

# 2021 Catalogue for Philanthropy Application Instructions

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*Our staff and reviewers keep your narrative and financial information confidential.*

**Please note:** You may complete the application all at once, or you can save as you go and return later. We recommend that you use the questions below to prepare your responses offline before beginning your application. All of our guidelines and answers to FAQs can be found [here](#). When you are ready, you'll find the [online application here](#).

**Completed applications must be submitted through our online site no later than Wednesday, February 17<sup>th</sup>, 2021 at 5:00 PM.**

*There are five parts to the application. While there are not specific word counts for each response, we encourage brevity (no more than 2-4 paragraphs) for each question. Our intent is for you to share your organization's story however is most effective.*

*Programmatic reviewers will focus their attention on Section 2, while financial reviewers will focus on Section 4. All other information will be used for reference only.*

## Part I: Basic Organizational Information

- Your 501(c)(3) status and EIN
- Location & area(s) served
- Contact information for your Executive Director, Board Chair, and application writer (if different from your Executive Director)
- Catalogue application history: Are you a new partner or existing partner? How many times have you applied before? How did you hear about the Catalogue?
- Quick Facts including:
  - Program area: Select a primary and up to two secondary program areas
  - Year founded, budget size, and number of staff
  - 10-word organizational description: a quick snapshot of who you are/what you do. For example, "champions the dignity and rights of vulnerable DC seniors" or "closes the achievement gap for youth in Ward 5".

## Part II: Narrative

The narrative includes 11 questions divided into two sections. In general, when answering these questions, ask yourself *"If someone from outside the organization were to read this, would they have a clear picture of the scope of the issue we are tackling? Would they know why our programs are appropriate and necessary? Would they see our impact?"*

\*Please note: This is the only part that programmatic reviewers are using to evaluate your application.

## **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? *(1-2 paragraphs)*
- 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! *(1-3 paragraphs)*
- C. Your Board:** List your board members and their occupations/affiliations. Note your board giving policy and the number of board members who support you.
- D. 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. *(2-3 paragraphs)*
- E. Equity:** How does your thinking about racial equity inform how you develop and implement programs? *(1-2 paragraphs)*
- F. Differentiate yourself:** What niche do you fill? What are you best (or only!) at? What makes you different from other, similar programs? *(1-3 paragraphs)*

## **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. Note: Please focus the majority of your answer on the services you provide in a typical year, but also include a description of how your programs have pivoted during the COVID-19 pandemic. *(3-4 paragraphs)*
- B. Short and long-term goals:** What are the organization's top 3 goals, either programmatic or operational, for the coming year (12 months)? Where does it see itself in 3-5 years? How are you positioned to meet these goals? *(2-3 paragraphs)*
- 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? *(1-2 paragraphs)*
- D. Your impact:** What is your impact to date, and what metrics or stories can you share from your last fiscal year? How do you measure your impact? *(3-4 paragraphs)*
- E. Community connection:** Describe your role in your community and the other organizations or groups that work alongside you to serve your clients. How do you get feedback and learn from the community you serve to continually improve and realign your work? *(1-3 paragraphs)*

## 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 food deliveries;
- \$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. For questions that ask for 2021 data, please use information from your current fiscal year. For questions that ask for 2020 data, please use financial information from your most recently completed fiscal year, and so on.

For parts D and F, financial statements should include: 1) a statement of activity/statement of profit and loss, 2) your balance sheet, and 3) a statement of functional expenses (how much you spend on programs, fundraising, and general and administrative expenses).

### Financial Documents Required:

- A. **Proof of 501(c)(3) status** – A copy of your IRS 501(c)(3) determination letter.
- B. **IRS Form 990/990EZ**
- C. **2019 budget vs. actual revenue and expenses**
- D. **2019 audited, reviewed, compiled, or internal financial statements**
- E. **2020 budget v. actual revenue and expenses**
- F. **2020 audited, reviewed, compiled, or internal financial statements**
- G. **2021 organizational budget** – A copy of your current year projected budget. *You may include year-to-date actuals if it helps explain your financial position.\**
- H. **Anticipated major sources of 2021 funding** – Please list your major funders and the amount you expect to receive. You do not need to list individuals by name if you would prefer to protect their identities.
- I. **Sources of funding by category** - 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).

### **From your statements of activity (also called profit and loss statements)\*:**

- How much were your total revenue and expenses in 2019?
- How much were your total revenue and expenses in 2020?
- In 2020, what was the total salary your organization paid to all staff? Do not include benefits.

**From your internal records\*:**

- In 2020, what was the annual salary of your Executive Director?

**From your 2020 statement of functional expenses\*:**

- What were your total general and administrative expenses and your fundraising expenses in 2020?

**From your balance sheets\*:**

- What were your net assets at the end of the year in both 2019 and 2020?

**Financial narrative:** What else should we know about the financial information you have provided?

**\*Please note – 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.

## **Part V: Demographic Information**

This section will help the Catalogue improve future applications and make our process more equitable. Our review team will not evaluate your responses in this section.

1. Does your Executive Director identify as BIPOC (Black, Indigenous, and/or Person of Color)?
2. How does your Executive Director describe their gender?
3. How many board members do you currently have?
4. How many of your board members identify as BIPOC (Black, Indigenous, and/or Person of Color)?

**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).

To help you complete the application, we will be offering a virtual Tips and Tricks Workshop on four dates throughout the winter. Attendance is not required but is strongly recommended if you have not completed an application with us before.

### **Non-Discrimination:**

Unlawful discrimination has no place at the Catalogue for Philanthropy. Our core values include a commitment to equal opportunity and inclusion. We require all organizations that apply to affirm their commitment to core values of non-discrimination consistent with [ours](#).

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