



# Grantseeker Packet

Updated 2026



## Grantseeker Resource Packet

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# Welcome!

Whether you are a first-time applicant or have received funds in the past, please review this packet for all updates to our process. This information is updated at least once a year.

Once you've reviewed, call us at (901) 684-1564 if you have questions or need advice on how to proceed or prepare your grant request. We'll do our best to provide direction and guidance. Our staff are always available to assist potential grant applicants.

## Contact Us

Questions about areas of focus, programs, what to include in your application? Please contact one of the following programs staff:

- Tiffanie Grier, Program Officer, [tgrier@assisifoundation.org](mailto:tgrier@assisifoundation.org)
- Alyssa Nucaro, Program Officer, [anucaro@assisifoundation.org](mailto:anucaro@assisifoundation.org)
- Ernestine Smith, Sr. Program Officer, [esmith@assisifoundation.org](mailto:esmith@assisifoundation.org)

Need technical assistance with the portal? Please contact:

- Taylor Wamble, Director of Grants Management, [grants@assisifoundation.org](mailto:grants@assisifoundation.org)

## Basic Eligibility

If you have any questions regarding the following, please contact us prior to submitting an application. You will find specific eligibility criteria in other sections of this packet. Please read thoroughly.

1. **IRS status:** Your organization must currently hold tax-exempt status under Section 501(c)(3) of the IRS Code.
2. **Geographical Location:** Both your organization and the project or program you are proposing must be located within and serve the Greater Memphis area.
3. **Faith-Based Organizations:** Organizations that exclude individuals based on their faith are not eligible for funding. This includes, but is not limited to, requiring participants, staff, or board members to sign a statement of faith affirming specific religious beliefs or limiting services, employment, or leadership opportunities to individuals of a particular faith. Your organization is required to certify that it welcomes individuals of all faith traditions, both Christian and non-Christian. More details below.

## Eligibility Compliance

There are two checkpoints where you will be asked to confirm compliance with our eligibility requirements.

1. In the eligibility quiz which is required before attempting to open a new application. It will not allow you to progress to an application if you do not comply.
2. In the Certification and Acceptance Form, which must be signed by your Executive Director and a board member and submitted with your application.

We sincerely appreciate your accurate responses to the eligibility quiz, which helps ensure your efforts are invested in requests that meet our criteria.

## Quarterly Eligibility

While many organizations may apply at any time, please take note of the following if you are an Arts, Education or Digital News nonprofit. This allows us to consider all applications of these types all at once.

- **Arts and Culture** requests are accepted in the first quarter only.

- **Education** or education-related requests are accepted in the second quarter only.
- **Digital News** requests are accepted only in the third quarter.

## Exclusions

**The Foundation does not make grants for the following:**

- Individuals (including personal financial assistance or scholarships)
- National fundraising campaigns
- Events (including but not limited to): auctions, dinners, fundraisers, festivals, health fairs, conferences, tournaments, workshops, or event tickets
- Religious outreach projects that serve only one congregation
- Political organizations, candidates, or lobbying efforts
- Financial shortfalls, such as recurring budget deficits or government funding cuts
- Athletic competitions, including tournament fees and travel expenses
- Evangelization or proselytizing efforts
- Ongoing program expenses, such as annual workshop series, membership dues, regularly needed medical equipment, or patient care costs
- Regularly supported activities of fundraising organizations
- Sponsorships
- Emergencies
- Charter Schools
- Summer Camps

## New Organizations

For organizations in operation for less than two years, please contact a program officer prior to completing an application. We can help you determine if you have the appropriate documentation to submit a complete application. The foundation requires two years' worth of financial statements to be attached to your application.

Consider our Before You Ask class as you are preparing to seek funding from grantmaking institutions.

New organizations are at risk of tipping, which is described below. We are unable to consider requests which are disproportionate to your organization's budget.



# Tipping Exclusion

Tipping is an IRS rule where a 501(c)(3) public charity accidentally loses its public status and gets reclassified as a private foundation.

**The Cause:** It happens when a public charity fails the IRS public support test. This test requires at least one-third of an organization's funding to come from the general public or government.

**The Trigger:** A single massive grant or gift from one private donor or foundation can "tip" the math. Any individual gift larger than 2% of the charity's total income is capped in public support calculations, inflating the total support pool without adding to public backing.

**The Impact:** Your nonprofit will become a private foundation. Private foundations face stricter IRS rules, excise taxes, and limits on certain types of grants, and some major donors stop giving because of these legal restrictions.

If you are a new organization and/or your operating budget is less than the amount you intend to request, be sure to reach out to a program officer to discuss prior to completing an application.

# Faith Based Organizations

This note is an effort to help clarify the intent of the nondiscrimination clause. We acknowledge and appreciate your statements of values and faith that guide the practices of yours and many other faith-based organizations. If, however, your organization precludes or prohibits individuals of a different faith from participation, or receiving services from your organization, and/or from serving on the governing board of your organization, the Foundation asks that you seek funding from other sources. We appreciate the values of principles and not changing them for either expediency or gain. To clarify further, even if you have volunteers, employees, and serve clients from ALL faith traditions, if you have never had non-Christians on your board and have no plans to select non-Christians to serve on the board, our request is that you please not evade this issue by claiming to have no document to explicitly prohibit their membership as part of the governing body. We have sometimes accepted applications in good faith with the expectation that faith-based organizations behave ethically and tell the whole truth, only to be told by a peer organization that we have been misled. We ask that you "walk your talk" and not hide your light.

The Assisi Foundation of Memphis, Inc. owes its legacy to Christians and non-Christians who built a hospital, whose eventual sale resulted in its formation. As a private Foundation, we are guided by a commitment to serve individuals and organizations within our community irrespective of ethnicity, gender, creed, national origin, religion, or disability status. We trust that the value you provide to others and the community will merit consideration from donors who may have a different history and may be guided differently.

## Eligibility Checklist

- ✓ Current 501(c)(3) status
- ✓ Meets Faith-nondiscrimination criteria – see full statement above
- ✓ In operation and provide services within our geographical funding area. Meaning you have a local address, as well as local staff/board members.
- ✓ Financial track record – if you do not have a formal audit, attach two years' worth of unaudited financials. Financial records are essential for an application review.



# Application Process

All communication from the Foundation regarding your application will come by email. Please note that the email that you use for your Executive Contact within the application will be used. We strongly discourage the use of a general email here (e.g. info@orgname.org). Please use a direct email address that is checked often.

Please note that ineligible or incomplete submissions will not be accepted. We will contact you to make you aware of what is needed and your application will be re-opened to allow you to make edits. If you are unable to resubmit your application by the deadline, we are happy to consider your application in the next eligible quarter.

1. **Submit Application:** Submit a complete application using the grants portal with all proper attachments in PDF format.
2. **Initial Review:** Applications are reviewed for eligibility and compliance. If your submission is incomplete or not in compliance with all requirements, it will be re-opened for you to submit again. Complete and eligible requests are processed further.
3. **Application is Processed:** An interview is scheduled by email using a Calendly scheduling link. You are assigned a program officer contact.
4. **Board Decisions:** You will be notified of board decisions shortly after the board meeting.

## Important Considerations

Please note that our entire process flows through the applicant organization as the potential grantee. Please contact us ahead of opening an application if you have special circumstances around your application, which may include fiscal sponsors, multiple branches, and unusual organization structure.

### Applicant Organization – Legally Responsible Entity

Applications must be submitted by the organization that will receive potential funding. This means the legal entity to which the grant check could be written must be the one applying and must be within our funding area.

### Executive Contact – Legally Responsible Party

The Executive Contact entered in the application should be the legally responsible party, who will sign on your organization's behalf. The Executive Contact is required to sign the following agreements:



- The certification and acceptance document (which must be uploaded with the application).
- The grant agreement if the organization is awarded funding. If the applicant organization has other required signers, those individuals' approvals/signatures must be provided before submission to avoid delays.

## **Application Checklist**

- ✓ Meets eligibility criteria (see checklist)
- ✓ Review this packet in its entirety. We make updates to this packet very regularly.
- ✓ Use the application Word doc linked on the website to gather all information which can then be transferred to the form.
- ✓ Register as a portal user
- ✓ Open and complete an application
- ✓ Submit application
- ✓ Monitor your email closely for any follow-up requests





## Quarterly Deadlines

The Foundation accepts applications on a quarterly basis. Please review the deadlines below to determine when you are eligible to apply.

We ask that you submit your application close to the deadline to ensure we have the most up-to-date information. We recommend submitting no earlier than one month prior to the deadline.

If you need clarification about whether your organization falls into the Arts, Education, or Digital News category, please reach out before applying. We want to make sure your time is spent on an eligible application.

Specific dates are accessible from The Foundation's website.

<https://assisifoundation.org/for-grantseekers/#application-dates>

- **1st Quarter:** Mid-November (preceding year)
- **2nd Quarter:** Mid-February
- **3rd Quarter:** Mid-May
- **4th Quarter:** Mid-August

## Notification Schedule

You will be notified about board decisions promptly by phone or email.

- **1st Quarter:** Early February
- **2nd Quarter:** Early May
- **3rd Quarter:** Early August
- **4th Quarter:** Early November

## Deadlines by Category

- **1st Quarter (Mid-November of preceding year):** Arts may only apply this quarter
- **2nd Quarter (Mid-February):** Education-focused may only apply this quarter
- **3rd Quarter (Mid-May):** Digital News may only apply this quarter

Please note that anything that falls outside of arts, education, and digital news may apply for any quarter.

# Application Types

The foundation offers three different application types. Please determine which best fits your needs and feel free to ask us if you have questions.

1. **Program Support** – Funding for projects/programs for constituents or staff. Choose this if your request supports a specific, defined initiative with its own goals, timeline, and budget — even if it's a smaller piece of a larger program. If you can describe what the funding will accomplish, by when, and how you'll measure success, it's likely Program Support. This includes operations/staff focused projects such as technology upgrades and professional development.
2. **Capital Support** – Funding to purchase, renovate or construct facilities. Choose this if your request is part of a large-scale fundraising effort tied to facilities or major infrastructure — such as construction, renovation, purchasing a building, or a significant one-time capital investment. These requests are usually part of a broader campaign with its own fundraising goal and timeline.
3. **General Operating Support** – Funding for operations or capacity building. Choose this if your request supports your organization's overall operations rather than a single initiative. This is unrestricted funding you could use across programs, staff, facilities, or supplies — think of it as funding the organization as a whole, not a specific effort.

Quick overview: If it's a *routine* cost of doing business, it's General Operating Support. If it's a defined initiative with a start and end, it's Program Support. If it's part of a facilities or building effort with a dedicated fundraising campaign, it's Capital Support.



# Special Considerations

## Organizations with Multiple Branches

Requests from large organizations with more than one site must come through the office of the Chief Executive Officer, or equivalent administrative role.

## Schools, Academic Institutions, or Education-Related Program Funding

- Requests from academic institutions with more than one site or with multiple departments (e.g., colleges and universities) must come through the office of the President or equivalent office.
- Requests from public or other school systems must come from the Superintendent's office.

Please select one application to submit as the priority for the annual education application cycle.

## City, County, Municipal, or Government Organizations

If you would like to submit an application, please contact the Foundation before you begin. Please be prepared to discuss any unique requirements or questions, such as:

- a. Who has the authority to submit a request?
- b. Does the person submitting the request have the authority to accept a grant?
- c. Will a grant, if approved, have to go through an additional process like approval from the council, commission, mayor, etc.?
- d. Who assumes liability if the conditions of an approved grant are not met?
- e. Grant letters are typically sent electronically with digital signatures. If your organization cannot accept electronic signatures, what is required instead?

# Endowment Funding

Endowment requests should use the Capital Support application.

If you are applying for funds for an endowment that is not part of a capital campaign request, include the following in the narrative portion of the application type your ask most closely fits your ask (program or general operating).

1. State the amount of your current cash reserve (a minimum of 3–6 months is preferred; ideally 12 months.)
2. Explain how spending percentages (programs/services vs. personnel vs. facilities) are adjusted when there is a funding shortfall, if applicable.
3. Describe the process used if sufficient working capital is not maintained (eliminate programs or services; use line of credit.)
4. Total amount of endowment to be raised.
5. Amount raised to date.
6. Number and amounts of pending requests.
7. Name of Registered Investment Advisor (RIA) for the endowment or process taken by the board to secure appropriate advice to manage the endowment.



# Technology Funding

Please use the **Program Support** application for technology requests. Include the following in the project information field:

- Technology assessment including infrastructure
- Specific goals and objectives
- Implementation strategies
- Funding plan
- Warranties
- Replacement policy for loss, damage, etc.
- Replacement plan when technology becomes obsolete
- Staff development/training
- Risk management procedures
- Evaluation plan



Technology Requests

# FAQS

## **Can I apply as a new organization?**

If your organization is in its startup phase, we highly recommend attending our "Before You Ask" class. This program provides valuable guidance on effectively applying for grants, which can be particularly helpful for new nonprofits.

Please note that we require *all* applicants to attach two years of financial statements to their submission. If your organization does not yet have two years of financial records, it may be premature to apply for funding at this stage.

If you have any questions about your organization's readiness to apply or the financial documentation required, please contact us before beginning an application. Our team is happy to provide guidance to help you determine the appropriate time to submit a funding request.

## **Can I apply if my organization is located outside of your funding area but the program/service provided is local?**

Not likely. Please answer the following questions. If you answered no to any of these questions, we ask that you do not apply. Contact the Foundation prior to starting an application.

- Did a local nonprofit invite your partnership?
- Is your mailing address in our funding area?
- Do you have local staff and board members?

## **Must I have a board of directors in place to apply for a grant?**

Yes. Consider attending Before You Ask if you are a newly established organization.

## **Am I still eligible for funding even if my organization doesn't fall within your areas of focus?**

Possibly. Please contact a program officer to discuss your organization and goals.



## **Can my church apply for funding?**

We cannot accept applications from churches. Church outreach organizations must have a separate, registered 501(c)(3) to be eligible to apply.

## **What is Before You Ask?**

Before You Ask is a free 12-week training program offered by the Foundation. You can find more information on our website. <https://assisifoundation.org/community-initiatives/>

## **Am I required to attend Before You Ask in order to apply?**

Before You Ask is not required. However, new or smaller agencies may find this class helpful before beginning to request funding from foundations.

## **What attachments does the Foundation require in addition to the narrative portion of the application?**

You must attach the following as PDF files. We will not accept any other file type.

- Signed certification & acceptance form
- Last two years' complete Form 990s
- Last two years' complete audited financials or unaudited financial statements
- Board list
- Key individuals list
- Project budget
- Organization budget

The organization's Form 990 must be current, accurate, and filed with the IRS to be considered for funding.

## **Does the Foundation require a special budget format?**

No, please use your agency's format. Be aware that different projects require different budget details. Your budget format should match the nature of your request.

## **What should be in the budget?**



Budgets are commonly divided into two parts: expenses and income. Examples of budgets can be found online.

### **What should I include in the expenses portion?**

Include personnel expenses for all people who work on the project, including employees or independent contractors. For employees, list the title, annual pay rate and if the person will be working less than full time or fewer than 12 months on the project, and the portion of time to be dedicated to the project. Also add payroll taxes and fringe benefits like health insurance. For independent contractors or consultants, list either their flat fee for the project or their hourly rate.

Also include direct expenses, or non-personnel expenses, that you would not incur if you did not do the project. This includes travel, printing, space or equipment rental, supplies, insurance or meeting expenses, like food and drink.

Finally, incorporate administrative or overhead expenses, or non-personnel expenses you will incur whether or not you do the project. Calculate these correctly and accurately. For example, if you pay \$500 a month for office space for four employees, you will continue to rent the office even if the project doesn't happen. If it does happen, the project/program director will occupy one-quarter of the office space, so you can charge for one-quarter of the rent, utilities and administrative costs, like phone, copying, postage and office supplies.

### **What should be included in income?**

Earned income or what people give you in exchange for the service or product. Contributed income, including cash and in-kind contributions. Show cash contributions first and indicate whether each item is received, committed or pending. In-kind contributions are goods or services instead of cash. They include donated space, materials or time.

Note: If you list in-kind contributions as budget income, you must show corresponding expenses. If someone gives you something at a major discount, show the entire expense and then list the portion donated under in-kind contributions. Also, if you are applying for a matching grant, in-kind income may be used as part of the match. This is reviewed on a case-by-case basis.

Other income—if you plan to seek funds from other funders and know you won't receive money from all of them, an "other funders" line is an easy way to indicate how much total money you need to receive from all other sources to balance the budget.

### **What if my organization has an active grant with Assisi right now – can I apply for another?**

We generally do not accept applications from active grantees. Please contact your program officer.

### **Do you accept AI generated proposals?**

While the Foundation does not prohibit the use of AI in the proposal writing process, we have noticed several concerning trends coinciding with the increased popularity of AI tools. Before using AI to assist with your application, please keep the following in mind:

1. **Eligibility Criteria:** We've seen an uptick in submissions that do not meet our stated eligibility requirements. While AI can help with efficiency, it should not come at the expense of thoroughly reviewing and understanding our funding guidelines. Please take the time to carefully assess whether your organization and project are a good fit before applying.
2. **Attention to Detail:** We frequently receive applications containing placeholder text or leftover AI prompts, suggesting a lack of careful proofreading. Before submitting your proposal, review it closely to ensure all information is accurate, complete, and relevant to your specific request.
3. **Post-Submission Communication:** After an initial review, we often need to request additional information or clarify next steps with applicants. However, we've noticed an increase in "ghosting" - applicants failing to respond to these follow-up communications. If you use AI to help prepare your proposal, please still be ready to engage personally with our team if contacted for more details.