FANNY HOLT AMES AND EDNA LOUISE HOLT FUND

*Bank of America, N.A., Trustee*

2022-2023 Guidelines and Application Tips

# CONTACT INFORMATION

Jennifer Lee and Michelle Stuart

Health Resources in Action

[holt@hria.org](mailto:holt@hria.org)

Dian Quinn, Trustee Representative

Philanthropic Solutions Group

Bank of America Private Bank

[dian.quinn@bofa.com](mailto:dian.quinn@bofa.com)

# FUND BACKGROUND

The Fanny Holt Ames and Edna Louise Holt Fund (the Holt Fund) was created at Edna Louise Holt’s instructions, and established in 2000, with Bank of America as the Trustee. To date, the Holt Fund has invested more than $18.7 million in programs to improve community health outcomes in Grafton, Vermont and surrounding towns. For additional information about the Holt Fund and a list of programs funded, visit: <https://hria.org/tmf/holt-fund>.

The Trustee has contracted with Health Resources in Action to support the operations of the Holt Fund.

# MISSION AND GUIDING PRINCIPLES

The Holt Fund focuses its funding and resources on meeting the medical needs of individuals who live in Grafton, Vermont and surrounding towns with primary consideration given to Grace Cottage Hospital, and with priority for those with limited access to health resources.

As guiding principles, the Holt Fund:

* Awards grants on a competitive basis to nonprofit 501(c)3 public charities as defined by the Internal Revenue Service Code
* Makes grant decisions based upon the needs of the communities, recognizing that needs evolve over time
* Focuses its resources on programs and organizations that have a positive and lasting impact on the largest number of people

# PROGRAM OVERVIEW

For the purpose of the Holt Fund, the term “medical needs” encompasses a broad range of activities including but not limited to: the social determinants of health (i.e., housing, education, food access, etc.); the provision of chronic, acute and long-term care services; diagnostic screening; emergency medical services; community-based prevention and health promotion activities; treatment; and health education efforts.

The Holt Fund makes grants on an annual basis to support programs and organizations that: seek to address health inequities within the Holt service area; improve access to care, particularly for vulnerable populations; and focus on prevention, health education, intervention, treatment, evaluation, and a personalized approach to care. In addition, the Holt Fund supports grants to build the organizational capacity of individual organizations or partnerships that provide health and medical services within the Holt catchment area.

The Holt Fund will consider applications from nonprofit organizations that are either a) located in or b) provide the majority of services for which they are seeking support in one or more towns in the catchment area. Applicants may include community-based organizations, healthcare providers, local governments, school systems, faith communities, and other nonprofit 501(c)3 public charities.

For the program year 2022-2023, the Fund will make grants in two categories:

Small Grants – Applicants may apply for single-year grants of up to $15,000 for discrete projects or programmatic expenses. Applicants must complete the parts of the online application required for small grants.

Large Grants – Applicants may apply for single- or multi-year requests (up to three years) of over $15,000 for program or project support, operating expenses (for organizations with annual budgets less than $1 million), or capital support.

Applicants may submit one application per funding cycle. Exceptions may be made for organizations acting in the role of fiscal agent. Please contact the Holt Fund for more details.

In addition to the above, standard grantmaking process, the Holt Fund is accepting proposals for projects related to housing as a social determinant of health. Please refer to the other set of grant guidelines which can be found on our webpage at <https://hria.org/tmf/holt-fund>/.

# USE OF GRANT FUNDS

As a condition for accepting grant monies, grantees must provide annual programmatic and financial reports detailing the use of the funds and over impact in the community; participate in a site visit at the request of the Trustee; and participate in periodic meetings of grantees. Receipt of second- and third-year funding for multi-year grants will be dependent on the submission of annual programmatic and financial reports.

Funds may not be used to build endowments, fund operating deficits, or initiate or influence legislation. Requests greater than 25% of an organization's operating budget will typically not be considered. No grants will be made to individuals.

# SELECTION CRITERIA

Applications to the Fanny Holt Ames and Edna Louise Holt Fund will be reviewed based on the following criteria for all grant categories:

* Adherence to the mission of the Holt Fund
* Significance of need
* Demonstration of how approach addresses health inequities for population(s) served
* Evidence that approach is feasible and appropriate to the proposal’s aims
* Ability of applicant to measure impact of grant funds on proposed need
* Evidence that the outcomes are well-conceived, realistic and measurable
* Ability of applicant to demonstrate sufficient experience and capacity to conduct program/project
* Use of collaborative approach(es) where appropriate

In addition, Large Grant requests will also be reviewed on the following criteria:

* Likelihood that the proposed program/project will have a lasting impact on the need
* Ability of the applicant to sustain the program/project once Holt funding ends

# GEOGRAPHIC CATCHMENT AREA

The Holt Fund’s objective is to meet the medical needs of Grafton, Vermont and surrounding towns, including:

* Andover
* Athens
* Brookline
* Chester
* Grafton
* Jamaica
* Londonderry
* Rockingham
* Springfield
* Townshend
* Westminster
* Weston
* Windham

# APPLICATION PROCESS

ALL applications must be submitted online using the following links:

Begin a **NEW** application:

[**INSERT NEW LINK HERE**]

Go to your Account Page to return to a **SAVED** application:

<https://www.GrantRequest.com/SID_2364?SA=AM>

To apply for a grant from the Holt Fund, applicants must submit an online application including the following:

**Organization Information**

* **Tax Identification Number**: Applicants must enter the tax identification number of the nonprofit institution or organization that is overseeing the project or the fiscal sponsor of the project.
* **Organization to Lead Proposed Project**: If different from organization overseeing project.
* **Organization CEO Contact Information**: Complete requested fields for contact information for organization’s CEO, or equivalent.
* **Mission of Organization**: State the mission of organization overseeing the project or the fiscal sponsor of the project. (100-word limit)
* **Organization’s Operating Deficit**: If this organization experienced a deficit in either of the past two years, state the amount and provide an explanation, including whether it was a planned deficit. (200-word limit)

**Program Information**

* **Program Primary Contact Information**: Complete requested fields for contact information for program’s primary contact.
* **Mission of Organization to Lead Proposed Project**: If different from organization overseeing project. (100-word limit)

**Proposal Information**

* **Title of Program/Project**
* **Type of Support Requested**: Select the type of support requested (small or large grant)
* **Target Population:** Describe the demographics of the population you serve, including any health inequities they experience. (100-word limit)
* **Health Issue Area**: Select the health area(s) that applies to the proposed program/project.
* **Geographic Area Focus**: Select the communities served by the proposed program/project from the Holt Catchment Area.
* **Estimated Number of Individuals in Target Population to be Served by this Program/Project:**
  + Number of Individuals to be Served who Live IN the Holt Catchment Area
  + Number of Individuals to be Served who Live OUTSIDE of the Holt Catchment Area
* **History and Experience**: Provide a brief summary of the lead organization’s history and experience in providing community-based programs. (200-word limit)
* **Purpose**: Describe the health need(s) being addressed and your organization’s unique role in meeting those need(s). (250-word limit)
* **Broader Context of Program**: Describe how your proposed program/project fits into the broader context of the field and alignment with any existing initiatives. (250-word limit)
* **Activities and Timeline**: Describe your planned activities including how it will address the stated need, any partners, and the intended impact. Include a timeline of these activities and specific goals and expected outcomes/success indicators. (600-word limit)
* **Evaluation**: Describe how you will measure the impact of this work and monitor success for the program/project. (300-word limit)
* **Sustainability**: Describe the overall sustainability plan for your organization and/or your project/program in terms of staffing and finances. How would the proposed activities and/or your organization be affected if you do not receive the requested funding? (300-word limit) *(Not required for small grant applications. If applying for small grant, please insert “small grant” in response area)*
* **Total Project Budget Year 1**
* **Amount Requested from Holt Year 1**
* **Total Project Budget Year 2 (not applicable for small grant)**
* **Amount Requested from Holt Year 2 (not applicable for small grant)**
* **Total Project Budget Year 3 (not applicable for small grant)**
* **Amount Requested from Holt Year 3 (not applicable for small grant)**

**Attachments**

* **Proposal Attachments** (Document Upload): The documents and forms listed below must be combined and converted into ONE PDF file for upload. The document should be named “Org Acronym. Abbreviated Program Title.2020.” Include items in the following order:
  + Budget Forms – Forms must be completed for the project budget unless the application is for general operations, in which case only the organizational budget is required. Note: requests greater than 25% of an organization’s operating budget will typically not be considered.
  + Do not include any unrequested attachments.
* **Organizational Attachments** (Document Upload): The documents and forms listed below must be combined and converted into ONE PDF file for upload. The document should be named “Organization Name.2022.” Include items in the following order:
  + Current Board of Directors List with names, towns of residence, and affiliation(s) with other nonprofit boards
  + Most recent annual audit. If your organization is not required to have an independent audit, provide a copy of your most recent 990
  + Board-approved organizational budget for the current fiscal year

# TIMELINE

**February through March 2022** Staff available to respond to requests from local providers for information about the Holt Fund and its application process, via phone and email

**Friday April 1, 2022** Deadline for completed applications

**May 2022** Committee’s final review of applications

**Late May 2022** Committee’s recommendations forwarded to U.S. Trust, Philanthropic Solutions, Bank of America – Holt Fund Trustee

**Tuesday, June 14, 2022** Notification of funding decisions for all applications

*The Holt Fund is committed to supporting organizations that adhere to non-discrimination and equal opportunity laws as established by the state of Vermont as well as federal and city regulations. The Fund will not issue grants that discriminate against any individual or group based on race, color, creed, national origin, or any other demographic.*

# ONLINE APPLICATION TIPS

*Please read guidelines above before beginning online application.*

*If you need technical/IT assistance in starting either application, please contact*

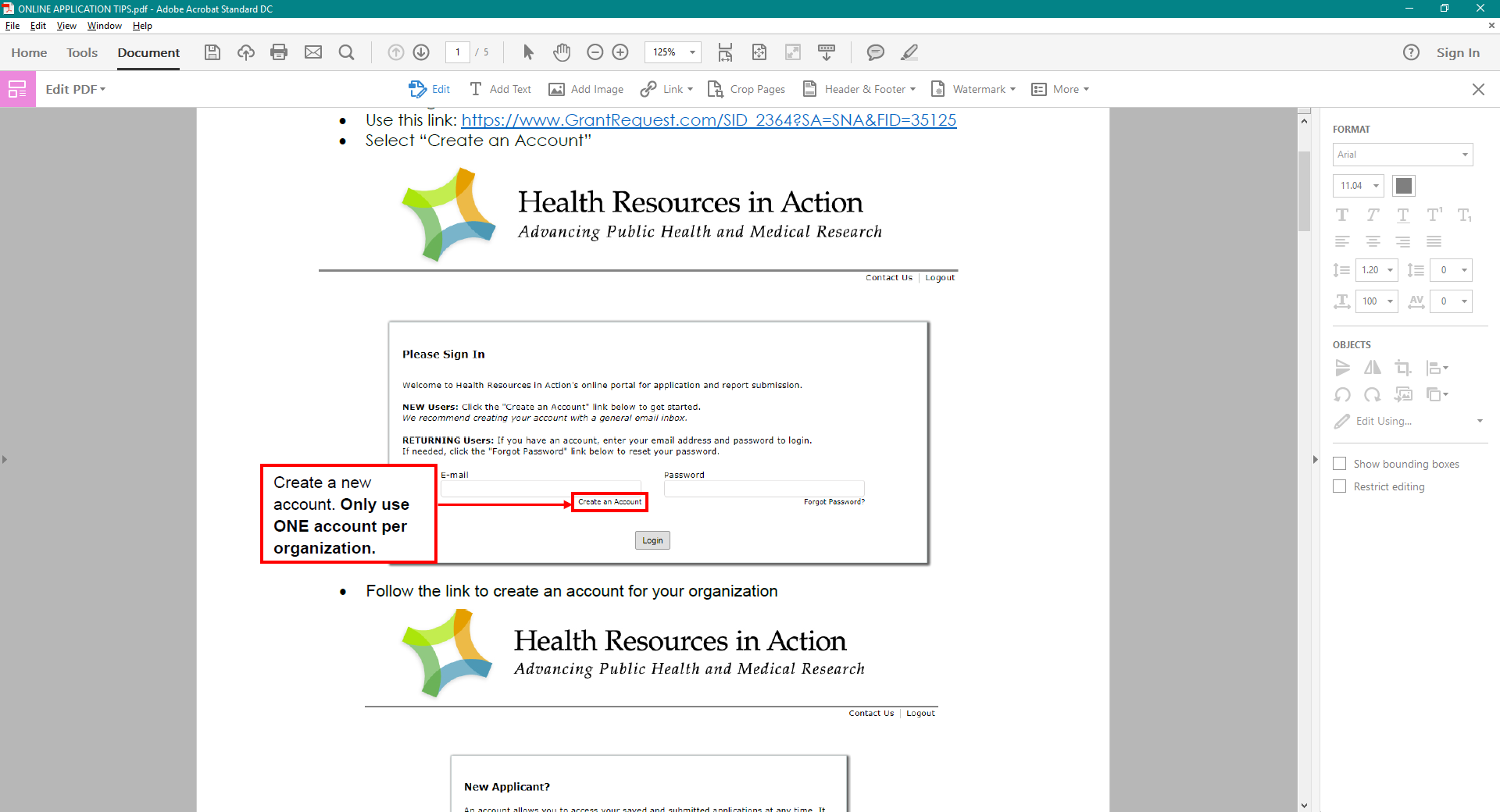
*Michelle Stuart at* [*mstuart@hria.org*](mailto:mstuart@hria.org)*..*

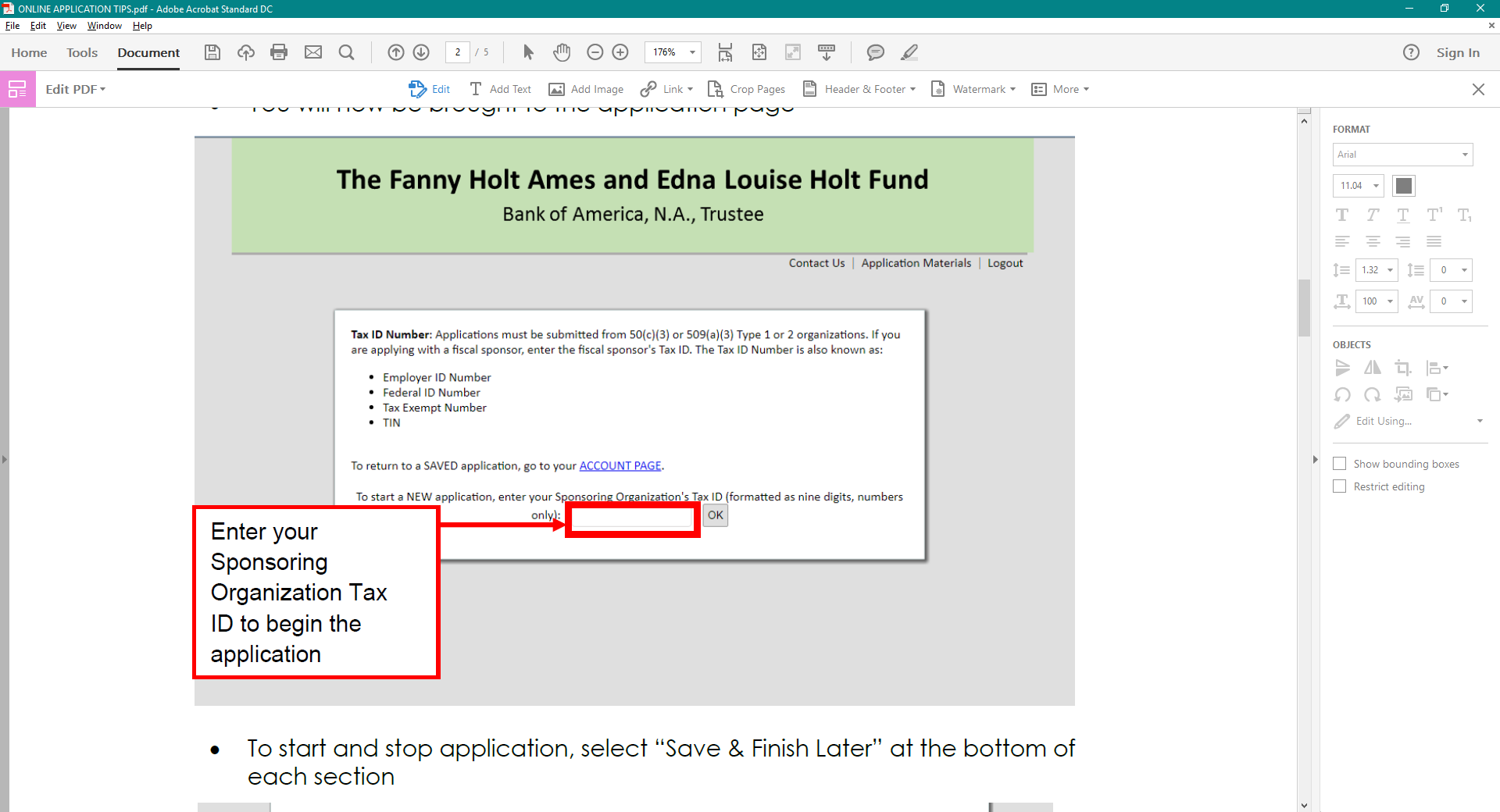
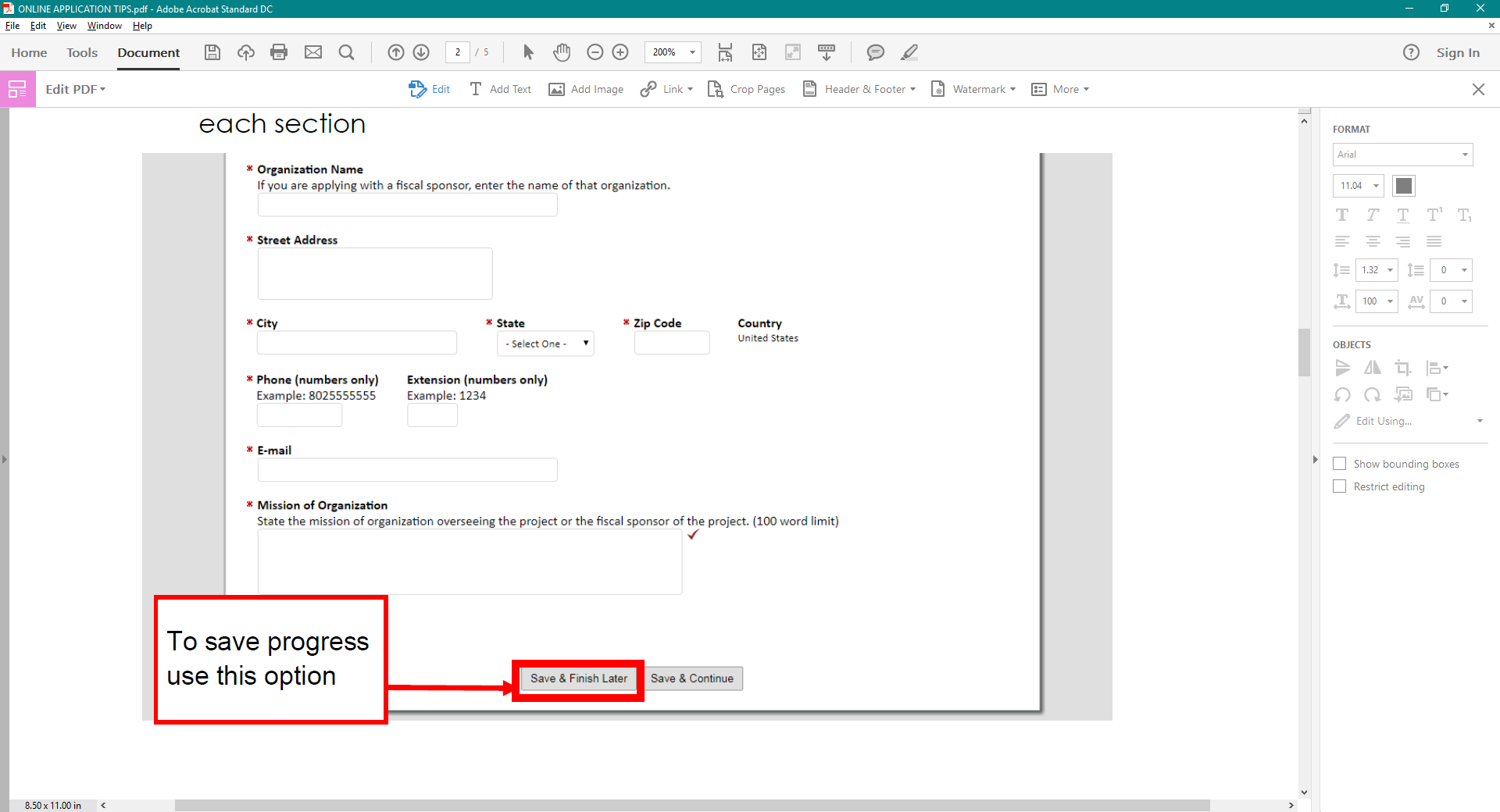
*If you need assistance with the content of your application, please contact Jen Lee or*

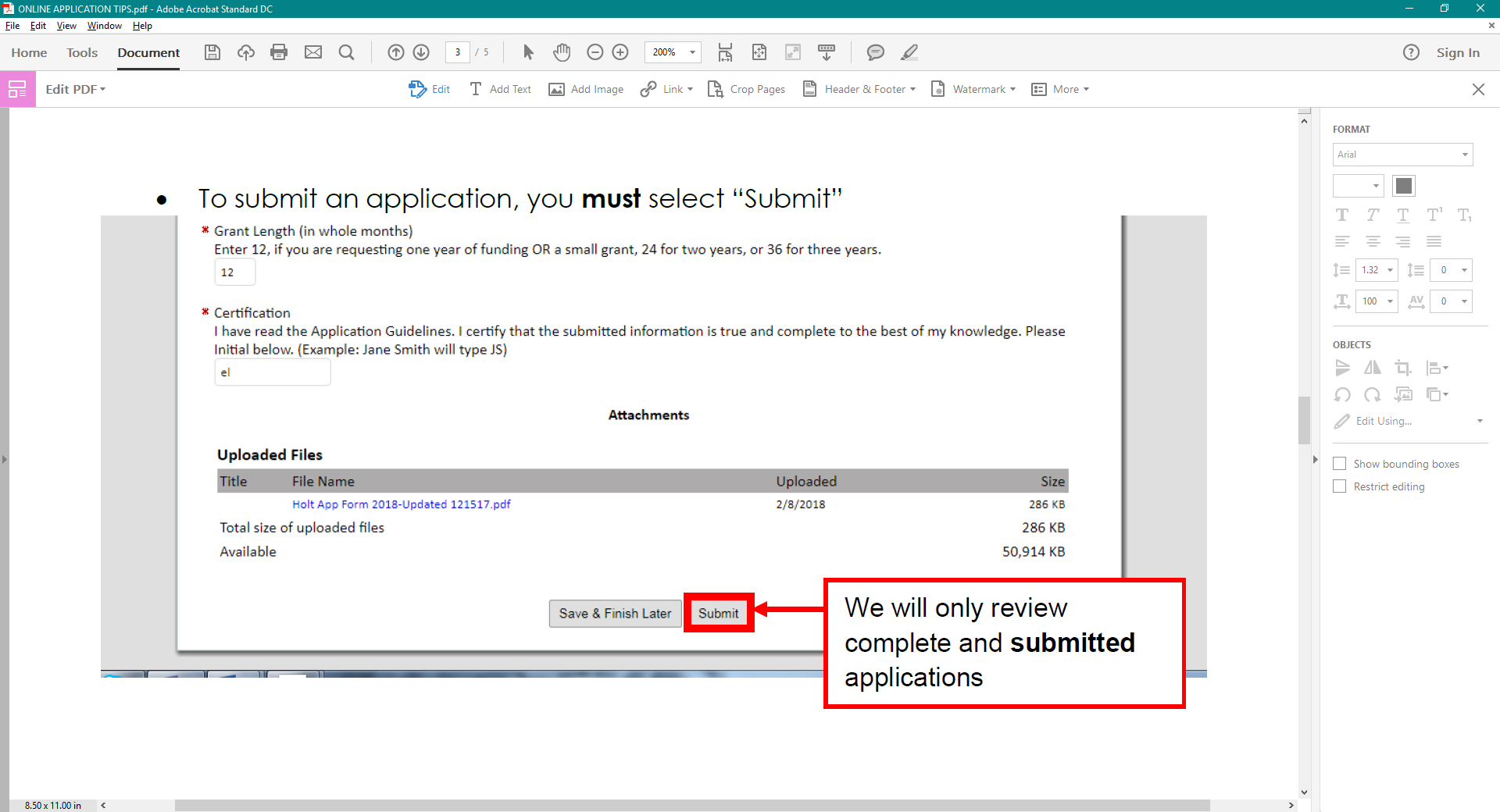
*Michelle Stuart at* [*holt@hria.org*](mailto:holt@hria.org)*..*

## NEW USERS

* If your organization has never submitted an online application, please use the following instructions.
* Use this link: https://www.grantrequest.com/SID\_2364?SA=SNA&FID=35270
* Select “Create an Account”

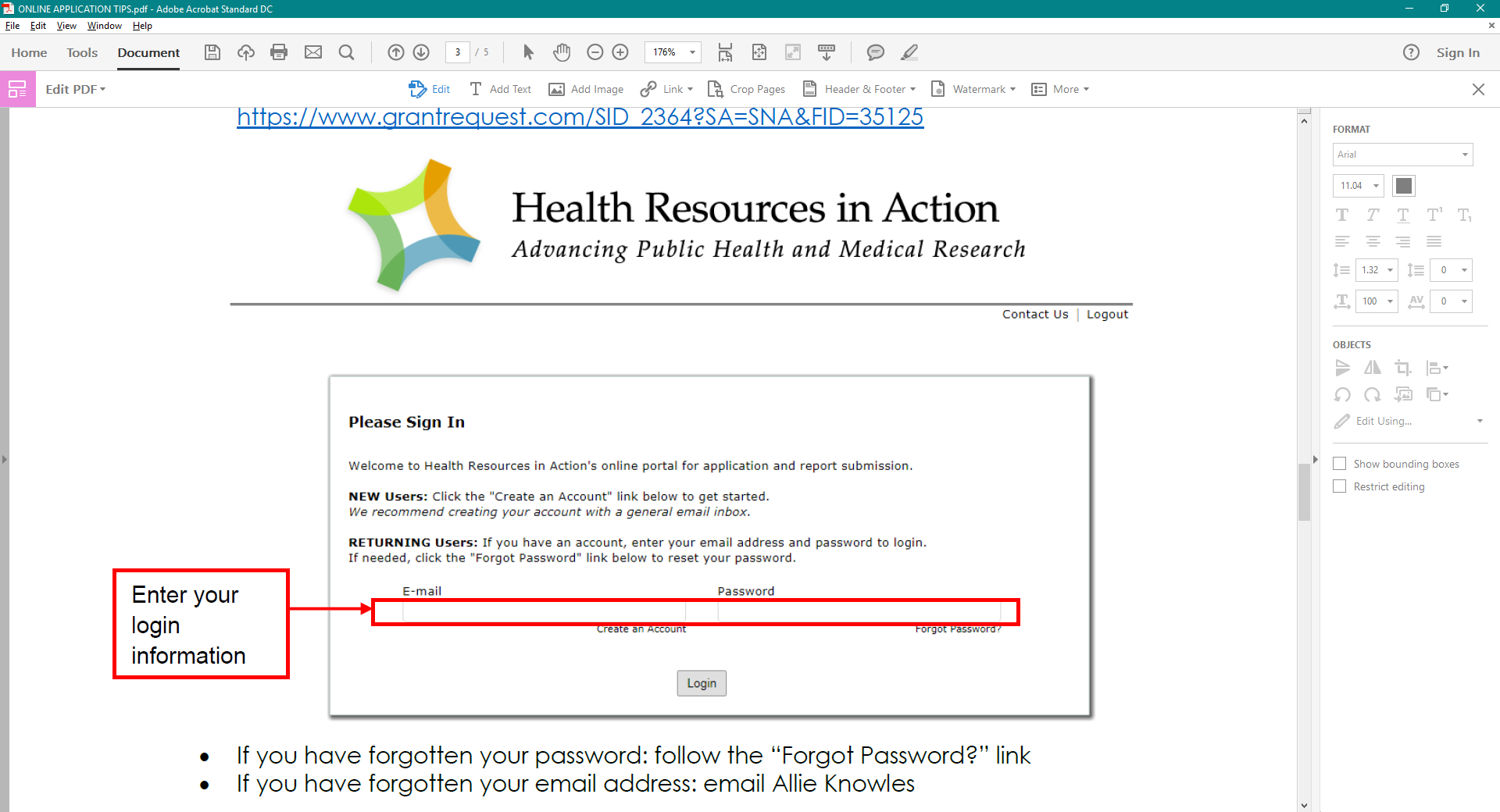
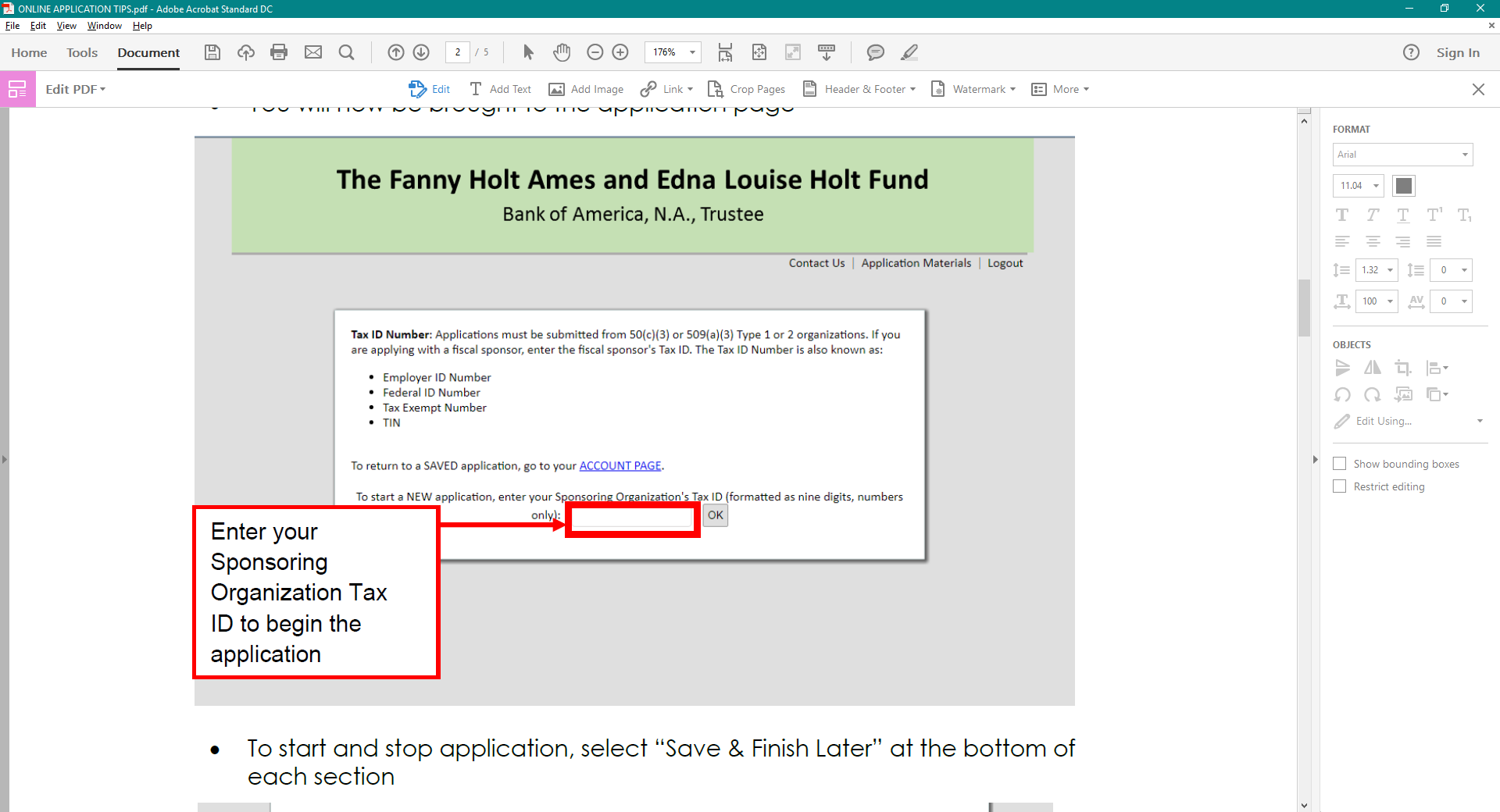


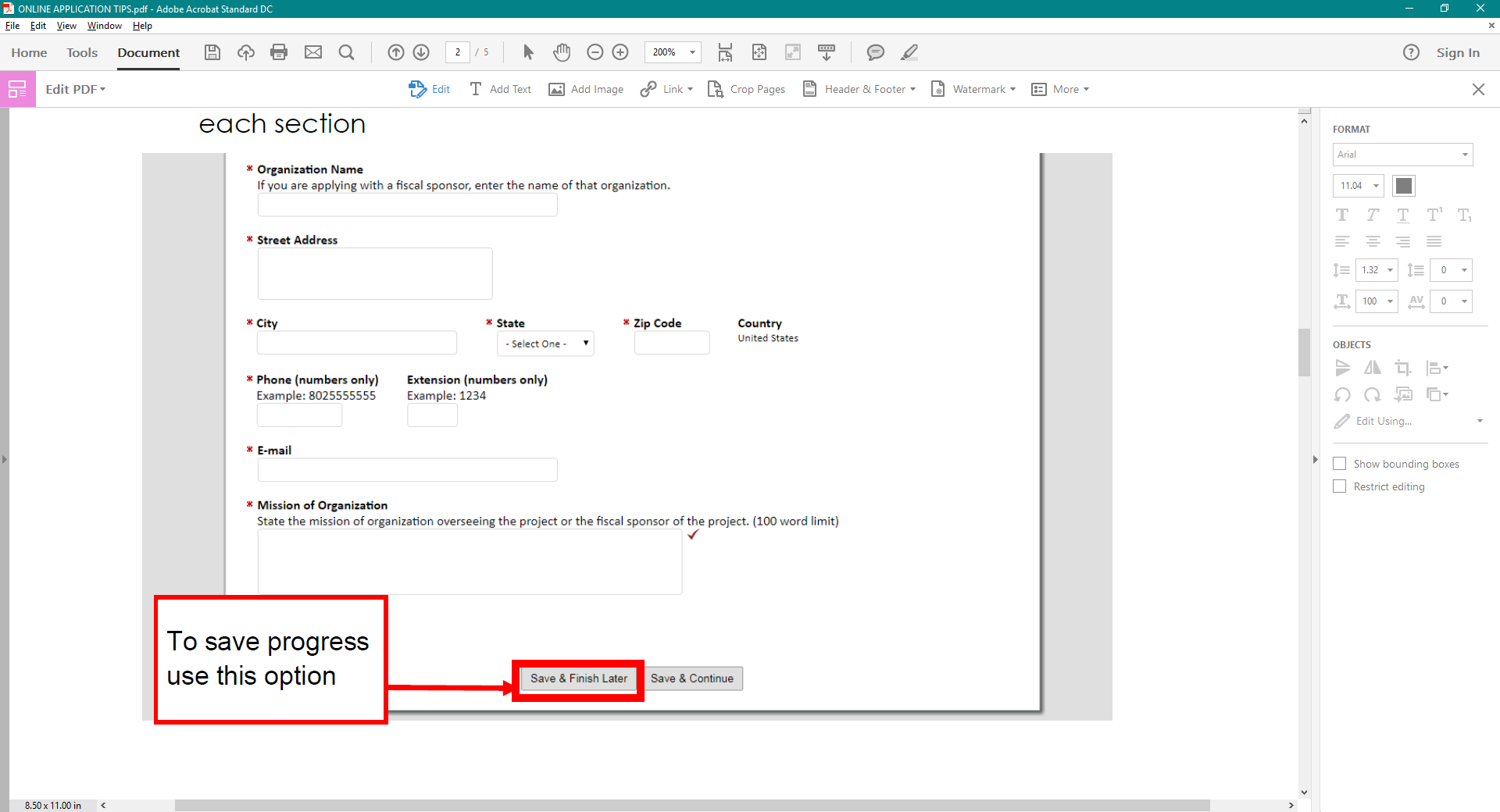
* Follow the link to create an account for your organization
* Your new account has been created
* You will now be brought to the application page
* To start and stop application, select “Save & Finish Later” at the bottom of each section
* To apply, you **must** select “Submit”



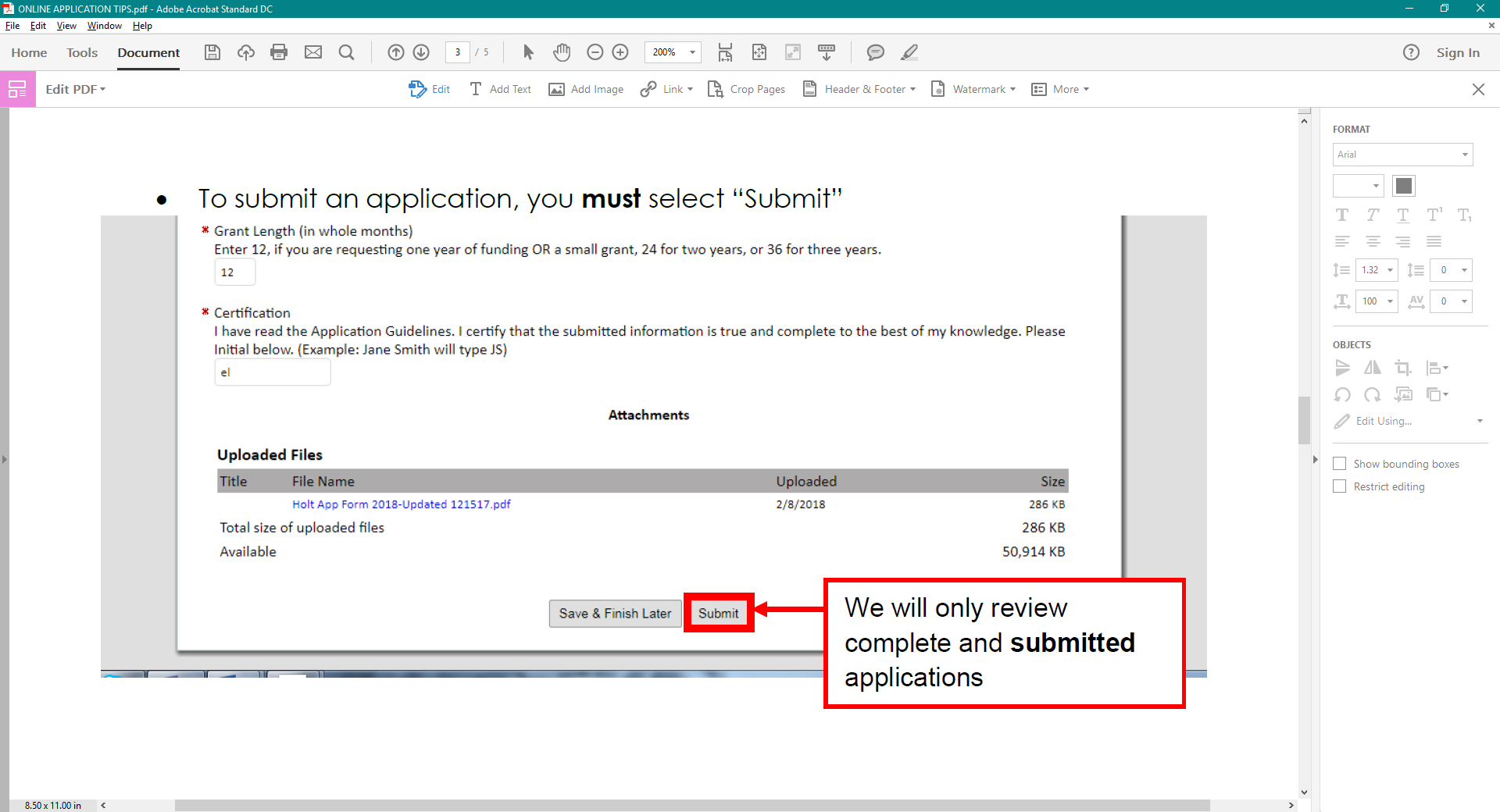
HRIA. Holt Program.2019.pdf 2/28/20

**RETURNING USERS**

* If you or someone in your organization has submitted an **online** application in the past, please use the following instructions
* Use this link to begin an application: https://www.grantrequest.com/SID\_2364?SA=SNA&FID=35270
* If you have forgotten your password: follow the “Forgot Password?” link
* If you have forgotten the email address you used to sign up, contact Emily Lawson, elawson@hria.org for assistance
* To access your account page, use this link to access a SAVED application: <https://www.grantrequest.com/SID_2364?SA=AM>
* You will now be brought to the application page
* To start and stop application, select “Save & Finish Later” at the bottom of each section



* To apply, you **must** select “Submit”



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