

**Guidance for applicants to the**

**Society of Merchant Venturers’ Charity Committee**

The Society of Merchant Venturers grant giving Committee meets four times throughout the year to consider applications for funding. The following guidance sets out the criteria by which decisions will be made. Please read these notes before applying to the Charity and take note of the timing of the meetings below.

In response to the Covid-19 pandemic, the Society of Merchant Venturers is, for the time being, directing the majority of its charitable donations towards **organisations that have been most negatively impacted by the Covid-19 crisis**, as well as those **organisations that are supporting individuals and communities who have been most negatively impacted by the crisis**. Whilst we continue to encourage applications from organisations that operate within the categories detailed below, please ensure that your application takes account of this top-line criteria relating to the Covid-19 crisis.

The Committee will consider applications from organisations addressing the following needs within the Greater Bristol area (defined as the former County of Avon):

* Social Needs – care of the elderly, homelessness, poverty or the prevention of crime
* Youth – to support training (outside educational establishments), assist character development and increase employment prospects and to assist the disadvantaged
* Education – directly involved with primary, secondary and tertiary education. Priority will be given:

1. to the SMV family of schools
2. in support of other Greater Bristol educational activities and initiatives

* Social Enterprise – to promote and support social enterprise
* Health Care
* Culture and the Arts
* Environment
* Bristol – projects, preferably those associated with the Society’s spheres of interest and achievement which will benefit Greater Bristol and its economic development.

**Who can apply?**

Priority will be given to supporting organisations that benefit local people within Greater Bristol. Organisations applying need not be registered charities but do need to have charitable purposes, have a management committee comprising at least three unrelated people, a set of rules under which the organisation operates and a bank account in the name of the organisation, with at least two signatories.

**How much is available?**

In general, grants of up to a maximum of £5,000 are available. From time to time the members of the Society may consider applications for amounts that are larger than this, should the work of an organisation be of particular interest to the Society. Applications for grants will not, in principle, be considered for repeat applicants until three years after the award of a previous grant.

**What sort of grants may be made?**

Grants can be for capital equipment or ongoing revenue costs, but grants are unlikely to be made towards the cost of an existing salaried position. If you would like to discuss your application before submitting it, please contact Julie Newman at Quartet Community Foundation, [julie.newman@quartetcf.org.uk](mailto:julie.newman@quartetcf.org.uk) .

**How does it work?**

The Society of Merchant Venturers grant giving Committee meets a number of times during the year, typically January, April, July and October. Please contact the Society for the latest meeting dates and deadlines before submitting applications. You should be informed of the decision on your application within six weeks from the date of the relevant Committee meeting.

To apply, please complete the application form that is available on the Society’s website <https://www.merchantventurers.com/what-we-do/charitable-giving/> or contact Merchants’ Hall, The Promenade, Bristol BS8 3NH.

Once you have completed the form please email it to [enquiries@merchantventurers.com](mailto:enquiries@merchantventurers.com) or send it to the address above.

**Exclusions**

The Society of Merchant Venturers does not normally make grants for the following:

* Statutory organisations or the direct replacement of statutory funding
* Projects that take place before an application can be considered
* Activities that are intended to raise funds for other organisations

**Supporting documents**

In addition to completing an application form, please provide the following:

* A copy of your constitution / governing document / set of rules
* The contact details of at least three members of your Management Committee / Board of Trustees / Board of Directors
* A copy of a bank statement or other evidence of a bank account in the name of your organisation (the bank account must have at least two signatories. Alternatively, if you belong to a small organisation that does not have a bank account, another charitable organisation can look after the funds for you, but you must provide written authorisation from the organisation that will do this).
* A copy of your most recent annual accounts of financial records that show your organisation’s balance of funds, income and expenditure. If you do not have financial records covering a full year then you will need to provide the records you currently have.
* A safeguarding policy if your organisation works directly with children or vulnerable adults.

*April 2020*