



The Shepard-Holton Trust General Guidelines

Grant applications are due by **January 8** each year for disbursement the following calendar year. Applications must be submitted in writing to the Office of the Bishop. The Trusts and Endowments Committee shall review all requests received. Decisions will be communicated to applicants no later than **February 1**.

Criteria

This The Shepard-Holton Trust is the result of a bequest made by Dora Eddy Shepard, who died in 1937. It was originally designated for two convalescent homes – one of them for children – that had been operated by the diocese. Now that those homes no longer exist, grants from the trust are available to diocesan institutions that care for children and the aged.

How to Apply

All grant requests for the Shepard-Holton Trust must be complete at the time of submission and should include the following:

A document answering the following questions in the following order:

- Cover Sheet (see below)
- The amount of the request
- Funding period of this grant
- Background and mission of the institution requesting the grant
- A narrative explanation of the need for funding and how it applies to the criteria of the Trust
- If it is a program or project, a statement disclosing all other sources of funding

Additional Materials:

- Current income statement and balance sheet
- Budget current past year
- Budget estimate (income/expense) for the year the grant is sought (e.g., 2021 financials for a grant payout in fiscal year 2021)

End of year evaluation for organizations who received grants

At the conclusion of the calendar year or completion of the program or project the organization agrees to submit a written report answering the following questions:

- Briefly restate the plan outlined in the original request. What progress have you made toward achieving the results you described in your proposal during this period? What evidence do you have to demonstrate your success? If you did not achieve your intended results, why not?
- What lessons have you learned that will help your organization and other organizations that may be involved in similar work?
- How has the grant helped promote health and wellness in Colorado?



THE EPISCOPAL CHURCH IN
COLORADO

COVER SHEET FOR THE SHEPARD-HOLTON GRANT

Date

Organizational Information

Name of Organization _____

Address _____

Phone _____

E-mail and/or Website (if appropriate)

Executive Director

Contact person (if other than Executive Director)

Has your organization received a grant from the Oakes Trust before?

_____ Yes

_____ No

Signature of Executive Director

Signature of Board President