

P. H. HOLT FOUNDATION

Grant Policy and Guidance

Who we are

The PH Holt Foundation is an independent grant-making organisation that works to create a better future for the people of Merseyside.

The Foundation is named after Philip Henry Holt, who, with his brother Alfred founded the Ocean Steam Ship Company Ltd. in 1865. The brothers were keen philanthropists and supported charitable endeavours that aimed to improve the quality of life for the people of Liverpool.

After Philip Holt's death in 1914, the first of two charitable trusts that carry the family name were created. The Holt Education Trust was established in 1915, followed in 1955 by The PH Holt Charitable Trust, known today as the PH Holt Foundation.

A Better Future for Merseyside

To be considered for funding, your activity should meet one of our Better Future priorities:

- Engaging with your community
- Enabling people to overcome barriers
- Involving excluded groups in the arts
- Widening access to learning

We provide grants to small and medium sized registered charities and charitable incorporated organisations (CIOs) operating for at least 12 months and delivering community activities, arts, education, environmental and heritage programmes.

- Headquartered in Merseyside and have an annual income of under £1 million.
- Registered with the Charity Commission for more than a year and have a full set of accounts.
- Deliver services in any of the five Merseyside boroughs (Knowsley, Liverpool, Sefton, St Helens, and Wirral)
- Have a clear case for support and provide solutions recognised to improve people's lives.
- Are focused upon improvement and measuring success
- Where a PH Holt grant would add value and make a difference.

How much we give and the timescales

Grants are for one year and range from £1,000 up to £10,000. There is no set amount to request since trustees assess each application on merit. Larger and recurrent grants may be considered in exceptional circumstances. However, we recommend calling the office to check if your approach is feasible and meets our priorities. **The office is open Wednesday through to Friday. Telephone 0151 237 2661.**

It can take up to **4 months** from a deadline to assess applications, so plan well in advance of your activity or project starting since we are unable to fund retrospectively.

What we fund

- Project or activity costs for new or existing services.
- Funding for essential running costs or overheads.
- Salaries to retain experienced or qualified project staff.
- Equipment and resources.
- Volunteering and training costs.

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- Unrestricted funding for small grassroots charities with limited access to grants (turnover under £50,000).

Factors we consider when making grants

Activities that have genuine impact, improve communities, encourage self-help and resilience, and address new or recurring problems, are all desirable. Here are some aspects we consider when reviewing grants:

- Is the application complete and well-considered?
- Are the plans realistic, achievable, or sustainable, and is the work known to be effective?
- Does the work improve services or facilities at a community level?
- Does the activity support a priority group, deprived area, or an under resourced community asset?
- Has the charity the expertise to manage and deliver the activity?
- Does the application have a strategic fit to the Foundation's priorities, or address a problem we wish to tackle?
- Is the charity clear on how it will measure and report on the activity?

A guide to some of the activities fund

- Outreach or community programmes that engage people in positive activities to address specific needs such as poverty, a lack of skills, isolation, stress and anxiety, substance abuse, youth violence or family breakdown.
- Opportunities for people to participate in the performing arts, crafts, learning, recreation, or play activities to improve well-being— especially for those who would not typically have access to such opportunities.
- Support for self-help groups, befriending, and mentoring schemes to reduce isolation.
- Activities that help people advance knowledge, boost confidence, self-esteem, or develop skills.
- Opportunities for people who face barriers, such as mental ill health, disability, or discrimination.
- Recovery programmes offering therapeutic and emotional support for children, young people, and adults isolated or at risk of developing mental health problems.
- Activities to improve the local environment and transform indoor or outdoor spaces.
- Advice, information, and advocacy services to address debt, access entitlements, or legal support.
- Practical advice and advocacy for victims of abuse or at risk of violence including women's refuges.
- Support for refugees and asylum seekers to aid integration, inclusion, and language skills.
- Improving the physical or mental well-being, independence, and quality of life of older people.
- Assistance for homeless people to rebuild lives and gain practical skills to live independently.

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What we do not fund

- Charities not headquartered in Merseyside
- CIC's, social enterprises, and non-registered groups
- Activities outside Merseyside
- Statutory bodies and work that is primarily the responsibility of the State
- Hospitals and health services
- Medical research
- State and independent education
- Campaigning and lobbying activities
- Religious and political causes
- Capital projects
- Land purchases
- Loan repayments
- Endowment appeals
- General fundraising appeals
- Sponsorship of events
- Animal welfare charities
- Grants to individuals
- Retrospective funding

*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 and How to apply

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

Deadline	Grant Notification Period
1 st January	First week in April
1 st April	First week in July
1 st July	First week in October
1 st November	First week in January

- b. We advise charities to discuss potential applications with us in advance 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.**
- c. Allow **up 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.
- d. Charities in receipt of a grant are eligible to reapply once a previous grant has been spent and a Progress and Monitoring report submitted. Contact the Foundation if you need further advice.
- e. Applications must be made online www.phholtfoundation.org.uk/

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- f. Complete all sections of the application. Describe how your project works, who is involved in delivering it, the beneficiaries, costs, dates, other funders, the difference and impact your project aims to 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, and profile. If your activity is new and you are unsure of numbers give an estimated figure.
- g. Below are some pointers to help you as a guide. Use only those relevant to your activity.

Section 3 Grant Request

Tell us a bit more about your project/activity and what our grant will be spent on? [max 750 words]

- Are you seeking full or part funding?
- Is this application for new activity, or continuing something that works well?
- Who in your organisation will deliver the activity and what are their roles?
- Where will the work take place and how long will it last?
- What activities are involved and how many beneficiaries will be reached?
- What experience do you have in delivering the service or activity?
- How well placed are you to meet the needs of the people you wish to help?
- What do you intend to achieve for your beneficiaries?
- What difference will our grant make to your organisation?

Outcomes - What specific outcomes are you hoping to achieve from this funding? [max 150 words]

In your experience of working with your beneficiaries what changes are hoping to achieve for them and how will you know if your work has been a success? Try and be as specific as you can. The sort of areas to consider are numbers or % of people: moving into employment, learning a new skill, gaining a qualification, 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. Choose 3 that are most important to your beneficiaries and ones you know you are able to measure.

Monitoring - How will you measure and monitor the work delivered? [max 150 words]

Explain how will you measure and record your work to ensure it meets a need? What framework will you use? Will you consult beneficiaries to shape and adjust activity?

Section 3 Budget and costs

Here we wish to see that the costs associated with your activity are well-considered and planned. The elements usually comprise salaries, sessional fees, volunteer costs, resources, materials, equipment, and running costs. Include all the elements required, not just the part you seek funded and break down the cost to arrive at a total.

Checklist of Supporting Documents

- Charities with income above £50,000 p.a. Please provide your latest Annual Report and Accounts, a copy of a recent bank statement, and relevant safeguarding policies.
- Charities with an income under £50,000 p.a. Please provide you most recent Trustees' Report, a current cashflow forecast, and last year's income and expenditure.

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- Charities registered under two years. Please attach your Constitution.

Do not attach promotional brochures or additional papers other than those requested. If we require additional information, we will contact you.

We look forward to receiving your application

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