



WELCOME!

ICYPAA University 2015-2016 Cycle
Session 5 – Sunday, March 27, 2016

Bid Requirements 1 & 7: Roster & Tax Laws



How To Participate In ICYPAA University

- Register by clicking the link sent via email or posted on Facebook.
- If your computer does not have a microphone or you are having other technical difficulties, you may participate by dialing in on your phone.
 - The dial-in number is located in your registration confirmation email.
- It is recommended that everyone use a headset.
- During the webinar you are able to ask questions by typing them out into the questions box, indicating that you have a question in the questions or chat box, or by utilizing the hand-raising function.
- When asking questions, please identify which committee you are on.
- Questions will be answered at the end of each section.
- If a presenter is unable to answer all questions in the time allotted, the presenter will email you an answer to your question.



Introduction To ICYPAA University

- Bidders and Advisory Council members frequently have informal conversations at ICYPAA, where we discuss several important topics. These conversations are a great way for individuals to gain insight to Council's experience and expectations. ICYPAA University was created so that this information could become more widely available to anyone seeking it.
- The Bid Development committee intends to present a series of educational webinars, providing an interactive environment for Bidders and Council members to learn from each other.
- Each webinar will be recorded and available for viewing on the ICYPAA website. The full schedule of ICYPAA University webinars can be found here: <http://www.icypaa.org/bid-center/icypaa-university>.
- Please understand that the individual presenters are sharing their qualified experience and not representing the Advisory Council as a whole.
- The full schedule of ICYPAA University webinars can be found here: <http://www.icypaa.org/bid-center/icypaa-university>.



Personal Introductions:

Council members, when prompted, please introduce yourself:

- First name and last initial **only**
 - This webinar is being recorded and will be posted to our website
- Current position on the Advisory Council
- Which ICYPAA Host Committee you served on
- What position you served on your Host Committee

Bidders, when prompted, please introduce yourself:

- First name and last initial **only**
 - This webinar is being recorded and will be posted to our website
- Which Bid Committee you serve on
- Current position on your Bid Committee



ICYPAA University

Session 3 Agenda

Bid Requirement #1

- Creating a Member Roster
- Things to Consider

Bid Requirement #7

- Introduction
- Permission to Conduct Business
- DBA / Assumed Name Filings
- Local Tax Exemptions
- Sales Tax Collection
- Final Thoughts on Paperwork

Bid Committee Roundtable

Advisory Council Testimonial

- Mike P. (Alternate Chair, 54th ICYPAA)



Bid Requirement #1

“Create a roster of committee members.”



Bid Requirement #1 – Introduction

What do you want to include in your roster?

Most Common Components:

- Names
- Email Addresses
- Phone Numbers
- Current Committee Positions
- Homegroups
- Sobriety Dates
- Past Committee Positions



Bid Requirement #1 – Suggestion

Each bid committee may submit a redacted bid book for sharing with other committees. Meaning all personal contact information should be removed from this redacted version.

Example:

FLORIDA BID ROSTER 2014

Name	Committee Position	Email Address	Sobriety Date	Birth Date	Years on Bid	City	Homegroup
	Committee Chair		07/20/11	03/18/90	3	West Palm Beach	Noon Lunch Bunch
	Alt-Chair		02/21/00	04/30/79	4	Miami	Harmony Room
	Treasurer		05/01/03	05/24/74	4	St. Petersburg	5th Dimension YPG
	Secretary		05/08/09	05/06/82	2	Bradenton	Sarasota YPG
	Current Practices		04/06/13	01/15/86	1	Miami	We Stopped in Time
	Service Chair		01/20/09	04/15/74	1	Jacksonville	Riverside YPG
	Outreach Chair		10/18/10	08/24/89	4	West Palm Beach	Lake Worth YPG



Bid Requirement #1 – Things to Consider

- Remember this newly reconstructed Bid Requirement allows the roster to be more personalized.
- Everything listed previously was simply a suggestion based on the most common components, but not an exclusive list.
- Please adjust it as your committee sees fit.
- Add or remove items to best represent your committee
- This is the perfect place to show the personality of your bid committee through customization and creativity.

Questions?



Bid Requirement #7

“Produce a concise summary of applicable federal, state, provincial and local tax/business laws.”



Bid Requirement #7 – Introduction

- Each state and province has different laws that pertain to doing business within their jurisdiction.
- It is the Bid Committee's responsibility to do this research and provide the Advisory Council with a summary so that Council can make the most informed decision possible.
- Most of this information as well as any necessary filing forms can often be found at each state's Secretary of State office/website but some states have separate divisions for corporations.
- Host Committee's Relationship to ICYPAA, Inc.
 - When the Advisory Council selects a committee to host ICYPAA, that host committee becomes an agent of the corporation ICYPAA, Inc.
 - The new host committee can then use ICYPAA, Inc.'s Federal Tax ID #.
 - ICYPAA, Inc. is a registered non-profit corporation in the state of Colorado and is federally tax exempt.



Bid Requirement #7 – Permission to Conduct Business

- Common Form Names: Application for Authority for Foreign Corporation, Application for Foreign Not-for-Profit Corporation for Authorization
- ICYPAA as a Foreigner?
 - Unless the host state is Colorado, ICYPAA, Inc. is considered a Foreign Not-Profit Organization and must register to do business in the host state/province.
 - This is the bedrock on which all of the other tax and legal forms depend.
 - Until ICYPAA, Inc. is officially registered in your state, there is very little chance of being able to set up a bank account (if applicable, i.e. a state w/o Chase Bank) or file any of the other necessary forms with your local government.



Bid Requirement #7 – DBA / Assumed Name Filings

- Common Form Names: Certificate of Assumed Name, Application or Registration of Fictitious Name/Trade Name Application
- For example: “59th ICYPAA”
 - In order for your host committee to take advantage of being under the corporate umbrella of ICYPAA, Inc., yet do business under a name like “58th ICYPAA”, paperwork needs to be filed with your state/province.
 - An officer of ICYPAA, Inc. will usually need to sign off on this paperwork.



Bid Requirement #7 – Local Tax Exemption

- Common Form Names: Application for an Exempt Certificate/ Application for Consumer's Certificate of Exemption
- State/Province Tax Exemption
 - Even though ICYPAA, Inc. is federally tax exempt, The Host Committee must file for tax-exempt status in the Host state.
 - It is important to note that just because ICYPAA, Inc is federally income tax exempt, it does not mean that a state will automatically recognize a tax exemption for sales tax.
 - Once paperwork has been approved, the Host Committee will receive something like an Exempt Organization Certificate, which allows the Host Committee to make purchases in the Host state without paying sales tax.
 - If ICYPAA has previously registered for tax exempt status in the Host state/province and is still officially recognized as such, paperwork may not need to be filed.



Bid Requirement #7 – Sales Tax Collection

- Common Form Names: Application to Register for a Sales Tax Certificate of Authority/Application to Collect Tax
- Collecting Sales Tax
 - Some states/provinces require that sales tax be collected on merchandise sold by the Host Committee. If this is the case in your location, *quarterly sales tax returns may need to be filed.*
 - In order to collect sales tax, the Host Committee will need to register with your state/province as a sales tax collector



Bid Requirement #7 – Other Thoughts on Paperwork

- Some states/provinces will require specific documentation about ICYPAA in order to process the various applications (such as Articles of Incorporation, a Certificate of Good Standing, etc.). You can get this paperwork from the Advisory Chair or Treasurer once you have been awarded the conference.
- The above list of paperwork is not exhaustive. This is why your bid committee needs to provide the Advisory Council with a concise summary of your research on this subject.
- The main thing to remember is this requirement is all about research and showing the Advisory Council you know how your state handles this type of conference.
- Filing the necessary paperwork is one of the first tasks the Host Committee will need to do immediately upon being awarded ICYPAA.
- Even if you do not include the actual filing forms in your printed bid book, it is beneficial to have them on hand when bidding in case you are awarded ICYPAA so that we can begin the process while everyone is face-to-face.



Bid Requirement #7 – Other Helpful Hints and Tips

- You probably have people on your Host Committee or in your local AA community that have set up small businesses in your state before. They can give you guidance on things to think about.
- Do not be afraid to call the government agencies for any questions you may have. They are very helpful and resourceful.
- If this is not your first year bidding, remember that laws change all the time. Do not assume the research you did the year before is still valid. Double check the research and do no cut and paste from year to year.
- Do not forget about “local”. Make sure you understand any county or city requirements.



Bid Requirement #7 : Review

- Introduction
- Permission to Conduct Business
- DBA / Assumed Name Filings
- Local Tax Exemptions
- Sales Tax Collection
- Final Thoughts on Paperwork
- Other Helpful Hints and Tips

QUESTIONS?



Bid Committee Roundtable



Bid Committee Roundtable

each participant will be asked to select ONE question to answer

Question 1: What would you like to see explained or described in greater detail on ICYPAA University?

Question 2: What do you think could be done to improve communication between Bid Committees and Advisory?

Question 3: What do you find is the most difficult/confusing aspect of bidding?



Advisory Council Testimonial

- Mike P. (54th ICYPAA St. Louis, MO Alternate Chairperson).



Any Questions?

- Please ask questions by typing them out into the questions box, indicating that you have a question in the questions or chat box, or by utilizing the hand-raising function.



Thank you for attending ICYPAA University Session 5

This webinar has been recorded and will be available on the ICYPAA website for viewing along with a PDF copy of the presentation material.

We look forward to your continued participation with ICYPAA University!

- Our next webinar will be Session 6: **Bid Requirements 5 & 6**, on Sunday, April 24th @ 1:00 PM PST / 2:00 PM MST / 3:00 PM CST / 4:00 PM EST.
- If your committee would like a private, one-hour webinar meeting with available Council members, please contact us at biddev@icypaa.org with your requested dates and times (no individual webinars will be scheduled after one month before the conference in 2015). We will do our best to accommodate. There is a limit of one individual webinar per Bid Committee per year.

Feel free to contact us with any further questions or comments:

- Subcommittee emails: <http://www.icypaa.org/bid-center/bid-related-questions>
- Individual emails: <http://www.icypaa.org/council/roster>