Community Transport Fund
- Peggy Blunt Memorial Fund
- Quartet Sector Development Fund
- Rogerson Fund
- Surviving Winter Appeal
- Swiss Life Empowering Places Revenue Fund
- TAP for Bristol 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
- The Lark Trust Quartet Charitable Fund
- The Scantlebury Challenge 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 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
- Foster Family Fund
- Harry Crook Foundation
- HAS Trust Charitable Fund
- Hugh and Judith Champion Charitable Fund
- J and M Britton Charitable Trust
- Lloyd Robinson Family Fund
- Marjorie Edwina Whitlock Fund

- Needham Cooper Charitable Trust
- 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 AA Savings Fund
- Bank of Ireland UK/Bristol and West Endowment Fund
- Basil Brown Fund
- Ben Durston Community First Fund
- Bridging Fund 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
- Clevedon Youth and Community Fund
- Crazy Diamond Fund
- Dean Beesley Family 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
- 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
- Redcliffe Parish Charity Endowment 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
- 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
- Dan Hickey Endowment 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
- Gordon and Beryl Cole Fund
- Harptree Fund
- Harvest Charitable Fund
- Helen Moss Grassroots Fund
- Hutchen Charitable Trust

- JP Morgan Fund for Education
- KPMG Fund
- Lee Family Fund
- Marlow Family Fund
- Mayden Foundation Charitable Fund
- Michael Lutley Fund
- Moss Family Fund
- Nisbet Trust BS11
- Osborne Clarke Endowment Fund
- Peter Rilett Fund
- Rose Bowl Fund
- Shakespeare at the Tobacco Factory Fund
- 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

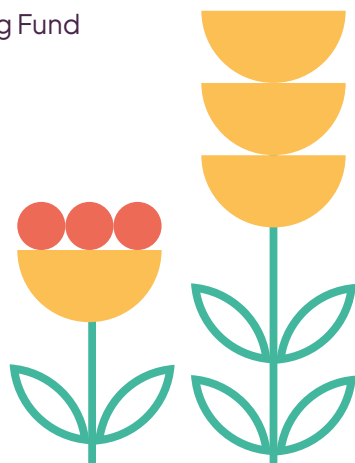
**£25,000 – £49,999**

- 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
- Chair'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
- David and Julia Norton Fund
- Dixon Family Fund
- Ebb Fund
- Egginton Family Fund
- Eupheus 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
- Hughes Family Fund
- J R Dunn Fund
- Jennifer Skellett Fund
- Johnstone Family Fund
- Kaye Family Grassroots Fund
- Lalonde Fund
- Masters Family Fund
- Mosaic Management Consultancy Fund
- Mulberry Fund
- Neal Family Fund
- Pamela's Grassroots Fund
- Parklyn 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
- Stoke Park Group Friends' Fund
- Sue and John Cottrell Fund
- Sunflower Fund
- The Corrigan Fund
- The Pat and Paul Johnson Charitable Trust Fund
- The Serchio Fund
- The Sunshine 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
- Freedom 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
- 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 fund holders who wish to remain anonymous and 1 new legator.**

# Our impact: climate and nature

The West of England is blessed with beautiful landscapes and green spaces. Philanthropy plays a role in protecting them and our residents from the impacts of the climate and nature emergency. Funding is helping community organisations to decarbonise, provide equal access to nature’s benefits and protect our local environment.

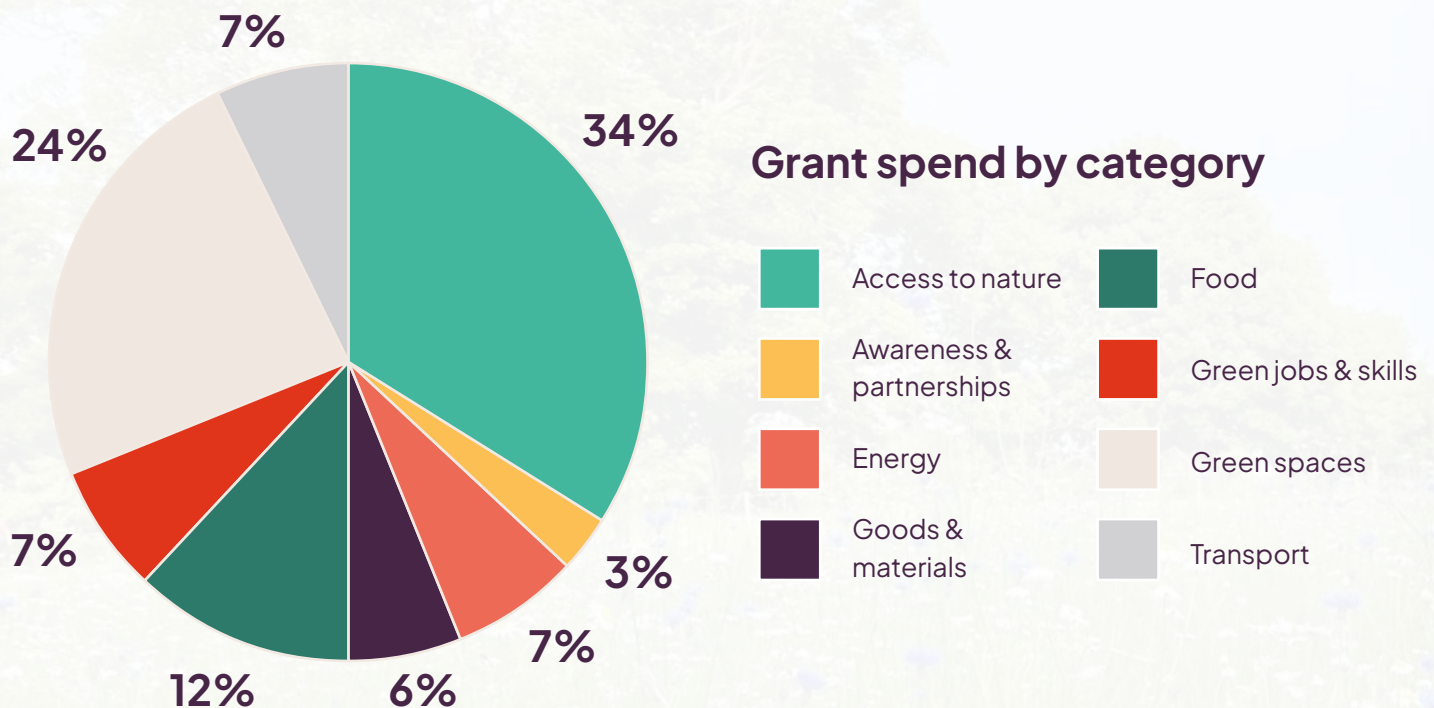
Supporting action for climate and nature is one of Quartet’s core objectives. We’re signed up to the Funder Commitment on Climate Change, committing us to do what we can to help and report on our progress. Notably this year, our Board approved an extension to the investment policy for our £64m endowment fund which excludes investment in any company involved directly in the extraction and production of oil and gas, tar sands or oil shale. This supports our investments being fossil fuel free, formalising a direction of travel which has been ongoing for several years. We also had support from Future

Leap to understand Quartet’s own carbon footprint and we’re working through their recommendations to reduce our impact.

## Grant-making

Detailed analysis shows that in the last financial year we gave out over £780,000 in grants that would have a positive impact on climate and nature. This represents 17% of our grant-making total for the West of England last year, and a 30% increase on the previous year’s figure.

The greatest proportion of funding went towards supporting access to nature for residents who might otherwise face barriers. This includes funding for activities like therapeutic time in nature or countryside trips for inner city children. Nearly a quarter of the funding went towards protecting and enhancing green spaces, including funding for park groups, wildflower meadows or new growing spaces.





Start of the wildflower meadow



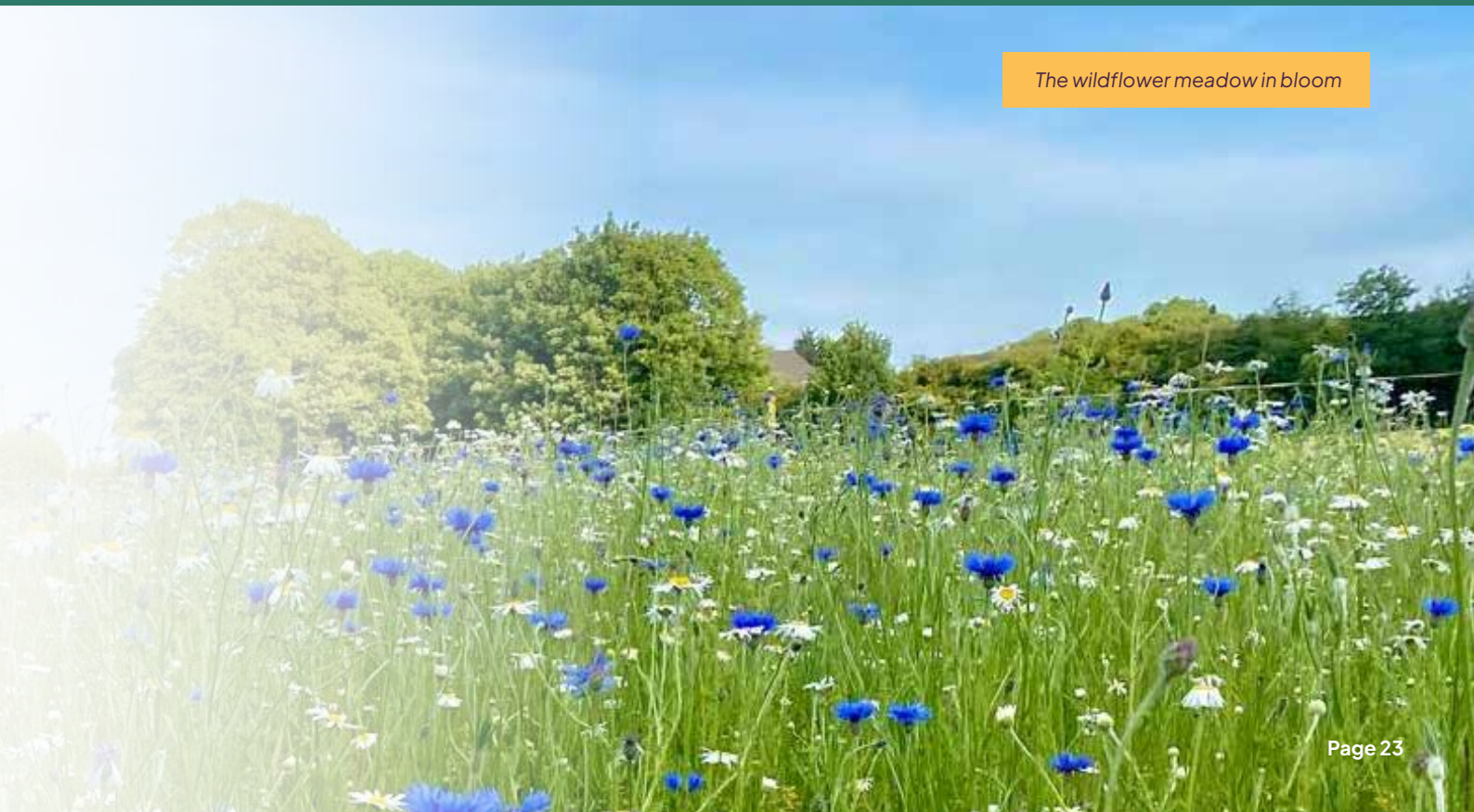
The meadow is now a focal point for everyone. The children who helped with the planting feel a sense of connection and pride with the meadow flowers now in bloom, as do the adults involved. Walking groups, dog walkers and general park users love the beauty of the wildflowers.”

– **Andrew Bloxham,**  
**Friends of the Park**

## Biodiversity in Bristol

Friends of the Park is a group of volunteers who protect and improve Oldbury Court Park (also known as Vassalls Park) in north east Bristol, carrying out activities like litter picking and tackling invasive plants. Two grants of £2,000 from the Wessex Water Environmental Fund enabled them to create a wildflower meadow in the park. Built by local volunteers, the meadow has involved the community in environmental activity and improved the park’s biodiversity.

The wildflower meadow in bloom



# Remembering those who made a difference

We were very sad to learn about the deaths of several Quartet fund holders and supporters during the last 12 months including Affra Baird, Keith Bonham, Terry Webber, Paddy Scantlebury, Beryl Jervis, Geoffrey and Ilfra Jarman, and Diana Sweeting. We are grateful for their support.

## Jerry Cowhig, fund holder

Jerry's journey with Quartet began at one of our annual celebration events. Inspired by what he saw, he established an endowment fund with us in 2013, making the most of a national matched giving initiative. From the start, Jerry was deeply involved in choosing which organisations to support, driven by his passion for helping young people, especially those facing barriers to opportunities, and for the arts.

His fund has gone on to support the vital work of charities like Coexist Community Kitchen, Digilocal, Invisible Circus, and the Royal Academy of the West of England.

Jerry was delighted that the small fund he started has given out more in grants than his original gift, and that it will continue to make a difference for generations to come. He was committed to his philanthropy, bringing his wide-ranging knowledge, critical mind and ready smile to all his interactions with us.

Although he is no longer with us we are grateful that our relationship with his family will continue through his wife, Annette, and his children, Margot and Rick.



*"Jerry loved Quartet. He delighted in being a supporter through the fund that he established and took a keen interest in the organisations and initiatives he was involved with. He was determined that his support would continue after he was no longer around, and he took great care to make succession arrangements before he died. Whilst we miss him terribly and are dreadfully sad, it is an honour and a privilege to be carrying out his wishes, confident that he was very happy to know that his fund will continue to benefit organisations and people in Bristol for another generation."*  
– Jerry's family

## Robert Bourns, former Chair of Trustees

**In June, we were deeply saddened to learn of Robert Bourns' death. Robert was our Chair of Trustees from 2014–2019 and a huge part of our work.**

His time as Chair marked us giving over £3 million in grants in one year for the first time in our history, and we remain grateful for his dedicated support in enabling us to reach that milestone.

Robert wore many hats at the foundation including that of fund holder in the early days of the TLT Solicitors fund held with us. He made time for everyone he met, from our volunteers and staff team to the charities that he went to visit on our behalf. His kindness and generosity will be greatly missed.



# 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	Anna Smith	<a href="mailto:anna.smith@quartetcf.org.uk">anna.smith@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 Triggles-Wells	<a href="mailto:david.triggles-wells@quartetcf.org.uk">david.triggles-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@quartetcf.org.uk">julie.newman@quartetcf.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>
Yan Lau	<a href="mailto:yan.lau@quartetcf.org.uk">yan.lau@quartetcf.org.uk</a>	
Marketing	Jane Quan	<a href="mailto:jane.quan@quartetcf.org.uk">jane.quan@quartetcf.org.uk</a>
	Kelly Rogers-Smedley	<a href="mailto:kelly.rogers-smedley@quartetcf.org.uk">kelly.rogers-smedley@quartetcf.org.uk</a>
Operations	Aidan Woodburn	<a href="mailto:aidan.woodburn@quartetcf.org.uk">aidan.woodburn@quartetcf.org.uk</a>
	Charlene Lawrence	<a href="mailto:charlene.lawrence@quartetcf.org.uk">charlene.lawrence@quartetcf.org.uk</a>
	Michelle Evans	<a href="mailto:michelle.evans@quartetcf.org.uk">michelle.evans@quartetcf.org.uk</a>
Finance	Cathy Swift	<a href="mailto:cathy.swift@quartetcf.org.uk">cathy.swift@quartetcf.org.uk</a>
	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>

We extend our heartfelt thanks to Ronnie Brown who retired in June after 31 years at Quartet. We wish Ronnie all the very best for the future.



### **Quartet Trustees**

Sue Mountstevens OBE (Chair)  
Nick Lee (Deputy Chair)  
Dan Wood  
Di Robinson  
Edward Thompson  
Ella Patel  
Junior Sheikh  
Kristen Pye  
Lauren Couch  
Lee Dineen  
Matt Crossman  
Matthew Lee  
Oliver Delany OBE  
Siôn Lutley

With thanks to Raj Kakar-Clayton for his contribution as a trustee over the last year. We wish him every success.

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

Trevor Smallwood OBE DL, President  
Peaches Golding OBE, Patron  
Will Bee MBE, 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  
Bristol Community Recovery  
Bristol One City Social Action Small Grants  
Bristol Youth and Community Action (BYCA)  
Bristol Youth and Play Support  
Commissioner's Crime Prevention Fund  
Megawatt Community Energy  
North Somerset Community Partnership  
Resilience Programme  
Stoke Park Group Friends' Fund  
Wessex Water Foundation Avonmouth Area Fund  
Wessex Water Foundation Community Fund  
Wessex Water Foundation Environment Fund

### **Professional advisers**

#### **Independent auditors**

- Bishop Fleming

#### **Legal advisers**

- CMS Cameron McKenna Nabarro Olswang LLP
- Osborne Clarke
- Temple Bright LLP
- Veale Wasborough Vizards

#### **Investment managers**

- Cazenove Capital
- CCLA
- Rathbones

#### **Bankers**

- Bank of Scotland





# Get involved and make a difference

Our work is made possible by the incredible generosity of our supporters, and there are many meaningful ways you can get involved. Whether through financial contributions, sharing your time and expertise, inviting us to speak at events, or connecting us with others who might be interested in giving locally, every action helps us make a greater impact.

## Become a fund holder

Starting a new fund or transferring an existing fund to us gives you the opportunity to make a tangible difference. It's a chance to build lasting relationships with both our team and the charities that support the causes that matter to you.

Contact Sabita Ravi,  
[sabita.ravi@quartetcf.org.uk](mailto:sabita.ravi@quartetcf.org.uk)

## Make a contribution to our general fund

Your support will help local grassroots initiatives and community organisations tackling inequality and disadvantage. You choose whether to make a one-off donation or contribute monthly.

Visit [quartetcf.org.uk/donate](https://quartetcf.org.uk/donate), or call us on 0117 989 7700.

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## Professional advisers

We know that each of your clients is unique and we're here to collaborate with you, offering support to help your clients make meaningful charitable contributions.

Contact Angela Emms,  
[angela.emms@quartetcf.org.uk](mailto:angela.emms@quartetcf.org.uk)

## Pro bono

Many of the voluntary groups we work with benefit greatly from specialist skills and guidance. Through our ProHelp service, we connect businesses and individuals with opportunities to share their expertise.

Contact John Stienlet,  
[john.stienlet@quartetcf.org.uk](mailto:john.stienlet@quartetcf.org.uk)

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## Trustees and committee members

If you are enthusiastic about local charitable giving and have skills, knowledge or experience relevant to our work, a role as a trustee or committee member might be right for you.

Contact Aidan Woodburn,  
[aidan.woodburn@quartetcf.org.uk](mailto:aidan.woodburn@quartetcf.org.uk)

## Help simply by spreading the word

Whether that's a conversation or a post on social media, it all helps to make a difference.

 Sign up to our newsletter, [quartetcf.org.uk/contact-us/our-newsletter](https://quartetcf.org.uk/contact-us/our-newsletter)

   Follow us on social media



Quartet  
Community  
Foundation



## Leave a legacy that lasts

A gift in your Will to Quartet is a powerful way to support your local community, now and for generations to come.

For over 37 years, Quartet has helped build stronger, fairer communities across the West of England. By leaving a legacy, you can be part of that ongoing story, helping local people thrive, supporting causes close to your heart, and ensuring your values live on.

Contact Claire Wynne Hughes,  
[claire.wynnehughes@quartetcf.org.uk](mailto:claire.wynnehughes@quartetcf.org.uk)  
or call 0117 989 7700

## In View The Digital Divide

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.



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