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 Ocean Steam Ship Company Ltd in 1865. During their lifetimes, the brothers were great philanthropists - establishing some of Liverpool's most cherished education and arts institutions which endure to this day. They also aimed to improve everyday life for Liverpudlians and ship workers alike through their support of local causes. After Philip Holt's death in 1914, his bequest created the first of two charitable trusts that bear his name. Holt Education Trust 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 must meet one of our priority themes:

- Creating opportunities for people to contribute to local communities
- 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

Who we fund

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.

What we fund

Our grants are typically for:

- Project grants for new or existing work
- Grants for equipment or building improvements
- Community, family, or young people's programmes
- Advice, information, or advocacy services
- Services for disabled or marginalised groups
- Outreach, mental health, or women's projects
- Refugee or homeless support

In addition, recognising some of the best work takes place in communities with limited access to grants, we may consider funding core costs of small local grass roots charities (turnover under £100,000).

What we look for when awarding grants

- Activities that have a real and positive impact
- New approaches to tackle emerging or persistent challenges
- Activities that promote self-help and resilience
- Activities that strengthen communities

How much do we give to each successful project

Grants range from £500 to a maximum of £10,000 for an appeal of major significance. There is no standard amount since trustees prefer to respond to genuine need and consider each application on its merits.

Grants are for one year, but in the case of charities previously supported, we may consider an application over two or three years, but this is subject to prior discussion with the Foundation.

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Categories we do not consider

- CIC's and social enterprises
- National charities and those enjoying high profile support
- Intermediary charities with no direct services
- Individuals and uniform groups
- Work that has already taken place
- Medical research
- Religious and political causes
- Sponsorship of individuals or events
- General charity appeals
- Statutory responsibilities

*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

There are four grant cycles each year. Applications must be made by 9am on the dates shown below:

Our deadlines are before 9am on:	**1 January**	**1 April**	**1 July**	**1 October**

Allow three months 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**

How to apply

- Applications must be made using the Foundation's application form which can be downloaded from the website: www.phholtfoundation.org.uk or obtained by emailing administrator@phholtfoundation.org.uk
- Your application must not run to more than three pages of A4.
- Provide full details to present your case – completing all sections of the 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, copy of a recent bank statement and relevant safeguarding policies. **Note:** For 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 any other additional papers to those requested. If we require additional information, we will contact you.
- For charities registered under two years, attach your Constitution.

Submitting your application

- Email Anne Edwards 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
- We are happy to discuss in advance of a grant deadline all applications, large or small, and recommend you telephone the Foundation Office any **Wednesday to Friday 0151 237 2663**

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We look forward to receiving your application

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