Samueli FOUNDATION

Brief Guide: Getting Started on the Application

Before getting started with your application, we strongly encourage you to:
- **Review each Fund** guidelines, eligibility, and selection criteria at the Samueli Foundation website
- **Review a copy of the application** to familiarize yourself with the questions and to anticipate any additional information you will need to pull together. The applications are available for download at the Samueli Foundation website

For both the Breakaway Fund and Build OC Fund applications, ensure you have the following information:

For the "About your Organization" application section:
- Organization name
- Organization EIN, if applicable
- Organization mailing address
- Organization website
- Organization mission
- Organization status
  - Incorporated as a 501c3
  - Under fiscal sponsorship
  - Other (e.g., library, school district, synagogue, etc.)
- Fiscal sponsor name, if applicable
- Fiscal sponsor EIN, if applicable
- Organization social media handles, if available (e.g., Facebook, Instagram, X, and LinkedIn)
- Cities your organization currently serves in Orange County. *You will be able to select from a list of 34 Orange County cities or all county response.*
- Focus area(s) that best describe(s) your organization's mission. *You will be able to select from a list.*

For the "Primary Contact for the Request" application section:
- Name
- Title
- Phone number
- Email address

For the Breakaway Fund application, you will be asked for the following information for each application you complete:

- Name of your request or project. *Provide us with a title for your project or request. It may be how you refer to the project, or it may just be what you are requesting for your organization.*
- The Breakaway Fund category that best describes your project. *Use your best judgment to determine the category.*
    - Talent and Leadership
    - Systems and "Stuff"
    - Expertise
    - "Season Ticket"
- Project description and how it will strengthen your organization's capacity and/or advance its mission. Please use 150 words or fewer to describe your project. *We are looking for a short summary of your request.*
- The impact you expect as a result of this project. Please use 150 words or fewer.
- Amount Requested. *We are asking for the figure.*
- Project Budget. *We are asking for the figure.*

For the Build OC Fund application, we encourage you to gather all your documents for your capital projects to help expedite your application process. Your capital project documents should be able to help address the following information:

- Organization budget: for the current and prior fiscal years. *We are only asking for revenue and expense figures for the current and past fiscal years. We are not asking for supporting documentation.*
- Project Type(s): *Use your best judgment to determine the category(ies).*
    - Facilities and/or Land Acquisition
    - New Construction
    - Renovation
    - Repair
    - Preservation
    - Equipment
- Name of your capital project
- Capital project description. Please use 150 words or fewer. *We are looking for a short summary of your project.*
- Current stage of project execution. Describe completed and upcoming milestones and include the anticipated date of project completion. Please use 150 words or fewer
- Meaningful milestone to be reached within a year of receiving funding within a year of receiving funding. Please use 150 words or fewer.

- Total capital project budget. *We are asking for the figure.*
- Already committed or pending funding. *We are asking for the figure.*
- Amount Requested. *We are asking for the figure.*
- Project budget. *You will be able to upload a copy of your project budget in whichever format you prefer (PDF, Excel, PowerPoint, JPEG, etc.).*

Additional Help Guides

We have designed the following step-by-step guides to assist you in the completion of your application(s)

- [Setting Up an Account in the Samueli Foundation portal](#)
- [Starting your Application by Adding a New Organization](#)
- [Selection and De-Selection of Lists in the Application](#)

Questions

For any questions, please use the chat icon in the Samueli Foundation grant portal or email us:

- breakaway@samueli.org for Breakaway Fund
- buildoc@samueli.org for Build OC Fund