



**Berkeley  
Partners  
For Parks**

Berkeley Partners for Parks  
P.O. Box 13673  
Berkeley CA 94712-4673  
info@bpfp.org  
Tax ID: 94-3228356

## LIMITED PARTNER REQUEST

**Berkeley Partners for Parks (BPFP) is a 501(c)(3) nonprofit organization. Our mission is to:**

- *Develop and cultivate wider community interest in the parks and other public amenities in and around Berkeley;*
- *Encourage and support the organization of community groups to adopt and work for the welfare of parks and other public amenities in and around Berkeley; and*
- *Provide fiscal sponsorship to groups that support our mission.*

**A limited partner in BPFP is an organization with independent legal status carrying out a specific project that falls within the mission of BPFP. This document asks for some information about your organization and the project for which you are seeking BPFP fiscal sponsorship, so that both of us can determine if it is a good fit. If a question doesn't make sense, skip it. We anticipate a meeting between us before either of us makes a commitment.**

**Name of Group** \_\_\_\_\_

**Please check all that apply:** Active in \_\_\_\_\_ in furthering parks\_\_\_\_, gardens\_\_\_\_,  
Berkeley? Or ...?  
paths\_\_\_\_, creeks\_\_\_\_, historic restoration\_\_\_\_, public amenities\_\_\_\_, recreation\_\_\_\_,  
other related (specify)\_\_\_\_\_

**Purpose and Proposed Activities:** Please tell us what you hope your group will accomplish. Is your present thinking that you will accomplish one project and then maintain that project at a lower level, or even disband? Or do you see your group taking on a series of projects or tasks and continuing indefinitely? (Feel free to use another sheet of paper.) For limited partners this needs to be very specific about what, how long, physical boundaries, etc. Ask us for help if this seems difficult.

Will you pass all revenues and expenditures for this project through BFPF? \_\_\_\_\_

How many volunteers do you hope to have in a year? \_\_\_\_\_ Volunteer hours? \_\_\_\_\_

About how much money do you hope to raise each year, or for your project? \_\_\_\_\_

How do you expect to fund your work? Memberships? \_\_\_\_\_ Fundraising events? \_\_\_\_\_

Donations from individuals? \_\_\_\_\_ Other? \_\_\_\_\_

Grants? (From public? \_\_\_\_\_ private? \_\_\_\_\_ governmental? \_\_\_\_\_ local? \_\_\_\_\_ national? \_\_\_\_\_ sources)

Notes, comments: \_\_\_\_\_

Do you already have an EIN? \_\_\_ No It is: \_\_\_\_\_ For pre-existing organizations, are you registered with the IRS? \_\_\_ Yes \_\_\_ No What tax form do you file? \_\_\_\_\_

Please identify people who are/will be involved in your activities. Note which one will be the treasurer or fiscal contact.

<b>Contact: Name</b>
<b>Address</b>
<b>Email</b>
<b>Phone(s)</b>

<b>Contact: Name</b>
<b>Address</b>
<b>Email</b>
<b>Phone(s)</b>

<b>Contact: Name</b>
<b>Address</b>
<b>Email</b>
<b>Phone(s)</b>

It is our practice to notify all listed contacts by email of monthly BFPF meetings and related events. Please let us know when contacts change. If you would like others (additional or instead) informed, please let us know via email at [books@bfpf.org](mailto:books@bfpf.org) .

When you have completed this questionnaire and looked at the Limited Partner Principles and Practices (next page), we would like to meet with two or three of you to discuss your needs and, in general, how BFPF operates. Please contact our chair, Ms Charlie Bowen, at 510.540.7223 or [charlie\\_paths@comcast.com](mailto:charlie_paths@comcast.com), or [info@bfpf.org](mailto:info@bfpf.org) Thank you for your interest. We look forward to talking with you.

For information about BFPF and its partner groups please visit our website at [www.bfpf.org](http://www.bfpf.org)

## **BFPF PRINCIPLES & PRACTICES**

### FOR LIMITED PARTNERS

*Your group agrees that for the specific purpose(s) stated in your application you will:*

- *Use the funds you collect for the purposes defined in your application or as you and we subsequently agree to change them.*
- *Put all financial transactions for these specific purposes through BFPF and document them properly.*
- *Prepare and send required letters of acknowledgement for tax-deductible donations you receive. (BFPF will keep you informed of the IRS requirements.)*
- *Include a statement on all communications related to these specific purposes acknowledging your limited relationship with BFPF.*
- *Keep BFPF informed when any of your primary contacts change.*
- *For grants BFPF must have contracts with both you and the donor. Legally we will receive the funds from the donor and then 're-grant' them to you, subject to your using them for the agreed purposes.*
- *Provide a brief narrative report to BFPF in October of each year, describing your activities during the previous year (which with your permission will be published in our annual newsletter).*
- *If you use an employee or an Independent Contractor for regular services, that person must be paid by you and reimbursed by us to you. Do not engage a fundraiser or grant-writer who would be paid from these funds without our prior approval.*
- *Abide by IRS restrictions on political activity. BFPF will provide guidelines.*
- *Pay annual membership dues plus an administrative fee for BFPF's services to you. Currently the membership is \$35/year and the fee is 7% of income from most sources. Because contracts with governments often require extensive documentation and special handling, the fee will be 10% for those contracts. However, we will keep the fee at 7% for small grants that do not require major bookkeeping – please discuss this with us in advance.*
- *Prepare and submit whatever organizational and tax returns you are responsible for, including as income the amounts BFPF pays to or for you for the covered purpose(s).*
- *Endeavor to attend at least one BFPF Board and/or membership meeting each year (for information exchange and social benefits).*

*Berkeley Partners for Parks agrees to:*

- *Permit you to use our Section 501(c)(3) tax-exempt status to solicit funds only for the specific purpose(s) described on the application form.*
- *Provide all accounting services for such funds, including depositing funds designated for you, preparing checks as you request and providing regular reports to you.*
- *Create separate restricted accounts as needed (e.g., for a contract or new project).*
- *Handle BFPF's regulatory and tax compliance matters related to the specific purpose(s). You must continue to file your own regulatory and tax forms.*
- *Permit you to use our Seller's Permit for the specific purpose(s). We will prepare the sales tax report and will provide Resale permits as requested.*
- *Handle the necessary state registration and reporting for fundraising, including for raffles, for the specific purpose(s). You must inform us in advance of these activities.*
- *Provide whatever financial reporting on specific purposes is required by a grantor or donor. We will remind you of reporting deadlines as they approach.*
- *Respond promptly to your needs for information, approvals, funds, etc.*





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[Inside address: to new limited partner]  
[Date]

Dear [new group name],

This is an addendum to the BFPF Partner Agreement and, if in conflict, it supersedes certain of the bullet items in the Agreement. You wish to use BFPF's tax status for some, but not all, of your activities. The activities you wish to include are specified under *Purpose and Proposed Activities* on page 1 of the Limited Partner Request. We agree that any activity not specified there is not covered by our agreement.

The financial reporting to the IRS that you and we make must be consistent. Current IRS regulations say that:

- The income which is intended to support the activities and goals in this document technically comes to BFPF, not to you. BFPF reports that income to the IRS on our Form 990. You do not report that income (because it didn't come to you). However we will issue you a 1099 (assuming that we reimburse you \$600 or more in one calendar year), which you will have to include in your income, from BFPF, not your grantor. Similarly your expenses should be reported on your tax return.
- You will submit invoices, receipts and requests for payments to BFPF. BFPF will pay these and report them as expenses to your project(s).

The result is that on your tax return you will record income and expenses in equal amounts over one (or more) years.

Agreed between:      New Limited Partner

BFPF

Organization \_\_[new group name]\_\_\_\_\_

Berkeley Partners For Parks

By (individual's name)

\_\_\_\_\_

\_\_\_\_\_

Dated:

\_\_\_\_\_

\_\_\_\_\_