2021 Catalogue Application
Overview, Tips and Tricks
Today’s Agenda

1 Who is CFP?
2 Why apply to CFP?
3 Overview of the Application
4 Narrative Section
5 Financial Section
6 Final Selection and Beyond
7 Questions
Who is CFP?

- Started in 2003
- Raised over $45 million for nonprofit partners
- 2200+ participants in Catalogue workshops
# How CFP Can Help

## Raise Your Visibility

<table>
<thead>
<tr>
<th>Feature</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Print Catalogue</strong></td>
<td>Annual printed guide to giving that is sent to over 30,000 regional households and foundations</td>
</tr>
<tr>
<td><strong>Online Giving Portal</strong></td>
<td>Part of CFP website that gets 25,000 monthly visits; hosts your profile and accepts donations on your behalf</td>
</tr>
<tr>
<td><strong>Social Media Support and Amplification</strong></td>
<td>CFP staff can like and support your social media work leading to bigger and more engaged audience</td>
</tr>
<tr>
<td><strong>CFP Blog</strong></td>
<td>Read by 4,000 monthly visits, great way to publish content about your work that you can also link to elsewhere</td>
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## Build Your Capacity

<table>
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<tr>
<th>Feature</th>
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<tr>
<td><strong>Core Curriculum</strong></td>
<td>Required set of four workshops focused on the fundamental parts of development work</td>
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<tr>
<td><strong>Elective Workshops</strong></td>
<td>2+ workshops a month on development, communications, volunteer management, evaluation, and board engagement</td>
</tr>
<tr>
<td><strong>Know Your Neighborhood</strong></td>
<td>Collaboration meetings between nonprofits that are based in, or serve in, similar geographic areas</td>
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<tr>
<td><strong>Targeted Campaigns</strong></td>
<td>Social and print media campaigns throughout the year including Giving Tuesday, Back to School, etc.</td>
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Who Should Apply?

Any local nonprofit with specific budget

1. Registered 501(C)3

2. **Budget**: Between $100,000 and $4 million

3. **Service Area**: Serve people and communities of Greater Washington, and have local headquarters

4. **New**: Cannot apply if accepted into print Catalogue in 2018, 2019, or 2020
# 2021 Application Timeline

## Application Opens December 14!

<table>
<thead>
<tr>
<th>Date</th>
<th>Event</th>
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<tbody>
<tr>
<td>February 17th</td>
<td>Applications are due</td>
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<tr>
<td>February-March</td>
<td>Application review of programs and financials</td>
</tr>
<tr>
<td>Mid-April</td>
<td>Virtual site visits (if needed)</td>
</tr>
<tr>
<td>Early May</td>
<td>Final decisions and notifications</td>
</tr>
<tr>
<td>Summer</td>
<td>Opportunity for customized feedback</td>
</tr>
<tr>
<td>November 1st</td>
<td>2021 Catalogue launches!</td>
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© 2020 Catalogue for Philanthropy: Greater Washington
2021 Application Overview

Competitive Application Process

1. **Long-term Partner:** Partnership is for four years (2021-25)

2. **Competitive:** 200+ organizations will apply

3. **Expert Review:** All applications will be reviewed by members of our 150+ expert community

4. **Due Date:** Applications due Wednesday, February 17th at 5:00 pm

5. **More Info:** Online application and materials at [www.cfp-dc.org/apply](http://www.cfp-dc.org/apply)
2021 Application Overview

 Changes for 2021

1. **Shortened narrative:** Streamlined section and removed word limits

2. **Financial narrative:** How are you coping with COVID-19?

3. **Demographic Information:** Not part of review but will help us make the process more equitable
Application Logistics: Create an Account

Apply to the Catalogue for Philanthropy

Log in here to apply

WHO WE ARE: AN OVERVIEW

The mission of the Catalogue for Philanthropy: Greater Washington is to create strong and vibrant communities by connecting caring citizens with worthy community causes. For donors, this means we take the guesswork out of giving by

QUICK LINKS

Apply Here
Application Guidelines, Instructions and Workshops

cfp-dc.org/apply
Forgot Password?

Catalogue for Philanthropy

Set a New Password

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Your password can't be too similar to your other personal information. Your password must contain at least 8 characters. Your password can't be a commonly used password. Your password can't be entirely numeric.

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application.cfp-dc.org
Three Parts of the Application

Tell Us Your Story

- Basic organizational information
- Organizational narrative about impact
- Basic financial information and ratios
Completing the Narrative

Tell Us Your Story and Impact

1. Basic Organizational Information

2. Narrative Section 1: Who are you?

3. Narrative Section 2: What do you do?

4. Wish List: What do you need?
## Narrative Questions

### How to make your story stand out

<table>
<thead>
<tr>
<th>What community need do you address?</th>
<th>What makes your program or approach to work interesting?</th>
<th>How does racial equity thinking inform your work?</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>What is your local impact?</strong></td>
<td><strong>Short and long-term goals</strong></td>
<td><strong>What is your role in the community?</strong></td>
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</table>
Helpful Hints

Make Your Narrative Unique and Compelling

- Make sure your answers build a cohesive story
- Have someone else read it over

- Normal programming & COVID-19 pivots
- Use language from other grant applications
- Remember your audience!
Program Review

Who are the reviewers?

Local
Experts who know this region

Professional
Trained and experienced in our process

Consensus
Multiple scores averaged
Program Review

Scoring your Application

What is your local impact?  
Who do you make a difference for?  
Are your programs well-managed?

How do you adapt to community need?  
Positive and constructive feedback
A Quick Look at Financials

2021-2022 Catalogue Application

Basic Information
1. Organization Information
2. Application Contacts
3. Catalogue History
4. Quick Facts

Narrative
5. Who Are You?
6. What Do You Do?

Wish List
7. Four Wish List items

Financials
8. Financial Contact Information

Financial Uploads

Fiscal Year End (mm/dd/yy) *

Is your organization a local branch or affiliate of a national organization for which the national organization files a 990 and supplies an audit? *

If you are a local branch or affiliate of a national organization, please submit internal financial statements for your local office in addition to your national organization’s financials. For fill-in-the-blank questions, please provide information for your local office only.

- Yes
- No

A. Proof of 501(c)(3) status *

Copy of IRS 501(c)(3) determination letter

Choose File No file chosen
Financial Year

■ 2019 – two years ago
  – Fiscal year ended June 30, 2019, or December 31, 2019, etc

■ 2020 – past completed year
  – Fiscal year ended June 30, 2020, or December 31, 2020, etc

■ 2021 – the current/upcoming fiscal year
  – Fiscal year ending June 30, 2021, or December 31, 2021, etc
Information Needed

- Budget vs. Actual for 2 most recent completed fiscal years
- Financial statements for 2 most recent completed years (statement of activity, statement of financial position, & statement of functional expenses)
- Latest 990 or 990EZ filed
- Budget for current fiscal year
- List of major funders with projected contributions for next/upcoming fiscal year
Financial Review Focus

Stability
Is your organization at risk of shutting down?

Trusted
Are your finances well managed and controlled?

Ratios

- Administrative and Fundraising Cost Above 40%
- ED Salary Over 25% of Budget
- Multiple Years of Loss or Over 50% Reduction in Net Assets
Review and Submit

Basic Information

Organization Information

Organization Name
Elyse Test

Legal Name (if doing business under a different name)

EIN/Tax ID
2020

Street Address
1

Final Review & Submit

Please review the contents of your application. When you are ready, you may submit it by pressing the button below.

Take a moment and print your application from this page for your records.

← Back to Edit Responses

Submit for Review
Final Selection and Beyond

Accept
Requirements of Participation and Non-Discrimination Policy

Announce
Class of 2021-22 partnership

Attend
CFP events and trainings
Questions?

Email Elyse (enelson@cfp-dc.org) if you need any help!