

Meeting Notes

Small Business Liaison Team (SBLT)

Thursday, October 27, 2016 1:00-2:30 pm

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

Location	Department of Commerce Building Sunrise Room, Building 5, Floor 4 Conference Room #407
Purpose	Department of Revenue – Business License Service – System Updates – Agency Presentation, & Washington State BusinessHub &SBLT Partnership – Agency Presentation
Attendees	• Una Wiley • Jeanne Nations • Jeff Baughman • Rachael Lindstedt • Margeret Warner • Servando Patlan • Scott Hitchcock • Patrick Reed • Linda Alongi • Nancy Skewis • Ashley Miller • Kim Johnson • Jovi Swanson • Grant Pfiefer • Elizabeth Wheat • Brittany Wilson • Edmon Lee • Kayla Burr • Rose Gundersen • Doug Cheney •

Agenda Highlights

- **Welcome and Agenda Overview**
- **Calendar of Events & Web Traffic Report**
- **2017 SBLT Outreach Planning**
- **Business Roadmap Update**
- **Washington State BusinessHub &SBLT Partnership – Agency Presentation Department of Revenue – Business License Service – System Updates – Agency Presentation**
- **SBLT Members' Roundtable**

Welcome and Agenda Overview

Scott Hitchcock, Office for Regulatory Innovation and Assistance

- Quick overview of the agenda – Introductions
- 2017 Outreach Plan:
 - **Action:** Scott Hitchcock, ORIA: Today or tomorrow, will be emailing outreach survey to the SBLT requesting feedback for the outreach plan. During the next SBLT meeting will be reviewing draft of survey report. Helps us know who has resources and time to contribute to each of the items.
 - December 8th is the next SBLT meeting. There is no SBLT meeting in November.

- **Action:** ORIA: The next step for the Business Roadmap is to convert the Word version of the document to HTML.

Calendar of Events – Updates to the Calendar

Rachael Lindstedt, Office for Regulatory Innovation and Assistance

- Presented on the [Small Business Events Calendar^a](#)
 - For the month of October, there are no items listed.
 - For the month of November, there is one item listed:
 - [North Puget Sound – Small Business Summit^b](#) will be held November 2, 2016 at the Lynnwood Convention Center. This event is hosted by the Economic Alliance of Snohomish County.
 - **Action:** SBLT members requested the following events be added to the Small Business Events Calendar:
 - Servando Patlan, DES: March 9, [Alliance Northwest in Puyallup^c](#)
 - Elizabeth Wheat, WaTech: December 9, UBI Summit
 - Expanding the number of seats to 70
 - Keynote speakers will be business owners
 - If you would like to attend, please contact Elizabeth Wheat at Elizabeth.Wheat@watech.wa.gov or 360-407-8698.
 - **Suggestion:** Scott Hitchcock, ORIA: Proposed updating the calendar purpose to include events agencies are sponsoring or attending. With updating the calendar purpose, there's a greater chance of event participation from regulatory agencies.
- **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](#) 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^d](#) for July 1, 2016 to September 30, 2016:
 - Calendar of Events
 - Small Business Guide agency referrals
 - Small Business Guide HTML
 - Small Business Guide PDF
- A quarterly web traffic report is presented to the Small Business Liaison Team each month; next month's report will include data from August 1, 2016 to October 31, 2016.

- Presented the *NEW* [Web Traffic Report by Countries^e](#) for July 1, 2016 to September 30, 2016.

Small Business Guide & Washington BusinessHub - Update

Elizabeth Wheat, WaTech

- Presented on the [BizHub & SBLT Partnership^f](#)
- The presentation includes information on:
 - Objectives
 - BusinessHub Customer Needs
 - Proposed Use Cases
 - BizHub is scoped towards small immature businesses; new businesses that have been in business less than two years. This was presented to the Executive Steering Committee – used two use cases.
 - Successful vendor selected through a competitive process is “Deloitte”
 - In the process of project up-ramp. Have all of the environmental updates complete. On January 1, 2017 will begin having employee and customer engagement
 - Proof of Concept Update
 - Biz Hub / SBLT Vision – The vision is intended to be a virtuous cycle.
 - Recommended Metrics
 - Dashboard would include excise tax, sales tax, business license, efile and UBI
 - Conducting a series of automatic tests to make sure the product is in place
 - Currently testing links for link atrophy, broken links, link accessibility, and compliance
 - Current results between old content and Small Business Guide content
 - Survey Metrics – Rhonda Polidori, WaTech & Britany Wilson, ORIA worked together to build a survey.
 - WaTech recommends removing the question in the survey that asks which Small Business Guide chapter(s) that customer is interested in. Can find this metric when customers click on the Small Business Guide chapter.
 - WaTech is considering having a customer Kiosk in the Office of the Secretary of State’s (OSOS) Olympia Office. This would be a similar customer kiosk model used last year in Seattle.
 - Last year, when the kiosk was positioned in Seattle received a ton of data.
 - Next Steps: Mutual Work Planning
 - BizHub to Work with OSOS to gather additional surveys
 - BizHub to continue to instrument metrics and work on dashboard
 - BizHub to refine survey

Department of Revenue – Business Licensing Services – Agency Presentation

Ashley Miller, Department of Revenue

- Presented on the [My DOR Business Licensing System](#)
 - Login or register for My DOR at: <https://secure.dor.wa.gov/home/>
 - In order to log into my My DOR you need a Secure Access Washington (SAW) user ID
 - Business License option will automatically be an option for customers in SAW
 - Customers can file an annual report without needing a code or password (this is a recently updated feature)
 - My DOR has the same information as the paper Business License Form
 - If a customer needs to enter a Unified Business Identifier (UBI) number it will be automatically routed to the Office of Secretary of State (OSOS)
 - Ability to add trade names
 - Addresses may be verified – checking postal guidelines and city limits – does a cross check for partners on Business Licensing Services' (BLS) behalf
 - OPAY is the third party vendor that was used for My DOR
 - For a copy of the business application, you can print out detailed information
 - After a letter is mailed to the customer with the letter ID, the customer can find additional information in My DOR. If they need expedited information, they can contact Business Licensing Services and they can now push the information through instead of having the customer wait.
 - Ability to see endorsements, renewal dates, messages, request status, names, and address information
 - To hire an employee, go to:
 - Already set-up with DOR
 - Add license endorsements/employees
 - To close an account (with ESD, L&I, etc.), go to:
 - Close Account
 - Select the agencies you want to have
 - First BLS is notified of the closed account and then and then other state agencies are notified

SBLT Members' Roundtable

All SBLT Members

- **Action:** Scott Hitchcock, ORIA: is going to follow-up with the Economic Alliance of Snohomish so the SBLT can be involved in the planning stages of future events.
- Rose Gundersen, L&I: Training for ethnic business owners is currently on hold. Waiting on business owners to respond.
- Rose Gundersen, L&I: November 8, Planning meeting on information sharing tax workshop outreach event with the Thurston County Chamber, DOR, and L&I.
- Scott Hitchcock, ORIA: Part of outreach plan in 2017 is to change the way we communicate with each other about events we are attending.

SBLT Members' Roundtable (continued)

All SBLT Members

- Patrick Reed, OSOS – Effective December 2016, all titles will be gone and replaced with Governor.
- Washington Small Business Fair Debrief: Did not have enough time during the meeting to discuss the Washington State Small Business Fair Debrief. For more information on the business fair, you can view the check-in and exit surveys:
 - Check-in Survey:
https://www.ezview.wa.gov/Portals/_1729/Documents/Presentations/2016%20Check%20in%20Survey%20tabulation.pdf
 - Exit Survey:
https://www.ezview.wa.gov/Portals/_1729/Documents/Presentations/2016%20Exit%20Survey%20tabulation.pdf

Referenced Hyperlinks

- a **Small Business Events Calendar:** <http://www.oria.wa.gov/BizEvents>
- b **North Puget Sound – Small Business Summit:** <http://npssmallbusinesssummit.org/>
- c **Alliance Northwest:** <http://alliancennorthwest.org/>
- d **Web Traffic Report:**
[https://www.ezview.wa.gov/Portals/_1729/Documents/Presentations/WebSite%20Analytics%20-%20SBLT%20Report%20\(Jul-Sep%202016\).pdf](https://www.ezview.wa.gov/Portals/_1729/Documents/Presentations/WebSite%20Analytics%20-%20SBLT%20Report%20(Jul-Sep%202016).pdf)
- e **Web Traffic Report by Countries:**
[https://www.ezview.wa.gov/Portals/_1729/Documents/Presentations/Website%20Analytics%20-%20Countries%20\(Jul-Sep%202016\).pdf](https://www.ezview.wa.gov/Portals/_1729/Documents/Presentations/Website%20Analytics%20-%20Countries%20(Jul-Sep%202016).pdf)
- f **BusinessHub & SBLT Partnership Presentation:**
https://www.ezview.wa.gov/Portals/_1729/Documents/Presentations/BizHub%20-%20Small%20Business%20Liaison%20Team%20-%202016%2010%2027.pdf