



Guidance for grant applications

The Society of Merchant Venturers' Charity Committee

Our Charity Committee normally meets four times a year to consider applications for charitable funding. This guidance explains who can apply, what we prioritise and how the application process works.

Before you apply: Please read this guidance carefully and follow it when completing your application. You can check the next application deadline on our website.

Who can apply?

Our grant programme is primarily designed to support small not-for-profit organisations and community groups with charitable aims.

- Applicants must be based and deliver their work in Bristol, Bath and North East Somerset, North Somerset or South Gloucestershire. Any grant awarded must be used to benefit people in one or more of these areas.
- You do not need to be a registered charity, but your organisation must have charitable purposes.
- Your organisation must have a management committee of at least three unrelated people, a constitution or other set of rules, and a bank account in the organisation's name with at least two signatories.

There is no upper limit on the size of organisation that can apply. However, we prioritise funding where we believe it can make the greatest impact, particularly organisations with a total annual income of less than £1 million.

What we prioritise

When assessing applications, we will consider:

- the level of funding request, priority will be given to applications that are £5,000 or less
- how closely the proposed work aligns with our charitable objectives which can be found [here](#)
- the number of people who will benefit, alongside the nature and extent of that benefit
- the level of reserves your organisation holds and other sources of funding available to you (if your organisation is holding significant financial reserves, we will need to understand why these can't be used to cover the cost of the project/activity you seek a grant towards)
- the communities your application aims to support and the existing provision available to them

We particularly welcome activities, projects and services that:

- improve the lives of local people by addressing specific needs and disadvantages within their communities
- address the concerns and priorities of the people they seek to benefit
- where possible, actively involve people from the community in designing and delivering the activity
- complement existing local charitable and community activities.

Community Interest Companies and social enterprises

Community Interest Companies (CICs) and social enterprises may be supported where:

- their work has a demonstrable social benefit
- the organisation has at least three directors registered at Companies House, the majority of whom are not paid employees and are unrelated
- the salary and benefits of any paid director are approved by a majority of non-executive directors and are reasonable and proportionate to their work and the organisation's financial position
- the organisation has an asset lock and a designated asset-locked body with charitable objectives similar to those of the CIC
- the organisation is limited by guarantee rather than limited by shares.

What we don't fund

- Individuals
- General appeals under this process. If you are fundraising for a specific project in the Greater Bristol area, please contact enquiries@merchantventurers.com
- The direct replacement of statutory funding
- Political groups or activities that promote political beliefs
- Activities intended to promote or influence religious beliefs
- Activities primarily concerned with animal welfare
- Arts projects with no community or charitable element
- Sports projects with no community or charitable element
- Medical research, equipment or treatment
- Projects that take place before an application can be processed
- Activities that raise funds for other organisations

How much can you apply for?

Grants are normally up to £5,000. We may not always be able to award the full amount requested because funds are limited, so please consider the full cost of your project or activity and request the amount genuinely needed to deliver it.

In exceptional circumstances, the committee may consider larger applications where an organisation's work is of particular significance. Any larger application must be discussed with our CEO before submission.

Repeat applications

The normal maximum set out above applies across any four-year period, rather than to each application.

The committee may consider funding awards over an extended period of up to three years, subject to the organisation meeting delivery criteria during years one and two. In exceptional circumstances, the committee may consider larger grants.

What can a grant pay for?

Grants can be used for capital equipment or ongoing revenue costs. We are unlikely to fund the cost of an existing salaried position.

If you would like to discuss your application before submitting it, please contact Yan Lau at Quartet Community Foundation: yan.lau@quartetcf.org.uk.

How does the grant-making process work?

The Charity Committee normally meets four times a year, typically in January, April, July and October. Application deadlines are published on our website.

We aim to let you know the outcome of your application within six weeks of the relevant committee meeting. To apply, please complete the application form available on our website.

Supporting documents

In addition to completing the application form, please provide:

- A copy of your constitution, governing document or set of rules
- Contact details for at least three members of your Management Committee, Board of Trustees or Board of Directors
- Evidence of a bank account in your organisation's name with at least two signatories. If your organisation does not have its own bank account, another charitable organisation may hold the grant on your behalf; you must provide written confirmation that it has agreed to do so
- Your most recent annual accounts or financial records showing your organisation's balance of funds, income and expenditure. If you do not yet have records covering a full year, provide the records you currently have
- A safeguarding policy that is up-to-date and relevant to your work
- Contact details for a referee who knows your organisation's work in a professional capacity but is not directly involved in it

Local branches of national organisations should explain why their request is not funded through the national budget.

Important: We cannot submit incomplete applications to the committee, so please make sure you provide all required supporting documents.

How we collect and use your data

Personal information submitted through the application process will be used to assess and administer your grant application. For more information about how we collect, use and store personal information, please see our [Privacy Policy](#)

If you have any questions about the application process, please contact us at enquiries@merchantventurers.com.