

THE LEARNERS LAB FOUNDATION (TLLF)
TECHNICAL ASSISTANCE SERVICE CENTER (TASC)
RETAINER & REQUEST FOR TECHNICAL ASSISTANCE SERVICES (TAS)

The Learners Lab Foundation (TLLF) is a public, all volunteer foundation that designs, manages, and operates a portfolio of Charitable & Fiscal Sponsorship programs. Our mission develops, acquires and creates access to free and low cost professional development programs, and helps new or young 501c3's become established, and launch & mobilize their operations. We are working to build a proprietary network of business, technology, professional development and funding access resources for those we serve, our partners, and other stakeholders. The launch of our Technical Assistance Service Center (TASC) will greatly support achieving those goals.

TLLF'S TECHNICAL ASSISTANCE SERVICE CENTER (TASC)

As a start-up of volunteers, we know the challenges and shortfalls when pursuing status as a tax exempt entity then getting operations launched; our own journey was far too many years. We also understand that not every entity in this position wants or needs a fiscal sponsorship yet they may still require some level of assistance to keep them moving forward. That's where TASC comes in.

TASC is the Technical Assistance Services Center the Foundation has established to provide fiscal sponsorship caliber assistance to start-up 501(c)(3) in the initial/early stages of their tax exempt status with needs that do not require a fiscal sponsor. The Center operates as a consultancy, and commences upon receipt of a formal request for Technical Assistance Services and its Retainer Fee.

ELIGIBILITY FOR TLLF'S TECHNICAL ASSISTANCE SERVICE CENTER

To be eligible for TASC, business entities may be five (5) years old or less, with or without its tax exempt status, but operate for tax exempt purposes on US soil. All US territories are eligible for The Foundations Fiscal Sponsorship Program and TASC support.

TASC Registrants operating on US soil but receiving or sending funds outside the US will be subject to reviewed for approval by our Audit Committee and Legal Department on a case by case basis. The Foundation is not chartered for international support services, does not accept foreign funds, and will not assist in any international financial management or transaction.

ASSISTANCE FOR INTERNATIONAL OPERATIONS

While the Foundation is not chartered to operate or support operations outside of the US, organizations and programs with *International* interests and operations may still register as a TASC Client. As a charitable foundation, we can develop a customized, "*Master List of International Fiscal Sponsors (MLIFS)*" organizations and programs you can then pursue, and secure interns to help you manage that process. The TASC conducts research and cross referenced with the National Director of Fiscal Sponsors, and other internally established resources including The Foundation's **Pub78 RDMS**, a data system developed by TLLF which holds the combined 3 IRS "**Publication 78**" data dump list of Charities and Non-Profit Organization.

To receive for assistance in identifying International Fiscal Sponsors, please download the TASC-Intl Registration Form from www.TheLearnersLab.org/docs/TASC-Intl-R&R.pdf, and as a www.TheLearnersLab.org/docs/TASC-Intl-R&R.docx.

Like our fiscal sponsorship program, our Technical Assistance Service Center operations are customized to the specific need of the client. When submitting your request for technical assistance, kindly understand that while TASC and Fiscal Sponsorship services are similar, their associated discounts, benefits, entitlements, and/or perks, fiscal sponsorship bare come with very specific fiduciary obligations & restrictions and will not be identical. As well, only Fiscally Sponsored entities can receive grant processing services.

TECHNICAL ASSISTANCE SERVICE CENTER & PROCESSES

The Retainer and onboarding process for TLLF's Technical Assistance Service Center is generally the same as with Fiscal Sponsorship Application process with three key distinctions:

1. **There is no Application Process.** Interested parties simply complete the Retainer questionnaire and pay the non-refundable Retainer Fee. This constitutes registration to receive technical and management assistance services thru TASC.
2. **TASC Does Not Include Donation Processing or Grant Funds Administration.** The Foundation legally may only accept donations, grants and contributions on behalf of a Fiscal Sponsorship Awardee to which it has been chartered, regardless of what kind of contributions offered.

Should a TASC client require contribution services, by law and statutory requirement of the Internal Revenue Service (IRS), that entity must apply to be a fiscal sponsorship awardee to an IRS approved Fiscal Sponsor, and advise the Donor accordingly. Feel free to visit



the IRS website at www.IRS.gov for clarification on its definition of a tax exempt entity and the National Network of Fiscal Sponsors (www.FiscalSponsors.org) regarding the nature of fiscal sponsorship relationship.

3. **Retainer (paid in full) along with this "Registration & Retainer Agreement" is Required to Commence any TASC Service.**
A flat, one-time, non-refundable Retainer fee of \$350 is required at the time your Retainer is submitted. We understand if this may be a challenge and welcome two successive payments of \$175 each should such a payment schedule be necessary.

As with our fiscal sponsorship program, part of the TASC review & onboarding phase includes analyzing your needs assessment then researching and formulating anticipated delivery resources. Where required, that will include securing outside resources to partner with us or to deliver on their own the management service or technical assistance you require.

Technical Assistance Service Center runs ongoing as needed with no requirement for minimum or maximum terms. The Foundation does, however, reserve the right to place the entrance into the program in Hiatus to accommodate the ebb and flow of resources, demand for services, or the capacity to meet client needs relative to the availability of staff and supporting resources.

TELL US ABOUT YOUR ORGANIZATION

For Clarity, Type Written Responses Only

1. **Your Name & Title:**

2. **Preferred Contact Info (Mailing Address, Phone, Email (only one please):**

3. **The Organization [Proposed] Name & Tax ID#: (If you don't have one, call 800 829 4933 or apply online at www.IRS.Gov, its free)**

4. **Provide 3 Business References:** (include complete info: name, title, business affiliation, address, office & cell, email (all direct)

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|----------------------|----------------------|----------------------|

5. **Location of Proposed Operations (city, state; indicate if operations will be national or multi-state):**

6. **Based upon IRS criteria, what type of tax exempt entity are you (or will your organization be)?**

Association Charity Church/Religious Org Education Institution
 Non Profit Private Foundation Public Foundation Political Organization

7. **If not yet approved, have you completed and submitted your IRS Form 1023/1024 Application for Tax Exempt Status?**

Y N In Progress

8. **If no, is that something we need to help you with?**

Y N

DESCRIBE YOUR TECHNICAL ASSISTANCE NEEDS

What Do You Need Help With?

1) Our issues, most pressing concerns, and immediate needs are...

[Empty text box for response to question 1]

2) We need supports and need assistance with the following operational infrastructures: (Check all that apply)

- a. Organizational Chart, Governance and Overall Business Unit Development []
- b. HR Department and Infrastructure Development []
- c. Finance Department and Infrastructure Development []
- d. General Accounting, Project Accounting, Bookkeeping, Payroll []
- e. Technology Department and Infrastructure Development []
- f. Programmatic Development, Professional Development Training Department/Program/Materials []
- g. Industry/Service Specific Policy Development []
- h. Other type of assistance not mentioned []

Here are additional details regarding the above selection(s):

[Empty text box for additional details regarding question 2]

3) We would like to be spotlighted in the new online newswire service, InfoXchange? Here’s what we want readers, potential funders, peer start-ups and vendors to know about our organization and our work. *This will be used as the summary introduction the month before your feature is published.*

[Empty text box for response to question 3]

RETAINER AGREEMENT & SUBMISSION TERMS

By my hand for this Registration & Retainer Agreement, affirm that I, _____, on behalf of my organization, _____ that we are Hiring on Retainer, The Learners Lab Foundation (TLLF) for the sole purpose of providing consulting and technical assistance services to support the above needs are articulated within this registration instrument.

By submitting this Retainer agreement, I, _____, am confirming that we have approved all of the contents as presented and that they are truthful.

We are also confirming that (*unless clearly otherwise directly specified in this Retainer agreement*), we, _____ give TLLF permission to share the contents of this Retainer ONLY with regard to the type and nature of support services being provided to our organization on the TLLF website properties, in its social media outlets, with outside media and with the general public for the purposes of assisting our organization, marketing their assistance to our organization, to achieve the service goals outlined within this Retainer, AND as a demonstration of their work and commitment to helping us and other peer entities in the furtherance of meeting our needs.

Please Initial to Acknowledge Agreement and Submission Terms



The Learners Lab Foundation (TLLF) Does Not Engage in International Business, Nor Does It Issue or Make Grant Awards of Any Kind.

This Retainer is NOT for the receipt of grants, the acceptance of financial or other contributions.

I acknowledge that TLLF does not directly/indirectly orchestrate funding activities of any kind, nor engage in the management of financial or non-financial assets of its clients beyond that of the basic accounts payable, general & project accounting, or payroll with its related services. We understand, if funding is required, TLLF will be happy to provide grant writing assistance to our TASC portfolio of services.

Please Initial to Acknowledge Funding Disclaimer

PLEASE NOTE THE FOLLOWING:

TLLF Technical Assistance Program services are unique and customized to the specific needs of each TASC Client and are made in good faith but cannot be guaranteed. The availability of some product or services, or their related discounts, or the replenishment thereof which are exclusive to The Learners Lab Foundation cannot be guaranteed as they may be subject to the OEM and/or TLLF Partner(s) making a resource or funding for a resource available to us.

Please Initial to Acknowledge

Because of the prevalence of fraud, ALL REQUEST for TASC will be thoroughly vetted before any Technical Assistance Service Program activities commence. We understand a portion not exceeding \$150 of the \$350 Retainer fee is not refundable.

(Initial) _____

AUTHORIZATION OF SUBMISSION

Submission:
(Handwritten only, electronic signatures not accepted)

Authorized Signature /Date

Title of Signatory

[Proposed] Organizations Name

What brought you to The Learners Lab Foundation?

[Redacted area]



PAYMENT TERMS & PROCESS

Please include your Retainer Fee or a scanned or PDF copy of your "PayPal Payment Confirmation and Receipt" with your Retainer Agreement & Registration Package as "Proof of Payment.". Packages submitted without the application fee or the PayPal confirmation/receipt will be considered incomplete and will not be processed until all is received.

TASC Retainer Agreements with Payment are accepted in hardcopy by FedEx/UPS/USPS Express or Priority Mail, or email; please send "Attn: TASC Program" in the subject line.. Questions may be directed to TASC program office at TASC@TheLearnersLab.org.

Click here to pay to use our secure PayPal Account: [TLLF Fiscal Sponsorship Application Fee @ PayPal](#)

Any transaction stopped due to insufficient funds will incur an additional \$50 finance fee which must be included at your time of payment. Thank you.

For Registration Packages submitted as Hard Copy, and mail:

- a. By US Postal Service Priority or Express Mail with payment issued as Cashier's Check by a **US Banking Institution**.
- b. By US Postal Service Priority or Express Mail with US Postal Money Order (*only available from US Post Offices*). *We do not accept Money Grams and Western Union Instruments, thank you.*
- c. By US Postal Service Priority or Express Mail **include PayPal Payment Confirmation** if paying online but mailing your application in.

For check or money order, make payable to:

**The Learners Lab Foundation (TLLF) Tax ID 45-5222602
6511 Princess Garden Parkway
Collamore Bldg., #202
Lanham, MD 20706**

Attn: Fiscal Sponsorship Application for [Your Organization/Programs Name]