P. H. HOLT
FOUNDATION

GRANT POLICY AND GUIDANCE

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, with his brother Alfred, founded the Ocean Steam Ship Company Ltd. in 1865 in Liverpool. The brothers were active philanthropists and contributed to a wide variety of projects that benefited Liverpool communities, encouraging resiliency and self-help.

After Philip Holt's death in 1914, the first of two charitable trusts that bear 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.

Our priority themes

To be considered for funding, your activity should meet one or more of our priority themes:

- Creating opportunities for people to contribute to their community
- 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

Charities that we will support

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.

- Headquartered in Merseyside and have an annual income of under £2 million.
- Registered with the Charity Commission for more than 12 months 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 range from £750 and can rise to £15,000. However, there is **no standard amount** since trustees consider each application on its merit. Trustees prefer to assist charities in true need and

expect to see a budget that has been carefully costed, and in which the charity has considered how we can best help in conjunction with other funders. Before applying, get in touch with us to talk about the funding parameters to ensure your approach is realistic.

Grants are normally for one year.

It takes up to six weeks from the deadline date to assess and decide on 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 to retain experienced or qualified staff.
- Running costs for facilities and resources.
- Equipment purchases.
- Volunteering and training costs.
- 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.

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.

- Support for self-help groups, befriending, and mentoring projects to reduce isolation and help people feel more included in their communities.

- Activities that help people advance their knowledge, boost their confidence, self-esteem, or education.

- Improving opportunities for people who face specific challenges, such as disability, mental illness, discrimination, exclusion, or isolation.

- Opportunities for people to participate in the performing arts, crafts, learning, recreation, or play activities to improve their well-being— especially for those who wouldn't typically have access to such opportunities.

- Support for children, adolescents, and adults who are isolated or at risk of developing mental health problems including recovery programmes offering therapeutic and emotional support.

- Activities aimed at improving the local environment or transforming indoor and outdoor spaces

- Services that provide advice, information, and advocacy to help people address financial problems, access entitlements or legal advice.

- Support for victims of abuse, including practical assistance, advice, advocacy, and refuges protecting victims at risk of violence.

- Support for refugees and asylum seekers to enable them to share in the life of the community or that promote inclusion and help with their integration in the UK.

- Improving the physical or mental well-being of older people to help maintain independence and quality of life.

- Assistance for homeless people to rebuild their lives and gain practical skills to live independently.

Who we do not fund

- CICs, social enterprises, and non-registered groups
- Charities not headquartered in Merseyside*
- Intermediary charities with no direct services
- Work that has already taken place
- General charity appeals
- Medical research, medical care, or hospital equipment
- Statutory responsibilities (including schools, colleges, hospitals, and social care)
- Sponsorship of individuals or events
- Well-funded groups or large fundraising appeals
- Religious or political causes
- Premises refurbishments not specifically advancing social welfare

*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

We accept applications at any time, however, our quarterly grant rounds close at **5 pm** on the dates shown below:

Our final deadlines are 5 pm on:	1 January	1 April	1 July	1 October

Allow up to **six weeks** 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**

Additional Guidance for Religious Organisations

We warmly welcome applications from religious organisations for projects that serve the wider community. To help you determine if your project is eligible, please keep the following guidelines in mind:

Community-Focused Projects: We fund initiatives that are open to everyone in the community and directly align with our priority themes. We are unable to fund core activities or services provided solely for your own congregation or membership.

Building Work & Facilities: We do not provide grants for work on religious buildings, structural repairs, or internal fixtures and fittings.

Financial Documentation: In addition to your main charity accounts, please provide subsidiary accounts for the specific community project. These should detail the project's separate costs and resources, certified by your main charity treasurer.

How to apply

- Applications must be made from the Foundation's website only. We do not accept applications in any other form.

- Complete all sections of the online 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, a copy of your last three months bank statements and relevant up to date safeguarding policies. For charities registered under two years, attach your Constitution. Charities with an income under £50,000 p.a. or 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

- Once your application is submitted online, you will receive an acknowledgement via email and a pdf copy of your application form for your records. **Please note that we do not accept application forms via email in any format, or by post**:

We look forward to receiving your application