|  |  |  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- | --- | --- |
| **Your Organisation** | | | | | | | | |
| **Charity Name** |  | | | | | | | |
| **Registered Number** |  | | **Year Formed** | | |  | | |
| **Registered Address** |  | | | | | | | |
| **Contact & Role** |  | | | | | | | |
| **Telephone/Mobile** |  | | | | | | | |
| **Email** |  | | | | | | | |
| **Website** |  | | | | | | | |
| **Past Holt Funding** |  | | | | | | | |
| **State Briefly your Charity’s Main Activities** [approx. 300 words] | | | | | | | | |
| **Please provide details about the staff and volunteers who work in your organisation** | | | | | | | | |
| **Paid staff FTE [35rs]** |  | | | | | | | |
| **No. of Volunteers** |  | | | | | | | |
| **Project Name** |  | | | | | | | |
| **Project Description** [max 50 words] |  | | | | | | | |
| **Grant Requested** |  | | | | | | | |
| **Priority Theme** √ | Community engagement | | | | |  | | |
| Overcoming barriers | | | | |  | | |
| Arts for excluded groups | | | | |  | | |
| Access to education | | | | |  | | |
| Caring for the environment | | | | |  | | |
| **State the Merseyside borough/s your service operates.** |  | | | | | | | |
| **Who are the primary beneficiaries and how many will directly benefit?** |  | | | | | | | |
| **Activity Start Date** |  | **End Date** | |  | | | | |
| **To be compliant with law and practice, does your organisation have the following?√** | | | | | | **Yes** | | **No** |
| Public and Employer’s Liability Insurance | | | | | |  | |  |
| Diversity and Equal Opportunities policy | | | | | |  | |  |
| A risk assessment covering your organisation’s activities | | | | | |  | |  |
| DBS checks for staff and volunteers working with children and adults with support needs? | | | | | |  | |  |
|  | | | | | | | | |
| 1. **Your Project - tell us more about the work or activity you want us to fund and what our grant will be spent on? [see guidance notes]** | | | | | | | | |
|  | | | | | | | | |
| 1. **Outcomes - what are the principal aims you are looking to achieve from this funding?** | | | | | | | | |
|  | | | | | | | | |
| 1. **Monitoring - how will you know you have been successful?** | | | | | | | | |
|  | | | | | | | | |
| 1. **Budget and Funding Request – what are the costs associated with your activity?** | | | | | | | | |
| **Item** | **Brief description** | | | | **Amount** | | | |
| **Salary/Sessional/Volunteer Roles** |  | | | |  | | | |
|  |  | | | | £ | | | |
|  |  | | | | £ | | | |
|  |  | | | | £ | | | |
| **Project Resources & Materials** |  | | | |  | | | |
|  |  | | | | £ | | | |
|  |  | | | | £ | | | |
|  |  | | | | £ | | | |
| **Premises and Running Costs** |  | | | |  | | | |
|  |  | | | | £ | | | |
|  |  | | | | £ | | | |
|  |  | | | | £ | | | |
|  | **Total cost** | | | | **£** | | | |
|  | **Amount raised** | | | | **£** | | | |
|  | **Amount requested from PH Holt** | | | | **£** | | | |
| What are you asking us to fund? | | | | | | | | |
| What other funding has been secured and from whom? | | | | | | | | |
| In the event of a shortfall, who else will you approach for funding? | | | | | | | | |
| 1. **Checklist Documents - enclose the following with your Word application** | | | | | **√** | |  | |
| * Safeguarding Policy for Children/Vulnerable Adults | | | | |  | |  | |
| * Copy of your organisation’s latest bank statement | | | | |  | |  | |
| 1. Annual Report & Accounts [**Note:** charities under £50,000 p.a. with no audited accounts, provide your current year’s income and expenditure, cashflow and trustees’ report] | | | | |  | |  | |
| **Declaration - before signing, please ensure you have completed all the sections of the application form and you enclose the documents requested in the above checklist.** | | | | | | | | |
| I am an authorised representative of the organisation and to my best knowledge, the information provided in this application form is correct.  **Name:**  **Signature:** **Date:** | | | | | | | | |
| *Disclaimer: By completing this form, you are acknowledging that we may store the information you have submitted, in both hard copy and electronic form, and that it may be distributed to our trustees and other advisors via electronic, printed, or verbal communications.* | | | | | | | | |

**Keep the application form to no more than 4 pages of A4**

**…………………………………………………………………………………………………………………**

**Application Guidance**

**When and How to apply**

1. We accept applications at any time, but standard grant rounds close at **9am** on 1st of January, April, July and October.

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| **Our final deadlines are 9am on:** | **1January** | **1 April** | **1 July** | **1 October** |

1. We advise charities to discuss potential applications with us in advance of submission for an informal chat and advice. Telephone the Foundation Office **on 0151 237 2663 Wednesday to Friday - no matter how small the query. We are genuinely interested in your work.**
2. Allow **3 to 4 months** from submission for trustees to reach a decision on your application. Not all applications meeting criteria receive funding - this is simply due to the volume of requests.
3. Charities in receipt of a grant are eligible to reapply once a previous grant has been spent and a report submitted. Contact the Foundation if you need further advice**.**
4. Applications must be made using the Foundation’s application form which can be downloaded from the website: [www.phholtfoundation.org.uk](http://www.phholtfoundation.org.uk) or obtained by emailing [administrator@phholtfoundation.org.uk](mailto:administrator@phholtfoundation.org.uk)

Complete all sections of the application form in Word. Describe the funding need and difference 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. **Be sure to** state the number of beneficiaries, age ranges, ethnicity, and profile. If your activity is new and you are unsure of numbers give an estimated figure.

Here is some advice on what to include in Section 1:

1. **Your project -** what will our grant be spent on?

* Are you seeking core, project, or unrestricted funding?
* Are you seeking part, full, or funding following the end of one or more funding streams?
* Is this application for new activity or are you continuing something that works well?
* How well placed are you to meet the needs of the people you wish to help?
* What experience have you in delivering the service or activity?
* Who will deliver the activity and how? What are their roles?
* Where specifically will it take place and how long will it last?
* What activities are involved?
* What do you intend to achieve for your beneficiaries and the improvements you hope to bring?
* What difference will our grant make to your organisation?

1. **Outcomes -** in your experience of working with your beneficiaries what changes are likely to happen because of them taking part in the activity? Try and be as specific as you can. The sort of areas to consider are numbers or % of people: moving into employment, gaining a qualification, or learning a new skill, going on to volunteer, improving literacy, numeracy, or IT skills. Consider soft skills too such as resilience, managing routines, budgeting, communication, problem solving, time management or improvements in confidence and self-esteem.
2. **Monitoring -** how will you measure and record your work to ensure it meets a need? What framework do you use, and do you consult beneficiaries to shape and adjust activity?
3. **Budget** - here we wish to see that the costs associated with your activity have been considered and planned. These usually comprise salaries, sessional fees, volunteer costs, resources, materials, equipment, and running costs. Add/delete rows to the table if needed but include all aspects of the work, not just the amount of money for which you are applying.
4. **Checklist** **of Supporting Documents** - provide your latest Annual Report and Accounts, a copy of a recent bank statement and relevant safeguarding policies. For charities registered under two years, attach your Constitution.

* Charities with an income of £50,000 p.a. and under, with no audited accounts provide your current year’s income and expenditure statement and Trustees’ Report.
* Do not attach promotional brochures or additional papers to those requested. If we require additional information, we will contact you.

**Submitting your application**

1. Email 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](mailto:administrator@phholtfoundation.org.uk)
2. We prefer to discuss applications in advance of submission and welcome telephone calls no matter how small the query. Telephone the Foundation Office any Wednesday to Friday 0151 237 2663.

**We look forward to hearing from you and receiving your application.**

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