2020 Catalogue Application
Overview, Tips and Tricks
Today’s Agenda

1 Who is CFP?

2 Why apply to CFP?

3 Overview of the Application

4 Getting Started

5 Narrative and Financials

6 Final Selection and Beyond

7 Questions
Who is CFP?

- Started in 2003
- Raised over $40 million for nonprofit partners
- 2200+ participants in Catalogue workshops
How CFP Can Help

### Raise Your Visibility

**Print Catalogue**
Annual printed guide to giving that is sent to over 30,000 regional households and foundations

**Online Giving Portal**
Part of CFP website that gets 25,000 monthly visits; hosts your profile and accepts donations on your behalf

**Social Media Support and Amplification**
CFP staff can like and support your social media work leading to bigger and more engaged audience

**CFP Blog**
Read by 4,000 monthly visits, great way to publish content about your work that you can also link to elsewhere

### Build Your Capacity

**Core Curriculum**
Required set of four workshops focused on the fundamental parts of development work

**Elective Workshops**
2+ workshops a month on development, communications, volunteer management, evaluation, and board engagement

**Know Your Neighborhood**
Collaboration meetings between nonprofits that are based in, or serve in, similar geographic areas

**Targeted Campaigns**
Social and print media campaigns throughout the year including Giving Tuesday, Back to School, etc.
## 2020 Application Timeline

### Application Season is Here!

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<tr>
<th>February 7th</th>
<th>February-March</th>
<th>Mid-April</th>
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<tr>
<td>Applications are due</td>
<td>Application review of programs and financials</td>
<td>Site visits (if needed)</td>
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<th>Early May</th>
<th>Summer</th>
<th>November 1st</th>
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<td>Final decisions and notifications</td>
<td>Opportunity for customized feedback</td>
<td>2020 Catalogue launches!</td>
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2020 Application Overview

Competitive Application Process

1. **Long-term Partner:** Partnership is for four years (2020-24)

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 Friday, February 7th at 11:59pm

5. **More Info:** Online application and materials at [www.cfp-dc.org/apply](http://www.cfp-dc.org/apply)
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 2017, 2018, or 2019
Application Logistics: Create an Account

Apply to the Catalogue for Philanthropy

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
Three Parts of the Application

Tell Us Your Story

- Basic organizational information
- Organizational narrative about impact
- Basic financial information and forms
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 Narrative Section 3: What is your capacity?

5 Wish List: What do you need?
Helpful Hints

Make Your Narrative Unique and Compelling

What is your local impact?

What makes your program or approach to work interesting?

What is your background or experience with individual donors?

What are your goals for the Catalogue partnership?

What is the story of your finances and organizational structure?

Remember your audience!
A Quick Look at Financials

Audited statements are NOT required

Browse and upload financial documents required for the application

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2020-2021 Catalogue Application

**Basic Information**
1. Organization Information
2. Executive Director/Head of Organization
3. Contact Person for this Application
4. Board Chair
5. Catalogue History
6. Additional Information
7. Quick Facts

**Narrative**
8. Who Are You?
9. What Do You Do?
10. Your Capacity

**Wish List**
11. Please list four WISH LIST items

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**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?**

*Please note – If you are a local branch or affiliate of a national organization, you will need to submit internal financial statements for your local office in addition to the national organization’s financials. Please make sure to provide this additional information for each instance in which you submit national information. For questions H through R, please provide information on 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
Information Needed

- Latest audited financial statements (if available – not required)
- Financial Report as of 12/31/2019 (regardless of your year end)
- Latest 990 or 990EZ filed
- Budget vs. Actual for 2 most recent completed fiscal years
- Budget for next/upcoming fiscal year
- List of major funders with contribution amounts for the latest completed fiscal year
- List of major funders with projected contributions for next/upcoming fiscal year
Major Items on the Form

- **Revenue**
  - Various sources
  - Concentration of revenue

- **Expenses**
  - Program services
  - Administrative costs
  - Fundraising costs
  - Salaries
Financial Year

- 2018 – two years ago
  - Fiscal year ended June 30, 2018, or December 31, 2018, etc

- 2019 – past completed year
  - Fiscal year ended June 30, 2019, or December 31, 2019, etc

- 2020 – next incomplete year/open year
  - NPO uses calendar year, future year refers to year ending December 31, 2020
  - NPO uses fiscal year, future year refers to year ending June 30, 2020, September 30, 2020, etc.
Items Not Included in Revenue and Expense

- Gifts-in-kind; including inventory, long-lived assets, and items used for fund-raising purposes
- Contributed services
- Contributed utilities or use of long-lived assets
Ratios

- **Total Administrative and Fundraising Costs / Total Expenses**
  - Is this 35% or more?

- **Total Fundraising Costs / Total Expenses**
  - Type of fundraising activities
  - Allocation of fundraising expenses to programs

- **Total Salaries Expense / Total Expenses**
  - Is majority paid to Executive Directors/CEO?
  - Is ED/CEO’s salary 15% or more of total expense?
Final Selection and Beyond

Accept
Requirements of Participation and Non-Discrimination Policy

Announce
Class of 2020-21 partnership

Attend
CFP events and trainings
Questions?

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