

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 Foundation is named in honour of Philip Henry Holt, who in 1865 together with his brother Alfred, founded Ocean Steam Ship Company Ltd in Liverpool. The brothers were great philanthropists, and during their lifetimes established some of Liverpool's most cherished education and arts institutions. They also supported many local causes to encourage greater resilience and community spirit improving everyday life for ship workers and residents alike. After Philip Holt's death in 1914, his bequest created the first of two charitable trusts that bear his name. Holt Education Trust in 1915, followed in 1955 by The PH Holt Charitable Trust, known today as the PH Holt Foundation.

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 registered 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:

- Community, family, or young people's programmes
- Advice, information, or advocacy services
- Services for disabled, elderly, or marginalised groups
- Outreach, mental health, or women's projects
- Refugee or homeless support
- Project grants for new or existing work
- Capital grants for equipment and buildings

In addition, recognising some of the best work takes place in communities with limited access to grants we can fund running 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

The Foundation prefers to support a wide range of causes. Grants are usually for one year and range from £500 to a maximum of £10,000 for projects generating significant impact. There is no standard grant amount since trustees prefer to respond to genuine need and consider each application on its own merits.

For charities previously supported, we can look at funding over two or three years, but this is subject to prior discussion with the Foundation.

Categories we do not consider

- CIC's, social enterprises, or commercial endeavours
- National charities & charities outside Merseyside (even when service users come from the region)
- Organisations enjoying high profile support
- Activities of a statutory nature
- Work that has already taken place
- Umbrella charities that do not deliver direct services
- Grants to individuals and certain uniform groups
- Scientific and medical research
- One off holidays, trips, sponsorship of individuals or events
- Religious and political causes
- General charity appeals or mail-shots

*While we do not fund national charities, we may consider an appeal from a national charity headquartered in Merseyside or whose federated structure allows for local autonomy of decision making and spending in the region. Please contact us before applying on **0151 237 2663**.

When to apply

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

Our deadlines are before 9am on:	1 January	1 April	1 July	1 October
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Allow three months from 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 a grant can only re-apply following submission of a progress report covering previously funded activity. Contact the Foundation if you need further advice **0151 237 2663**

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, other funders, the difference and impact 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 Anne Edwards your application in **Word** format, together with the required attachments. We are unable to accept application forms in pdf format, or by post: administrator@phholtfoundation.org.uk
- We are happy to discuss in advance of a grant deadline all applications, large or small, and recommend you telephone the Foundation Office any **Wednesday to Friday 0151 237 2663**

We look forward to receiving your application

Note: we are unable to accept applications and correspondence by post