



Request for Proposals

Background: Abe Lee, Principal Broker of Abe Lee Realty, launched Abe Lee Charities in 2007 as a way to give back to Oahu 501(c)(3) organizations. Abe Lee and his agents have been providing cash and in-kind charitable donations throughout the agency's history, and this program was a way to step up charitable giving.

A five-member advisory panel selects one recipient charity per quarter to receive a percentage of Abe Lee Realty's income. Once an organization is selected, it will not be eligible for future funding unless otherwise stated. Each charity selected by the panel will receive funding on a quarterly basis as follows*:

Funding Quarters	Grant submission to be postmarked or delivered on or before	Recipient Charity Notification on or before	Check Award and Final Charity Recap on or before
ONE: January 1 – March 31	November 1	November 30	May 30
TWO: April 1 – June 30	February 1	February 28	August 30
THREE: July 1 – September 30	May 1	May 31	November 30
FOUR: October 1 – December 31	August 1	August 31	February 28

*Abe Lee Charities' advisors may opt to meet only once per year and select the year's recipient charities at one time.

Funding Opportunity: Abe Lee Charities has reserved 100 percent of its funding for non-profits which aid first-time home buyers and/or address homelessness. The program seeks to support projects that will have the greatest impact on the residents of Oahu. Preference will be given to those programs which encourage self-sufficiency. Charities that have smaller budgets and difficulty accessing funds will also be more heavily considered. Funding dollars are restricted for use on Oahu only, and cannot be applied to out-of-state national chapters.

Quarterly grants will range from \$6,000 - \$25,000. Requested projects must be feasible to complete even if Abe Lee Charities only grants \$6,000. The award amount will be the greater of the following two methods:

- 1) A minimum of \$6,000, or
- 2) A percentage of Abe Lee Realty's gross sales based on transaction closings.

Recipient charities will be funded for one quarter only. Charities must maintain good standing and accreditation with all regulatory bodies. Funds will be distributed as follows:

- 1) An initial \$6,000 grant will be given upon selection;
- 2) An additional check, for up to \$19,000 will be awarded after calculating Abe Lee Realty's gross income for the quarter.

Eligibility Requirements:

- Organizations must direct its funds to the island of Oahu.
- Grants cannot fund capital campaigns or improvements.
- Charities may be religious organizations or 501(c)(3) organizations. Government agencies and public schools are not eligible, nor are fiscal sponsorships.
- The majority percentage of the organization or program's constituency must be legally recognized as Hawaii state residents.
- Grant applications must be completed and submitted according to stated deadlines and will be kept on file and considered for a period of five years.

Proposal Package: Each submitting organization's proposal package must contain four complete, collated copies of the following:

Executive Summary: (1-2 pages)

- Minimum font size: 12 point with minimum 1 inch margins.
- Include name of applicant organization and project title.
- Briefly describe the following, using these headings, in the order listed:
 1. Description of organization or program and how it impacts Hawaii residents;
 2. Estimated number of Oahu residents to be assisted;
 3. Use of funds; and
 4. Project objectives (if more than one, summarize the three most important).

Supporting Documents *(submit five sets of each)*

- Most recently completed annual financial statement (local chapters should provide the local office financial statement and not the national office's financial statement)
- List of the organization's governing board members (separate sheet) including their professional or community affiliation
- Most recently completed IRS Form 990
- IRS 501(c)(3) designation letter
- Most recent audit
- Most recent annual report

Submit Proposals to:

Abe Lee Charities
Ala Moana Pacific Center
1585 Kapiolani Blvd, #1533
Honolulu, Hawaii, 96814.

Additional information: www.abeleerealty.com/charities, 942-4472 (ext. 210) or 216-4999 or abelee@hawaii.rr.com.

Note: Successful applicants will be required to submit a one-page recap of the project's outcomes on or before the final check presentation date. Meeting date, time, and location will be provided in the award letter.



Abe Lee Charities Funding Request Cover Sheet

Organization Information

(If this is a collaborative project, please submit names of collaborating agencies on a separate sheet.)

Name(s): _____

Address: _____

Phone: _____ Fax: _____ Email: _____

Website: _____

Primary Person Responsible for Project:

Name: _____ Title: _____

Phone: _____ Email: _____

Project Information:

Project Title/Targeted Need Population: _____

New or Ongoing Project: _____ Estimated Number of Oahu Residents to be Assisted: _____

Housing Need-Area Addressed: _____

By signing below you verify that **FOUR** collated sets of the documents listed below are complete and enclosed:

- | | |
|---|---|
| <input type="checkbox"/> Executive Summary | <input type="checkbox"/> Board Member List (separate sheet) |
| <input type="checkbox"/> Most Recently Submitted IRS Form 990 | <input type="checkbox"/> Current Financial Statements (local chapter) |
| <input type="checkbox"/> Most Recent Audit & Annual Report | <input type="checkbox"/> 501(c)(3) IRS tax-exempt status letter |

Two Signatures Required:

President, Board of Directors (Chief Volunteer)

Executive Director (Chief Compensated Staff)*

Print Name, Title, and Date

Print Name, Title, and Date

**If no compensated staff, please indicate and provide signature of another board member.*

Rev.02.26.08