



2020 Grant Criteria and Application Process

Who we are

The PH Holt Foundation is an independent grant-maker helping to create a better future for the people of Merseyside.

The PH Holt Foundation is named in tribute to Philip Henry Holt, who in 1865 together with his brother Alfred, founded Ocean Steam Ship Company Ltd in Liverpool. They were great philanthropists during their lifetimes - helping build some of Liverpool's cherished educational and arts institutions enriching daily life. They also supported many local causes that made a positive difference to communities, and that promoted self-help and resilience. Philip Henry Holt's bequest in 1915 formed the foundations of the PH Holt Foundation today.

Our priority themes

To be considered for funding, your activity must meet one of our priority themes:

- Creating opportunities for people to contribute to local communities
- Enabling people to overcome barriers
- Widening access to education for all ages
- Increasing engagement in the arts for excluded groups
- Encouraging care of the natural or built environment

Who we fund

We provide grants to small and medium sized Merseyside charities and charitable incorporated organisations (CIOs) that have been operating for at least 12 months, and wish to change lives through community activities, education, arts, heritage, and environmental programmes.

What we fund

Our grants are typically for:

- New or existing projects
- Capacity building
- Volunteer or beneficiary costs
- Advice and support services
- Building improvements and equipment

In addition, recognising some of the best work takes place in communities with limited access to grants, we may consider funding the core costs of small local grass roots charities (turnover under £100,000).

What we look for when awarding grants

- Actions that build or strengthen communities
- Activities that make a real and positive impact
- New approaches to tackle emerging or persistent challenges
- Activities that promote self-help and resilience

How much do we give to each successful project

Grants are usually for one year and range from £500 to a maximum of £10,000 for projects generating significant impact. Our average grant is £5,000 since the Foundation prefers to support a wide range of causes. In the case of charities previously supported, we may consider a small number of applications running over two or three years, but this is subject to prior discussion with the Foundation.

Categories we do not consider

- National charities & charities outside of Merseyside (even when service users come from the region)
- CIC's and social enterprises
- Organisations enjoying widespread support

- Activities that are a statutory responsibility
- Non charitable or commercial endeavours
- Work that has already taken place
- Uniformed groups
- Umbrella charities that do not deliver services
- Scientific and medical research
- Holidays, outings, and sponsorship of individuals or events
- Religious and political causes
- General charity appeals

*While we do not fund national charities, we may consider applications from national charities headquartered in Merseyside or whose federated structure allows for local autonomy of decision making and spending in the region. Please contact us before applying.

When to apply

There are four grant cycles each year. Applications must be made by 9am on the dates shown below:

Our deadlines are by 9am on:	1 January	1 April	1 July	1 October
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Allow three-four months from the quarterly closing date for trustees to reach a decision on your application. Not all applications meeting the criteria receive funding - this is simply due to the volume of requests.

Note: If you have been refused funding from the Foundation, allow 12 months to elapse before re-applying. Similarly, charities in receipt of our funding should also allow 12 months before submitting a new application.

How to apply

- Applications must be made using the Foundation's application form which can be downloaded from the website: www.phholtfoundation.org.uk or obtained by emailing administrator@phholtfoundation.org.uk
- Your application must not run to more than three pages of A4.
- Provide full details to present your case – completing all sections of the application form. Describe how your project works, who is involved in delivering it, the beneficiaries, costs, dates, any other funders, and the difference and impact that your project will make. Remember that whilst you are familiar with your activity (and you may have applied to us before), assume you are writing to us for the first time.
- Provide your latest Annual Report and Accounts, copy of a recent bank statement and relevant safeguarding policies. **Note:** For charities with an income under £50,000 p.a. or with no audited accounts, provide your current year's income and expenditure statement and Trustee Report.
- Do not attach promotional brochures or any other additional papers to those requested. If we require additional information, we will contact you.
- For charities registered under two years, attach your Constitution.

Submitting your application

- Email your application in Word format, together with the required attachments to: administrator@phholtfoundation.org.uk
- **Note:** we are unable to accept applications sent by post.
- We are happy to discuss in advance of a grant deadline all applications, large or small, and recommend you telephone prior to submitting. The Foundation Office is open Wednesday to Friday.

Anne Edwards, Administrator, PH Holt Foundation, 151 Dale Street, Liverpool, L2 2AH. Telephone 0151 237 2663 [**Wednesday to Friday only**].

Thank You!
We look forward to receiving your application