

1. Purpose

1.1 The purpose of this policy is to set out the principles, criteria and processes that govern how the Joseph Holt **Trailblazer Fund** awards funds.

1.2 The Trailblazer Fund is an annual charitable fund of £15,000 (reviewed annually for 1 successful applicant). This contribution is ringfenced and allocated exclusively for charitable fund making.

1.3 The grant is defined as a one-off financial award made from the Trailblazer Fund to support charitable activities. Grants are typically awarded to registered charities.

2. Introduction

The Trailblazer Fund has been established to reinvest in the communities in which Joseph Holt pubs are located.

The Fund operates across the North West and supports charitable activity within a defined geographic area (see Section 4).

The Trailblazer Fund is:

- Governed by a Joseph Holt Trailblazer Fund Panel, including but not limited to business areas including family members, operations, marketing, HR and training.
- Administered by the above group
- Awarded annually, based on a fixed amount agreed at the start of each financial year by the Joseph Holt Trailblazer Fund Panel and Exec team.

The Fund Panel ensure proper governance of the Fund in three ways:

- Through clear fund making principles ensuring decisions align with the Fund's purpose.
- Through published fund making criteria setting out what the Fund will and will not support.
- Through transparent fund making processes outlining how decisions are reached.

3. Fund Structure

- Contributions are calculated and ringfenced on an annual basis
- The total accumulated amount forms the annual fund pot.
- The total available funding is confirmed prior to each annual funding round.

The Fund is awarded once per year unless otherwise determined by the Fund Panel.

4. Fund Making Principles

The principles underpinning the Trailblazer Fund are:

- The Fund Panel have ultimate collective responsibility for all fund making decisions.
- All funds awarded must align with the charitable purpose of the Fund.

- Fund Panel reserve the right to apply conditions to any fund.
- Fund Panel reserve the right not to approve any application if it:
 - Is not charitable in law
 - Conflicts with the Fund's purpose or policies
 - Could damage the reputation of the Fund or its contributors

The Fund aims to balance robust governance with a straightforward and accessible application process.

5. Fund Making Criteria

5.1 Geographic Focus

- The project being funded must operate within the North West.
- Activities should normally take place within a proximity to a Joseph Holt pub.

5.2 Eligible Organisations

The Trailblazer Fund will normally support:

- Registered charities

Preference will be given to:

- Small local charities under £1million turnover
- Established charities of a reasonable size

The Fund will not normally support:

- National organisations based outside the North West running local projects
- Organisations with an annual income exceeding £1,000,000
- Individuals
- Privately owned and profit-distributing companies
- Community groups not operating as charities

Non-registered charities will only be funded in exceptional circumstances.

5.3 What the Fund Will Support

Fund Panel expect funds to support one or more of the following:

- Services and activities that improve lives within the local community
- Initiatives addressing homelessness, poverty, community wellbeing (including LGBTQIA+), mental health or social inclusion
- Projects that expand or strengthen effective local services
- Capital items, equipment or essential operational costs
- New initiatives
- Grassroots sports charities
- Children and charities supporting young people

Funds may support:

- Projects
- Equipment
- Capital developments
- Running costs
- New positions, including salaries

All funds are restricted and must be used solely for the agreed purpose.

5.4 What the Fund Will Not Normally Support

- General fundraising appeals or circulars
- Religious activity not providing wider public benefit
- Public bodies carrying out statutory obligations
- Activities that have already taken place
- Grant-making by other organisations
- Animal welfare-only activities

6. Fund Making Process

The Trailblazer Fund operates an annual funding round.

All eligible applications go through a five-stage process:

1. Completion of application form and criteria
2. Initial assessment to determine eligibility and suitability by Fund Panel members
3. Review and recommendation by the Fund Panel
4. Visits to charities by Fund Panel members
5. Final approval by the Fund Panel

All funds must be formally approved by the Fund Panel.

Fund members may also invite applications or proactively commission projects aligned with the Fund's purpose.

Decisions are final.

7. Reporting Requirements

All awardees must:

- Provide at least one written report as a minimum at the end of the awarded project
- Demonstrate how funds were used
- Highlight outcomes, impact and any challenges

8. Variations to This Policy

Fund Panel reserve the right to amend this policy at any time to reflect operational or strategic changes.

How to Apply

Applications must be submitted via Trailblazer Fund application form to the Fund Panel.

Applications must clearly state:

- The purpose of the funding
- Whether it supports new or existing activity
- Costs of the project
- Number of beneficiaries
- Expected outcomes and impact

Applicants who have previously received funding must have submitted all required reports before reapplying.

When Will Decisions Be Made?

The Trailblazer Fund is usually awarded annually.

Applicants will be informed of:

- The closing date
- The decision date for shortlisted applications
- Shortlisted applicants are visited and any additional information is requested
- Trailblazer Fund is awarded