

2017 Catalogue for Philanthropy Application Instructions

Please note: You may complete the application one or more parts at a time, save as you go, and return at your convenience. The application will time out if you leave it open on your desktop, so please save as you go. 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 Monday, February 27th, 2017 at 11:59 PM (submitted through our online application site).

There are three parts to the application:

Part I: Basic Organizational Information (#1-6)

Part II: Narrative (#7.1 - 7.18)

The narrative is divided into a set of 18 questions (approximately **2500-3000 words total**). Organizations that are applying to be re-featured in the Catalogue will answer two additional questions. 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?"*

- 7.1 **About you:** Who are you? What do you do? Why does it matter?
- 7.2 **History:** Share a brief history of your organization, explaining how and why it came into being. If there is an interesting story, please share it!
- 7.3 **What community need 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.
- 7.4 **Differentiate yourself:** What niche do you fill? What are you best (or only!) at? What makes you different from other, similar programs.
- 7.5 **Connect yourself:** What makes you a good partner? Do you collaborate with other nonprofits in the community? If so, which ones, and how do these collaborations work?
- 7.6 **Strategies and programs:** What strategies are you employing to address the need you have identified? What specific programs are part of that strategy? Describe them fully.
- 7.7 **Short and long-term goals:** What are the organization's goals for the coming year (12 months) and where does it see itself in 3-5 years? How are you positioned to meet these goals?
- 7.8 **Challenges:** What are the barriers, both internal and external, that present challenges in carrying out your work?

- 7.9 **Accomplishments:** Describe your major accomplishments to date. In addition, if you have honors and awards to your credit, please share them here.
- 7.10 **Your impact:** Identify your target population and how it benefits from your work. How do you measure or define your impact and what is your impact to date? (We understand that “impact” has different meanings for different applicants.)
- 7.11 **Overall resources:** Describe the resources (financial), capacity (staff and volunteers), and connections (partnerships, networks, pro bono aid) that support you in fulfilling your organization’s mission and meeting your goals.
- 7.12 **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 their donations comprise.
- 7.13 **Experience with individual donors:** How would you describe your history of raising and stewarding funds from individual donors? Be specific.
- 7.14 **Revenue and Expenses:** Total revenue and total expenses for your most recently completed fiscal year. Budgets for fundraising/G&A (general and administrative), and programs and the percent for each. If special circumstances apply, please note these. Do you have a current 990 on file and if so what is the most recent year of your 990 filing? Do you conduct an audit?
- 7.15 **Sources of funding by category:** Give the total amount you raise, and the percent of funds you receive from different sources: board, individuals, foundations, corporations, government, special events, earned income, other.
- 7.16 **Plan B:** If a majority (over 50%) of your funding is from a single source (e.g. government funding) what is your "plan B" should this funding be cut or sizably reduced? (Only answer this question if relevant.)
- 7.17 **Capacity for a Catalogue partnership.** How are you equipped to make the most of this four-year partnership? Who are the staff relevant to a Catalogue partnership? What is their capacity (ability/time) to work with our team?
- 7.18 **Milestones.** What milestones (other than budget growth) do you hope to reach as a result of your partnership with the Catalogue?

ONLY organizations applying to be re-featured in the Catalogue are required also to answer the following two questions:

- 7.19 **Benefits of Being Featured in the Catalogue:** What was the biggest benefit(s) for your organization of being featured in the Catalogue for Philanthropy? Please be specific.
- 7.20 **Planned Engagement with the Catalogue:** If accepted, what do you anticipate your engagement with the Catalogue will look like going forward? Please be realistic. If you were able to take advantage of the Catalogue's resources (online tools, trainings, etc) describe their impact. If not, what positions you to make better use of them in the coming year should you be selected.

PART III: FINANCIAL SUPPLEMENT

We will ask you to upload a set of standard financial documents along with a financial worksheet. We will host two financial workshops to review the financial supplements including the worksheet. Attendance at a workshop is not required but is **STRONGLY RECOMMENDED**. Financial workshops will take place in early and late February, dates TBA. Additional online financial resources & FAQs can be found under “Financial Links” [here - cfp-dc.org/rfp](http://cfp-dc.org/rfp).

Acceptable file formats: .xls, .doc, .pdf

Financial Documents Required:

1. **Proof of 501(c)(3) status** - Copy of IRS 501(c)(3) determination letter.
2. **IRS Form 990/990EZ** - Copy of your most recent 990 or 990EZ. If you are a local affiliate of a national organization that files a national 990, please upload the national 990 **and** include local financial statements for the years requested. ***Please note your FYE (fiscal year end) on the top of the 990 before submitting.***
3. **2015 FYE information (budget v. actual).**
4. **2015 audited, reviewed, compiled, or internal financial statements.** *It is always a good idea to provide the best information you are in a position to give us.* Please note, salaries line should clearly detail number of paid employees, both full time and part time, and their positions. Fundraising and G&A should be clearly delineated.***
5. **2016 FYE information (budget v. actual).**
6. **2016 audited, reviewed, compiled, or internal financial statements.** *Again, it is always a good idea to provide the best information you are in a position to give us.* Please also include unaudited information through 12/31/2016. Salaries line should clearly detail number of paid employees, both full time and part time, and their positions. Fundraising and G&A should be clearly delineated.***
7. **2017 organizational budget** – Current year projected budget, with salaries and G&A clearly delineated. If you are an organization with an FYE date of 3/31/17 or 6/30/17, you are welcome to submit a 2017 budget v. actual statement for your current FY to date, ending on the most recently completed quarter.
8. **Anticipated sources of 2017 funding** - A list of anticipated major sources of funding by category (board, individual, foundation, government, other). You do not need to list individuals by name if you would prefer to protect their identities.
9. **Financial Worksheet** – Download a copy of the Financial Worksheet and complete. For help in doing so, please make sure to attend one of our financial workshops. The worksheet can be found under “Financial Links” [here - cfp-dc.org/rfp](http://cfp-dc.org/rfp).

*****Please note – If you are a local branch or affiliate of a national organization** supplying an audit, you will also need to submit internal financial statements for the local entity. Please make sure to provide this additional information for each instance in which you submit national information.

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 202-955-6538, or email us at 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.

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