

Meeting Notes

Small Business Liaison Team (SBLT)

Thursday, September 22, 2016 1:00-2:30 pm

Please send corrections, edits or additional information to help@oria.wa.gov.

Location	Columbia Room, Department of Commerce Building
Purpose	Workshops to Train Ethnic Business Owners on UBI Requirements; Small Business Retirement Marketplace
Attendees	<ul style="list-style-type: none">• Linda Alongi • Jeff Baughman • Kayla Burr • Doug Cheney • Rose Gundersen •• Scott Hitchcock • Kim Johnson • Edmon Lee • Rachael Lindstedt •• Carolyn McKinnon • Daryl Murrow • Ron Nielsen • Servando Patlan •• Natalya Putt • Patrick Reed • Tiffany Scroggs • Janet Shimabukuro •• Jovi Swanson • Peter Vernie • Margeret Warner • Elizabeth Wheat •

Agenda Highlights

- **Welcome and Agenda Overview**
- **Calendar of Events & Web Traffic Report**
- **Small Business Guide & Washington BusinessHub – Update**
- **Workshops to Train Ethnic Business Owners on UBI Requirements**
- **Small Business Retirement Marketplace**
- **SBLT Members' Roundtable**

Welcome and Agenda Overview

Scott Hitchcock, Office for Regulatory Innovation and Assistance

- Quick overview of the agenda – Introductions
- **2017 Outreach Plan:** cataloguing ideas for new year; talk about accomplishments for 2016 in December and develop new plan for 2017. **Action:** ORIA will send the draft outreach plan to the SBLT for ideas
 - **Roadmap:** Concerns regarding cutting too much of the document - **Action:** ORIA will work with SBLT members & center for business and innovation to determine the customer needs. Remember purpose of the roadmap is to provide more of a quick checklist to introduce customers to businesses
 - **Performance Measures:** We should track our performance measures. Are there statistics regarding whether SBLT is doing better, worse, or no impact?
 - **Action:** Add metrics to Outreach plan for 2017; if no data currently available, research location of information

- **BizFair – Outreach Materials:** ORIA is attending the BizFair on Saturday. ORIA will have a table and a lot of materials; so there will not be a lot of space, but can put a few outreach materials out. Let ORIA know by Friday if you have materials for ORIA to bring for your agency.

Calendar of Events – Updates to the calendar

Rachael Lindstedt, Office for Regulatory Innovation and Assistance

- Presented on the Calendar of Events for Small Businesses.
 - For the month of September there is one event listed: the [Washington Small Business Fair^a](#) in Renton. If you are interested in attending, please contact Kari Gilje, Small Business Liaison with the Internal Revenue Service at kari.s.gilje@irs.gov.
 - There are no events listed in the month of October.
- **Recommendation:** As there does not appear to be many additions to the calendar and there are still a lot of questions regarding the purpose of the calendar – next year re-define or re-evaluate the Calendar of Events.
- **Reminder:** The events listed on this calendar should only be public events for small businesses to allow SBLT members to better coordinate their outreach efforts. Please visit the [Small Business Events Calendar^b](#) to review any upcoming events and let ORIA know (send to help@oria.wa.gov) if there are any missing events or if your agency is attending an event not currently listed as an attendee.

Web Traffic Report

Rachael Lindstedt, Office for Regulatory Innovation and Assistance

- Presented the [Web Traffic Report^c](#) for June 1, 2016 to August 31, 2016:
 - Calendar of Events
 - Small Business Guide agency referrals
 - Small Business Guide HTML
 - Small Business Guide PDF downloads
- A quarterly web traffic report is presented to the Small Business Liaison Team each month; next month's report will include data from July 1, 2016 to September 30, 2016.
- **Action:** ORIA is still reviewing the best method to display the geographical data to the SBLT

Small Business Guide & Washington BusinessHub - Update

Elizabeth Wheat, WaTech

- Rhonda is no longer with WaTech and the new project owner is Elizabeth Wheat who plans to work closely with SBLT to make sure that the content of the BusinessHub website is consistent

- Updates
 - Added pdfs to website (bottom of the page)
 - Fixed issues with Safari (other browsers)
 - Used Small Business Guide survey format and BusinessHub surveys so questions are consistent and feedback is sent to both
 - WaTech wants to develop the relationship between SBLT and BusinessHub; will use the survey to provide SBLT members with customer feedback
- Next Steps
 - Allow for analytics (metrics) – this would take the place of the SBG analytics report that Rachael Lindstedt, ORIA provides to SBLT monthly
 - Mail out survey for more responses
 - Attend BizFair to encourage individuals for customer feedback
- Provided Handout: Washington BusinessHub
 - Collaborative project
 - Review and provide feedback to Elizabeth Wheat, WaTech by the next week or so

Workshops to train Ethnic Business Owners on UBI Requirements

Rose Gundersen, Labor and Industries

- Heard from:
 - Department of Licensing,
 - Employment Security Department,
 - Commission on Asian Pacific American Affairs,
 - Department of Enterprise Services,
 - Office of Minority & Women's Business Enterprise
- Still waiting to hear from others, so she can schedule workshop
 - City of Bellevue possible location
 - Patrick Reed, SOS: You can use the Secretary of State's buildings - Bellevue archives building – can fit approximately 30 people
- Goal of 3-4 workshops schedule; currently 7 different chambers are involved; Still working on the logistics
 - Scott Hitchcock, ORIA: LNI has good resources for video productions; perhaps the training could be recorded and provide online
 - Rose Gundersen, LNI: good idea; I am actually working with LNI staff with other projects

Small Business Retirement Marketplace

Carolyn McKinnon, Department of Commerce

- Presentation: [Washington State Retirement Security Initiative^d](#)

- Update on small business retirement
 - 25-30 states trying to provide solution for private retirement; employees are not planning ahead so there is a high likelihood of more elders in need in the future
 - Retirement saving gap: Kids take a lot of the money which would be used towards retirement
 - 40% of workers do not with retirement benefits in the workplace
 - Approximately 90,000 small business (less than 100 employees is defined as a small business – per initiative) offer no retirement savings benefits – 65% of small business (these stats were sampled from Employment Security Department)
 - Washington marketplace model – 1st in the nation to launch the initiative (without having a mandate)
 - Early look developers currently working on marketplace; trying to make it match up with private sector shopping
 - All voluntary; no regulations
 - Opening the “gates” this week
- WAC 365-65-080: limit on fees
 - Going after underserved businesses; not high networked
 - SBLT: Concerns regarding this requirement
 - Jeff Baughman, OIC: Going live January 1 – legislation coming out in favor of the purchaser not the insurance business; working with federal government, so more than just state
 - Not many options at this time – this is a test drive
- Ask: need SBLT help to reach out to small businesses and working people
 - Has information for outreach – electronic etc.
 - Co-hosting with AARP to bring everyone together in a forum to discuss challenges and concerns
- RedTech & Kentico – Department of Commerce is partnering with these companies to develop the small business retirement marketplace
 - **Action:** ORIA will be adding this information to the Small Business Guide
 - Jeff Baughman, OIC: recommended working with brokers to get information out
 - Rose Gundersen, LNI: would like access to materials

Carolyn: Partner resource kit available in January 2017; want to provide this information to SBLT Members' Roundtable

All SBLT Members

- Patrick Reed, SOS: update on Secretary of State system replacement
 - Moving target; launch date in April 2017
 - Increases usability

- Janet Shimabukuro, DOR: Atlas – MyDOR introduced
 - Rollout 2 (fall) will combine MyDOR and MyAccount (tax system)
 - Working on User Interface improvements
 - Feedback regarding new systems
 - Margeret Warner, ORIA: Customers provided feedback that it would take longer to obtain a business license because they needed to wait to obtain a letter ID that had to be mailed to customer by the Department of Revenue – Business Licensing Services
 - Existing business: used for providing confidential information
 - Next week, customers will be able to add information without letter id
 - Elizabeth Wheat, WaTech: usability consultant provided feedback – the security piece is super confusing
 - Business license application processing times?
 - Kim Johnson, DOR-BLS: 10 business days online
 - Backlog is due to adjusting to the new system
 - Performance measures are that business license is to be processed within 3 business days and 2-3 weeks for paper business license applications
 - [Business Licensing Wizard^e](#) is great
 - Getting lots of feedback; tracking trends and making changes
 - MyDOR new business licensing portal is within SAW
 - Kelso is partnering with cities to pilot the new single system
- Servando Patlan, DES: translation for Small Business Guide – done by next month

Referenced Hyperlinks

- ^a **Washington Small Business Fair:** <http://www.oria.wa.gov/BizEvents>
- ^b **Small Business Events Calendar:** <http://www.oria.wa.gov/BizEvents>
- ^c **Web Traffic Report:**
[https://www.ezview.wa.gov/Portals/_1729/Documents/Presentations/WebSite%20Analytics%20-%20SBLT%20Report%20\(May-July%202016\).pdf](https://www.ezview.wa.gov/Portals/_1729/Documents/Presentations/WebSite%20Analytics%20-%20SBLT%20Report%20(May-July%202016).pdf)
- ^d **The Alliance Northwest:** <http://alliancenorthwest.org/>
- ^d **Washington State Retirement Security Initiative:**
[https://www.ezview.wa.gov/Portals/_1729/Documents/Presentations/SBRM Joint Comm Aging Disability 9 2016.pdf](https://www.ezview.wa.gov/Portals/_1729/Documents/Presentations/SBRM%20Joint%20Comm%20Aging%20Disability%209%202016.pdf)
- ^e **Business Licensing Wizard:** <https://secure.dor.wa.gov/gteunauth/#1>