

# FANNY HOLT AMES AND EDNA LOUISE HOLT FUND

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

## CONTACT INFORMATION

Jennifer Lee and Chenchen Hensz  
Health Resources in Action  
[holt@hria.org](mailto:holt@hria.org)

Christine L O'Donnell, Trustee  
Representative  
Philanthropic Solutions Group  
Bank of America Private Bank

## FUND BACKGROUND

The Fanny Holt Ames and Edna Louise Holt Fund (the Holt Fund) was created in 2000 at Edna Louise Holt's instructions with Bank of America as the Trustee. To date, the Holt Fund has invested more than \$20 million in programs to improve community health outcomes in Grafton, Vermont and surrounding towns.

The Trustee has contracted with Health Resources in Action to support the operations of the Holt Fund. Additional information about the Holt Fund and a list of programs funded can be found at <https://hria.org/tmf/holt-fund>.

## MISSION AND GUIDING PRINCIPLES

The Holt Fund provides funding to support the medical and health needs of residents of Grafton, Vermont and surrounding towns with primary consideration given to Grace Cottage Hospital, as well as priority for those with limited access to health resources.

Key guiding principles include:

- Awarding grants on a competitive basis to nonprofit 501(c)3 public charities
- Making grant decisions based on community need, recognizing that needs evolve over time
- Focusing resources on programs and organizations that have a positive and lasting impact on a significant portion of the population who resides in the region

## PROGRAM OVERVIEW

U.S. TRUST 

Bank of America Private Wealth Management



HEALTH  
RESOURCES  
IN ACTION

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 (e.g., 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. The Holt Fund does not accept applications from individuals or for-profit organizations.

For the 2025-2026 grant cycle, the Fund will make grants in two categories:

**Small Grants** – Single-year grants up to \$15,000 for discrete projects or programmatic expenses.

**Large Grants** – 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.

In addition to Traditional Grants, the Holt Fund is accepting Housing Initiative proposals for projects related to housing as a social determinant of health. This separate funding opportunity is captured in a different set of grant guidelines found on our webpage at <https://hria.org/tmf/holt-fund/>.

## USE OF GRANT FUNDS

As a condition for accepting funding, grantees must provide annual programmatic and financial reports detailing the use of the funds and 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.

## 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:

[https://www.grantrequest.com/SID\\_2364?SA=SNA&FID=35355](https://www.grantrequest.com/SID_2364?SA=SNA&FID=35355)

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

[https://www.grantrequest.com/SID\\_2364?SA=AM](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.2025.” 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.2025." 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

<b>February and March 2025</b>	Staff available to respond to requests from applicants via phone and email
<b>Monday, April 7, 2025 @ 5:00 PM EST</b>	Deadline for completed applications
<b>April and May 2025</b>	Committee's final review of applications
<b>Mid-June 2025</b>	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 [holt@hria.org](mailto:holt@hria.org).

If you need assistance with the content of your application, please contact [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=35355](https://www.grantrequest.com/SID_2364?SA=SNA&FID=35355)
- Select "Create an Account"



Contact Us | Logout

Default ▾

**Please Sign In**

Welcome to the grants application and reporting submission portal for Health Resources in Action. Through this portal, you can manage submissions for:

- Health Resources in Action
- The Medical Foundation
- Kaiser Permanente Center for Gun Violence Research and Education

**NEW Users:** Click the "Create an Account" link below to get started.  
*The Account must be created with the Applicant's email address.*

**RETURNING Users:** If you have an account, enter your email address and password to login.  
 If needed, click the "Forgot Password" link below to reset your password.

E-mail  Password

[Create an Account](#) [Forgot Password?](#)

Login

Create a new account.  
Only use ONE account  
per organization

- 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

The Fanny Holt Ames and Edna Louise Holt Fund  
Bank of America, N.A., Trustee

Contact Us | Application Materials | Logout

**Tax ID Number:** Applications must be submitted from 50(c)(3) or 509(a)(3) Type 1 or 2 organizations. If you are applying with a fiscal sponsor, enter the fiscal sponsor's Tax ID. The Tax ID Number is also known as:

- Employer ID Number
- Federal ID Number
- Tax Exempt Number
- TIN

To return to a SAVED application, go to your [ACCOUNT PAGE](#).

To start a NEW application, enter your Sponsoring Organization's Tax ID (formatted as nine digits, numbers only):

Enter your Sponsoring Organization Tax ID to begin the application

- To start and stop application, select “Save & Finish Later” at the bottom of each section

\* Organization Name  
If you are applying with a fiscal sponsor, enter the name of that organization.

\* Street Address

\* City                      \* State                      \* Zip Code                      Country  
   - Select One -                      United States

\* Phone (numbers only)                      Extension (numbers only)  
Example: 8025555555                      Example: 1234

\* E-mail

\* Mission of Organization  
State the mission of organization overseeing the project or the fiscal sponsor of the project. (100 word limit)

To save progress use this option

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

\* Grant Length (in whole months)  
Enter 12, if you are requesting one year of funding OR a small grant, 24 for two years, or 36 for three years.

12

\* Certification  
I have read the Application Guidelines. I certify that the submitted information is true and complete to the best of my knowledge. Please Initial below. (Example: Jane Smith will type JS)

el

Attachments

**Uploaded Files**

Title	File Name	Uploaded	Size
	HRIA. Holt Program.2019.pdf	2/28/20	286 KB
Total size of uploaded files			286 KB
Available			50,914 KB

We will only review complete and **submitted** applications

## 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=35355](https://www.grantrequest.com/SID_2364?SA=SNA&FID=35355)
- If you have forgotten your password: follow the “Forgot Password?” link
- If you have forgotten the email address you used to sign up, contact [Holt@hria.org](mailto:Holt@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](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”