

# FANNY HOLT AMES AND EDNA LOUISE HOLT FUND 2026-2027

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

Guidelines and Application Tips

## CONTACT INFORMATION

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## FUND BACKGROUND

The Fanny Holt Ames and Edna Louise Holt Fund (the Holt Fund) was created in 2000 in accordance with Edna Louise Holt's instructions, with Bank of America as trustee. To date, the Holt Fund has invested more than \$21 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 [Fanny Holt Ames and Edna Louise Holt Fund - HRiA](#)

## 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

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- 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 reside in the region

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
- Health education efforts

## PROGRAM OVERVIEW

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 2026-2027 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 year requests 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. Grantees are not allowed to have more than one active award with The Holt Fund per funding opportunity. 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.

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

## GEOGRAPHIC CATCHMENT AREA

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

- |               |               |
|---------------|---------------|
| • Andover     | • Rockingham  |
| • Athens      | • Springfield |
| • Brookline   | • Townshend   |
| • Chester     | • Westminster |
| • Grafton     | • Weston      |
| • Jamaica     | • Windham     |
| • Londonderry |               |

## TIMELINE

<b>Monday, May 4, 2026 @ 12 PM EST</b>	Program launch
<b>Monday, May 11, 2026 @ 12 PM EST</b>	Holt Program 2026 Information Webinar ( <a href="#">Registration link</a> )
<b>May and June 2026</b>	Staff available to respond to requests from applicants via phone and email
<b>Tuesday, July 7, 2026 @ 3:00 PM EST</b>	Deadline for submitting completed applications
<b>July and August 2026</b>	Committee review of applications
<b>Early Fall 2026</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.*

## INSTRUCTIONS FOR PROPOSAL SUBMISSION

1. Please read guidelines above before beginning online application.
2. Register for an account in HRiA Award Manager at: <https://hria.us-1.smartsimple.com/>
3. Once you have logged into the HRiA Award Manager, click on “Funding Opportunities”, then click on the purple APPLY NOW button next to Holt Fund 2026-2027.

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.
- **Mission of Organization:** State the mission of your organization or the fiscal sponsor of the project as applicable. (100-word limit)
- **Organization’s Operating Deficit:** If this organization or the fiscal sponsor (as applicable) 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)
- **Organization to Lead Proposed Project:** If different from organization overseeing project. (answer only if there is a fiscal sponsor)
- **Mission of Organization to Lead Proposed Project:** If different from organization overseeing project. (100-word limit) (answer only if there is a fiscal sponsor)
- **Organization CEO Contact Information:** Please list the contact information for the highest-ranking official for the organization that will receive the funding. Alternatively, if you are applying with a fiscal sponsor, enter the contact information for the highest-ranking official (CEO, President, Executive Director, Municipal Manager, etc.) for the fiscal sponsor organization.

### Program Information:

- **Program Primary Contact Information:** Complete requested fields for contact information for program’s primary contact.
- **List of Collaborators/ Partners and brief description of their roles (if applicable)**

### Proposal information:

- **Title of Program/Project**
- **Total Project Budget /Amount Requested**
- **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)

- **Geographic Area Focus:** Select the communities served by the proposed program/project from the Holt Catchment Area. Applicants have the option to provide additional context should they prefer (100-word limit)
- **Approximately what proportion of individuals served by this program/project live within the catchment area?** (Please select the appropriate option from: a. Nearly all (75–100%), b. More than half (51–74%), c. Less than half (26–50%), d. Very few (0–25%), or, e. Other (please explain))
- **History and Experience:** Provide a brief summary of the lead organization’s history and experience in providing community-based programs. (250-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. (350-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)

**Attachments:** Do not include any unrequested attachments.

- **Proposal Attachments** (Document Upload): The document should be uploaded as an excel sheet:
  - **Budget Form** – The “**Budget Template 2026-2027 Traditional Grants**” form 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.
- **Organizational Attachments** (Document Upload): The documents and forms listed below should be uploaded as PDFs. Include items in the following order:
  - **Current Board of Directors** List with names, towns of residence, and affiliation(s) with other nonprofit boards
  - Board-approved organizational budget for the current fiscal year

### AI Policy Declaration

*If you need technical/IT assistance in starting either application or with the content of your application, please contact [Holt@hria.org](mailto:Holt@hria.org)*