

## For 138 OC nonprofits, the check's in the mail

Samueli Foundation's new fund gives \$11M charities can use for the basics, right now



Lindsey Spindle, president of Samueli Family Philanthropies, speaks during the Orange County Nonprofit Needs Assessment Report in Irvine earlier this year. The Samueli Foundation's new Breakaway Fund will provide \$11 million to local groups, or about 9% of the \$128 million the foundation expects to give in Orange County this year. Paul Bersebach — Staff Photographer



Volunteers sort incoming food at South County Outreach's food pantry in Irvine in 2024. South County Outreach is getting Breakaway Fund money, which is giving \$50,000 to \$100,000 each to local groups. Jeff Gritchen — Staff Photographer

**BY ANDRE MOUCHARD**

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Accounting services. Bonuses to retain great employees who are grotesquely underpaid. A marketing program for thrift stores.

Those are some of the needs local nonprofits said they would like to fill when they made requests this year to the Samueli Foundation's new charitable giving program, the Breakaway Fund.

Now, some of that spending is set to begin. Foundation officials notified 138 nonprofits late Monday that their proposals were greenlit and, over the next month, each of those groups will receive \$50,000 to \$100,000 to finance a range of essential, but not necessarily sexy, items that all businesses, including nonprofits, need to keep operating.

In all, the fund will distribute \$11 million, or about 9% of the \$128 million the Samueli Foundation expects to give in Orange County this year.

“This is one of the most joyful things we’ve done in a long time,” said Lindsey Spindle, president of Samueli Family Philanthropies.

The fund marks the Samueli family’s first foray into public, open-call-style philanthropy. Most of their philanthropic projects are worked out in private, and many involve more money. Among other things, multi-billionaires Henry and Susan Samueli have backed everything from high-profile health programs at UC Irvine (Susan & Henry Samueli College of Health Sciences) and a public charter school in Santa Ana (the Samueli Academy) to social causes, such as the Ending Human Trafficking Collaborative.

### **‘The need is now’**

The idea to offer a twist on that strategy — to issue smaller donations, and to make the money available to every nonprofit that touches the county — came earlier this year, after the Samueli Foundation and Orange County Community Foundation surveyed local charities and found a sharp disconnect between what nonprofits need and what donors are interested in funding.

The new fund, according to Spindle, is aimed at filling that gap.

“Instead of us, or any donor, telling nonprofits what we want to fund, we ask what they need. And they tell us. And we provide it,” Spindle said. “It’s a total no-brainer.”

The Samuelis, owners of the Anaheim Ducks, chose the name Breakaway after the moment in a hockey game when a player picks off a puck and skates full speed for an open shot on goal. As that suggests, a key element of the new fund is speed (and capitalizing on an opportunity).

Nonprofits were told they would have a six-week window to apply, starting May 1. They also were told that their requests would be answered, one way or another, within three months, an unusually quick turnaround for charitable grants and gifts.

“The need is now. The urgency is now,” Spindle said.

Even the applications for the Breakaway Fund were built for speed, requiring no more than 20 minutes to fill out.

“I made my team test it and test it and test it,” Spindle said, laughing.

All of that is different from the way most deep-pocketed foundations operate. Typically, they explain what their priorities are and expect applicants to meet their criteria. A few others, like Mackenzie Scott, the former wife of Jeff Bezos, offer money without receiving any applications, secretly researching nonprofits and then gifting them money.

### **Trust-based giving**

The Breakaway Fund — and a similar Samueli fund “Build OC,” aimed at helping small nonprofits get into new buildings or remodel old ones or buy land — operate out of what philanthropy experts call “trust-based” giving. Simply put, it means the donors write checks to agencies with the belief that the agency will figure out the best use for that money.

In the Breakaway Fund, the money isn’t totally string-free. Spindle said her organization spent three months vetting applications. It also will follow up to find out how the money was spent and what impact it made.

Still, the trust-based mindset — and the open application process — appealed to local nonprofits interested in working with the Breakaway Fund.

The Samueli Foundation initially believed it would give \$5 million through the fund and get a few hundred applications. Instead, by the end of the six-week application process, in mid-June, it had received 1,004 applications. That prompted the Samuelis to boost their total giving to \$11 million to 138 grantees.

Nonprofit leaders said the Samueli model emphasizes trust over direction, and said the approach will make the donations more effective.

“Most donors are willing, more than willing, to help with work that’s directly affecting a client. Food? Counseling services? Donors see those needs and will help you provide it. But what they don’t see, sometimes, are the needs connected to them. How do you pick up the food? That’s the kind of thing this is funding,” said LaVal Brewer, chief executive of South County Outreach, an Irvine-based nonprofit that helps provide food, shelter and financial counseling services.

## **How will the money be spent?**

Brewer said his group will receive \$100,000, and that it will use the money to create a marketing program that will boost profits at South County Outreach’s two thrift stores.

“When both of those stores are more than just self-sustaining, they become something that provides money for our services, and they’re doing their job,” he said. “It also means the donation we’re getting from the Samueli family will be very valuable.”

Others said they’ll use Breakaway money to train staff in ways that will make them more effective and, hopefully, keep them connected to their mission.

“Part of this will be used for professional staff development, which is money we would never be able to spend on our own,” said Brateil Aghasi, chief executive of WISEPlace, a Santa Ana-based group that provides shelter and housing support services to adult women, many of whom are victims of domestic violence.

Aghasi said her group helps about 200 women at any one time, with a full-time staff of nine people and more than 1,300 volunteers.

“We need to keep people. And to do that, we need to train them in our mission, to make them feel connected,” she said. “Without that, this is a very difficult job to stay with.

“This gift presents an opportunity that most funders won’t get into,” Aghasi added.

Kathy McCarrell, interim chief executive for The Priority Center Ending the Generational Cycle of Childhood Trauma, a Santa Ana group that combats child abuse, said she’ll use Breakaway money to get herself fired.

“We’re going to conduct a national search for a permanent chief executive,” she said. “When we can take our time with that, and get a candidate who understands our mission and our community, we’ll be a better organization and do more good.

“That’s what gifts like these are intended to do, I think.”

## **Still hope for some**

Samueli Foundation leader Spindle said groups that didn’t get money this week aren’t completely out of luck. Her organization has created an artificial intelligence program that can match requests for grants with potential donors.

She said that program will be made available for would-be donors to use as a way to search a database of Breakaway applications that didn’t get funding.

“There were a lot of great ideas that we wished we could back,” Spindle said. “We believe this is a way for some of them to get what they need.”

## **Breakaway Fund recipients**

2e4me Academy Inc.; Abrazar Inc; Action Alliance Foundation; AIDS Services Foundation Orange County (Radiant Health Centers); Alzheimer’s Orange County; America on Track; Anaheim Family YMCA; Anaheim United Methodist Church; Asian American Museum of Orange County; Boys & Girls Club of the South Coast Area; Boys & Girls Clubs of Brea Placentia Yorba Linda; Braver Players Musical Theater Foundation;

California State University Long Beach Research Foundation; CarePossible Inc; Casa Teresa; Caterina’s Club; Center for Music and Wellness Inc; Child Creativity Lab; Children and Families Coalition of Orange County; Children’s Cause Orange County; CHOC Foundation; Choral Arts Initiative; CIELO; Community Health Initiative of Orange County; Community Legal Aid SoCal; Constitutional Rights Foundation Orange County; Cor Community Development Corporation; Creative Identity; Creative Kids Playhouse Childrens Theatre of Orange County; Cristo Rey Orange County High School Inc;

Dance Arts Academy Foundation; Educate to Empower; Elevate Orange County; Encompass Housing; Epilepsy Support Network of Orange County; Family Assistance Ministries; Family Promise of Orange County Inc; Florence Crittenton Services of Orange County Inc; For the Children; Friendship Shelter; Futures Unwalled; Gay & Lesbian Community Services Center of Orange County (LGBTQ Center OC); Girls Incorporated of Orange County; Gloves 4 Grief Inc.; Guided Discoveries Inc;

H4H Foundation; Hands Together a Center for Children; Hart Community Home Inc; Helping the Behaviorally Challenging Child; High Hopes Counseling Foundation Inc; High School Inc. Academies Foundation; Higher Ground Youth and Family Services Inc.; Home on the Green Pastures; Hope Center of Orange County; Hope Community Services Inc; Innovative Housing Opportunities Inc; Inside the Outdoors; Intervention Center for Early Childhood; Irvine Adult Day Health Services Inc; Jamboree Housing Corporation; Jewish Home for the Aging of Orange County (Heritage Pointe); Jobforward Inc;

Korean Community Services Inc; Laguna Beach Police and Community Foundation; Laguna Food Pantry; Laguna Ocean Foundation; Laguna Radio Inc; L-Arche Wavecrest; Latino Center for Prevention and Action in Health and Welfare; Laura's House; Let's Be Kind; Lutheran Social Services of Southern California; M3ND Project Inc; Mariposa Women and Family Center; Maryam Parman Foundation for Children Inc; Miracle Babies; MOMS Orange County; Museum of Make Believe; Muzeo Foundation;

Neighborhood Housing Services of Orange County Inc.; Noble Path Foundation Inc; OC United Together; Orange Coast Memorial Medical Center (MemorialCare Orange Coast Medical Center); Orange County Amazing Grace Ministries (SoulRapha); Orange County Bird of Prey Center; Orange County Children's Therapeutic Arts Center; Orange County Chinese Community Service; Orange County Coastkeeper; Orange County Educational Arts Academy; Orange County Gang Reduction and Intervention Partnership; Orange County Jewish Community Scholar Program; Orange County Public Libraries; Orange County Walk to Remember (Forever Footprints); Orange Elderly Services Inc.; Our Redeemer Evangelical Lutheran Church of Garden Grove;

Parkinson's Exercise Program for You; Pathway School Inc; Pediatrics-Adolescent Diabetes Research and Education Foundation; People Assisting the Homeless; PierPride; Precious Life Shelter Inc; Project Self-Sufficiency; PTA California Congress of Parents Teachers & Students Inc; Reimagine Network; Renewable Farms; Risehyre Inc; Saddleback Memorial Medical Center (MemorialCare Saddleback Medical Center); San Clemente Community Theatre (Cabrillo Playhouse); San Clemente Village; Sandy Feet Initiative; Santa Ana Kiwanis Club Foundation; Sawdust Festival Corporation; Second Harvest Food Bank of Orange County Inc; South Coast Repertory Inc; South County Outreach; Southern California Hospice Foundation; Southland Integrated Services Inc;

Temple Judea of Laguna Hills; The Chance Theater; The Collaborative Courts Foundation; The Foundation of Laguna Woods Village; The Hub OC; The Joyful Child Foundation; The Neighborhood Feeding Program; The Priority Center Ending the Generational Cycle of Trauma Inc.; Tilly's Life Center; Tomorrow's Leadership Collaborative Charter School; Town and Country Manor of the Christian and Missionary Alliance; Trinity Counseling Services; UC Irvine Jack and Shanaz Langson Institute and Museum of California Art; Uniquely Knitted Inc; UPLIFT Youth Foundation; Villa Center Inc; Vital Access Care Foundation; Voice of Refugees; Waves of Impact; Waymakers; and WISEPlace