

Meeting Notes

Small Business Liaison Team (SBLT)

Thursday, June 22, 2017, 1:00-2:30 pm

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

Location	Department of Commerce Building Floor 1, Large Room 110 Columbia Room
Purpose	Presentation: Update on Strategies to Increase State Utilization of Minority, Women and Veteran Owned Businesses
Attendees	• Linda Alongi • Ari Anthony • Jeff Baughman • Rose Gundersen • • Scott Hitchcock • Edmon Lee • Rachael Lindstedt • Amy Markhoff • • Grant Pfeifer • Laura Raymond • Janet Shimabukuro • Nancy Skewis • • Jovi Swanson •

Agenda Highlights

- **Welcome and agenda overview**
 - Upcoming Events
 - Web Traffic Report
- **Presentations:**
 - Small Business Insight: Olympia Family Chiropractic
 - Agency Consultation Services
 - Secretary of State
- **Future presentation ideas**
- **Roundtable**

Welcome and agenda overview

Scott Hitchcock, Office for Regulatory Innovation and Assistance

- Reviewed agenda and introductions
- Events Workgroup
 - Partnering with Center for Business and Innovation for a Small Business Event occurring in the fall (November)
 - Focus on women in business
 - Similar to the Small Biz Fair in which workshops and tables for agencies
 - Location at the South Puget Sound Community College

- Who is interested in providing a workshop?
 - Labor and Industries: Volunteer Paid Sick Leave
 - Secretary of State: Limited Liability Company / Corporation
- Weekday and/or weekend day?
 - If we chose a weekend day then the venue will not be free as they need to provide security – in which case, will any agency be willing to sponsor the event
- **Action:** Scott will send email requesting additional workshops and/or agency sponsors
- Communication Workgroup
 - Doodle poll sent to team to discuss roadmap and next steps; SBLT discussion that followed included:
 - Creating common checklists
 - Using the BLS Wizard as the checklist; update the format of the results
 - Connect with local businesses to review checklist

Upcoming Agency Event

Department of Commerce

- [CleanTech Showcase 2017^a](#): June 26, 2017, Seattle
- **NASA Small Business Industry Day**: September 26, 2017, Seattle

Internal Revenue Service

- [Washington Small Business Fair^b](#): September 30, 2017, Renton

Web Traffic Report

Rachael Lindstedt, Office for Regulatory Innovation and Assistance

- Presented the [Web Traffic Report^c](#) for March 1, 2016 to May 31, 2017:
 - Small Business Guide agency referrals
 - Small Business Guide HTML
 - Small Business Guide PDF
 - United States and Country page views
- A quarterly web traffic report is presented to the Small Business Liaison Team each month; next month's report will include data from April 1, 2017 to June 30, 2017.

Presentations

Small Business Insights: Olympia Family Chiropractic

Amy Markhoff and Ari Anthony

- Started licensing process February 5 – opened doors June 12
- Why Washington state?
 - Moved from CA (mandatory vaccination law)
 - Family lives in WA and grew up here
 - Chiropractic is very well-accepted and regulated
- Business Structure: S-Corp with IRS and Corporation with state
 - Knowing whether they filled out everything correctly was the hardest part
 - Was helped by both family and accountant
- Applied for their licenses online which was very easy and very smooth process
- Setting up business bank account was also pretty easy especially because of the help they received from Amy's family
 - Too many answers from too many resources available on the internet
 - Having someone to talk to is the better way to go
 - No conflicting information from state resources, just a lot of jumping around which can get you lost – overwhelming
- Gave up CA license, but CA fees are half the cost of WA
- Local jurisdiction was extremely helpful with providing information on required permits (signage); took 3-4 days to finish the permitting process
- No plans for expanding business in include massage therapist – in part due to space in current location and because they want to focus on chiropractic
- Two months of marketing before opening their doors which resulted in 65 new clients on the first day. They went to festivals, met with as many people as possible and built referral networks with other medical staff
- Recommendation for SBLT:
 - Create something like a checklist; helps to know where to go and the steps (1, 2, 3 etc.)
 - Roadmap and Business Licensing Wizard provide that information although it could be put in a better format;
 - Part of what makes a checklist complicated is the number of different types of businesses

- Be consistent when providing information and assistance to small business' to help build trust
- Willing to provide advice to agencies

Agency Consultation Services

Scott Hitchcock, Office for Regulatory Innovation and Assistance

- Spoke to Joel Sacks (Director, LNI, and Goal #2 Council Chair) who recommended that a list of consultation services that are available through state agencies be made available to businesses.
- ORIA is acting on this recommendation and requesting that SBLT member agencies help by providing ORIA with a list of consultation services provided by their respective agencies.
 - Consultation services means tailor-made to the business rather than general customer services
 - If there is a fee (such as the \$750 for the Economic Gardening offered by Commerce) that's fine; just any services that are available to small business owners

Secretary of State

Patrick Reed, Secretary of State

- Continuity Plan for Secretary of State
 - Office will remain open and filing documents.
 - The UBI system will remain online; however, there may be no maintenance available.
 - Atlas will be down so they will be manually generating annual reports.
 - The front desk charges a \$50 fee for emergency annual reports.
 - The Annual Reports will not be available on the BLS system June 27
- New system launch: August 7
 - They are in the final stages of User Acceptance Testing (UAT)
 - Working with DOR on communication with the new system and ATLAS
 - Features include the Core Services for the first launch; SOS owns the code so it will be easier to manage and enhance the system as needed
 - Original filings will be managed through business rule,
 - Each question will accepted or reject on the spot,
 - Changes in search function: will be able to retrieve scanned copies of the actual document of record; certified copies will still occur a charge
 - Name verification will remain under human review (no state has perfected the name verification)
 - Reinstatement and origination will still require human review
 - Mergers and conversion will stay in paper format (8-80 pages)

- Trademark search will be available at a later date
- August 2-3, SOS will be training super users in Seattle and gathering feedback from the system; will learn how to use the system
 - **Action:** If you feel there is a number of people in your agency that needs training in the search function, contact Patrick Reed at 360-725-0358 or patrick.reed@sos.wa.gov.

Roundtable

- Rose Gundersen, LNI: spoke with Ernie regarding the Small Business Guide translations – LNI may be willing to provide financial support to maintain the translated guides. They will need an estimate of the costs, number of updates, etc.
 - **Action:** Scott Hitchcock, ORIA, will work with Servando Patlan, DES, to obtain some estimates for the translations. Maybe other SBL member agencies would be willing or able to split the costs.
- Janet Shimabukuro, DOR: New position and new unit within Department of Revenue, Customer Experience and Communications Director
 - Smaller unit (17 employees)
 - Hired Anna Gill with UTC and Jane Curtis with Communication as managers; still have a manger position open
 - Kim Johnson no longer reports to Janet, but she will continue to be involved in SBLT and this new position will allow Janet to be more involved in SBLT as well
- Janet Shimabukuro, DOR and Jeff Baughman, OIC: went through Cyber Security Training (presented by Dave Kirk); lots of great information was provided.
 - NCSA will be coming to Washington state to train the trainers (Infrared)
 - Washington state is piloting the training on cybersecurity
 - **Recommendation:** put them in touch with Celia to set up quarterly trainings for small businesses and/or add class offerings in Small Business Guide (Safety section)
 - Rose Gundersen, LNI: We are currently mapping out small business organizations, maybe we can provide can connect the trainers to the organizations
- Scott Hitchcock, ORIA: Our office is currently looking at using media wiki for the Small Business Guide which will provide contextual navigation (easier searching) and a great API to connect to other agency websites

Referenced Hyperlinks

- a **CleanTech Showcase 2017**
<http://www.cleantechalliance.org/events/EventDetails.aspx?id=926107>
- b **Washington Small Business Fair**
<http://www.bizfair.org/>
- c **Web Traffic Report**
[https://www.ezview.wa.gov/Portals/_1729/Documents/Analytics/WebSite%20Analytics%20-%20SBLT%20Report%20\(Mar%202017%20-%20May%202017\).pdf](https://www.ezview.wa.gov/Portals/_1729/Documents/Analytics/WebSite%20Analytics%20-%20SBLT%20Report%20(Mar%202017%20-%20May%202017).pdf)