

# 2020 Catalogue for Philanthropy Application Instructions

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*Any narrative or financial information submitted to the Catalogue is kept confidential between our staff and reviewers.*

**Please note:** You may complete the application all at once or in multiple sessions by saving as you go and returning at your convenience. We recommend that you consult this document and prepare your written statements in a Word document prior to beginning your application. All guidelines, including links to FAQs, can be found [here](#). When you are ready, you'll find the [online application here](#).

**Completed applications are due no later than Wednesday, February 12<sup>th</sup>, 2020 at 5:00 PM (submitted through our online application site).**

**There are four parts to the application:**

## **Part I: Basic Organizational Information (#1-7)**

1. Basic organizational information & area(s) served
2. Contact information for your Executive Director
3. Application contact information (if different from ED)
4. Contact information for your Board Chair
5. Application history to the Catalogue: type of application (new participant or existing participant), number of times you've applied before, and how you heard about the Catalogue
6. Additional Information: 501(c)3 status, EIN
  - If you are not an independent 501c3, do you have a fiscal sponsor? If so, please list the name of the sponsoring organization.
7. Quick Facts including:
  - Program area: You will select a primary and two secondary program areas.
  - Year Founded & Budget Size
  - Number of Full Time and Part Time Staff
  - Is the founder serving as Executive Director (or a similar position, such as President or CEO)?
  - 10-word organizational description: who you are/what you do. For example, "environmental group seeking cleaner environment through projects for urban teens," or "dance presenter with programs for at-risk youth." (Note: please don't say "we are a 501(c)(3) nonprofit in Maryland"; this doesn't tell our reviewers anything about you!)

## Part II: Narrative

The narrative is divided into a set of 14 questions. Organizations that are applying to be re-featured in the Catalogue will answer one additional question. In general, when answering these questions, ask yourself *“If someone from outside the community were to read this, would they have a clear picture of the scope and size of the issue we are tackling, why our programs or services are appropriate and necessary, and what impact we are having?”*

### Section 1: Who Are You?

- A. About you:** What is your mission? What vision do you have for the community? What values guide your operations? *(Word limit: 200 words)*
- B. History:** Share a brief history of your organization, explaining how and why it came into being. If there is an interesting story, such as your founder’s story, a significant period of growth in your history, or a change in your focus, please share it! *(Word limit: 250 words)*
- C. What community need or social issue do you address?** Make sure to lay out the landscape for someone who isn’t familiar with the issue and explain how you see your work in the context of the field as a whole. Then, identify your target population and how it benefits from your work. *(Word limit: 500 words)*
- D. Differentiate yourself:** What niche do you fill? What are you best (or only!) at? What makes you different from other, similar programs? *(Word limit: 300 words)*
- E. Connect yourself:** What partnerships or collaborations have you set up to help you strengthen your impact? *(Word limit: 300 words)*

### Section 2: What Do You Do?

- A. Programs and services:** What programs or services do you offer to address the need you have identified? How are these programs structured? Describe them fully. *(Word limit: 500 words)*
- B. Short and long-term goals:** What are the organization’s top 3 goals, either programmatic or operational, for the coming year (12 months), and where does it see itself in 3-5 years? How are you positioned to meet these goals? *(Word limit: 350 words)*
- C. Challenges:** What are the barriers, both internal and external, that present challenges in carrying out your work? How do you plan to address these challenges? *(Word limit: 250 words)*
- D. Your impact:** What is your impact to date, and what metrics or stories can you share from your last fiscal year? (We understand that “impact” has different meanings for different applicants.) *(Word limit: 500 words)*
- E. Honors and Awards:** If you have honors and awards to your credit, please share them here. *(Word limit: 200 words)*

### **Section 3: Your Capacity**

- A. Your Board:** List your board members and their occupations/affiliations. Note your board giving policy, the number of board members who support you, and the percentage of your overall revenue that their donations comprise.
- B. Capacity for a Catalogue partnership.** In addition to introducing you to new donors via our print Catalogue and other outreach, the Catalogue for Philanthropy provides many different resources for our network of nonprofits, including professional development opportunities through The Learning Commons, access to customized marketing materials, and opportunities to present your work to donors. How is your organization poised to leverage these resources to make the most of a four-year partnership? Who are the staff relevant to a Catalogue partnership? What is their capacity (ability/time) to work with our team? (*Word limit: 250 words*)
- C. Experience with individual donors:** How would you describe your history of raising and stewarding funds from individual donors? Please be specific. If you don't have much experience with individual giving, what are your plans for donor cultivation and stewardship? (*Word limit: 250 words*)
- D. Sources of funding by category:** Give your total revenue and expenses for your most recently completed fiscal year and the percent of funds you receive from different sources: board, individuals, foundations, corporations, government, special events, earned income, in-kind/pro bono, other. Please indicate the types of goods or services that are included in your in-kind revenue (if applicable).

### **Part III: Wish List**

#### **Wish List:**

Please complete a 'Wish List' that will help Catalogue readers understand in concrete terms what a donation to your organization will mean to you. Please fill out an "item" for each of the following four categories: \$100; \$500; \$1000; OTHER (your choice)

Here are some examples:

- \$100: gasoline for 2 weeks of deliveries to elderly shut-ins;
- \$500: half the art supplies for our summer program;
- \$1000: counseling for 10 survivors of domestic abuse for 1 month;
- \$15,000(OTHER): scholarship for 1 student for an entire year

### **PART IV: Financial Information**

We will ask you to upload a set of standard financial documents and provide some specific financial data. We will provide information on how to complete this section as part of our Application Overview, Tips and Tricks workshop taking place on four dates throughout the winter. Attendance at a workshop is not required but is **STRONGLY RECOMMENDED** if you have not completed an application with us before.

Financial Documents Required:

- A. **Proof of 501(c)(3) status** - Copy of IRS 501(c)(3) determination letter.
- B. **IRS Form 990/990EZ** - Copy of your most recent 990 or 990EZ. *Please note the month and year of your fiscal year end on the top of the 990 before submitting.*
- C. **2018 budget vs. actual.**
- D. **2018 audited, reviewed, compiled, or internal financial statements.** Your financial statements should include an income statement/statement of profit and loss, your balance sheet, and a statement of functional expenses (including fundraising and G&A allocations).\*
- E. **2019 budget v. actual.**
- F. **2019 audited, reviewed, compiled, or internal financial statements.** Your financial statements should include an income statement/statement of profit and loss, your balance sheet, and a statement of functional expenses (including fundraising and G&A allocations).\*
- G. **2020 organizational budget** - Current year projected budget. If you are an organization with an fiscal year end date of 3/31/20 or 6/30/20, you are welcome to submit a 2020 budget v. actual statement for your current fiscal year to date, ending on the most recently completed quarter.\*
- H. **Anticipated sources of 2020 funding** - A list of anticipated major sources of funding sorted by category (board, individual, foundation, government, other). Please list the names of major foundation or government funders. You do not need to list individuals by name if you would prefer to protect their identities.
- I. In 2018, what was your total revenue?
- J. In 2018, what were your total expenses?
- K. In 2019, what was your total revenue?
- L. In 2019, what were your total expenses?
- M. In 2019, what was the annual salary of your Executive Director?
- N. In 2019, what was the total salary your organization paid to all staff? Do not include benefits.
- O. In 2019, what were your total general and administrative expenses?
- P. In 2019, what were your total fundraising expenses?
- Q. In 2018, what were your net assets at the end of the year?
- R. In 2019, what were your net assets at the end of the year?

**\*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.**

**Questions:** Before you email or call, please read our [Frequently Asked Questions \(FAQ\)](#).

If you don't find the answers you are looking for, call us at 202-248-5034, or email us at [info@catalogueforphilanthropy-dc.org](mailto:info@catalogueforphilanthropy-dc.org)

Non-Discrimination:

The Catalogue for Philanthropy does not discriminate on the basis of race, gender, creed, ethnicity, religion, sexual orientation, age, or disability. Organizations must agree to our non-discrimination policy in order to be eligible to apply.

Catalogue for Philanthropy: Greater Washington is a 501(c)(3) nonprofit organization.