

### APPLICATION GUIDANCE

These guidance notes have been designed to assist you in completing your online application for our quarterly grants. If you require any further clarification, or if you are unsure of your charity's eligibility, please contact PH Holt Foundation [administrator@phholtfoundation.org.uk](mailto:administrator@phholtfoundation.org.uk)

The online application form allows you to save and resume your application at any time by clicking on the **SAVE** button at the bottom of each 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. **Please be aware** that upon visiting this 'save and resume link', signatures and file uploads will need to be resubmitted. Unless you use this link the data you have entered cannot be retrieved, and 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.

You may wish to draft some responses in advance so that you can check your spelling and word count before completing the form.

**Please note that it is a requirement to attach the following documents, your grant application will not be considered without these:**

- **3 months complete, unredacted bank statements (except information that identifies an individual as per GDPR guidance)**
- **An up-to-date safeguarding policy**
- **Most recent annual accounts (if applicable)**

Once you have completed the application, uploaded the documents, and submitted your form, you will receive an email confirming that we have received your application with a pdf attached of your submission. Should you wish to make any alterations please contact: [administrator@phholtfoundation.org.uk](mailto:administrator@phholtfoundation.org.uk) within one week of completing the form.

The rest of this document lists the information which you will need to enter on the application form, together with supporting guidance notes where appropriate.

**Input is mandatory for all fields with an asterisk\***

## **2. ORGANISATION DETAILS**

Registered charity name\*

*Please provide details of your organisation as it appears on any governing documents and the Charity Commission website.*

Registered charity number

Company number (if applicable)

Date constituted\*

Address\*

Borough\*

Postcode\*

Website address

### **Contact Information**

*Please provide details for the main person who we should contact in relation to this application. If we need more information, we may contact you to arrange a phone call to discuss your application, so please ensure that we have correct contact details, preferably a mobile number and email.*

First name\*

Last name\*

Position held\*

Email address\*

Confirm email address\*

Phone\*

### **Income, Expenditure and Activities**

Please tell us about your organisation's aims, objectives and main activities\*

*Please tell us about your charity's aims and objectives and give a short description of what your organisation does at the moment (usually found in your governing documents). (Maximum 2,000 characters including spaces, which is about 330 words)*

Annual income - most recent annual accounts\*

Annual income - current year budget\*

Annual expenditure - most recent annual accounts\*

Annual expenditure - current year budget\*

Please state your reserves policy and whether your current level of unrestricted free reserves is within this policy\*

*(Maximum 2,000 characters including spaces, which is about 330 words)*

### Staff and Volunteers.

How many staff/volunteers work for your organisation?

Number of full-time staff\*

Number of part-time staff\*

Number of volunteers\*

### Does your organisation have the following?

Appropriate DBS checks for staff and volunteers working with children or adults with support needs\*

*Yes/No*

Safeguarding Policy\*

*Yes/No*

Equity, Diversity and Inclusion Policy\*

*Yes/No*

Public Liability Insurance and Employer's Liability Insurance\*

*Yes/No*

A Risk Assessment covering your organisation's activities\*

*Yes/No*

Impact Report\*

*Yes/No*

### GRANT REQUEST

Please select the type of grant you are applying for

*Please select from the drop-down list*

*Project Costs*

*Running Costs*

*Salary Costs*

*Other*

Project/activity name \*

*This is the name of your project or service – if you already have a working title for the service, use that. (Maximum 100 characters including spaces, which is about 16 words)*

Project summary. Please provide a short description of what you intend to spend any grant from PH Holt on.\*

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*This summary is important. Please make sure it is concise, clear and reflects what you are asking the PH Holt Foundation to fund. (Maximum 300 characters including spaces, which is about 50 words)*

Priority theme\*

*Please select from the drop-down list*

*Enabling people to overcome barriers*

*Engaging with your community*

*Involving excluded groups in the arts*

*Widening access to education*

In which Merseyside borough does your organisation mainly operate? If your project is taking place across more than one borough, tick Merseyside.\*

*Knowsley*

*Liverpool*

*Sefton*

*St Helens*

*Wirral*

*Merseyside*

Primary beneficiaries. These are the beneficiaries specific to the work you are asking us to fund.

*Adults 25+*

*Children 0-18*

*Young People 18-25*

*Older People 65+*

Description

*Disabled including with a learning disability*

*Disadvantaged or vulnerable group*

*Facing loneliness and isolation*

*Homeless people*

*In poor mental health*

*In poor physical health*

*Minorities*

*People with addictions*

*Poor life or vocational skills*

*Refugees and Asylum seekers*

*Victims of abuse*

*Other*

How many will directly benefit from this work\*

*Please enter a number*

## Project Details

*The Trustees will undertake a full assessment of the grant application and consider the merits of the information provided by you to determine whether the grant will be made for 1 or more years. For example, this may include the level of reserves currently held and the reserves policy; impact potential (clear and measurable objectives); existence of effective risk, controls and assurance framework; efficiency and the achievement of value for money; sound financial management practices; financial stability (the requested grant should be appropriate for the proposed activities and the charity's overall income). This list is non-exhaustive.*

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What period of time will this grant cover?

*Grants are normally for one year*

Total grant you are requesting over the whole grant period?

*Please enter the whole amount you are applying for e.g. £5 k, £10 k, etc*

Project/activity start date\*

Project/activity end date\*

Tell us a bit more about your project/activity and what our grant will be spent on\*

- *what you would like to do*
- *what difference this will make*
- *who will benefit from it*
- *how you know that it is needed*
- *is this application for a new activity, or continuing something that works well - your priorities - need to have, like to have \**

*(Maximum 6,000 characters including spaces, which is about 900 words)*

What specific outcomes are you hoping to achieve from this funding?\*

*Please provide as much detail as possible, for example what changes do you wish to achieve; how will you know your work has been a success; what is the potential for longer-term impact and sustainability; % increase in victim support sessions; % increase in the number of cases or people supported, % increase in housing, health, or welfare rights advice*

*(Maximum 2000 characters including spaces, which is about 300 words)*

How will you measure and monitor the work delivered\*

*You will need to have a clear plan for measuring the impact of the grant and demonstrating its effectiveness. Explain how you will measure and record your work to ensure it meets a need. What system will you use for collecting data to track progress and outcomes, allowing for evaluation and learning. If you are seeking more than a one-year grant, what milestones are you seeking to achieve?*

*(Maximum 1,500 characters including spaces, which is about 250 words)*

## BUDGET AND COSTS

Please provide the full costs associated with your project/activity, not just the part you are asking us to fund.

| Category 1 *                                                                                                                                                           | Project/activity/element * | Costs * |
|------------------------------------------------------------------------------------------------------------------------------------------------------------------------|----------------------------|---------|
| <i>Please select an item</i><br><i>Salary/Sessional/Volunteer Costs</i><br><i>Project resources and materials</i><br><i>Premises and running costs</i><br><i>Other</i> |                            |         |
| Category 2                                                                                                                                                             |                            |         |
| <i>Please select an item</i>                                                                                                                                           |                            |         |

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|                                             |  |  |
|---------------------------------------------|--|--|
| Category 3<br><i>Please select an item</i>  |  |  |
| Category 4<br><i>Please select an item</i>  |  |  |
| Category 5<br><i>Please select an item</i>  |  |  |
| Category 6<br><i>Please select an item</i>  |  |  |
| Category 7<br><i>Please select an item</i>  |  |  |
| Category 8<br><i>Please select an item</i>  |  |  |
| Category 9<br><i>Please select an item</i>  |  |  |
| Category 10<br><i>Please select an item</i> |  |  |

What are you asking us to fund? If you are seeking funding from us for specific items, note them here.

*Please enter all activities you wish for us to fund*

What funding has already been secured? If you haven't secured any funding towards the total costs enter 0.\*

*Enter a number*

From whom have you secured funding?

*Tell us what other funders you have secured funding from*

In the event of a shortfall, who else will you approach for funding? This should include the names of other funders and the amount you are asking them for to show how you intend to make up the shortfall. You may also include any anticipated income from regular donors, event fundraising and in-kind costs. \*

*Tell us about other funders or income sources you would look to help you raise the funding. Would you scale down the activity if you were unable to raise the full amount shown and how would this affect the activity? (Maximum 750 characters including spacing)*

Is there anything further that you wish to add that has not been covered in the questions answered?

*(Maximum 1750 characters including spacing, which is about 290 words)*

## DECLARATION

### Documents

**Please note that if you do not submit 3 full months unredacted bank statements, up to date safeguarding policy and latest annual accounts (if applicable) with your application, this will slow down the application process.**

**Copies of your organisation's latest bank statements for the last 3 months\***

[Add file ....](#)

**Up to date Safeguarding Policy for Children/Vulnerable Adults\***

[Add file ...](#)

**Your most recent Annual Report and Accounts**

[Add file ...](#)

**Charities under the audit threshold (less than £50,000 p.a.). You will need to upload your most recent Trustees' Report, a current cashflow forecast and last year's income and expenditure.**

[Add file ...](#)

## Bank Details

*Enter the details from your charity bank account including zeros. It is important that all the details are accurate otherwise payments cannot be made.*

Bank Name\*

Account Name \*

Account Number \*

Sort Code \*

## Data Protection

PH Holt Foundation takes your privacy very seriously and will only collect personal information from you where it has a legitimate reason to do so, and/or you give your explicit consent. We process all personal data provided for the purposes of assessing your application, monitoring and managing any grant awarded in accordance with our privacy policy, which is available on our website [www.phholtfoundation.org.uk](http://www.phholtfoundation.org.uk)

We reserve the right to disclose non personal information regarding your application and activities to other grantmakers unless you expressly request otherwise. No personal data will be shared for this purpose.

Third party data: No personal data concerning third party individuals should be included in your application form without their informed consent.

Detection of fraud: We reserve the right to share personal information to detect and prevent fraud and do not require consent.

## **Declaration**

Before signing, please ensure you have completed all the sections of the application form and that you have attached 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. I confirm that informed consent has been obtained for all individuals identified in this application, and I am authorised to submit this application on behalf of the organisation.

Please sign on the line below using your cursor/mouse and enter your full name and date.

Signature\*

Signed by\*

Date signed\*