Grantseeker Packet

Updated Q4 2026

THE ASSISI FOUNDATION OF MEMPHIS, INC.

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 if 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
- Alyssa Nucaro, Program Officer, anucaro@assisifoundation.org
- Ernestine Smith, Sr. Program Officer, esmith@assisifoundation.org

Need technical assistance with the portal? Please contact:

- Taylor Wamble, Director of Grants Management, 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 help 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 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 in the third quarter only.

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

Organizations must have been in active operation for a minimum of three completed fiscal years with a 501(c)(3) designation or under a fiscal sponsor. Applicants with a fiscal sponsor must have an independent local advisory board or board of directors.

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.

Tipping Exclusion

Understanding "Tipping"

To keep public charity status, a 501(c)(3) generally needs at least one-third of its support to come from the public and/or government sources over a rolling five-year period. A large grant from a single funder, like a private foundation, can throw off that ratio. That's because any one donor's gifts count as "public" support only up to 2% of your total support. If your organization falls below the threshold, the IRS may reclassify it as a private foundation. This is called "tipping," and it brings stricter rules and can make fundraising harder.

Could you be at risk? Ask yourself:

- Does most of our funding come from one or two sources?
- Would Assisi's potential grant change our revenue mix?

How to avoid it: Build a diverse funding base, with support from individuals, government, and more than one foundation.

If you're a small or new organization and have limited revenue, tipping is a concern. You're welcome to speak to a program officer about your potential for tipping prior to considering an application. We will notify applicants if we cannot consider your request due to tipping risk.

A good resource:
https://www.peoplesmediafund.org/resources/hidden-irs-rule-trips-many-nonprofits

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
- ☐ Must be in operation at least three completed fiscal years
- ☐ In operation and provides services within our geographical funding area. Meaning you have a local address, as well as local staff/board members.
- ☐ You meet quarterly eligibility criteria based on arts/culture, education, or digital news applications. Please reach out with questions.

Application Process

1. **Prepare:** Read all instructions linked on our website prior to registering. All information you need to determine eligibility and what to prepare exists on our website. We ask that you register and open an application only after you're sure you are eligible.
2. **Register:** Register as a portal user when you are ready to apply. A registration guide is linked right next to the Registration button on our website.
3. **Submit Application:** Submit a complete application using the grants portal with all proper attachments in PDF format.
4. **Initial Eligibility 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.
5. **Application is Processed**: An interview is scheduled by email using a Calendly scheduling link. You are assigned a program officer contact.
6. **Board Decisions:** You will be notified of board decisions shortly after the board meeting.

Eligibility Review

Please note that ineligible or incomplete submissions will not be processed. 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 updated application by the deadline, we are happy to consider your application in the next eligible quarter. Please note that if you are requesting funding for arts/culture, education or digital media, the next deadline may be a full year later.

All communication will go to the email address you enter for your Executive Contact in the application. 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.

We will email you only once regarding an ineligible or incomplete submission.

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/or an unusual organizational 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). A separate board member signature is also required.
- 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 application submission to avoid delays.

Application Checklist

- ☐ Ensure you meet eligibility criteria (see checklist)
- ☐ Review this packet in its entirety. We update it regularly.
- ☐ Locate and use the application Word doc linked on the website to gather all the information, which can then be transferred to the online application.
- ☐ Register as a portal user
- ☐ Open and complete an application (see application types documentation)
- ☐ 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 or 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.

Program Support

Preference is given to requests that:

- Address a critical community need or opportunity.
- Address root causes of a problem.
- Include clearly stated goals, timelines, objectives and measurable outcomes.
- Include an effective mechanism for measuring the impact.
- Exhibit sound and realistic financial plans as well as diverse funding sources.
- Will not duplicate existing services unless there is a clear need for additional services.
- Can be replicated by other organizations.
- Involve collaboration or cooperation with other organizations.
- Promote activities that build and sustain connections among diverse groups.

The requesting organization should:

- Demonstrate the expertise and experience necessary to accomplish the project.
- Operate under sound financial principles.
- Have a plan for ongoing financial and community support for sustainability.

Capital Support

Preference is given to requests that:

- Demonstrate that the project is necessary to fulfill the organization's mission and conduct its programs, and is part of a long-range plan for the organization.
- Serve a broad segment of the Greater Memphis area.
- Enhance or improve the organization's ability to meet the needs of those it serves.
- Provide a detailed, itemized capital project budget.
- Demonstrate diverse funding sources, including agency and board contributions, public appeals, grants and loans.
- Provide a project timeline/schedule that includes the campaign's start date, expected duration, plans for additional funding if needed, and date that construction/renovation will begin.
- Explain the impact that the project will have on the agency's ongoing operating budget.

The requesting organization should:

- Include a method to evaluate the campaign's success. For example, will it be based on reaching the goal, finishing the project on schedule, or increasing services provided as a result of the campaign?
- Preferably, have raised in cash or pledges at least 50% of the capital campaign total.
- Have leveraged other support.

General Operating Support

Preference is given to requests that:

- Are in compliance with Tennessee requirements for nonprofits
- Clearly describe the value of accomplishing the mission for the benefit of the community
- Include a copy of the most recently approved strategic business plan
- Present expected results for the grant period

Application Types

- Describe evaluation processes
- Outline strategies for sustainability prior to end of the grant period
- Provide a detailed organizational budget covering all operational expenses and revenue sources. Identify cash in hand as well as pending and other amounts to be raised.

Please note: To apply for a general operating grant an organization should have been in active operation for at least three fiscal years or have a fiscal sponsor.

Application Types

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.

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- Include an effective mechanism for measuring the impact.
- Exhibit sound and realistic financial plans as well as diverse funding sources.
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- Can be replicated by other organizations.

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- Operate under sound financial principles.
- Have a plan for ongoing financial and community support for sustainability.

Capital Support

Preference is given to requests that:

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- Serve a broad segment of the Greater Memphis area.
- Enhance or improve the organization's ability to meet the needs of those it serves.
- Provide a detailed, itemized capital project budget.
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Preference is given to requests that:

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- Are in compliance with Tennessee requirements for nonprofits
- Clearly describe the value of accomplishing the mission for the benefit of the community
- Include a copy of the most recently approved strategic business plan
- Present expected results for the grant period
- Describe evaluation processes
- Outline strategies for sustainability prior to end of the grant period
- Provide a detailed organizational budget covering all operational expenses and revenue sources. Identify cash in hand as well as pending and other amounts to be raised.

Please note: To apply for a general operating grant an organization should have been in active operation for at least three fiscal years or have a fiscal sponsor.

Application Types

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

FAQS

Can I apply as a new organization?

Organizations must have been in active operation for a minimum of three completed fiscal years with a 501c3 designation or under a fiscal sponsor. Applicants with a fiscal sponsor must have an independent local advisory board or board of directors.

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

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.

- 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 that serve one congregation. 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.

What is your AI policy?

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.

What happens if I submitted an incomplete or ineligible application?

Ineligible or incomplete submissions will not be processed. 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 updated application by the deadline, we are happy to consider your application in the next eligible quarter. Please note that if you are requesting funding for arts/culture, education or digital media, the next deadline may be a full year later.

We will email you only once regarding an ineligible or incomplete submission.

How will I know what happens after submission?

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.

See the Application Process section for more details.

Use of Artificial Intelligence

The Foundation does not prohibit the use of artificial intelligence (AI) in preparing grant applications; however, applicants use AI at their own discretion and are responsible for the information submitted. We encourage responsible use, including protecting confidential information and carefully reviewing AI-assisted content for accuracy. All application materials should truthfully reflect the organization's needs, capabilities, programs, and intended outcomes. For organizations that use AI, we encourage its use as a tool to support, not replace, the organization's own knowledge and judgment.

AI Considerations

1. **Eligibility Criteria**: We've seen an uptick in submissions that do not meet our stated eligibility requirements. Please take the time to carefully assess whether your organization and project meet the foundation's criteria.

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.

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