



EMPLOYEE-OWNED S CORPORATIONS OF AMERICA

2021 District Visits Guide

A visit or meeting with a Member of Congress and your company's employee-owners can be one of the most impactful ways to tell your S corporation ESOP story and build support for employee ownership with federal lawmakers. These events, which ESCA calls "district visits" and "town halls", help educate Members about the benefits of employee ownership and can convert a Member of Congress into an active supporter of S ESOP policies. Additionally, as businesses and Congress continue to work amidst the COVID-19 pandemic, these meetings allow employee-owned companies to share their "on the ground" experiences with their Members of Congress so they can make informed decisions about stimulus and recovery legislation.

This guide details the various types of meetings, how they are each organized, and answers commonly asked questions. Additionally, ESCA staff is always available to help, and take a leading role working with you and your company to organize a virtual or in-person visit or meeting. To get started planning a district visit, please contact Matt Pearce at mpearce@vennstrategies.com or 701-471-8391, Diandra Brennan at dbrennan@vennstrategies.com or 202-549-7414 or Kelsey Stapp at kstapp@vennstrategies.com or 713-882-6031.

District Visits, Town Halls and Regional Events

There are the three primary ways that ESCA companies can engage with a Member of Congress at the state or congressional district level. All three types of events – district visits, regional events, and in-district meetings – can allow your company to showcase the uniqueness of the ESOP structure, communicate ESCA's legislative priorities to the Member and/or staff, and highlight the way ESOP companies in the Member's state/district create jobs, provide for retirement security, and promote economic growth. Virtual events are held via a video conferencing platform (Zoom, Webex or Teams) or via a conference call. Below are the three types of visits ESCA companies tend to host:

- 1. (Virtual) District Visits:** Typically involve one ESCA company hosting a Member of Congress/ staff. In-person events are usually scheduled for an hour timeframe while virtual events are typically 30 minutes. Below is a template agenda for a typical in-person district visit, whereas virtual events do not include the 30-minute tour:
 - **15 mins: Small group meeting with executives**
 - Offers an opportunity to introduce attendees and welcome the Member.
 - **30 mins: Tour of office or facility (in-person visit only)**
 - Allows the Member to see the company up-close, speak with employee-owners, and get a feel for what the company builds/does.
 - **15 mins: Employee-owner town hall or large group discussion**
 - Gives Member a chance to address employee-owners and answer questions.
- 2. Regional Events and Virtual Town Halls:** Similar to a traditional district visit, a regional event is anchored by a Member of Congress visiting a company site and includes inviting other ESCA company representatives from other area and

prospective ESCA members (S ESOP businesses not yet part of ESCA) to participate in the event. Virtual Town Halls are the virtual equivalent of regional events, most often held with members of the tax-writing House Ways & Means Committee and Senate Finance Committee and attended by multiple ESCA member companies. These events help showcase the ESOP community in a state or congressional district and can be used as an ESCA membership recruiting tool by getting non-ESCA members engaged in ESCA's advocacy activities.

- 3. In-District Meetings:** Unlike district visits and regional events, in-district meetings take place in the Member's local office similar in feel and structure to meetings that take place in a Member's Capitol Hill office. ESCA company employee-owners will travel to meet with the Member of Congress at one of their state/congressional district offices for a 20- to 30-minute meeting to introduce their company, give employee-owners a chance to discuss ESOP issues, and make a legislative ask.

Why are these types of meetings important?

These meetings allow Members of Congress and their staff to see first-hand the benefits of being an employee-owned company. Company executives and employee-owners are given the opportunity to educate their elected representative about the benefits of working at an employee-owned company for the community, the economy, and the individual employee-owners. Specifically, these meetings now allow companies to describe first-hand what effect the pandemic is having on their businesses and communities so Members of Congress will ensure S ESOPs are protected in future COVID-19 recovery legislation.

When do (virtual) district visits or town halls occur?

In-person meetings and visits usually occur during congressional recesses and district work periods when Members of Congress return to their district or state. However, a large benefit of the virtual meetings is that it is not necessary to wait for a congressional recess when a Member of Congress is likely to be in their district/state. Thus far, ESCA has aimed to host one virtual district event and/or town hall per week.

What is a meeting typically like?

A typical district visit lasts for about an hour whereas a virtual meeting with a Member of Congress lasts about 30 minutes. For a district visit or virtual district visit, an ESCA team member will moderate and introduce ESCA and the company representatives on the call. A designated primary speaker will introduce their company and offer insight into their how their company, industry and employee-owners are doing. During a virtual town hall or regional event with multiple company participants, each company present will have a primary speaker who can offer a few minute introduction and company or industry overview in turn. The second half of the meeting will usually be used as an opportunity for the ESCA company representatives and employee-owners on the call to ask the Member of Congress questions and discuss any relevant concerns.

How can I invite a Member of Congress to a district visit or virtual town hall?

ESCA is available to help throughout the entire process – from drafting the invitation, to coordinating the scheduling process, to organizing the event. ESCA staff can work with you and your company from start to finish. Once a visit is scheduled, ESCA staff will also assist in developing personalized talking points, briefing memos, and holding conference calls to prepare for the visit or event. Please reach out to Matt Pearce, Diandra Brennan or Kelsey Stapp (emails above) to begin the process.

FAQS

Q: How many meetings or events can my company participate in?

A: As many as you'd like! ESCA is constantly sending out invitations to target Members of Congress including House Ways & Means Committee members, Senate Finance Committee members, long-time allies of ESCA, and newly elected Members of Congress. If an office is available to meet, ESCA will then extend invitations to ESCA companies with significant operations and/or headquarters in the district or state to attend the meeting.

Q: For a district event, how do I know which Members of Congress to invite?

A: You can pinpoint the appropriate Member of Congress to invite by visiting [House.gov](https://www.house.gov) and using the Find Your Representative feature at the top right. ESCA staff can also identify a Member for a visit or meeting by grassroots information we have for your company on file.

Q: I would like to plan a district event or virtual meeting, but I am very busy, what resources can ESCA provide?

A: All you have to do is to let ESCA staff know your company wants to meet with a Member of Congress, whether virtually or in-person, and a member of the ESCA team can help pinpoint the appropriate Member or list of Members based upon your company's grassroots data. ESCA staff will draft and send an invitation to schedule the event and provide written materials to prepare you and your colleagues as well as the Member of Congress and their staff. If this Member of Congress presides over a state or Congressional district that other ESCA companies have significant operations or headquarters in, ESCA may propose inviting additional member company representative to attend as well.

Q: Will a member of the ESCA team attend the meeting?

A: Yes! An ESCA team member attends all district events and townhalls to act as a moderator to ensure all attendees have a chance to speak while allowing time for Q&A and discussion with the Member of Congress. The ESCA team can also handle all policy questions related to legislation and employee ownership issues so you can focus on introducing your company and sharing your employee ownership story.

Q: Will there be media present?

A: In-person district visits can have media should you choose, however most do not. Virtual events do not have media present.

Q: Is there anything we shouldn't talk about?

A: Before the meeting takes place, ESCA can do a briefing call with your company to discuss what to talk about and what not to talk about. It is usually recommended to avoid talking about non-ESOP related issues, controversial political topics, or subjects not directly related to ESOPs. It is important to remember to focus on telling your company's employee ownership story, positive economic impact in the community, and the number of employee-owners in the district or state. Our goal in 2021 is to share as many stories of how employee-owned companies are doing during the current economic climate and how they have had to adapt.

Q: Are political contributions (PAC) involved?

A: No, these visits are official visits.

117th Congress
Tax Writing Committee Rosters

U.S. House Ways and Means Committee	
Democrats	Republicans
Rep. Richard Neal (D-MA), Chairman	Rep. Kevin Brady (R-TX), Ranking Member
Rep. Lloyd Doggett (D-TX)	Rep. Devin Nunes (R-CA)
Rep. Mike Thompson (D-CA)	Rep. Vern Buchanan (R-FL)
Rep. John Larson (D-CT)	Rep. Adrian Smith (R-NE)
Rep. Earl Blumenauer (D-OR)	Rep. Tom Reed (R-NY)
Rep. Ron Kind (D-WI)	Rep. Mike Kelly (R-PA)
Rep. Bill Pascrell (D-NJ)	Rep. George Holding (R-NC)
Rep. Danny Davis (D-IL)	Rep. Jason Smith (R-MO)
Rep. Linda Sanchez (D-CA)	Rep. Tom Rice (R-SC)
Rep. Brian Higgins (D-NY)	Rep. David Schweikert (R-AZ)
Rep. Terri Sewell (D-AL)	Rep. Jackie Walorski (R-IN)
Rep. Suzan DelBene (D-WA)	Rep. Darin LaHood (R-IL)
Rep. Judy Chu (D-CA)	Rep. Brad Wenstrup (R-OH)
Rep. Gwen Moore (D-WI)	Rep. Jodey Arrington (R-TX)
Rep. Dan Kildee (D-MI)	Rep. Drew Ferguson (R-GA)
Rep. Brendan Boyle (D-PA)	Rep. Ron Estes (R-KS)
Rep. Don Beyer (D-VA)	Rep. Kevin Hern (R-OK)
Rep. Dwight Evans (D-PA)	Rep. Lloyd Smucker (R-PA)
Rep. Brad Schneider (D-IL)	Rep. Carol Miller (R-WV)
Rep. Tom Suozzi (D-NY)	
Rep. Jimmy Panetta (D-CA)	
Rep. Stephanie Murphy (D-FL)	
Rep. Jimmy Gomez (D-TX)	
Rep. Steven Horsford (D-NV)	
Rep. Stacey Plaskett (D-VI)	

U.S. Senate Finance Committee	
Democrats	Republicans
Sen. Ron Wyden (D-OR), Chairman	Sen. Mike Crapo (R-ID), Ranking Member
Sen. Debbie Stabenow (D-MI)	Sen. Chuck Grassley (R-IA)
Sen. Maria Cantwell (D-WA)	Sen. John Cornyn (R-TX)
Sen. Robert Menendez (D-NJ)	Sen. John Thune (R-SD)
Sen. Thomas Carper (D-DE)	Sen. Richard Burr (R-NC)
Sen. Benjamin Cardin (D-MD)	Sen. Rob Portman (R-OH)
Sen. Sherrod Brown (D-OH)	Sen. Patrick Toomey (R-PA)
Sen. Michael Bennet (D-CO)	Sen. Tim Scott (R-SC)
Sen. Robert Casey (D-PA)	Sen. Bill Cassidy (R-LA)
Sen. Mark Warner (D-VA)	Sen. James Lankford (R-OK)
Sen. Sheldon Whitehouse (D-RI)	Sen. Steve Daines (R-MT)
Sen. Maggie Hassan (D-NH)	Sen. Todd Young (R-IN)
Sen. Catherine Cortez Masto (D-NV)	Sen. Ben Sasse (R-NE)
Sen. Elizabeth Warren (D-MA)	Sen. John Barrasso (R-WY)

Bold – 2022 Reelection (Senate)