



City of Portsmouth Blue Ribbon Task Force
Establishment of a Public Private Historical Archive

Meeting: DATE: 10/27/2025 - 9:00 -10:30
City Hall - Conference Room A

Agenda

- Approval of 09/22/2025 Minutes
- Finance Report - Status of Accounts
- Conservation Assessment Updates
- Needs for IRS Submission
 - Review of what needs to be submitted
 - Correspondence from Dan Hershey, Hurwit Associates
- Other Business
- Adjourn

You are invited to a Zoom meeting.

When: October 27, 2025 09:00 AM Eastern Time (US and Canada)

Register in advance for this meeting:

<https://us06web.zoom.us/j/81885365389>

After registering, you will receive a confirmation email containing information about joining the meeting.



September 22, 2025 Meeting Minutes

Archiving Committee on Creating a Public/Private Historical Archive *Portsmouth NH City Hall Conference Room A, 9 - 10:30am*

Attending: Alan Cohen, Charles Doleac, Elizabeth Farish, Christine Friese, Tom Hardiman, Jeff Keefe, Vincent Lombardi, Kristen Peterson and Emma Stratton.

Absent: Richard Candee

Guests: George Dumas, Portsmouth Resident; Linnea Grim, Strawberry Banke Museum and Andrew Goldstein, Albacore Museum.

Proposed Name: Portsmouth Archive Center

Meeting Opened by Vincent Lombardi: 9:06am

MOTIONED and **SECONDED** to accept August 25, 2025, Meeting Minutes. All in favors; no opposition.

Discussion of:

Organizations 'Conservations Assessments

- City, Christine: Meeting with Barbara this week, to discuss pre-work prep to assist in the process.
- Elizabeth: Discussed 20 year growth space contingency (expectation of growth).
- Jeff: Consider a satellite location for overflow object, not needed in the primary location.
- Andrew: Looking for objects with a provenance and story, as opposed to government technical manuals and objects from the Albacore.
- Vince: A portion of the collection will need to be secured.

Submission to Secretary of State for Incorporation

- Vince: The budget was sent to all in this Committee.
- Jeff: We also need a "Purpose Statement," which can be found in our previous report. We can submit the application immediately.

- Chuck: Requests we send the SOS approved name to the attorney so we can move forward.

Needs for IRS Submission

- 501(c)3 filing: We need to send the budget and Statement of Purpose, and sending to Trevor for submission. Our TIN can be obtained quickly once this filing is complete. At that point, the Blue Ribbon Committee status converts to the next committee format.

Other Business

- Vince: Announcing city council mtg September 24, 7pm, to update the council on progress.
- Finances: Update on attorney fee balance.
- Vince: We need a succession plan for leadership, as (Vince) is not running for re-election.

Next meeting confirmed: October 27, 2025

Meeting Adjourned by Vincent Lombardi: 9:51am

DRAFT

Re: Portsmouth Archive Center 501(c)(3) Application

From Dan Hershey <dhershey@hurwitassociates.com>
Date Fri 10/17/2025 8:08 AM
To Councilor Vincent Lombardi <councilor.lombardi@portsmouthnh.gov>
Cc Trevor McCourt <tmccourt@portsmouthnh.gov>

Thanks for this, Vince.

If we had a copy, I wasn't aware of it. This is exactly the financial information we need to provide to the IRS as part of the application for 501(c)(3) status. I'll review and let you know if I have any questions. Upon first glance I see a category for "dues" on the income side of the ledger. Could you briefly explain that source of revenue? Are those donations to be made by the four Founding Members or do you plan to have a larger membership?

As for the additional information we require, here is a copy of excerpts from my previous email. Please see the highlighted items:

1. **Activities** - Please provide a detailed outline of the expected activities of the organization in the initial years of operation. This includes any potential grantmaking programs as well as scholarship programs if you intend to make grants to individuals. A brief description of each of these programs will also be required in order to answer the questions "who, what, when, where, why and how" for each program/activity.

In addition to the above main elements of the application, we will need the following information:

1. **Grantmaking** - As noted above, please let us know if the entity will make grants to your other organizations or if it will simply operate its own programs (or both). Note that you will need to detail projected grants/scholarships in the financial budget projections.
2. **Fundraising** - Please describe for us (in basic categories) what types of fundraising the organization will undertake. Below are the categories listed in the IRS application:

16 Check any of the following fundraising activities that you will undertake (check all that apply):

- | | |
|--|--|
| ☒ Website, mail, email, personal, and/or phone solicitations | ☒ Foundation grant solicitations |
| ☐ Receive donations from another organization's website | ☐ Government grant solicitations |
| ☐ Bingo | ☐ Other (non-bingo) gaming activities |
| ☐ Other (describe) | |

☐ We will not engage in fundraising activities.

Please let me know if you have any questions or concerns about this. I would be happy to have a call to discuss this if it would be helpful.

Sincerely,

Dan

Additionally we will need to know who will be serving in each of the officer positions of president, treasurer and clerk.

Finally, please note that we also need to obtain an EIN for the new corporation. I will prepare the paperwork necessary for that. Please let me know who will sign that on behalf of the corporation (typically the president) and note that I will need to obtain that person's social security number. ***Please don't send that information by email. For data security and confidentiality reasons, we only take that information over the phone.***

Of course, please let me know if any of this isn't clear. I'd be happy to have a quick call to clarify anything for you.

Sincerely,

Dan

Daniel A. Hershey CAP®

HURWIT & ASSOCIATES

Legal Counsel for Philanthropy and the Nonprofit Sector

T 617-630-6900 | F 617-928-3441

1150 Walnut Street

Newton, MA 02461

dhershey@hurwitassociates.com

www.hurwitassociates.com

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From: Councilor Vincent Lombardi <councilor.lombardi@portsmouthnh.gov>

Sent: Thursday, October 16, 2025 4:16 PM

To: Dan Hershey <dhershey@hurwitassociates.com>

Cc: Trevor McCourt <tmccourt@portsmouthnh.gov>

Subject: Portsmouth Archive Center 501(c)(3) Application

Good Afternoon Dan,

We need to know what to provide you to move forward with the application to the IRS. I believe we forwarded a proposed 3-year budget but I will attach it here.

Vince

Councilor Vince Lombardi

Councilor.Lombardi@PortsmouthNH.gov

603-828-2324

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IRS Form SS-4

From Dan Hershey <dhershey@hurwitassociates.com>
Date Fri 10/17/2025 1:39 PM
To Councilor Vincent Lombardi <councilor.lombardi@portsmouthnh.gov>
Cc Trevor McCourt <tmccourt@portsmouthnh.gov>

 1 attachment (175 KB)
PAC Form SS-4 Draft 10-17-2025.pdf;

Dear Vince,

Please see attached the IRS Form SS-4 which will allow us to obtain an EIN on behalf of PAC.

As noted previously, I will need the name of the "responsible party" (typically the president or other officer of the organization). I will also need that person to sign the document and I will need his/her social security number and a phone number for PAC. Note that I don't need the original signature page - a signed/scanned and emailed version of the signed SS-4 Fwill suffice.

Please let me know if you have questions about this. I can be reaached on my cell at 617-513-3801.

Sincerely,

Dan

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From: Dan Hershey <dhershey@hurwitassociates.com>
Sent: Friday, October 17, 2025 8:07 AM
To: Councilor Vincent Lombardi <councilor.lombardi@portsmouthnh.gov>
Cc: Trevor McCourt <tmccourt@portsmouthnh.gov>
Subject: Re: Portsmouth Archive Center 501(c)(3) Application

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Text for the filing: Statement of Purpose/Executive Summary

From K Peterson <kristenlynne.peterson@gmail.com>

Date Mon 9/22/2025 8:09 PM

To Councilor Vincent Lombardi <councilor.lombardi@portsmouthnh.gov>; Jeffrey W. Keefe <jkeefe@wholewealthmanagement.com>

 1 attachment (6 MB)

FINAL_Report_Nov30_2023_PDF.pdf;

Statement of Purpose I recommend:

Portsmouth Public/Private Archive will preserve and provide access to the administrative records and historical and cultural materials of Portsmouth for the benefit of present and future generations. The keepers of the Archive will be committed to providing archival services to member organizations by organizing and maintaining them in a secure, climate-controlled, and fire-protected environment, while facilitating access to these resources for researchers, students and the general public through both physical and digital means.

- - - - -

This is the final text, as seen in our 2023 Report:

Portsmouth Public/Private Archive will preserve and provide access to the administrative records and historical and cultural materials of Portsmouth for the benefit of present and future generations. The keepers of the Archive will be committed to providing archival services to member organizations by organizing and maintaining them in a secure, climate-controlled and fire-protected environment, making these Archives available to researchers, students and the general public through digital and physical means.

This is an earlier version, eventually edited to the above Report text:

The purpose of the Portsmouth Public/Private Archives is to preserve and provide access to the historical, cultural, and administrative records of Portsmouth for the benefit of present and future generations. We are committed to providing archival services to member organizations in organizing, and maintaining these records in a secure, climate-controlled and fire protected environment, and to making the archives available to researchers, students, and the general public through digital and physical means. We strive to promote engagement in our community and access

to anyone interested in the early history of our country, state and city through the preservation of these records, and by fostering partnerships with public and private organizations to achieve our shared goals.

Application for Employer Identification Number

(For use by employers, corporations, partnerships, trusts, estates, churches, government agencies, Indian tribal entities, certain individuals, and others.)

See separate instructions for each line. Keep a copy for your records.
Go to www.irs.gov/FormSS4 for instructions and the latest information.

OMB No. 1545-0003

EIN

Type or print clearly.	1 Legal name of entity (or individual) for whom the EIN is being requested Portsmouth Archive Center, Inc.							
	2 Trade name of business (if different from name on line 1)		3 Executor, administrator, trustee, "care of" name					
	4a Mailing address (room, apt., suite no. and street, or P.O. box) The Office of the City Attorney, 1 Junkins Avenue		5a Street address (if different) (Don't enter a P.O. box.)					
	4b City, state, and ZIP code (if foreign, see instructions) Portsmouth, NH 03801		5b City, state, and ZIP code (if foreign, see instructions)					
	6 County and state where principal business is located Rockingham, NH							
	7a Name of responsible party		7b SSN, ITIN, or EIN ON FILE					
	8a Is this application for a limited liability company (LLC) (or a foreign equivalent)? ☐ Yes ☒ No		8b If 8a is "Yes," enter the number of LLC members					
	8c If 8a is "Yes," was the LLC organized in the United States? ☐ Yes ☐ No							
	9a Type of entity (check only one box). Caution: If 8a is "Yes," see the instructions for the correct box to check. ☐ Sole proprietor (SSN) _____ ☐ Partnership _____ ☐ Corporation (enter form number to be filed) _____ ☐ Personal service corporation _____ ☐ Church or church-controlled organization _____ ☒ Other nonprofit organization (specify) Charitable, educational ☐ Other (specify) _____ ☐ Estate (SSN of decedent) _____ ☐ Plan administrator (TIN) _____ ☐ Trust (TIN of grantor) _____ ☐ Military/National Guard ☐ State/local government ☐ Farmers' cooperative ☐ Federal government ☐ REMIC ☐ Indian tribal governments/enterprises Group Exemption Number (GEN) if any _____							
	9b If a corporation, name the state or foreign country (if applicable) where incorporated New Hampshire		State Foreign country					
10 Reason for applying (check only one box) ☒ Started new business (specify type) Nonprofit tax-exempt entity ☐ Hired employees (Check the box and see line 13.) ☐ Compliance with IRS withholding regulations ☐ Other (specify) _____ ☐ Banking purpose (specify purpose) _____ ☐ Changed type of organization (specify new type) _____ ☐ Purchased going business ☐ Created a trust (specify type) _____ ☐ Created a pension plan (specify type) _____								
11 Date business started or acquired (month, day, year). See instructions. September 11, 2025		12 Closing month of accounting year June						
13 Highest number of employees expected in the next 12 months (enter -0- if none). If no employees expected, skip line 14. <table><tr><td>Agricultural</td><td>Household</td><td>Other</td></tr><tr><td>0</td><td>0</td><td>0</td></tr></table>		Agricultural	Household	Other	0	0	0	14 If you expect your employment tax liability to be \$1,000 or less in a full calendar year and want to file Form 944 annually instead of Forms 941 quarterly, check here. (Your employment tax liability will generally be \$1,000 or less if you expect to pay \$5,000 or less, \$6,536 or less if you're in a U.S. territory, in total wages.) If you don't check this box, you must file Form 941 for every quarter. ☐
Agricultural	Household	Other						
0	0	0						
15 First date wages or annuities were paid (month, day, year). Note: If applicant is a withholding agent, enter date income will first be paid to nonresident alien (month, day, year)								
16 Check one box that best describes the principal activity of your business. ☐ Construction ☐ Rental & leasing ☐ Transportation & warehousing ☐ Health care & social assistance ☐ Wholesale—agent/broker ☐ Real estate ☐ Manufacturing ☐ Finance & insurance ☐ Accommodation & food service ☐ Wholesale—other ☐ Retail ☒ Other (specify) Nonprofit charitable, educational, literary								
17 Indicate principal line of merchandise sold, specific construction work done, products produced, or services provided. Nonprofit charitable & educational activities to preserve documents and other artifacts relating to the history and culture of Portsmouth								
18 Has the applicant entity shown on line 1 ever applied for and received an EIN? ☐ Yes ☐ No If "Yes," write previous EIN here								
Third Party Designee	Complete this section only if you want to authorize the named individual to receive the entity's EIN and answer questions about the completion of this form.							
	Designee's name Valerie Sussman, Hurwit & Associates Address and ZIP code 1150 Walnut Street, Newton, MA 02461	Designee's telephone number (include area code) 617-630-6900 Designee's fax number (include area code) 617-928-3441						
Under penalties of perjury, I declare that I have examined this application, and to the best of my knowledge and belief, it is true, correct, and complete.		Applicant's telephone number (include area code)						
Name and title (type or print clearly)		Applicant's fax number (include area code)						
Signature		Date						

Do I Need an EIN?

File Form SS-4 if the applicant entity doesn't already have an EIN but is required to show an EIN on any return, statement, or other document.¹ See also the separate instructions for each line on Form SS-4.

IF the applicant...	AND...	THEN...
started a new business	doesn't currently have (nor expect to have) employees	complete lines 1, 2, 4a-8a, 8b-c (if applicable), 9a, 9b (if applicable), 10-14, and 16-18.
hired (or will hire) employees, including household employees	doesn't already have an EIN	complete lines 1, 2, 4a-6, 7a-b, 8a, 8b-c (if applicable), 9a, 9b (if applicable), and 10-18.
opened a bank account	needs an EIN for banking purposes only	complete lines 1-5b, 7a-b, 8a, 8b-c (if applicable), 9a, 9b (if applicable), 10, and 18.
changed type of organization	either the legal character of the organization or its ownership changed (for example, you incorporate a sole proprietorship or form a partnership) ²	complete lines 1-18 (as applicable).
purchased a going business ³	doesn't already have an EIN	complete lines 1-18 (as applicable).
created a trust	the trust is other than a grantor trust or an IRA trust ⁴	complete lines 1-18 (as applicable).
created a pension plan as a plan administrator ⁵	needs an EIN for reporting purposes	complete lines 1, 3, 4a-5b, 7a-b, 9a, 10, and 18.
is a foreign person needing an EIN to comply with IRS withholding regulations	needs an EIN to complete a Form W-8 (other than Form W-8ECI), avoid withholding on portfolio assets, or claim tax treaty benefits ⁶	complete lines 1-5b, 7a-b (SSN or ITIN as applicable), 8a, 8b-c (if applicable), 9a, 9b (if applicable), 10, and 18.
is administering an estate	needs an EIN to report estate income on Form 1041	complete lines 1-7b, 9a, 10-12, 13-17 (if applicable), and 18.
is a withholding agent for taxes on nonwage income paid to an alien (that is, individual, corporation, or partnership, etc.)	is an agent, broker, fiduciary, manager, tenant, or spouse who is required to file Form 1042, Annual Withholding Tax Return for U.S. Source Income of Foreign Persons	complete lines 1, 2, 3 (if applicable), 4a-5b, 7a-b, 8a, 8b-c (if applicable), 9a, 9b (if applicable), 10, and 18.
is a state or local agency	serves as a tax reporting agent for public assistance recipients under Rev. Proc. 80-4, 1980-1 C.B. 581 ⁷	complete lines 1, 2, 4a-5b, 7a-b, 9a, 10, and 18.
is a single-member LLC (or similar single-member entity)	needs an EIN to file Form 8832, Entity Classification Election, for filing employment tax returns and excise tax returns, or for state reporting purposes ⁸ , or is a foreign-owned U.S. disregarded entity and needs an EIN to file Form 5472, Information Return of a 25% Foreign-Owned U.S. Corporation or a Foreign Corporation Engaged in a U.S. Trade or Business	complete lines 1-18 (as applicable).
is an S corporation	needs an EIN to file Form 2553, Election by a Small Business Corporation ⁹	complete lines 1-18 (as applicable).

¹ For example, a sole proprietorship or self-employed farmer who establishes a qualified retirement plan, or is required to file excise, employment, alcohol, tobacco, or firearms returns, must have an EIN. A partnership, corporation, REMIC (real estate mortgage investment conduit), nonprofit organization (church, club, etc.), or farmers' cooperative must use an EIN for any tax-related purpose even if the entity doesn't have employees.

² However, don't apply for a new EIN if the existing entity only (a) changed its business name, (b) elected on Form 8832 to change the way it is taxed (or is covered by the default rules), or (c) terminated its partnership status because at least 50% of the total interests in partnership capital and profits were sold or exchanged within a 12-month period. The EIN of the terminated partnership should continue to be used. See Regulations section 301.6109-1(d)(2)(iii).

³ Don't use the EIN of the prior business unless you became the "owner" of a corporation by acquiring its stock.

⁴ However, grantor trusts that don't file using Optional Method 1 and IRA trusts that are required to file Form 990-T, Exempt Organization Business Income Tax Return, must have an EIN. For more information on grantor trusts, see the Instructions for Form 1041.

⁵ A plan administrator is the person or group of persons specified as the administrator by the instrument under which the plan is operated.

⁶ Entities applying to be a Qualified Intermediary (QI) need a QI-EIN even if they already have an EIN. See Rev. Proc. 2000-12.

⁷ See also *Household employer agent* in the instructions. **Note:** State or local agencies may need an EIN for other reasons, for example, hired employees.

⁸ See *Disregarded entities* in the instructions for details on completing Form SS-4 for an LLC.

⁹ An existing corporation that is electing or revoking S corporation status should use its previously assigned EIN.

Form 1023, Part VI - Financial Data**A. Statement of Revenues and Expenses**

	Current Tax Year	2 Succeeding Years	
	From 9/2025 to 12/31/2025	From 1/1/2026 to 12/31/2026	From 1/1/2027 to 12/31/2027
REVENUE			
1 Gifts, grants, and contributions received (do not include unusual grants)			
2 Membership fees received			
3 Gross investment income			
4 Net unrelated business income			
5 Taxes levied for your benefit			
6 Value of services or facilities furnished by a governmental unit without charge (not including the value of services generally furnished to the public without charge)			
7 Any revenue not otherwise listed above or in lines 9–12 below (attach an itemized list)			
8 Total of lines 1 through 7	\$ -	\$ -	\$ -
9 Gross receipts from admissions, merchandise sold or services performed, or furnishing of facilities in any activity that is related to your exempt purposes (attach an itemized list)			
10 Total of lines 8 and 9	\$ -	\$ -	\$ -
11 Net gain or loss on sale of capital assets (attach an itemized list)			
12 Unusual grants (attach an itemized list)			
13 Total Revenue Add lines 10 through 12	\$ -	\$ -	\$ -
EXPENSES			

14 Fundraising expenses			
15 Contributions, gifts, grants, and similar amounts paid out (attach an itemized list)			
16 Disbursements to or for the benefit of members (attach an itemized list)			
17 Compensation of officers, directors, and trustees			
18 Other salaries and wages			
19 Interest expense			
20 Occupancy (rent, utilities, etc.)			
21 Depreciation and depletion			
22 Professional fees			
23 Any expense not otherwise classified, such as program services (attach itemized list)			
24 Total Expenses Add lines 14 through 23	\$ -	\$ -	\$ -

[illegible]

\$	-
\$	-
\$	-
\$	-
\$	-
\$	-
\$	-
\$	-
\$	-
\$	-
\$	-