

# P. H. HOLT FOUNDATION

## Monitoring Report Guidance

**PLEASE DO NOT SIGN THE FORM ON THE LAST PAGE BEFORE YOU ARE READY TO SUBMIT. THE FORM LOCKS ONCE YOU SIGN IT AND YOU WON'T BE ABLE TO RESUME EDITING.**

### SAVE AND RESUME LATER:

You can save and resume your application at any time by clicking on the Save button at the bottom of every page. Please enter your email address and a link will be sent to you at this address. You can use this link any time within the next 30 days to resume answering questions on the form.

Upon visiting this save and resume link, **please do not sign the form on the last page until you are ready to submit**. The system recognises your signature as a submission, therefore locks the form and you will not be able to access it and lose all the progress made, you will have to start filling out the form at the beginning.

**If you save your form on more than one occasion, please ensure you use the link from the most recent email you have received when you resume your application.**

Following submission, should you wish to make any alterations contact:  
[administrator@phholtfoundation.org.uk](mailto:administrator@phholtfoundation.org.uk) within one week of completing the form.

As per the grant application form, all charities that receive grant funding are required to send the Trustees a progress report at the end of the grant period. The information you provide will help us learn about our effectiveness as a grant-maker, and to understand the difference our funding makes.

We suggest that before drafting your report, you refer to our offer letter you received via email, your original application (pdf copy sent with the acknowledgement email) and include feedback on any specific conditions or commitments made. Please complete each section of the form. You may include short case studies (which can be anonymised to prevent personal details being disclosed) to give Trustees a flavour of your activities and who you worked with.

|                                                                            |                                                                          |
|----------------------------------------------------------------------------|--------------------------------------------------------------------------|
| <b>Charity Request Name:</b><br><i>(this section is pre-filled)</i>        | <b>Project/Activity Funded:</b><br><i>(this section is pre-filled)</i>   |
| <b>Project/Activity Start Date:</b><br><i>(this section is pre-filled)</i> | <b>Project/Activity End Date:</b><br><i>(this section is pre-filled)</i> |
| <b>Progress Report Due Date:</b><br><i>(this is pre-filled)</i>            | <b>Grant Amount:</b><br><i>(this is pre-filled)</i>                      |

**Has the grant been spent according to the original budget?**  
*(please pick Yes/No in the drop down)*

### Contact Details:

*Please provide details for the main person who we should contact in relation to this progress report. If there are any queries, we will contact you to seek clarification or ask for more details, so please ensure that we have correct contact details, preferably a mobile number and email.*

|               |                 |
|---------------|-----------------|
| <b>Name:</b>  | <b>Surname:</b> |
| <b>Email:</b> | <b>Phone:</b>   |

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### Budget vs Actual Costs

Provide a breakdown of the grant expenditure and note any changes to spend in the table below.

*Note that the information you entered in your original application is redisplayed against Category, Project/Activity element and Cost. For each category of your expenditure, you should now enter your actual spend and reason if any of under/overspend.*

|                                                                                              |                                                                                                       |                                                                                       |
|----------------------------------------------------------------------------------------------|-------------------------------------------------------------------------------------------------------|---------------------------------------------------------------------------------------|
| <b>Category 1*</b><br><i>this section is pre-filled.<br/>Please complete the field below</i> | <b>Project/Activity Element</b><br><i>this section is pre-filled. Please complete the field below</i> | <b>Cost</b><br><i>this section is pre-filled.<br/>Please complete the field below</i> |
| <b>Actual Spend</b>                                                                          | <b>Reason for over/under spend</b>                                                                    |                                                                                       |
| <b>Category 2</b>                                                                            | <b>Project Activity</b>                                                                               | <b>Cost</b>                                                                           |
| <b>Actual Spend</b>                                                                          | <b>Reason for over/under spend</b>                                                                    |                                                                                       |
| <b>Category 3</b>                                                                            | <b>Project Activity</b>                                                                               | <b>Cost</b>                                                                           |
| <b>Actual Spend</b>                                                                          | <b>Reason for over/under spend</b>                                                                    |                                                                                       |
| <b>Category 4</b>                                                                            | <b>Project Activity</b>                                                                               | <b>Cost</b>                                                                           |
| <b>Actual Spend</b>                                                                          | <b>Reason for over/under spend</b>                                                                    |                                                                                       |
| <b>Category 5</b>                                                                            | <b>Project Activity</b>                                                                               | <b>Cost</b>                                                                           |
| <b>Actual Spend</b>                                                                          | <b>Reason for over/under spend</b>                                                                    |                                                                                       |
| <b>Category 6</b>                                                                            | <b>Project Activity</b>                                                                               | <b>Cost</b>                                                                           |
| <b>Actual Spend</b>                                                                          | <b>Reason for over/under spend</b>                                                                    |                                                                                       |
| <b>Category 7</b>                                                                            | <b>Project Activity</b>                                                                               | <b>Cost</b>                                                                           |
| <b>Actual Spend</b>                                                                          | <b>Reason for over/under spend</b>                                                                    |                                                                                       |
| <b>Category 8</b>                                                                            | <b>Project Activity</b>                                                                               | <b>Cost</b>                                                                           |
| <b>Actual Spend</b>                                                                          | <b>Reason for over/under spend</b>                                                                    |                                                                                       |
| <b>Category 9</b>                                                                            | <b>Project Activity</b>                                                                               | <b>Cost</b>                                                                           |
| <b>Actual Spend</b>                                                                          | <b>Reason for over/under spend</b>                                                                    |                                                                                       |
| <b>Category 10</b>                                                                           | <b>Project Activity</b>                                                                               | <b>Cost</b>                                                                           |
| <b>Actual Spend</b>                                                                          | <b>Reason for over/under spend</b>                                                                    |                                                                                       |

### Beneficiaries

How many people did your project/activity reach and who were they?

Please provide the number of beneficiaries reached in each category:

|                |                      |
|----------------|----------------------|
| Children 0 -17 | Young People 18 - 25 |
| Adults 25 +    | Older People 65 +    |
| All Age Groups |                      |

Who were they? Include all that apply

Please provide the number of beneficiaries reached in each category

|                                  |                                            |
|----------------------------------|--------------------------------------------|
| Care Leavers/Children in Care    | Disabled (including learning disabilities) |
| Drug or alcohol dependent        | Ethnic minorities                          |
| Excluded from education/training | Experiencing loneliness and isolation      |
| Former military                  | Homeless people                            |
| People in poverty                | Poor life or vocational skills             |
| Poor mental health               | Poor physical health                       |
| Prisoners or Ex Offenders        | Refugees/Asylum seekers                    |
| Victims of domestic abuse        | Victims of trafficking                     |
| Other                            |                                            |

### Priority Theme Breakdown of numbers reached

Please select the categories the beneficiaries were reached in each priority theme (*tick all that apply*)

Enabling people to overcome barriers

☐

Engaging with your community

☐

Involving excluded people in the arts

☐

Widening access to education

☐

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**Borough where project was delivered. Please provide the number of beneficiaries reached in each borough**

|          |                                     |
|----------|-------------------------------------|
| Knowsley | Liverpool                           |
| Sefton   | St Helens                           |
| Wirral   | Merseyside (if across all boroughs) |

**Benefit to Charity from funding** *(tick all that apply):*

Improved sustainability

Provided new service/project

Reached new clients

Recruited more staff / volunteer

Other Benefit to Charity *(type in the box below)*

|  |
|--|
|  |
|--|

## Beneficiary Impact

**Please provide the number of beneficiaries impacted in each category:**

|                                                                         |                                                         |
|-------------------------------------------------------------------------|---------------------------------------------------------|
| Numbers experiencing improved community or family relationships         | Number of beneficiaries gaining new or improved skills  |
| Numbers reporting improvements in quality of life/health and well-being | Numbers showing improved attitude or behavioural change |

## Progress Report

**What did you provide and what did our funding achieve? Use the space below to feedback on the grant and below are some pointers you could consider (5000 characters - 850 words limit):**

1. Was the project delivered as outlined in your application, did you reach the expected number of people, were the activities successful, or did unforeseen challenges cause a rethink?
2. Thinking about the original outcomes you set for your activity, how did they benefit your beneficiaries?
3. How did you collect information and measure these benefits or results?
4. Is the project or activity continuing, and if so, what other funding did you secure?
5. How was the grant recognised? If you wish to include samples of social media posts, website pages or leaflets, paste at the end of this form. Otherwise list the channels used such as annual report reports, local press etc.
6. Do you wish to include any short case studies or quotes from the people you helped?

**How has the economic climate affected your charity's operations?**

1. In recent months, have you lost staff or income due to external conditions?
2. Have you scaled back activities, closed programmes, or reached a beneficiary quota set by funding?
3. What are your priorities in the year ahead?

If you have not previously sent photographs of the project, please attach these when you complete this form

*(please upload case studies, supporting documents should you wish to do so too)*

*upload here .....*

Maximum file size 2MB each with a total of 25MB across all uploads on this form.

**PLEASE DO NOT SIGN AND DATE THIS FORM UNTIL YOU ARE READY TO SUBMIT IT.**

Signature: \_\_\_\_\_

Date signed: \_\_\_\_\_