

Legislative Toolkit

**Building Support For
America's Small Business Development Center Network**

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FOREWORD

The ASBDC is pleased to present the ASBDC Legislative Toolkit. The purpose of this Toolkit is to share practical ideas that you can use to educate lawmakers about the crucial work of America's Small Business Development Center Network, and the critical need for additional funding.

With roughly one-third of the funding for America's Small Business Development Center Network coming from Congress, and a similar share coming from state governments, grassroots legislative action is essential to the success of the SBDC program. All of the ideas described in this Toolkit have been used successfully by SBDCs around the country to inform lawmakers about the work that the SBDCs are doing to help America's entrepreneurs start and grow their own small businesses. The Toolkit also includes reference material such as ASBDC legislative issues and sample letters, information about the legislative process, lists of members of key congressional committees, and facts and figures about the SBDCs that you might find useful in your advocacy efforts.

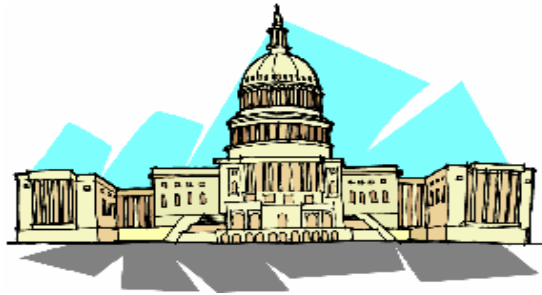
This Legislative Toolkit, like any good toolbox, is adaptable to changing needs. It is written on a word processor, so it can be kept up-to-date and incorporate new ideas and new issues as needed. Please contact the Association whenever you have an idea that you would like to add to this Toolkit. If you would like more information about any of the ideas presented in the Toolkit, you can contact the Association or contact SBDCs that are already implementing these ideas in their networks. Your Association is available to help you in your grassroots legislative efforts, to build America's Small Business Development Center Network and serve the needs of America's small businesses and aspiring entrepreneurs.

ACKNOWLEDGMENTS

Thanks to everybody who contributed ideas, material, energy and time to the development of this Toolkit, especially:

- ❖ Clinton Tymes, State Director of the Delaware SBDC Network, who led the effort to develop this Toolkit
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- ❖ Christian Conroy, Associate State Director of the Pennsylvania SBDC
- ❖ Jamie Frakes, Director of the Tennessee SBDC at Dyersburg State Community College
- ❖ Greg Higgins, State Director of the Pennsylvania SBDC
- ❖ Morris Hudson, Director of the Missouri Procurement Technical Assistance Centers
- ❖ Don Kelpinski, State Director of the Vermont SBDC
- ❖ Liz Klimback, Regional Director of the Texas-North SBDC
- ❖ Albert Laabs, State Director of the Tennessee SBDC
- ❖ Carol Lopucki, State Director of the Michigan SBTDC
- ❖ Kelly Manning, State Director of the Colorado SBDC
- ❖ Mark Petrilli, State Director of the Illinois SBDC Network
- ❖ Holly Schick, State Director of the Ohio SBDCs
- ❖ Max Summers, State Director of the Missouri SBDC

This Legislative Toolkit was written for the sole use of the members of the ASBDC to educate public policy makers about the work of America's Small Business Development Center Network.



I. Building Support For America’s SBDC Network

This Legislative Toolkit is intended to provide practical ideas and information to build support for America’s Small Business Development Center Network in Congress, state legislatures and other government bodies that can help our network serve the small business community. In this section of the Toolkit you will find a variety of ideas -- all of which have been successfully used by Small Business Development Centers (SBDCs) across the country -- to educate lawmakers and others about the importance of America’s Small Business Development Center Network.

We hope you will consider implementing some of these ideas in your state. If you would like more information about any of these ideas, you can contact the ASBDC or SBDC state and regional directors and other leaders in the network who have implemented these ideas in their networks. State and regional SBDC directors and other leaders who developed and have implemented the ideas presented in this Toolkit are listed in the description of each idea.

A. Building a Network of Advocates

There is a world of potential advocates for the SBDC program. Our network includes nearly 1,000 centers employing more than 5,000 counselors, trainers, researchers and administrative personnel across the country. Nationwide, our network has provided in-depth counseling of an hour or more, and training of two hours or more, to approximately 11 million small business owners and aspiring entrepreneurs since 1980. We partner with countless other organizations and provide referral business to many more. Everybody connected to the SBDC network -- directly and indirectly -- has an interest in the success of the SBDCs and is a potential advocate for our program. To build support for the SBDC network, we need to tap the energy, resources and contacts of as many of these potential advocates as possible.

Below is a list of people and organizations that could be included in your advocacy efforts:

- **All SBDC staff, including center directors, counselors and support staff**

Those of us who work in the SBDC network have a direct stake in ensuring that the SBDCs have the resources needed to serve the small business community, and we should all be advocates for the SBDC program. Even if your state's SBDC staff are not able to advocate for the SBDC network during their working hours, they can advocate in their free time and with their own resources. Help them to understand that the viability of the SBDC program depends on them, and involve them in your advocacy efforts. The directors and staff of your local centers are constituents of their state and federal lawmakers, and as such they make effective advocates.

- **Advisory Board members**

Advisory Board members should be people who are well connected in your state and who are willing to use their knowledge and contacts to advocate for the SBDC program. They should be chosen based on their effectiveness as advocates for the program, and they should be an integral part of your advocacy work.

- **SBDC clients**

Clients are potentially the best advocates for our network. Their success stories are our success stories. Let clients know that your program depends on federal and state funding. Ask clients to write letters to their lawmakers in support of the SBDC program, and give them sample letters to make it easy for them to write to their lawmakers. Share client success stories with lawmakers, and take clients with you when you visit your lawmakers. As the saying goes, it's always better to let others toot your horn for you.

- **Host institutions, both at the state and center level**

SBDCs are hosted by well respected and well connected institutions, both at the state and center level. You should involve your host institutions in your advocacy plan. Meet with the leaders of your host institutions regularly and talk about your advocacy efforts. Invite them to participate in your events and training programs, and show them how the SBDC benefits their organizations. Ask them to use their resources and contacts to advocate for the SBDC program. Ask them to introduce you to their contacts in Congress and in the state legislature. Your host institutions benefit from your success, and they should be powerful advocates for the SBDC program.

- **Small business and professional organizations**

Small business and professional organizations benefit from the work of the SBDCs in many ways. We serve many of their small business members, and we provide referral business to their members. They have a direct interest in our work on behalf of the small business community. Make a list of small business and professional organizations in your state. Contact them to explain how the SBDCs serve your common interests, and ask them to advocate for the SBDCs. Some of the small business and professional organizations that exist in almost every state include: chambers of commerce; NFIB chapters; retail associations such as the restaurant association; building contractors' associations; agricultural organizations; bar associations; associations of bankers and other lenders; the CPAs; the insurance agents; and many others.

- **Organizations that represent various constituency groups**

Veterans' organizations; women's groups; organizations of African-American, Hispanic-American and other ethnic groups -- they are powerful advocacy organizations, and they should be advocates for the SBDC network. In 2002, the SBDC network served more than a quarter of a million (271,309) women entrepreneurs; 162,780 minority entrepreneurs; and 48, 832 veterans. You should contact organizations that represent these powerful constituencies in your state, show them how the SBDCs serve their members, and ask them to advocate for the SBDC program.

All of the above individuals and organizations have an interest in the success of the SBDC network. You should ask them to get involved in supporting the SBDCs, by writing letters to lawmakers, visiting lawmakers, participating in your legislative advocacy events, and using their legislative contacts and resources.

For more information about building a network of advocates, you can contact the ASBDC (phone 703-764-9850) or contact leaders in the SBDC network who have developed such networks in their states, including:

- Greg Higgins or Christian Conroy, Pennsylvania SBDC (phone 215-898-1219)
- Albert Laabs or Jamie Frakes, Tennessee SBDC (phone 731-286-3205)

Below is a page from the Pennsylvania SBDC's Legislative Action Plan, listing specific organizations that the Pennsylvania SBDC reaches out to in building support for the SBDC network.

Potential Coalition Partners

Organizations with interests in the following sectors will be targeted for establishing relationships:

Economic Development

Local chambers of commerce
 Local economic development organizations
 Regional and Statewide economic development organizations
 Pennsylvania Chamber of Business & Industry
 Pennsylvania Federation of Business & Professional Women
 Pennsylvania League of Cities & Municipalities
 County Commissioners Association
 Pennsylvania Economic Development Association
 Center for Rural Pennsylvania
 Regional Entrepreneurial Assistance Networks
 Team PA

Finance

Pennsylvania Bankers Association
 Pennsylvania Financial Services Association
 Pennsylvania Association of Community Bankers

Professional Services

Pennsylvania Institute of CPAs
 Pennsylvania Bar Association
 Independent Insurance Agents of Pennsylvania
 Association of Professional Insurance Agents
 Pennsylvania Trial Lawyers Association

Small Business

NFIB
 Mid Atlantic Employers Association

Industry Groups

Pennsylvania Chemical Association
 Pennsylvania Drycleaners Association
 Eastern Building Material Dealers Association
 General Contractors Association of Pennsylvania
 Hardwood Lumber Manufacturers of Pennsylvania

Pennsylvania Aquaculture Association

Technology

Pittsburgh High Technology Council
 Eastern Pennsylvania Technology Council

Communications

Pennsylvania Cable and Telecommunications Association

Electricity

PA Rural Electric Association

Retail

Pennsylvania Retailers Association
 Pennsylvania Food Merchants Association

Restaurants

Pennsylvania Restaurant Association

Export

Small Manufacturing

SMC Business Council

Environmental Protection

Pennsylvania Environmental Assistance Network

Tourism

Pennsylvania Association of Convention & Visitors Bureaus

Agriculture

Pennsylvania Farm Bureau

Job Training

Private Industry Councils/Career Link Centers
 Minority Business Development
 Women Business Development

Procurement

Inventors

Franchising

Family Business

Higher Education

Homebased Business

Unions

Veteran Organizations

B. Putting Your Government Action Plan In Writing

Putting your government action plan in writing can help you focus, implement and evaluate your advocacy efforts. Several SBDCs have put their government action plans in writing, such as the Pennsylvania SBDC, the Tennessee SBDC and the Delaware SBDC.

The most important elements of a written government action plan are:

- Identifying the people in your network of advocates who will take part in your plan
- Setting out specific actions that will be taken by your network of advocates
- Assigning specific responsibilities among participants in your network of advocates
- Setting timetables for implementing your plans
- Establishing firm benchmarks that allow you to evaluate your efforts

Most importantly, putting your government action plan in writing takes it from the theoretical to the practical. We can all agree that we need to do more to educate our lawmakers -- but assigning specific goals and tasks to specific individuals can make it actually happen.

All of the ideas in this Legislative Toolkit can be incorporated into a written plan (and if fact, many of the ideas in this Toolkit are taken from State SBDC government action plans). You should feel free to use this Toolkit and the government action plans already developed by SBDCs around the country to develop a written plan for your network.

For more information about developing a written government action plan, you can contact the ASBDC (phone 703-764-9850) or leaders in the SBDC network who have developed written plans for their states, including:

- Greg Higgins or Christian Conroy, Pennsylvania SBDC (phone 215-898-1219)
- Albert Laabs or Jamie Frakes, Tennessee SBDC (phone 731-286-3205)
- Clinton Tymes, Delaware SBDC (phone 302-831-1555)

Below is a page from the Pennsylvania SBDC's Legislative Action Plan, listing actions to be taken in support of its legislative advocacy initiative, and a page from the Tennessee SBDC's Public Advocacy Plan, listing the goals of its plan.

[From the Pennsylvania SBDC's Legislative Action Plan, listing actions to be taken in support of its legislative advocacy initiative]

Timeline: SBDC Actions

| DATE | ACTION TO BE COMPLETED |
|--|---|
| Ongoing | Include Voter Registration Forms with Closing Letter |
| Ongoing | Satisfied Clients and Program Partners Asked to Write Support Letters to Elected Officials |
| Ongoing | Client MIS records to include Congressional, state house and state senate district numbers |
| Ongoing | Invite Legislators and their Staff to Attend Workshops |
| Ongoing | Encourage Legislators to Issue Press Releases on SBDC Activities and Client Business Openings |
| Ongoing | Outreach Offices Opened in Conjunction with Federal Representatives and Key State Legislators |
| Ongoing | Workshops Offered in Conjunction with Federal Representatives and Key State Legislators |
| February 28 | Letters Sent to All State Legislators, re: Appropriations Request |
| March 5 | Political Science Departments Provide Suggestions on Improvements to Investor Relations Plans |
| March 14, April 18, May 16, June 13 | Conference Call to Review Strategy |
| April 30 | Meet with All State Legislators re: Appropriations Request |
| May 15 | Meet with all Federal Representatives |
| Late June/Early July | Submit FY 2004 State Budget Request |
| July 31 | Hold an Event that features Senator Santorum or Specter |
| December 15 | Meet with All Legislators, re: SBDC Services Update |

It is the responsibility of all staff of the Pennsylvania Small Business Development Center program to assist in educating the program's investors on the return on their investment in the program.

[From the Tennessee SBDC's Public Advocacy Plan, listing the goals of its plan]

Statewide Public Advocacy & Legislative Relations

The following represents goals and objectives of the TSBDC's comprehensive advocacy efforts. Goals, time-frame, and perceived outcome are included in the breakdown for each goal and objective.

Goals

1. Increase the influence of the TSBDC network and its service centers with elected and appointed government officials.
2. Generate 450 letters of support for the TSBDC program and its services.
3. Continue to secure continuation funding for the program through state and federal funds, while continuing to build program revenue opportunities with interested partners in the private sector.
4. Educate state legislators about the TSBDC program and motivate them to support the program through increased state funding that impacts our partners.
5. Educate federal legislators about the importance of the TSBDC program to their constituents, and motivate them to approve funding that meets the needs of the network and demands for services by the public.
6. Sponsor a legislative event in each congressional district, inviting all members of the Tennessee General Assembly, as well as partnering organizations to attend the event.
7. Plan for quarterly trips to Nashville to visit with state legislators and support the Lead Center's efforts to send a delegation to Washington, DC twice annually to inform and educate congressional representatives and staff about the TSBDC program and its services.

C. Teaching Public Advocacy Skills to Your Network Members

State and regional SBDC directors cannot by themselves educate every state and federal lawmaker about the work and the needs of the SBDC network. And in many cases, state and regional SBDC directors may not even be the best advocates for their networks, because state and regional SBDC directors can't live in every lawmaker's district, and lawmakers would rather hear from their own constituents.

It is important for state and regional SBDC directors to share the load, and get other members of their SBDC networks -- center directors, counselors, staff and advisory board members -- involved in legislative outreach. But you can't just assume that all the members of your SBDC network understand the importance of legislative outreach, or that they know how to be effective advocates for the network.

You should consider teaching public advocacy skills to your SBDC network members, to make sure they understand their roles in your network's legislative outreach efforts. The Tennessee SBDC, for example, has developed a Public Advocacy Orientation Program, a seminar on legislative action, that is presented at each of the Tennessee SBDC network's centers. The class is two hours long, and teaches center directors and staff the importance of legislative advocacy and the information and skills they need to be effective advocates.

For more information about developing a legislative training program for the members of your network, you can contact the ASBDC (phone 703-250-3718), or contact Albert Laabs, State Director of the Tennessee SBDC (phone 615-366-3900) and Jamie Frakes, Director of the Tennessee SBDC at Dyersburg State Community College (phone 731-286-3201), to ask them about the Tennessee SBDC's Public Advocacy Orientation Program.

Below is a page from the Power Point presentation used in the Tennessee SBDC's Public Advocacy Orientation Program for local centers.

[Sample panels from the Power Point presentation used in the Tennessee SBDC's Public Advocacy Orientation Program for local centers.]

Objectives for today's session

- Raise awareness of the importance of government relations activity to your network and individual service centers
- Share some methods, techniques, and strategies that work in lobbying and advocacy activities
- Develop your understanding of government relations through role playing & experiential learning

Conclusions from Survey

In order to communicate with your Congressman and his/her staff in writing, faxes and e-mails are preferred. Keep your handwritten letters from clientele on hand. These are still important.

Develop a relationship with Congressional staff in the field as well as those in Washington, DC.

Use the scheduler as much as possible for visits.

Create additional value in your office by asking the Congressional staff to use your resources and send clientele your way.

Use all measures of accountability to show value in your operation.

D. Meeting With Lawmakers

Meetings are among the most effective ways to educate lawmakers about the SBDC program and the need for additional resources to serve the small business community. Meetings allow you to make your case directly to a lawmaker, listen to his or her questions and concerns, and build the relationships needed to sustain and grow the SBDC program.

You and the members of your network of advocates (center directors, counselors, staff, advisory board members, program partners, etc.) should meet regularly with your federal, state and local lawmakers -- especially lawmakers who serve on committees with jurisdiction over the SBDC program. Lawmakers should be visited twice a year if possible -- early in the legislative session when bills are still being drafted, and later in the session when final decisions are being made.

A list of Members of Congress who serve on the Small Business and Appropriations committees is included in the reference materials section of this Toolkit (see pages 53-55). It is crucial that you meet regularly with these Congressional committee members from your state. You should also identify the members of your state legislature who have the greatest impact on your SBDC network, and get to know them well.

It is time-consuming to set up and attend meetings with your state and federal lawmakers, but it is very important and you can do it if you share the burden with others in your network. Others in your network, who are constituents or have some other relationship with a lawmaker, can be very effective advocates. Lawmakers listen to people who vote in the lawmakers' districts, volunteer on their campaigns or contribute to their campaigns.

Finally, don't forget to involve clients in your visits to lawmakers. Take a client with you to your meeting. A success story from a satisfied client, who is also the lawmaker's constituent, will add a great deal to what you say on behalf of your SBDC network.

ASBDC staff is available to work with you in developing and implementing your legislative meetings strategy -- from advice on issues to raise and materials to take to your meetings, to accompanying you on your meetings. And if you find something out during a meeting with a lawmaker that could affect the SBDC program nationwide, let the Association know.

For more information about meeting with lawmakers, you can contact the ASBDC (phone 703-764-9850) or contact leaders in the SBDC network who have developed plans for meeting with lawmakers, including:

- Greg Higgins or Christian Conroy, Pennsylvania SBDC (phone 215-898-1219)
- Albert Laabs or Jamie Frakes, Tennessee SBDC (phone 731-286-3205)

TIPS ON MEETING WITH LAWMAKERS

- ✓ **Plan ahead.** You may have to request a meeting with a lawmaker six or more weeks in advance of the meeting date.
- ✓ **Be prepared.** Meetings with lawmakers are often brief. Decide in advance what you want to accomplish in the meeting (for example, asking the lawmaker to support increased funding for the network, or inviting the lawmaker to an SBDC event); know as much as you can about the lawmaker you are meeting with (for example, does he or she serve on a committee with jurisdiction over the SBDC program); think ahead about what you want to say and make sure that others attending the meeting with you are all on the same page; and take materials that you can leave with the lawmaker to reinforce your message (for example, client success stories and letters of support from the lawmaker's constituents).
- ✓ **Think locally.** Explain the importance of your network in relation to the lawmaker's district and constituents. A lawmaker may not care how many clients the nationwide SBDC network serves, but he or she will care how many of his or her constituents you serve.
- ✓ **Think politically.** Try to see the world through the lawmaker's eyes. Help him or her understand that supporting the SBDC network is good for his or her constituents and the local economy -- which will reflect well on the lawmaker. Let the lawmaker know that your network can help him or her with outreach and service to constituents (for example, by cosponsoring a procurement or training event with the lawmaker, or assisting small business constituents).
- ✓ **Be flexible.** Lawmakers are busy and have limitless demands on their time. Be prepared for the lawmaker to have to cut the meeting short, and be prepared to meet with staff if the lawmaker is unavailable. Be willing to address unexpected issues or questions the lawmaker might raise. But if you don't know the answer to a question, say so and get back to the lawmaker later if you can find the answer.
- ✓ **Follow up.** Make sure you send the lawmaker any information that he or she requested during the meeting, and send a thank-you letter reinforcing the issues you discussed at the meeting.

Below is a portion of the Pennsylvania SBDC's Legislative Action Plan, describing the network's plans for meeting with lawmakers.

Strategy 1

Develop relationships with all State Representatives, State Senators and Members of Congress and motivate them to expand the state and federal governments' investment in the SBDC program.

Attached is a revised listing of legislators that represent your service territory. Carefully review this revised list and note the following:

- Key legislators in your territory have been identified. Priority is to be given to them in all matters.
- Some legislators are shared by SBDCs. In these cases, SBDC directors must confer on how to communicate with those legislators, with one center taking the lead. In these situations, the legislator must be made aware of the other SBDCs that serve his or her district in addition to the one initiating the contact.
- If there are discrepancies in the list, please contact Christian Conroy. For example, if you have a good relationship with a legislator who is not on your list, let us know and we will adjust responsibility for that legislator. We need to take advantage of such strengths.

Action Items: Meeting with Legislators

| Tasks | Responsibility & Deadline |
|--|--|
| <p>All SBDC Directors must brief all their state Representatives, state Senators, federal Representatives, and their key management staff twice a year.</p> <ul style="list-style-type: none"> ▪ Fall visits are important because they lay the foundation for follow-up during the winter and spring regarding the appropriation request. | <p>SBDCs Spring Meetings: May 15, 2003 Fall Meetings: December 15, 2003</p> |

During these meetings SBDC directors need to:

1. Educate legislators about the SBDC program and its impact. Focus on benefits, not services. Benefits = community impact.
2. **Have clients tell of their experience with the SBDC and the benefit of SBDC services, and have program partners relate the program's benefits in their region.**
3. Educate legislators about the need for increased funding.
4. State the amount being requested
5. IN THE SPRING ONLY: Ask for their support of the appropriation request by sending a support letter to their leadership and appropriations committee chair. **Ask for a copy of this letter.**
6. Remind them that your center is available to assist his/her constituents. Offer him/her cosponsorship opportunity of a workshop if appropriate.
 ⇒ Leave behind brochures and materials for the legislator to provide to constituents.
7. Following these meetings:
 - Send a thank you letter to the legislator, summarize what you discussed during the meeting and again ask them to send a letter to their leadership and appropriations committee chair supporting the appropriations request...
 - Complete and forward to the SDO a Legislative Outreach Information Form reviewing the meeting....

E. Developing a Letter-Writing Program

Letter-writing is one of the easiest -- and most important -- ways to communicate with lawmakers. Lawmakers keep track of the number of letters they receive on an issue, as a measure of the importance of the issue to their constituents. If a lawmaker doesn't hear from constituents about an issue, he or she will assume it isn't very important.

You need to make sure that your lawmakers are hearing from your network's supporters -- on a continuing basis -- about the work of the SBDC network and the need for new resources. The best way to ensure that your lawmakers are hearing from their constituents in support of the SBDC network is to develop an organized letter-writing program.

First, include in your letter-writing program as many people from your network of advocates as possible. Ask your center directors, counselors, staff and advisory board members to participate. Ask your host institutions to write, as well as your allies in the small business community. And most importantly, get your clients involved -- they should know that the services they receive are government-funded and depend on support from Congress and the state legislature.

Second, make it easy for your supporters to write to their lawmakers, by giving your supporters the information they need to write. Give them the names and addresses of their lawmakers, and give them a sample letter.

Third, set annual goals for the number of letters that you would like your supporters to write, so that you have a standard by which to measure your success. Ask each of your host institutions and your allies and partners in the small business community to write to their lawmakers at least once a year. Suggest that counselors ask satisfied clients to write to their lawmakers about the services they received from the SBDC. All the counselor has to do is let clients know that SBDC services depend on government funding, and that it will help the SBDC to be able to continue to deliver services if clients write to their lawmakers in support of the program. Just make sure that clients know that writing is optional, and that it will not affect the service they receive from the SBDC.

An example of a letter-writing program can be found at the Delaware SBDC. The Delaware SBDC has implemented a postcard campaign in which SBDC personnel hand out postcards (pre-addressed to lawmakers) at SBDC seminars and training events, and ask attendees to write brief comments on how helpful the seminars and events have been in helping them manage their businesses.

Finally, ask every person who writes to his or her lawmakers in support of your network to send you a copy of the letter, so you can keep track of the letters and the numbers of letters that are being written.

Sample letters on SBDC issues are included in the Reference Material section of this Toolkit (see pages 42-47). Feel free to borrow from these letters to develop your own sample letters -- giving someone a sample letter increases the chances that he or she will actually write!

For more information about developing a letter-writing program, you can contact the ASBDC (phone 703-764-9850) or leaders in the SBDC network who have developed letter-writing programs in their states, including:

- Greg Higgins or Christian Conroy, Pennsylvania SBDC (phone 215-898-1219);
- Albert Laabs or Jamie Frakes, Tennessee SBDC (phone 731-286-3205);
- Clinton Tymes, Delaware SBDC (phone 302-831-1555).

Tips on Writing an Effective Letter to a Lawmaker

- ✓ Include your return address, not just so that you can receive a reply, but also so that the lawmaker can tell if you are a constituent. Most lawmakers only reply to letters from their own constituents.
- ✓ Begin the letter by saying clearly and specifically why you are writing and what you want the lawmaker to do.
- ✓ If you have any connection to the lawmaker (for example, you voted for him or her, or you volunteered on or contributed to his or her campaign), mention it in your letter. It will make your letter all the more effective.
- ✓ Focus on just one issue -- for example, providing an increase in funding for the SBDCs. Addressing multiple issues in one letter lessens the impact of each issue, and it lets the lawmaker pick (or avoid) the issues that he or she addresses in replying to your letter.

Below is a page from the Tennessee SBDC Public Advocacy Plan, describing its letter-writing program.

[From the Tennessee SBDC Public Advocacy Plan, describing its letter-writing program]

Goal 2

Generate 450 letters of support for the TSBDC program and its programs and services.

The key to being a successful advocate for the TSBDC will depend on the showing of public support that can be generated by each individual service center within the network. It has been said, by many staffers and members of congressional delegations, that the most important component of grassroots lobbying is through letter writing campaigns....

Action Steps to Accomplish Goal 2:

- a. Each service center contributes at least 38 letters from clients or spheres of influence in support of their respective service center. These letters must be sent to targeted members of the Tennessee Congressional delegation or members of the General Assembly.
- b. Respectfully request from the client in a follow-up session any feedback they may have received from their representative. The service center director should use some discretion in discussing feedback.
- c. IF possible, secure a copy of the letter that was sent. Keep a file of these letters.
- d. Maintain a mailing list of those clients and spheres of influence that sent letters on your behalf. Provide these people with a quarterly update of legislative issues that are affecting businesses in your area -- usually on one page. Data shows that people who are interested in writing letters to government officials prove to be solid advocates for the causes they personally adopt. So, use these people. They are a great resource.

Timetables and Assessment:

At least 125 letters should be submitted to the Tennessee Congressional delegation prior to the end of **April**.... Another 200 letters should be submitted by **October**....

F. Serving on a Lawmaker's Advisory Committee

Members of Congress and state legislators often establish committees of key constituents to get advice on important issues and to build relationships with important constituencies such as the small business community. Serving on a lawmaker's small business or economic development advisory committee provides an excellent opportunity to work with a lawmaker and, in the process, educate him or her about the role of the SBDCs in the small business community and the local economy.

Your knowledge of the small business community, and the problems that small business owners face, would be of great value to a lawmaker who wants to keep a finger on the pulse of his or her small business constituents. In addition, your ability to help a lawmaker organize meetings and other events with members of the small business community would be extremely helpful to a lawmaker. Few, if any, organizations have the contacts in the small business and economic development communities that SBDCs have. And when you go to a lawmaker to ask for his or her support for the SBDC network, you are much more likely to get a receptive ear if you serve on that lawmaker's advisory committee, and you have helped him or her to reach out to the small business community and build the local economy.

You should call your lawmakers' offices to find out if they have advisory committees. If the lawmaker has an advisory committee on small business issues, offer to serve on the committee. If the lawmaker doesn't have a committee, offer to help put one together.

Remember to involve your local center directors and counselors in this effort. They are constituents of the lawmakers that you need to build relationships with. And if your center directors and counselors are willing to serve on the advisory committees of their local lawmakers, your SBDC network will be represented on multiple lawmakers' committees.

If you would like additional information about serving on a lawmaker's advisory committee, you can contact the ASBDC (phone 703-764-9850) or leaders in the SBDC network who have served on lawmakers' advisory committees, including:

- Kelly Manning, State Director of the Colorado SBDC (phone 303-892-3864), who serves on Congressman Bob Beauprez's Economic Development and Small Business Advisory Committee
- Georgianna Parkin, State Director of the Massachusetts SBDC Network (phone 413-545-6301), who serves on Senator John Kerry's Advisory Committee on Child Care and Small Business.

Below is a letter from Congressman Beauprez of Colorado, in which he invites Colorado SBDC State Director Kelly Manning to serve on his Economic Development and Small Business Advisory Committee.

BOB BEAUPREZ
7TH DISTRICT, COLORADO

511 CANNON HOUSE OFFICE BUILDING
WASHINGTON, DC 20515
(202) 225-2645

4251 KIPLING STREET, SUITE 370
WHEATRIDGE, COLORADO 80003
(303) 940-5821



UNITED STATES
HOUSE OF REPRESENTATIVES

April 7, 2003

TRANSPORTATION AND
INFRASTRUCTURE COMMITTEE
SMALL BUSINESS COMMITTEE
VETERANS' AFFAIRS COMMITTEE
DEPUTY WHIP

Ms. Kelly Manning

Dear Kelly:

As the first to represent Colorado's newest congressional district, it is of great importance to me that I utilize every opportunity to serve my constituents to the best of my ability.

In order to do so, I have formed specific advisory committees to help inform me of issues, concerns and ideas affecting constituents in my area. One committee in particular that I would like to inform you of is my Economic Development and Small Business Committee.

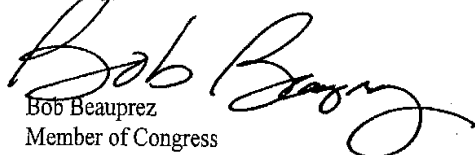
The mission of the Economic Development and Small Business Committee is to advise me on specific issues which are of concern to small businesses and to assist me in communicating relevant information to the business community. The committee will also advise me on economic development and job creation opportunities, as well as consider the impacts of these opportunities on the various stakeholders in the community. Finally, the committee will assist my office with a series of business seminars.

I would like to extend an invitation to you to become a member of this committee. I feel that your expertise can bring many assets and knowledge to the group.

The first meeting will be held on Tuesday, May 13 at 6:00 p.m. in my district office located at 4251 Kipling Street, Suite 370 in Wheat Ridge, Colorado. I have assigned a valuable member of my staff, Vicki Hulstrom, to take the lead on organizing the committee. Current legislation, new ideas which can benefit the people of this district and concerns about existing Federal laws will be the primary topics of discussion. I will not be able to attend the first meeting because of a previously scheduled event, but I look forward to meeting with you as a group to discuss your progress and the implementation of your ideas.

If you are interested in the Economic Development and Small Business Committee, please RSVP by filling out the enclosed questionnaire and sending it back to my district office in the envelope provided. Please contact Vicki with any questions or concerns you may have at (303) 940-5821.

Sincerely,


Bob Beauprez
Member of Congress

BB:vh
Enclosures

G. Presenting an Award to a Lawmaker

Everybody appreciates recognition for his or her work -- especially people who have to get elected and re-elected to their jobs. Presenting an award to a lawmaker gives your network a chance to thank a lawmaker for his or her support of the SBDC network and the small business community. And it is something the lawmaker will appreciate and remember when you ask the lawmaker to support your network.

An excellent example of just how effective the presentation of an award to a lawmaker can be is the Florida SBDC Network's presentation of its annual Small Business Dividend\$ Award. The award has been presented by the Florida SBDC Network to members of the state's Congressional delegation for the past four years. And along with presenting the award, the Florida SBDC Network also issues a statewide press release recognizing the award recipient's support for small business -- publicity that any lawmaker would value highly.

The Florida SBDC Network's Small Business Dividend\$ Award is presented at a Washington reception called the Annual Capitol-Business Briefing and Reception. It is hosted by the Florida SBDC Network at the Florida House, which is just across the street from the U.S. Senate office buildings and easily accessible to Members of Congress and their staffs. The event attracts a large number of Florida's Congressional delegation and staff members, and has significantly raised the visibility of the Florida SBDC Network among its representatives in Congress. The highlight of the event is the presentation of the Small Business Dividend\$ Award, which consists of a crystal trophy that any lawmaker would be proud to display in his or her office.

Presenting an award to a lawmaker can be simple. You don't have to organize an event or present a beautiful trophy if you think you don't have the time or the resources to do so. A certificate presented at a meeting can serve the purpose. The important thing is to publicly (so don't forget the press release) recognize lawmakers who support the SBDC network, and make the award in recognition of the lawmaker's support for small business in general -- an important constituency for any lawmaker. The award will be displayed in the lawmaker's office and listed in his or her biographical (and campaign) material. And the lawmaker will remember that you helped in his or her efforts to earn recognition in the small business community.

For more information about presenting an award to a lawmaker, you can contact the ASBDC (phone 703-764-9850), or contact Jerry Cartwright, State Director of the Florida SBDC Network (phone 850-595-6060) and Kelly McLeod, Marketing Specialist at the Florida SBDC Network, about the annual Florida SBDC Small Business Dividend\$ Award.

Below is a copy of a press release from the Florida SBDC Network, about the presentation of its annual Florida SBDC Small Business Dividend\$ Award to Senator Bob Graham.



Statewide Advisory Board

Chair:
Mr. Mike Donnelly, President
Beacon Management

Vice Chair:
Ms. Judith Dacey, CPA
Small Business Resources, Inc.

Permanent Co-Chair:
Dr. Parks Dimsdale, Jr.
Executive Vice President
University of West Florida

State Director:
Mr. Jerry Cartwright
FSBDC Network

Members:
The Honorable Jeff Atwater
Florida Senate

Mr. Stephen Beasley, President
Beasley & Associates

Mr. Bobby Branning, Community
Development Manager, Gulf Power

Dr. Lloyd Fernald, Professor
COBA, Management Department
University of Central Florida

Mr. David L. Hurley, President
Landmark Engineering & Surveying

Dr. Thomas L. Keon, Dean
COBA, University of Central Florida

Mr. Todd G. Kocourek, President/CEO
FL First Capital Finance Corporation

Mr. Louis Laubscher, Senior Director
Enterprise FL, Inc., Capital Development

Mr. Ed Linsenmeyer, Technology Officer
Coastal Systems Station

The Honorable David Meador
Florida House of Representatives

Mr. Dan Regelski, Regional Director
Florida Gulf Coast University SBDC

Mr. Keevin Williams, Vice President
FBBIE, Inc.

Ex-Officio Members:
Mr. Stephen Birtman, State Director
Nat'l Fed. of Independent Businesses

Ms. Barbara Boutin, Executive Director
Florida Economic Development Council

Mr. Bob Cordes, Manager
Economic Development, Gulf Power

Ms. Lynn Douthett, SBDC Project Officer
U.S. SBA, South Florida District Office

Mr. Bill Herrie, Vice President
FL Retail Federation, Government Affairs

Mr. Windell Paige, Director
FL DMS, Office of Supplier Diversity

Mr. Frank Ryll, President
Florida Chamber of Commerce

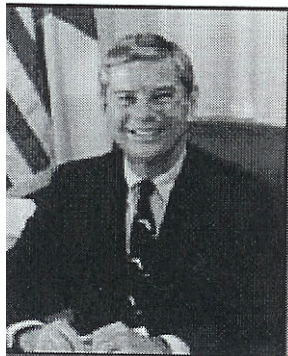
Mr. Thomas Stahl, Executive Director
Florida United Business Association

PRESS RELEASE

Release Date: March 7, 2003
Contact: Kelly McLeod, Marketing Specialist, kmcleod@uwf.edu

FOR IMMEDIATE RELEASE

Thirty-Seven Plus Years Supporting Small Business Earn Bob Graham Recognition as Florida SBDC's 2003 Small Business Dividend\$ Award Winner



Pensacola, FL: On Wednesday, March 19, 2003, the Florida Small Business Development Center Network will hold its **Fourth Annual Capitol-Business Briefing and Reception**, from 5:30 until 8:00 p.m., at the Florida House on Capitol Hill, in Washington, D.C., where U.S. Senator Bob Graham will be presented with the Network's prestigious **Small Business Dividend\$ Award**. "With more than 37 plus years of proven support of Florida's small business, Graham has more than earned this recognition," says Jerry Cartwright, FSBDC Network State Director.

Since 1966, U.S. Senator Bob Graham has represented the State of Florida in various political capacities in which he has and continues to take an active role in encouraging and supporting small business enterprise in Florida, starting with the position of Florida State Representative in 1966, moving on to Florida State Senator in 1970, Governor in 1978 and U.S. Senator in 1986 where he continues to advocate for small business.

As Governor, Graham endorsed the establishment of the Florida SBDC Network in 1978. In the Summer 1990 issue of the FSBDC's Dividend\$ Newsletter, Graham continued to support the SBDC program by stating, "Florida's SBDC program provides the valuable support and resources for our small businesses to succeed. I applaud your efforts and encourage your continued work on behalf of Florida's small businesses." In an effort to learn about the challenges businesses face, Graham began his "Workdays" in 1974 and since has completed more than a year's worth of days laboring side-by-side with the people he represents, including Mykonos, a family-owned, Greek restaurant in Tarpon Springs, whose owners also happen to have attended seminars at the University of South Florida SBDC in 2002; a carpenter's assistant; and a small bagel maker in Florida.

Other business initiatives Graham endorsed through the years include: The first Governor's Conference on Small Business to provide a unique forum for the state's entrepreneurs to voice its concerns about laws, policies and regulations to enhance Florida's small business community; numerous Small Business Forums held throughout the state; the establishment of the Florida First Capital Finance Corporation to provide long-term fixed asset financing to small business; and the creation of the Black Business Investment Board to strengthen the state's economy through minority economic development.

Currently, Graham serves as a senior member of the powerful Finance Committee, which handles tax, trade and health-care legislation, and the committees on Environment and Public Works, Energy and Natural Resources, as well as the ranking Democrat on the Veterans Affairs Committee--all of which provide Graham an opportunity to advocate on behalf of small business.

The FSBDC Network implemented this annual event, in March 2000, as a new and exciting way to brief the Florida Congressional Delegation regarding the impact of federal funding on the overall Florida economy of the small business community and, in particular, the impact in each member's district, as well as providing partnership networking opportunities. A distinctive element of the event is the acknowledgment of a Floridian whose service to the state has included strong support of small business issues. Past award winners include: Bill Young in 2002, Connie Mack in 2001; and Andy Ireland in 2000.

For additional information about the **Capitol-Business Briefing & Reception**, please contact Kelly McLeod at 850-595-6060 x218 or kmcleod@uwf.edu or visit our website at www.FloridaSBDC.com.

The FSBDC is a statewide network of certified business professionals dedicated to providing emerging and established entrepreneurs with guidance and training enabling them to grow and prosper generating positive economic impact. The Network features 31 college and university-based centers strategically located throughout the state.

State Director's Office • 401 East Chase Street • Suite 100 • Pensacola, Florida 32501
(850) 595-6060 / (800) 644-SBDC • fax (850) 595-6070 • fsbdc@uwf.edu • www.floridasbdc.com
A statewide service network partially funded by the U.S. SBA and administered by the University of West Florida

H. Organizing a Conference with a Lawmaker

Lawmakers often sponsor conferences on issues of interest to their constituents. And because lawmakers have limited resources and staff, they often work in cooperation with organizations in their communities to organize these events. You should consider working with your lawmakers to organize conferences for their small business constituents.

One of the most popular topics for lawmakers' conferences is procurement. An excellent example is the Missouri SBDC's annual procurement conference with Representative Ike Skelton. The Congressman sponsors the event, does a mass mailing to constituents announcing the event, and attends the event and speaks to the conference participants. The Missouri SBDC, along with the Missouri PTAC, organize the event in cooperation with the Congressman.

The benefit of this type of cooperation, from the lawmaker's point of view, is that he or she gets public credit for the conference and the appreciation of his or her constituents -- for an event that he or she may not have been able to organize on his or her own. The benefit to the SBDC is that it furthers the SBDC's mission to serve small business owners and aspiring entrepreneurs, and it earns the SBDC the gratitude and respect of the sponsoring lawmaker. It should be noted, however, that organizing a conference can take a good deal of time and effort, and it must be done well when the lawmaker's name is associated with the event.

For more information on organizing a procurement conference with a lawmaker, you can contact Max Summers, State Director of the Missouri Small Business Development Centers (phone 573-882-0344), or Morris Hudson, Director of the Missouri Procurement Technical Assistance Centers (phone 573-882-8058).

Below are sections of a procurement conference brochure that Congressman Ike Skelton of Missouri sent out with the assistance of the Missouri SBDC and the Missouri PTAC. Also below is the preparation schedule used by the Missouri SBDC and PTAC to organize the conference.

[From a procurement conference brochure that Congressman Ike Skelton of Missouri sent out with the assistance of the Missouri SBDC and the Missouri PTAC]

Representative Ike Skelton's Procurement Conference



Featured Luncheon Speaker
General Donald Cook, USAF

Thursday, May 30, 2002
7:30 am - 4:00 pm
Central Missouri State University
Warrensburg, MO
Room 234B
University Union Building
Parking available in Lot M

In Cooperation with:



This publication has been developed by the Missouri SBDC in partnership with the U.S. Small Business Administration.

Agenda

- 7:30 Registration — Room 234B
Coffee and Donuts with Ike Skelton
- 7:30 Track I – Contractor Exhibits and Track II – Government Exhibits Open
- 8:25 Track I and II Exhibits Close
- 8:30 Posting of Colors Room 240
Whiteman AFB Color Guard
National Anthem
Whiteman AFB
- 8:40 Introduction of Central Missouri State University President by
Wes Savage, Director, CMSU SBDC
Welcome & Introduction of Rep. Ike Skelton by
Dr. Bobby Patton, CMSU
- 8:45 Comments
Rep. Ike Skelton, 4th District
- 9:00 Successful Government Contractor
David Steward, Ch & CEO, World Wide Tech.
- 9:10 Administrative Announcements
- 9:15 Break/Drawing for Prizes
- 9:30 Government Procurement, Rm 237A and B
RADM Robert Cowley, USN
- 10:45 Tracks I and II Exhibits Open
- 11:55 Tracks I and II Exhibits closed. Please take your seat for the luncheon
- 12:00 Luncheon: Barbeque brisket with cole slaw, steak fries, and cake

Luncheon Speaker:
General Donald Cook, USAF
Commander, Air Education & Training Command

- 1:00 Continue with Tracks I & II
- TRACK I Contractor Exhibits
1:00 - 3:00
- TRACK II Government Exhibits
1:00 - 3:00
- TRACK III: SBA Contracting Issues
1:00 - 2:25 HUBZones, PRO-Net SDB Certification
- 2:40-400 SBA Financial Assistance – Assessing your SBA financing options, surviving the loan application process, and setting a financial plan of action

[From a procurement conference brochure that Congressman Ike Skelton of Missouri sent out with the assistance of the Missouri SBDC and the Missouri PTAC]

- TRACK IV: Base & Post Contracting Issues –**
1:00 - 2:25 Paperless contracting, micro purchases (credit card), Central Contractor Registration (CCR), contractor past performance
2:40 - 4:00 REPEAT
- TRACK V: Service Disabled Veteran-Owned, Small Business Program**
1:00 - 2:25 Service Disabled Veteran-Owned Small Business Program/National Veterans Business Development Corp.
2:40 - 4:00 Repeat
- TRACK VI: Writing Winning Proposals**
1:00 - 2:25 How to write proposals that will lead to awards
2:40 - 4:00 REPEAT
- TRACK VII: Financing Your Business**
1:00 - 2:25 How to finance your business from start-up through ongoing operation
2:40 - 4:00 Continue
- TRACK VIII: How to Get a GSA Contract**
1:00 - 2:25 Your window of opportunity to sell your products/services to the federal government and the military
2:40 - 4:00 Continue
- TRACK IX: Homeland Security**
1:00 - 2:25 State of MO Office of Homeland Security CMSU Criminal Justice Boone County Fire Protection District
2:40 - 4:00 Repeat
- TRACK X: Small Business Innovation Research/ Small Business Technology Transfer (SBIR/STTR)**
1:00 - 2:25
2:40 - 4:00 Repeat
- TRACK XI: Business Plan**
1:00 - 2:25 Developing a plan for obtaining loans or operating your business
2:40 - 4:00 Continue

For additional information, please refer to <http://web.missouri.edu/~moptac/pacevent.htm>

The following Exhibitors exhibited at last year's conference. For this 2002 conference, 171 government buying offices and 328 contractors have been invited.

Government

509th Contracting Squadron, Whiteman AFB; Center for Technology and Small Business Development, Warrensburg; Central Missouri State University, Warrensburg; Defense Logistics Agency, Ft. Belvoir, VA; Defense Supply Center Richmond, VA; Fort Leavenworth, KS; Fort Leonard Wood, MO; General Services Administration, Kansas City, MO; HQ AMC/LGC, Scott AFB, IL; Marine Corps Regional Contracting Office, Kansas City, MO; Metropolitan Community College, Kansas City; Missouri Procurement Technical Assistance Centers, Columbia, MO; Missouri Small Business Development Centers, Warrensburg, MO; Office of Administration; Jefferson City; Orange Electronic Commerce Resource Center; Small Business Administration, Kansas City; State of Missouri, Jefferson City; US Army-TACOM, IL; UM Procurement/Materials Mgmt, Columbia; UM Minority Business Development, Columbia; US Army Corps of Engineers, Kansas City; USDA Farm Agency, Kansas City; US Department of State, Washington, DC; US Dept of Veterans Affairs, Washington DC; US Postal Service, Kansas City

Contractors

Advancia Corporation, Waynesville, MO; Alliant Lake City Small Caliber Ammunition Co, Kansas City; Centennial Contractors Enterprise, Inc, Whiteman AFB; Eagle-Picher Technologies, Joplin; Engineered Support Systems (ESSI), St. Louis; Government Employees Hospital Associates (GEHA), Independence, MO; Haldex Brake Systems; Kansas City; Honeywell, Olathe, KS; Honeywell-US DOE, Kansas City, MO; IBS Industries, Independence; Mid Missouri Cellular, Sedalia; Moniteau Welding, Smithton, MO; Motorola, Inc Scottsdale, AZ; NASA Technology Transfer, Independence, MO; Newport News Shipbuilding, Inc, Washington, DC; Northrup Grumman Corp, Irving TX; Raytheon Aircraft Co, Wichita, KS; Rust Constructors, Ft. Leonard Wood; SolutionsPros, Lenexa KS; Stewart & Stevenson Tactical Vehicle Systems, Sedy, TX; The ARK Enterprises, Belton, MO; The Boeing Co, St. Louis, MO; TRA-LOR-MATE, Salem, MO; TWA Airlines, Kansas City, MO.

[Preparation schedule used by the Missouri SBDC and PTAC to organize the Representative Ike Skelton Procurement Conference]

Procurement Conference 30 May 2003 Preparation Schedule

| | <u>Planned Date</u> | <u>Actual Date</u> |
|--|---------------------|--------------------|
| First Planning Meeting | 13 Nov 02 | |
| Review Lessons Learned | 13 Nov 02 | |
| Establish tentative menu | 13 Nov 02 | |
| | | |
| Establish tentative agenda/topics | 13 Nov 02 | |
| Reserve Display Board | 14 Nov 02 | |
| Invite Exhibitors | | |
| --Government | 14 Dec 02 | |
| --Contractor | 26 Nov 02 | |
| | | |
| Second Planning Meeting | 8 Jan 03 | |
| Finalize Agenda | 8 Jan 03 | |
| Invite Speakers (Include hotel/motel info) | 31 Jan 03 | |
| | | |
| Mail Brochure | 31 Jan 03 | |
| Edited Mailing List Completed | 28 Feb 03 | |
| Notify Chambers of Commerce, associations, etc. | 18 Feb 03 | |
| | | |
| Create Mailing Labels of past attendees | 18 Feb 03 | |
| Identify Person(s) to sing National Anthem | 3 Mar 03 | |
| Contact _____ for color guard | 3 Mar 03 | |
| | | |
| Contact _____ for chaplain | 3 Mar 03 | |
| Third Planning Meeting | 5 Mar 03 | |
| Mail Brochure to approving person | 1 Apr 03 | |
| | | |
| Place conference on web site | 7 Apr 03 | |
| Place conference on _____ web site | 7 Apr 03 | |
| Place conference on _____ web site | 7 Apr 03 | |
| | | |
| Place conference on _____ web site | 7 Apr 03 | |
| Identify pianist | 7 Apr 03 | |
| Fourth Planning Meeting | 14 Apr 03 | |
| | | |
| Mail conference brochure | 22 Apr 03 | |
| Initial Publicity - Radio spots | 1 May 03 | |
| Speakers/Exhibitors confirm & advise of space requirements | 1 May 03 | |

[Preparation schedule used by the Missouri SBDC and PTAC to organize the Representative Ike Skelton Procurement Conference (continued from previous page)]

| | |
|--|--------------|
| Newspaper Ads (PSA) | 1 May 03 |
| Identify Facilitators | 1 May 03 |
| Advise _____ of Menu | 1 May 03 |
| Mail conference postcard | 8 May 03 |
| Paid Radio Ad | 8 May 03 |
| Navy Mail Publications | 8 May 03 |
| Forward Handouts to Printer | 8 May 03 |
| Publicity -- Radio | 8 May 03 |
| Publicity - Newspapers | 8 May 03 |
| Establish seating arrangements for head tables | 15 May 03 |
| Fifth Planning Meeting | 15 May 03 |
| Radio Interviews | 15-23 May 03 |
| Confirm National Anthem Singer | 15 May 03 |
| Confirm Color Guard | 15 May 03 |
| Confirm speakers | 15 May 03 |
| Confirm pianist | 15 May 03 |
| Review Lessons Learned | 15 May 03 |
| Receive Copies of Handouts and Presentations from Presenters | 22 May 03 |
| Prepare Final Agenda | 22 May 03 |
| Registration Deadline | 22 May 03 |
| Identify Contents (pubs) for Packet | 22 May 03 |
| Advise _____ of Menu | 22 May 03 |
| Receive Handouts from Printer | 22 May 03 |
| Receive Publications from Navy | 22 May 03 |
| Copy Final Agenda | 22 May 03 |
| Provide _____ of Final Meal Count | 22 May 03 |
| Prepare exhibitor floor plan (MH) | 22 May 03 |
| Prepare seating arrangements at opening session & luncheon | 22 May 03 |
| Locate signs outside | 29 May 03 |
| Place signs for each track in Union Building | 29 May 03 |
| Procurement Conference | 29 May 03 |
| Lessons Learned Meeting/Conference Call | 18 Jun 03 |
| Next Year's Conference | _____ 04 |

I. Holding a Client Exposition in the State Legislature

The Pennsylvania SBDC's Client Exposition, held each year in the State Capitol, brings together more than 50 small businesses and entrepreneurs, more than 100 elected state officials, and SBDC personnel from throughout Pennsylvania for a day-long display of small business products and services -- and a powerful demonstration of the SBDC network's impact on the state economy. The event turns the State Capitol Rotunda into an exhibit hall, small business conference and grassroots legislative forum for a day. In addition, the day before and the day after the Client Exposition are used as lobby days, for SBDC personnel to meet with their state lawmakers and take participating SBDC clients to the meetings.

The event is a benefit to small business owners, lawmakers and, not least of all, the Pennsylvania SBDC. SBDC clients get to exhibit their products and tell lawmakers about the importance of SBDC services to their success. Lawmakers get to visit with small business constituents and learn about SBDC services. And SBDC directors, counselors and staff get to make their case to lawmakers for resources for the network.

The Pennsylvania SBDC's Client Exposition is a statewide grassroots legislative action program wrapped into just a few days and a single location. It attracts the key lawmakers, including the governor and legislative staff, who determine the state's contribution to the SBDC program -- and it makes it easy for them to participate by holding the event in their own workplace.

You might consider implementing this idea in your state as part of your legislative program. It takes planning and the commitment of staff and other resources, but it is a highly efficient and powerful way to deliver the SBDC network's message to lawmakers. It takes the SBDC network straight into the State Capitol.

For more information about planning an event like the Pennsylvania SBDC's Annual Client Exposition, you can contact Greg Higgins, State Director of the Pennsylvania SBDC, or Christian Conroy, Associate State Director of the Pennsylvania SBDC (phone 215-898-1219).

Below is information from the Pennsylvania SBDC about the Client Exposition, including an overview of the event and a timetable and task list for planning the event.

Overview

The SBDC Client Expo & Breakfast Reception serves to educate elected and government officials about the SBDC program. This event is an important component of our efforts to successfully obtain state appropriations for the program.

The purpose of the 2003 SBDC client Expo is to focus on the individual entrepreneurs and small business owners that help prove the success of the Pennsylvania SBDC. These successful individuals build the small firms that support the Commonwealth's economy and communities.

Once again, The **9th Annual Client Expo and Breakfast Reception** will take place in the East Wing Rotunda at the Capitol Building on **Tuesday, April 29 2003**. This year's event will be slightly different than in the past. As far as the general idea is concerned, we will still demonstrate the impact the Pennsylvania SBDCs have on the Commonwealth to state elected officials. However, unlike having an evening reception, we will now set-up Monday night with a breakfast reception on Tuesday morning. Below is a brief schedule of events:

Monday, April 28 Set up from 6-9 pm

We will have a get together for the SBDC staff, clients and friends as we set up on Monday evening. Light dinner will be provided along with beverages, as we work to turn the East Wing into the SBDC showcase. **Displays MUST be set up on Monday evening. NO EXCEPTIONS.**

Breakfast Reception served from 8-10 am

A fully catered breakfast will begin at 8am. The breakfast reception is for legislators, their staff, other government officials, as well as our staff members and clients.

Photos with Celebrity Guest 8:30-10 am

We are looking to secure a celebrity who has a connection to Pennsylvania and comes from the world of media, business, sports, etc. The celebrity should be around for photos with clients and staff during this time.

Client Exposition 8am-2:30 pm

Client products will be on display beginning at 8 in the morning. It will be critical to keep products on display during the lunch rush. When the event has calmed down, probably around 2:30, we should start thinking about breaking down the displays.

Break down and departure 2:30 pm-4 pm

We will try to leave the East Wing before 4:00, to avoid any rush from people exiting the Capitol.



[Timetable and task list from the Pennsylvania SBDC Client Exposition]

Timetable & Task List -- SDO

| | |
|--------------------------|---|
| 8/1 | Reserve Capitol Rotunda space |
| 11/18 | Reserve Hilton space |
| 11/25 | Prepare budget |
| 12/6 | Review list of legislators to be sure that they are properly assigned to SBDCs |
| 12/9 | Contact Caterer |
| 12/9 | Contact Kevin Drawbaugh at JK Images |
| 12/9 | Contact Rilieghs |
| 12/9 | Reserve NPR space |
| 12/9 | Invite Governor - RSVP deadline of 1/20 so he can be included in the invitation |
| 12/11 | Review East Wing space |
| 12/16 | Meet with Designers about invitation |
| 12/16 | Web site updated with Expo 2003 information |
| 12/16 | Order Coffee Mugs, awards, buttons, etc. |
| 12/17 | Prepare media list |
| 12/18 | Identify person to create signs and displays and determine what displays and signs are needed |
| 12/19 | Invite Leadership to be Honorary Chairs |
| 12/19 | Review budget with PASBDC, Inc. |
| 1/6 | Notice of the event listed on House and Senate calendars |
| 1/13 | Hand out centers Expo 2003 packet, notification of theme and ask to identify clients -- due to SDO by 1/31 |
| 1/20 | Database established to track RSVPs |
| 1/27 | Request to Governor for Proclamation |
| 1/31 | Confirm Honorary Chairs |
| 1/31 | List of clients exhibiting due to SDO with a success story and photo, if available |
| 2/3 | SDO starts sending out success stories on clients exhibiting |
| 2/5 | Mark Your Calendars notices mailed |
| 2/10 | Memo to centers asking them how many invitations they will need and space needs for their exhibit |
| 2/14 | Preliminary reservation of tables and chairs |
| 2/14 | Confirm Kevin Drawbaugh at JK Images |
| 2/14 | Confirm caterer |
| 2/17 | Invitation copy to Designer |
| 2/19 | Number of invitations needed due to SDO |
| 2/26 | Arrange for client recognition during session |
| 3/3 | Invitations received from printer. |
| 3/3 | Letters to Honorary Chairs notifying them of constituent clients participating and asking them to present the clients with proclamations during the event |
| 3/7 | Invitations sent to SBDCs and SDO mailing list |
| 3/17 | Send Press Releases to SBDCs for exhibiting clients to use to promote their participation |
| 3/24-4/27 | Directors contact legislators to encourage them to come and to make appointments with them on 4/28, 4/30 |
| 3/26 | Logistical needs of clients and SBDCs exhibiting due to SDO |
| 3/28 | Hilton Room Reservation Deadline |
| 4/4 | Order tables, chairs, easels, and other materials |
| 4/7 | Event Program layout |
| 4/18 | RSVP Deadline, including clients and SBDC staff |
| 4/14 | Prepare information packages |
| 4/14 | Prepare nametags |
| 4/14-16, 21-23, 28,29 | NPR ad runs |

[Timetable and task list from the Pennsylvania SBDC Client Exposition -- continued]

4/16 Space Layout diagrams and To Do lists faxed to centers
4/21 Prepare thank you certificates for clients
4/23 Press release on event prepared and distributed on PR Newswire
4/25 Draft thank you letters
4/25 Fax media advisory to Harrisburg media outlets
4/29 **Expo 2003 SBDC Client Exposition and Reception**
5/1 Solicit feedback on the event from directors
5/5 Update database on people who attended
5/7 Send thank you letters to attendees and to participating clients
5/9 Prepare summary report on the event

Timetable & Task List -- SBDCs

1/06 Notice of the event listed on Senate and House calendars
1/13 Hand out centers Expo 2003 packet, notification of theme and ask to identify clients --due to SDO by 1/31
1/31 List of clients exhibiting due to SDO with a success story and photo, if available
2/3 SDO starts sending out success stories on clients exhibiting
2/5 Mark Your Calendars notices mailed
2/10 Memo to centers asking them how many invitations they will need and space needs for their exhibit
2/19 Number of invitations needed due to SDO
3/7 Invitations sent to SBDCs and SDO mailing list
3/24-4/27 Directors contact legislators to encourage them to come and to make appointments with them on 4/28, 4/30
3/26 Logistical needs of clients and SBDCs exhibiting due to SDO
3/28 Hilton Room Reservation Deadline
4/14-16, 21-23, 28, 29 NPR ad runs
4/18 RSVP Deadline, including clients and SBDC staff
4/23 Press release on event prepared and distributed on PR Newswire
4/29 **Expo 2003 SBDC Client Exposition and Reception**
5/1 Provide feedback on the event to the SDO
5/5 Send thank you and follow-up letters to people met with during the event -- **ask for specific action.**



J. Inviting Lawmakers to Your Events

SBDCs hold workshops, seminars, meetings and other events every day that involve significant numbers of small business owners, aspiring entrepreneurs and leaders in the small business community. These events are part and parcel of the SBDC network's service to the small business community. But these events are also ready-made opportunities for lawmakers to meet with small business constituents -- and ready-made opportunities to involve lawmakers in, and educate lawmakers about, the work of the SBDCs.

Every SBDC should consider inviting each of its lawmakers and their staffs to one of its regularly scheduled events at least once or twice a year. It doesn't require the SBDC to organize anything that it isn't already organizing for its clients. And it doesn't require SBDC personnel to be up to speed on anything that they are not already up to speed on -- namely, the work of the SBDCs and the need for our services in the small business community.

Be aware that an invitation to a lawmaker to attend an event should be sent out several weeks before the event (typically six to eight weeks in advance). And be aware that the event should involve a large enough group of people to make it worth the lawmaker's time. Lawmakers have varying ideas about what makes an audience large enough to be worthwhile. It's a function of several factors, such as how far the lawmaker has to travel to get to the event, who will be in the audience, how large the lawmaker's legislative district is, and so on. A group of about 50 people would be considered a good audience by most lawmakers.

Be sure to make the lawmaker feel welcome at the event. Give him or her time to speak to the audience, and recognize and thank the lawmaker for his or her support of the SBDC program and the small business community. You can also do things such as present the lawmaker with an award, give him or her a tour of your facility, and invite the media to cover the meeting. It can be a good experience for everyone involved -- clients, who get the extra benefit of speaking to their lawmakers; the lawmaker, who has the opportunity to meet with a group of small business constituents in an environment where the lawmaker is recognized for supporting services to the small business community; and the SBDC, which has the opportunity to build and strengthen its relationship with the lawmaker.

A good example of involving a lawmaker in a regularly scheduled SBDC event is the Michigan SBTDC's invitation to Congressman Thaddeus McCotter to attend the SBTDC's Network Meeting, which is held twice a year. The meeting brings together Michigan SBTDC network leaders, advisory board members, program and sponsor partners, and small business owners. The Congressman is a first-term member of the U.S. House of Representatives and was appointed to the Small Business Committee, which oversees the SBDC program. He was no doubt appreciative of the opportunity to meet with leaders in the small business community and

learn more about the SBDC network. In addition to meeting with SBTDC and small business leaders, the Congressman will have the opportunity to have lunch with the group; tour the new technology facility where the meeting is being held; and re-visit his *alma mater*, Schoolcraft College, which is a host institution of the Michigan SBTDC network.

The Pennsylvania SBDC and the Delaware SBDC have both included in their written government action plans provisions for each SBDC in their networks to invite lawmakers to workshops (such as Pre-Business, First Step and Surviving the Recession workshops), and other events such as Bankers Roundtables and conferences.

For more information about inviting lawmakers to your events, you can call the ASBDC (phone 703-764-9850) or contact leaders in the SBDC network who have done this, including:

- Carol Lopucki, State Director of the Michigan SBTDC (phone 616-331-7480)
- Greg Higgins, State Director of the Pennsylvania SBDC, or Christian Conroy, Associate State Director of the Pennsylvania SBDC (phone 215-898-1219)
- Clinton Tymes, Delaware SBDC (phone 302-831-1555)

Below is a copy of the letter sent by the Michigan SBTDC inviting Congressman McCotter to its Network Meeting.



State Headquarters
Grand Valley State University
Seidman School of Business
510 West Fulton Street
Grand Rapids, MI 49504
Phone: 616.331.7480
Fax: 616.331.7485
www.misbtdc.org

July 29, 2003

U.S. Representative Thaddeus G. McCotter
17197 N. Laurel Park Dr., Suite 161
Livonia, MI 48152

Dear Representative McCotter,

On behalf of the Michigan Small Business & Technology Development Center (MI-SBTDC), I would like to congratulate you on your appointment to serve on the House Committee on Small Business. It is an honor having you defend the worth of small business, the people they employ, and the principles of entrepreneurship.

As you are aware, the MI-SBTDC provides counseling, training and research for Michigan's new business ventures, existing small businesses, expanding new businesses, new technology companies, and innovators. The MI-SBTDC is housed at the Grand Valley State University Seidman School of Business in Grand Rapids.

Our statewide network continues to grow, as we now have 12 operational regional offices and over 30 satellite offices running strong. In an effort to enhance our network, we have semi-annual statewide meetings. This year's meeting will take place at Schoolcraft College, one of our strongest Michigan centers, on November 3rd and 4th. As a Schoolcraft alumnus, it would be an honor for us to have you speak to the group of 60 plus MI-SBTDC business consultants discussing your role on the House Committee on Small Business. We will be meeting at the following times:

- Monday, November 3, 1:30 – 5pm
- Tuesday, November 4, 8:30am – 12pm
- Another option would be to meet with the MI-SBTDC Statewide Advisory Board on Monday, November 3 from 9am – 12pm.

The Board is comprised of eight small business owners; program partners such as Michigan State University Extension; sponsor partners including National City, SBC and the MEDC; and organizational staff from the SBA and our host organizations, a total of 20 members all together.

Please notify my Marketing Manager, Jill Wallace, if you are available either of these days. We would gladly rearrange our program to accommodate your scheduling needs. Thank you for your consideration and again congratulations. For further information on the MI-SBTDC please visit our website at www.misbtdc.org.

Sincerely,

Carol Lopucki
State Director

Regional Centers

Escanaba

Traverse City

Alpena

Harrison/Mt. Pleasant

Saginaw

Flint

Grand Rapids

Lansing

Detroit

Mt. Clemens

Kalamazoo

Ypsilanti



K. Validating Your Economic Impact Statistics

There is an old saying that in political debate, everyone is entitled to his own statistics. We need statistics to educate lawmakers about the economic impact of the SBDCs. And virtually every state and regional SBDC network gathers local economic impact data to share with lawmakers and others. But some SBDC networks have taken the extra step of having their economic impact data validated by independent and/or official entities -- increasing the data's credibility and visibility.

The Vermont SBDC, for example, sent its economic impact data to the State Tax Commissioner and asked him to calculate the additional State revenues that resulted from SBDC counseling and training. The State Tax Commissioner, as we would expect, found that the Vermont SBDC program produced far more state revenue than it cost the taxpayers of Vermont. But now it wasn't the Vermont SBDC itself telling lawmakers that state funding for the SBDCs was a good investment of state tax dollars -- it was the State Tax Commissioner saying so. And the result was that the Vermont SBDC's return on state investment got a lot more attention from state lawmakers.

Since then, the Vermont SBDC has taken the additional step of having the State Economist, through his private consulting firm, validate the Vermont SBDC's economic impact data by using the REMI econometric model -- the same model used by the state to determine returns to the state from the tax credit program. Again, this allows the Vermont SBDC to tell lawmakers that the State Economist, using the same methods used by the state, has verified the SBDC network's economic impact data. Everyone may be entitled to his or her own statistics, but clearly some statistics have more impact than others.

Other state SBDC networks, such as Ohio and Oregon, have also found ways to increase the effect of their economic impact data by validating the data through independent and/or official sources. The Oregon SBDC Network, for example, is evaluated by a private firm commissioned by the Oregon Economic and Community Development Department. Similarly, the economic impact of the Ohio SBDC is analyzed each year by professors of economics at Ohio University, using a nationally recognized economic development modeling program called IMPLAN.

For more information about validating economic impact data through independent and official sources, contact leaders in the SBDC network who have done this, including:

- Don Kelpinski, State Director of the Vermont SBDC (phone 802-728-9101)
- Holly Schick, State Director of the Ohio SBDCs (phone 614-466-2711)
- Bill Carter, State Director of the Oregon SBDC Network (phone 541-463-5250)

L. Sharing Your Publications With Lawmakers

America's Small Business Development Center Network has a great story to tell, about the impact we have on the success of individual small business owners and the economy as a whole. Many SBDC networks have put their stories into effective publications that they share with lawmakers. We need to share our publications with lawmakers so they know what we're doing for their constituents and their local economies. Lawmakers want to know what they're getting for their support of our program.

There are several keys to making your publications interesting to lawmakers. Because all politics is local, the first key to making your network's story interesting to lawmakers is to make it local -- as specific as possible to the lawmaker's legislative district. The information that a lawmaker wants to know is: how many of my constituents do you serve, do you have a center in my district, how many jobs have you created for my constituents, and so on. Success stories from small business owners who are the lawmaker's constituents, and economic data from the lawmaker's legislative district have the most impact.

The second key to communicating your network's story to lawmakers is to communicate on a continuing basis. Share your publications with lawmakers several times a year. Don't be shy. A good story deserves to be retold. Lawmakers and their staffs are overwhelmed with information, and you can't expect them to remember you if they only hear from you once in a blue moon. There is also a lot of turnover among legislative staffers, and you need to continually educate the new staff about who we are, what we do and why we are important to the lawmaker and his or her constituents.

The third key is to keep your story up to date. Lawmakers want to know not only what you have done for their constituents, but also what you have done for their constituents lately. A good story needs to be kept up to date.

The North Texas SBDC, for example, sends monthly success stories to lawmakers in its region, and quarterly economic updates broken down by legislative district (see below). The Massachusetts SBDC sends an annual economic impact brochure to every state and federal lawmaker, as well as to allies and partner institutions (see below). To maximize name recognition, the Massachusetts SBDC's economic impact brochure maintains the same format, message and branding from year to year -- only the color of the brochure and the statistics change. The Illinois SBDC Network sends periodic impact reports to lawmakers, broken down by legislative district, and center directors take the reports with them when they visit lawmakers in their local offices.

For more information about sharing your publications with lawmakers you can call the ASBDC (phone 703-764-9850), or contact state and regional SBDC directors who have developed publications to share with their lawmakers, including:

- Liz Klimback, Regional Director of the North Texas SBDC (214-860-5835)
- Georgianna Parkin, State Director of the Massachusetts SBDC Network (413-545-6301)
- Mark Petrilli, State Director of the Illinois SBDC Network (217-524-5700)

Below are sample publications that the North Texas SBDC has shared with lawmakers, including an economic impact report for the 4th Congressional District of Texas and a client success story. Also below is a section of the Massachusetts SBDC's annual economic impact brochure.

[North Texas SBDC's economic impact report for the 4th Congressional District of Texas]



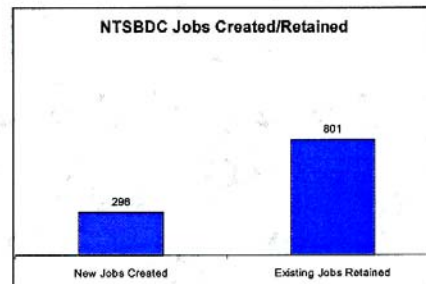
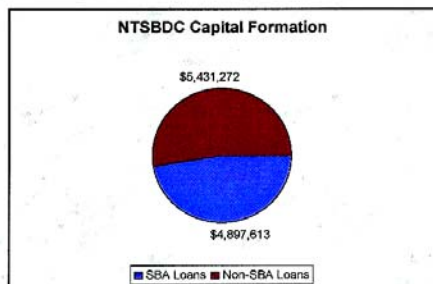
North Texas SBDC 2001 Economic Impact District 4 -- Ralph Hall

Of the twelve congressional districts served by the NTSBDC, District 4 generated the most SBDC clients in 2001. All of District 4 is within the NTSBDC region and is served by the following NTSBDC small business development centers:

- Collin SBDC
- Dallas SBDC
- North Central SBDC
- Grayson SBDC
- Kilgore SBDC
- Paris SBDC
- Trinity Valley SBDC
- Tyler SBDC

| | |
|-------------------------------|---------------|
| Counseling Cases | 1,148 |
| Counseling Hours | 4,559 |
| Established Businesses Served | 376 |
| Government Procurement | \$ 633,527 |
| Export | \$ 5,996,282 |
| Sales | \$ 39,988,933 |

As the 2001 data indicates, the NTSBDC has a significant economic impact on the District 4 counties.



[Sample client success story, shared with lawmakers by the North Texas SBDC]

Company refines processes, recovers

North Texas SBDC News Service

For more than 20 years, Beautiful Baby has been manufacturing and selling custom infant and teen bedding. The company's owners, Richard and Marti Fuhrman, specialize in helping stores set up special order departments, so they rely on trade shows to exhibit their bedding and accessories to retailers.

In 2001, current and projected orders seemed significant enough to warrant taking advantage of volume discounts by ordering a substantial amount of inventory. That proved to be a mistake. The terrorist attacks on September 11 caused their larger customers to cancel orders, and at the same time, a major industry trade show was cancelled because so many people were afraid to fly.

Beautiful Baby was in a cash crunch. The Fuhrmans did not have enough working capital and they could not pay their debt. A friend referred the Fuhrmans to the Kilgore SBDC, where counselor Joel Johnson helped them obtain a \$40,000

SBA loan to consolidate debt and reserve funds for operating capital. Joel helped Richard implement a just-in-time inventory

"Within three weeks of my first contact with Joel, I had a first rate prepared business plan completed, and two weeks later received SBA loan approval."



Richard and Marti Fuhrman recently expanded their wholesale bedding warehouse to include a retail factory outlet storefront.

management process, and assisted him in developing an expense reduction plan that has reduced expenses by 12 percent.

Loss in sales and excessive inventory temporarily affected net profits, but with a new, effective telemarketing program in place, the company is on track to increase sales by 10 percent over last year.

“Within three weeks of my first contact with Joel, I had a first rate prepared business plan completed, and two weeks later received SBA loan approval,” Richard said.

“Fortunately for me,” Richard said, “there is the Kilgore SBDC and a professional staff with a most talented counselor, Mr. Joel Johnson.”

BEAUTIFUL BABY

- Richard and Marti Fuhrman, owners
- Sole Proprietorship
- Manufactures and distributes custom bedding for children
- Established in 1979

KILGORE SBDC

- Serving Upshur, Gregg, Marion, Harrison, Panola and Rusk counties since 1990
- Hosted by Kilgore College
- Director: Brad Bunt, 903-757-5857

[Section of the Massachusetts SBDC's annual economic impact brochure, which the network shares with lawmakers]



Return on Investment

Studies consistently show that Massachusetts citizens receive a strong return on their investment by utilizing the Massachusetts Small Business Development Center (MSBDC) Network. The program's success is directly related to the quality of our professional staff and partnerships between the U.S. Small Business Administration, the Massachusetts Department of Economic Development, college and university sponsors, and a wide range of supporters in the business community. In 2001, the MSBDC provided counseling services to 3,449 clients.

Economic Impact Study: An impact study* of MSBDC clients who received five or more hours of counseling assistance in 2001 yielded the following findings:

- A vast majority of clients (93%) would recommend MSBDC services; 87% felt services were beneficial.
- Counseling services generated \$2.54 in tax revenue for each dollar expended on the program from state, federal and local funding sources.
- Following MSBDC counseling services, \$45.8 million in capital was secured.
- Each dollar spent by the MSBDC program leveraged \$12.77 in debt and equity capital.

MSBDC Clients:

- Outperformed average sales growth for all Massachusetts companies — 13.6% versus -0.8%.
- Created higher job growth — 13.7% versus state average of 1% for established firms.
- Generated \$89.8 million in total new sales revenue and \$9.1 million in total tax revenue (\$4.9 million federal tax revenue; \$4.2 million state tax revenue).
- Produced 1,129 new jobs with the average cost of generating a new job at \$3,176 and preserved 1,896 jobs.

M. Tailoring Your Strategy to Your Lawmakers' Interests

You can make your message to a lawmaker more effective by tailoring it to his or her interests. A good example of researching lawmakers' interests is the Massachusetts SBDC's "environmental scan" of lawmakers. The Massachusetts SBDC looks at the backgrounds, interests and key constituencies of its state and federal lawmakers, and then uses the information to work more effectively with each lawmaker.

For example, looking at the seven leaders of the Massachusetts State Senate, the Massachusetts SBDC found that all but one of the State Senate leaders matriculated from one of the educational institutions that sponsor Massachusetts SBDC regional offices -- UMass Amherst, UMass Boston, Dartmouth, Boston College, or Salem State College. In addition, two State Senate leaders are former owners of small businesses. Five State Senate leaders list economic or community development as a priority issue.

Looking at the 17 members of the State Senate's Ways and Means Committee (a key committee that influences funding for State programs), the Massachusetts SBDC found that the chairperson of the committee has a degree from UMass Boston and lists economic development as a priority; the assistant vice chairperson of the committee also has a degree from UMass Boston; another eight committee members have degrees from either a UMass school, Boston College or Clark University (all of which host SBDCs); and a majority of the committee members list economic development or business expansion as a priority.

With knowledge of a lawmaker's interests, background and key constituencies, the Massachusetts SBDC can point out different aspects of its program that will interest particular lawmakers, such as its affiliation with a particular university, its ability to support a lawmaker's priorities, or its ability to serve key constituencies. The Massachusetts SBDC does the same kind of analysis of its federal lawmakers. For example, Senator Kerry is interested in child care and small business. So Georgianna Parkin, the SBDC State Director, served on the Senator's Advisory Committee on Child Care and Small Business, which led to the introduction of legislation to allow child care businesses to use the SBA's 504 loan program. Congressman McGovern is interested in manufacturing, so he has been invited to speak several times at events sponsored by the Massachusetts SBDC's PTAC. Congressman Delahunt is interested in international trade, and he has participated in events sponsored by the Massachusetts SBDC's Export Center.

You can find out about lawmakers' interests and priorities by simply asking the lawmakers, their staffs or people who know them. You can also find information about a lawmaker by visiting his or her website. U.S. senators' websites are accessible from the U.S. Senate's website (www.senate.gov), and U.S. Representatives' websites are accessible from the U.S. House website (www.house.gov). State and local lawmakers usually have websites that are accessible

from the websites of the legislative bodies in which they serve. For a listing of the websites of the 50 State legislatures, the District of Columbia and the Territories, you can visit the National Conference of State Legislatures' site, www.ncsl.org/public/leglinks.cfm. In addition, the ASBDC office has access to published information about federal lawmakers.

For more information about performing the kind of environmental scan of lawmakers that is done by the Massachusetts SBDC, and ways to use this information to work with lawmakers, contact Georgianna Parkin, State Director of the Massachusetts SBDC (phone 413-545-6301).

Below is a copy of a letter from Senator John Kerry to Massachusetts SBDC State Director Georgianna Parkin, thanking her for serving on his Advisory Committee on Child Care and Small Business.



UNITED STATES SENATE
WASHINGTON, D. C. 20510

JOHN KERRY
MASSACHUSETTS

August 2, 2002

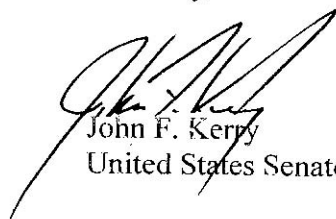
Dear Georgiana:

Please accept my deepest gratitude for your continued work on my Advisory Committee on Child Care and Small Business. You are taking great steps toward improving child care quality, accessibility, and viability not only in the Commonwealth, but potentially in the entire Nation.

As a result of your work with my office, I introduced a bill (S.2891) to create a pilot program that would extend the SBA's 504 loan program to non-profit child care businesses. I thank you for highlighting the importance of access to capital for non-profit -- as well as for-profit -- child care centers.

Your time and efforts through the Advisory Committee on Child Care and Small Business have already greatly contributed to strengthening the links between the Small Business and Child Care communities. Please know that I am grateful for all that the Committee is doing.

Sincerely,


John F. Kerry
United States Senator

N. Helping Lawmakers With Constituent Service

One of the most important things that lawmakers do, in addition to making our laws, is to help their constituents solve problems. Constituents ask their lawmakers for help with everything from finding lost luggage to finding information about starting a small business. Lawmakers call this “constituent service,” or “case work.”

Lawmakers take constituent service very seriously. The problem for lawmakers is that they never have enough staff to handle every problem that a constituent might call about -- especially if the constituent’s problem or question requires some expert advice.

That’s where SBDCs can be a big help to a lawmaker. Lawmakers and their staffs often need to refer constituents to experts, and the fact that the SBDC network is non-profit and government-funded makes it an ideal resource for lawmakers who need expert help for small business constituents.

Make sure your lawmakers know that you are available to help with constituent service (or case work) involving small business questions and problems. Just be sure that the lawmaker (and especially his or her constituent service staff) understands the kinds of services that your SBDC provides, so that the lawmaker’s office doesn’t refer cases to you that you can’t address. Also be sure that you take good care of any constituents that a lawmaker refers to you.

The Michigan SBTDC has developed a small business constituent referral form that it distributes to lawmakers’ offices, to help lawmakers’ offices make small business constituent referrals to the SBTDC and to help the SBTDC keep track of these referrals. The form (see below) calls for lawmakers’ offices to fax the constituent referral form to the SBTDC State Director’s office, so the State Director can ensure that the referrals are handled appropriately.

Helping lawmakers with constituent service doesn’t require the SBDC to do anything that it isn’t already doing -- helping people with small business questions and problems -- and there is no better way to educate a lawmaker on the importance and the value of SBDC services to the small business community.

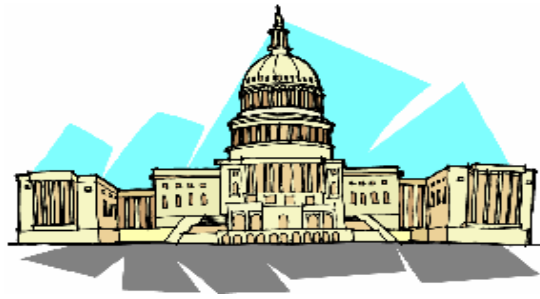
For more information about helping lawmakers with constituent service, you can call the ASBDC (phone 703-764-9850), or call Carol Lopucki, State Director of the Michigan SBTDC (phone 616-331-7480).

Below is the constituent referral form that the Michigan SBTDC distributes to lawmakers' offices.

Constituent Referral Form Small Business Assistance

| | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
|---|---|--|---|--|---|--|---|--|---|--|---|------------------------------------|--------------------------------------|---|--|--|-------|--|--|--|-------|---|-----------------------------------|---|-------|--|------------------------------------|---|--|--|--|-------------------------------------|--|
| <p>Services for Michigan's existing and prospective business owners include confidential one-on-one counseling, low cost training, and research services from the Michigan Small Business & Technology Development Center.</p> | <p>Contact Information: (All referrals are kept in strict confidence) Company Name: _____ Contact Name: _____ County: _____ Address: _____ City: _____ State/Zip: _____ Phone: _____ Fax: _____</p> | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| <p>Business Type: (check ONE)</p> <table style="width: 100%; border: none;"> <tr> <td><input type="checkbox"/> Not In Business</td> <td><input type="checkbox"/> Research & Development</td> <td><input type="checkbox"/> Retail Dealer</td> </tr> <tr> <td><input type="checkbox"/> Construction Concern</td> <td><input type="checkbox"/> Service Establishment</td> <td><input type="checkbox"/> Wholesale Dealer</td> </tr> <tr> <td><input type="checkbox"/> Manufacturer/Producer</td> <td><input type="checkbox"/> Surplus Dealer</td> <td><input type="checkbox"/> Other _____</td> </tr> </table> | | <input type="checkbox"/> Not In Business | <input type="checkbox"/> Research & Development | <input type="checkbox"/> Retail Dealer | <input type="checkbox"/> Construction Concern | <input type="checkbox"/> Service Establishment | <input type="checkbox"/> Wholesale Dealer | <input type="checkbox"/> Manufacturer/Producer | <input type="checkbox"/> Surplus Dealer | <input type="checkbox"/> Other _____ | | | | | | | | | | | | | | | | | | | | | | | |
| <input type="checkbox"/> Not In Business | <input type="checkbox"/> Research & Development | <input type="checkbox"/> Retail Dealer | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| <input type="checkbox"/> Construction Concern | <input type="checkbox"/> Service Establishment | <input type="checkbox"/> Wholesale Dealer | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| <input type="checkbox"/> Manufacturer/Producer | <input type="checkbox"/> Surplus Dealer | <input type="checkbox"/> Other _____ | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| <p>Business is a: (check ONE) <input type="checkbox"/> Start up Business <input type="checkbox"/> Existing Business</p> | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| <p>Assistance Needed:</p> <table style="width: 100%; border: none;"> <tr> <td><input type="checkbox"/> Accounting & Records</td> <td><input type="checkbox"/> Export/Import Assistance</td> <td><input type="checkbox"/> Marketing/Sales</td> <td><input type="checkbox"/> Total Quality Mgmt.</td> </tr> <tr> <td><input type="checkbox"/> Business Plan</td> <td><input type="checkbox"/> Financial Analysis</td> <td><input type="checkbox"/> Patents</td> <td><input type="checkbox"/> Trademark</td> </tr> <tr> <td><input type="checkbox"/> Business Start-up</td> <td><input type="checkbox"/> Government Procurement</td> <td><input type="checkbox"/> Personnel</td> <td><input type="checkbox"/> Other _____</td> </tr> <tr> <td><input type="checkbox"/> Computer Systems</td> <td><input type="checkbox"/> International Trade</td> <td><input type="checkbox"/> Product Diversification</td> <td>_____</td> </tr> <tr> <td><input type="checkbox"/> Cost Management</td> <td><input type="checkbox"/> Inventory Control</td> <td><input type="checkbox"/> Reengineering</td> <td>_____</td> </tr> <tr> <td><input type="checkbox"/> Defense Conversion</td> <td><input type="checkbox"/> ISO-9000</td> <td><input type="checkbox"/> Restructuring/Debt</td> <td>_____</td> </tr> <tr> <td><input type="checkbox"/> Electronic Commerce</td> <td><input type="checkbox"/> Licensure</td> <td><input type="checkbox"/> Sources of Capital</td> <td></td> </tr> <tr> <td><input type="checkbox"/> Engineering R&D</td> <td><input type="checkbox"/> Loan Assistance</td> <td><input type="checkbox"/> Technology</td> <td></td> </tr> </table> | | <input type="checkbox"/> Accounting & Records | <input type="checkbox"/> Export/Import Assistance | <input type="checkbox"/> Marketing/Sales | <input type="checkbox"/> Total Quality Mgmt. | <input type="checkbox"/> Business Plan | <input type="checkbox"/> Financial Analysis | <input type="checkbox"/> Patents | <input type="checkbox"/> Trademark | <input type="checkbox"/> Business Start-up | <input type="checkbox"/> Government Procurement | <input type="checkbox"/> Personnel | <input type="checkbox"/> Other _____ | <input type="checkbox"/> Computer Systems | <input type="checkbox"/> International Trade | <input type="checkbox"/> Product Diversification | _____ | <input type="checkbox"/> Cost Management | <input type="checkbox"/> Inventory Control | <input type="checkbox"/> Reengineering | _____ | <input type="checkbox"/> Defense Conversion | <input type="checkbox"/> ISO-9000 | <input type="checkbox"/> Restructuring/Debt | _____ | <input type="checkbox"/> Electronic Commerce | <input type="checkbox"/> Licensure | <input type="checkbox"/> Sources of Capital | | <input type="checkbox"/> Engineering R&D | <input type="checkbox"/> Loan Assistance | <input type="checkbox"/> Technology | |
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| <input type="checkbox"/> Engineering R&D | <input type="checkbox"/> Loan Assistance | <input type="checkbox"/> Technology | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| <p>Fax this form to the Michigan SBTDC at (616) 331-7485 Attn: Carol Lonucki, State Director</p> | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| <p>From the constituent office of: _____</p> | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| <p>District Number: _____</p> | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| <p>Today's Date: _____</p> | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| <p>Contact: _____ Title: _____</p> | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
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| <p>Phone: _____ Fax: _____</p> | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| <p>Comments:</p> | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |





II. Reference Material

In this section of the Toolkit you will find reference material that you might find useful in your advocacy efforts, including information on how a bill becomes law, how Congress funds the SBDCs, and information about finding state legislative websites.

A. How a Bill Becomes Law

The chart below describes the normal process by which a bill becomes law. However, it is important to remember that legislating is a highly political process -- the parliamentary process can be altered to achieve the desired results. It is often said that in Congress, “process follows policy” -- meaning that the policy or legal changes that Congressional leaders want will determine the process used to achieve those results. When the Congressional leadership wants to, they can move a bill through the parliamentary process very quickly and skip subcommittee and committee consideration of a bill entirely. Likewise, they can bury a bill in a subcommittee so that it never sees the light of day.

| <i>(This table describes a bill that starts in the House of Representatives and then goes to the Senate. However, most bills can originate in either chamber.)</i> | |
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| PARLIAMENTARY STEPS | INFLUENCES ON THE BILL |
| <u>Introduction</u> -- A Member of Congress introduces a bill. | The idea for a bill can originate with a Member of Congress, an interest group or association, or an individual constituent. But only a Member of Congress can introduce a bill. |
| <u>Committee Referral</u> -- The House parliamentarian assigns (refers) the bill to one or more congressional committees, based on an objective (non-political) assessment of which committees have jurisdiction over the issues addressed in the bill. | Members of Congress try to draft their bills in such a way that they address only one area of law, so that the bill will be referred to only one committee and will move through the parliamentary process more quickly. It also helps if the Member of Congress who introduces the bill serves on the committee that the bill is referred to -- so that he or she can help shepherd the bill through the committee. |

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| <p><u>Hearing</u> -- A congressional subcommittee or committee with jurisdiction over the bill holds a hearing on the bill.</p> | <p>The Member of Congress who introduced the bill, as well as interest groups that support the bill, must persuade the chairman of the subcommittee or committee with jurisdiction over the bill to give the bill a hearing. The chairman of the committee, in consultation with the subcommittee chairman, decides whether the bill will be considered at the subcommittee level or go directly to the full committee. At the hearing, supporters and opponents of the bill make their cases for and against the bill.</p> |
| <p><u>Mark Up</u> -- A congressional subcommittee or committee holds a “mark up” of the bill and reports the bill to the full House.</p> | <p>A “mark up” is a meeting of a subcommittee or committee in which a bill is debated and amended. It is called a “mark up” because, whenever the subcommittee or committee agrees to an amendment, the bill is “marked up” to show the changes made. The chairman of the subcommittee or committee decides whether the bill will get a mark up. The sponsor of the bill and the interest groups that support the bill must persuade the chairman to hold a mark up.</p> |
| <p><u>House Passage</u> -- The bill is considered by the full House. If it passes in the House, it is then sent to the Senate.</p> | <p>The House or Senate Leadership (that is, the Majority Leader or the Speaker) decides whether a bill will get to the House or Senate floor for consideration. The committee and subcommittee chairmen who have jurisdiction over the bill, as well as the sponsor of the bill and the interest groups that support the bill, play an important role in the Leadership’s decision.</p> |
| <p><u>Senate Action</u> -- When the House bill arrives in the Senate, the Senate can consider the bill that was passed by the House. However, if a similar (“companion”) bill has been introduced by a senator, the Senate will usually consider the Senate version of the bill. The bill usually goes through the same process in the Senate that it went through in the House -- committee referral, subcommittee and committee hearings and “mark up,” and consideration by the full Senate.</p> | <p>The Senate, like the House, can amend a bill as it moves through the legislative process. The sponsor of the bill, the subcommittee and committee chairmen, the Senate leadership and the interest groups that support the bill will all influence how (and how quickly) the bill moves through the parliamentary process.</p> |

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| <p><u>Conference</u> -- If there are differences between the bill that the House passed and the bill that the Senate passed, the House and Senate must form a "conference committee" to iron out any differences between the two bills. Alternatively, if either the House or the Senate passes the bill exactly as it was passed by the other chamber, the bill can be sent to the President without having to go through a conference committee.</p> | <p>Members of the conference committee are appointed by the leadership of the House and the Senate. The leadership can influence the outcome of the conference by who they appoint to the conference committee. The chairmen of the House and Senate subcommittees and committees that have jurisdiction over the bill and other interested members of the committee usually serve on the conference committee.</p> |
| <p><u>Passage of the Conference Report</u> -- The House and Senate each pass the bill (at this point called a "conference report"), as it was re-written by the conference committee.</p> | <p>The Constitution requires the House and Senate to pass the identical bill before it can become law.</p> |
| <p><u>Presidential Signature</u> -- The President of the United States signs the bill, making the bill the law of the land.</p> | <p>Because the President must usually approve a bill for it to become law, supporters of a bill often work with the White House as the bill moves through Congress.</p> <p>If the President disapproves (vetoes) the bill and sends a message to Congress stating that he has vetoed the bill, then it can only become law if both the House and the Senate vote to pass the bill (override the President's veto) by votes of two-thirds of both the House and the Senate. The President's veto stands and the bill dies unless at least two-thirds of the House and two-thirds of the Senate vote to override the veto. If the President's veto stands, the bill's supporters have to start the legislative process over again to get their bill enacted into law.</p> <p>The President can also veto a bill if Congress is not in session, by simply failing to sign the bill within 10 days of receiving it. This is known as a "pocket veto," since the President does not officially reject the bill but merely puts it in his pocket (so to speak) and does not sign it. The President can only "pocket veto" a bill if Congress is not in session. If Congress is in session and the President does not sign or reject the bill within ten days, the bill automatically becomes law.</p> |

B. How Congress Funds the SBDC Program

Federal funding for America's Small Business Development Center Network depends on the annual passage of the Commerce-Justice-State appropriations bill. But before the President signs the Commerce-Justice-State appropriations bill into law, several federal agencies and congressional committees will have made decisions that help determine the program's funding.

The President's Budget Proposal

The first step in the annual funding process for the SBDC program, and every other federal program, is the development of the President's budget proposal. The President's budget proposal is written by the Office of Management and Budget (OMB), in consultation with executive branch departments and agencies that administer federal programs. It is usually submitted to Congress in February. The President's budget proposal has no legally binding authority. If the President's party controls Congress, his budget proposal carries weight in Congress. However, when the House or Senate is controlled by the opposing political party, the President's budget proposal is usually considered dead-on-arrival in that chamber.

The Congressional Budget Resolution

The next step in the annual funding process is the writing of the Congressional budget resolution. The House and Senate Budget committees each write a budget resolution, which is passed by their respective chambers. The House and Senate budget resolutions are then sent to a conference committee, consisting of key members of each chamber's Budget Committee. The conference committee irons out any differences between the House and Senate budget resolutions so that the House and the Senate can then pass the same budget resolution. At that point, usually in April, the Congressional budget resolution is complete -- it doesn't require the President's signature because the Congressional budget resolution is not the law of the land. It is a resolution binding only in Congress. The Congressional budget resolution is a relatively short document, and it rarely mentions specific programs such as the SBDC program. The Budget Resolution's main purpose is simply to establish spending limits on various broad categories of federal spending.

The Congressional Authorizing Committees

Although action by the Congressional authorizing committees (such as the House and Senate Small Business committees) isn't really a step in the annual funding process (because authorizing committees usually authorize funding on a multi-year basis), the authorizing committees play an integral role in Congressional funding decisions. The Congressional authorizing committees are the ones that pass the laws that create federal programs, and they authorize (in other words, gives permission for) the programs to receive federal appropriations.

If an authorizing committee has not authorized a program to receive appropriations, the appropriations committees are not supposed to appropriate funding for the program.

The Congressional Appropriations Committees

After Congress passes the budget resolution, the appropriations committees start writing the annual appropriations bills. The process begins with the distribution of spending allocations (commonly referred to as spending “caps”) to the 13 appropriations subcommittees, based on the spending limits in the Congressional budget resolution. The Commerce-Justice-State appropriations subcommittee in the House and the Commerce-Justice-State appropriations subcommittee in the Senate write the appropriations bill that funds the SBDC program. The appropriations subcommittees write their appropriations bills (staying within the overall spending caps that have been assigned to them), pass the bills in their subcommittees, and send the bills to the full appropriations committees. After the full appropriations committees pass the bills, they are sent to the House and Senate floors, passed there, and then sent to a conference committee of House and Senate appropriators. The conference committee irons out the differences between the House and Senate bills, and once the House and Senate pass the same bill, it is sent to the President.

The President’s Approval

The President gets the first word (the President’s budget proposal) and the last word (his signature or veto) on appropriations for federal programs. If the President signs an appropriations bill, it becomes law. If he vetoes an appropriations bill, Congress must either override the President’s veto (by a two-thirds majority) or pass a revised bill and send it to the President for his approval.

If Congress and the President Miss the Fiscal Year Deadline

If Congress and the President do not enact a new Commerce-Justice-State appropriations bill into law by the end of the fiscal year (September 30), they usually pass short-term continuing resolutions to keep the SBDCs and other programs funded temporarily. Meanwhile, they work to complete a Commerce-Justice-State appropriations bill to fund the SBDCs and other programs through the new fiscal year.

During the time that federal funding for the SBDC program is being provided by short-term continuing resolutions, state and regional SBDC directors must work closely with their host institutions to make provisions for the network’s expenses. State and regional SBDC directors need to be aware that the new fiscal year’s federal funding for the SBDC program could change (for better or for worse) when Congress and the President eventually enact a new Commerce-Justice-State appropriations law. For more information about operating under short-term continuing appropriations resolutions, please contact the ASBDC (phone 703-764-9850).

C. Finding State Legislative Websites

To search for websites with information about the legislatures of the 50 States, the District of Columbia and the Territories, go to the National Conference of State Legislatures' website at www.ncsl.org/public/leglinks.cfm. There you will find a database of State legislative links that you can search by State and Territory or type of information (for example, legislators, bills, issue reports, etc.).

Reproduced below is a portion of the National Conference of State Legislatures' web page from which you can search for information about the legislatures of the 50 States, the District of Columbia and the Territories.

NCSLnet Search

State Legislatures Internet Links

This database contains information gleaned from the home pages and websites of the fifty state legislatures, the District of Columbia and the Territories. You can select to view specific website content materials (such as, bills, press rooms, statutes) from all states, one state or a selected list of states.

To select more than one state, hold down the Control-key and click the desired states. To select all states between two points (Alabama and Georgia), first click on the first item (Alabama), scroll down the list to the last item (Georgia) and hold the Shift-key while you click on that item.

We encourage you to help us keep this information accurate and current by e-mailing updated or missing information. Please contact us at (303) 364-7700 with any questions or comments about the database.

Select the state or states

You wish to search:

ALL
Alabama
Alaska
American Samoa
Arizona
Arkansas
California

Select One Content Area:

Home Page
Bills
Constitution
Issue Reports
Kids Pages
Legislators
Online Live