



EMPLOYEE-OWNED S CORPORATIONS OF AMERICA

ESCA 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, 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 tax and retirement policies.

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 lead the effort 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.

District Visits, Town Halls and Regional Events There are three ways that ESCA companies engage with a Member of Congress at the state or congressional district level. All three – district visits, regional events, and in-district meetings – 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.

1. District Visits (In-person or Virtual*): Typically involves one ESCA company hosting a Member of Congress/Congressional 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.

- **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.

**In a virtual setting, representatives of the ESCA company would spend the 30 minutes introducing themselves and their company, offering a snapshot of how the company is doing, and providing any additional perspectives on the benefits of employee-ownership.*

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 location or jobsite and includes inviting other local ESCA company representatives, and prospective ESCA members (S ESOP businesses not yet part of ESCA) as a way to recruit new members to ESCA. Virtual Town Halls are the virtual equivalent of regional events, most often organized by ESCA staff and 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 and are similar in feel and structure to lobby day 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 their district office for a 20-to-30 minute meeting and have the opportunity to introduce their company, give employee-owners a chance to discuss ESOP issues, and ask for their support of S ESOP legislation. These meetings typically include 4-5 reps from an ESCA company and can be set up in coordination with ESCA staff.

Why are these types of meetings important?

These meetings allow ESCA members to educate Members of Congress and their staff, about the benefits of employee ownership and provide a firsthand account about what it is like to be an employee-owner, the unique culture that comes with being an S ESOP businesses and share personal stories about the positive impact ESOPs have on workers at a personal level. These interactions are critical in turning a Member of Congress from a supporter to an ally.

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

In-person meetings, district visits, and regional events mostly occur when Congress is away from Washington DC and back in their district. These periods are called "congressional recesses" and "district work periods" when Members typically are out visiting local businesses and constituents. Below is a list of 2023 dates when Members are back in the districts.

118th CONGRESS, FIRST SESSION: DISTRICT WORK PERIODS AND RECESSES

Work Period/Recess Type	House	Senate
January/Martin Luther King Day Recess	1/16 – 1/23	1/4 – 1/20
President's Day Recess	2/10 - 2/24	2/20- 2/24
March	3/13 – 3/21	--
April	4/3 – 4/14	4/3 – 4/14
May	5/1 – 5/5, 5/26 – 6/2	5/22 – 5/29
July 4 th Recess	6/26– 7/10	6/26 – 7/7
August	8/1 – 9/11	8/1 – 9/4
October	10/2 – 10/16	10/9 – 10/13
November	10/30 – 11/3	--
Thanksgiving Recess	11/17 – 11/ 27	11/20 – 11/27
Winter Break	12/15 – 12/31	12/18 – 12/31

Virtual meetings have the added benefit of being easier to schedule and can be done almost any day of the year. Additionally, virtual meetings have the added benefit of exciting the Member to visit in-person, and often results in multiple interactions.

What is a meeting like?

A typical district visit lasts for about an hour whereas a virtual meeting with a Member of Congress lasts about 30 minutes. An in-person meeting is usually quite interactive with the Member of Congress being able to see the company's operations first-hand. While ESCA provides a suggested run of events (*See page 1*), it is up to the company what portion of the visit they spend the most time on. In the virtual format - an ESCA team member will moderate and introduce ESCA and the company representatives on the call. Each company will have a primary speaker who can introduce their company and discuss the importance of employee-ownership. The second half of the meeting can 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. 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 or Josh Greene (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 on file for your company.

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

A: Just 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 representatives to attend as well.

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

A: An ESCA team member attends all virtual 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. For in-person events, you are welcome to request that an ESCA member attend. That will depend on availability and the travel involved.

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 or controversial political topics. It is important 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.

Q: Are political contributions (PAC) involved?

A: No, these visits are official visits.

Best Practices for District Visits

- Remember it's about the people and the culture in your company – what your company does, what makes your company unique, and how your company contributes to the economy – all of that is important for the Representative to see.
- Make sure that your employees know in advance why it is important for Members of Congress to understand the real-world impact of working for an S corp. ESOP business as the structure is a creation of Congress.
- Find one or two employee-owners who have a great employee-ownership story to share and make sure that story gets told during the event.
- Have nametags for senior management that will be accompanying the Member on the facility tour.
- If possible, have a banner or sign with the company name in the room where the main gathering is taking place.
- Make sure employees are prepared to ask some questions during the meeting (if there is time for it) as it is important to keep the exchange lively and the conversation two-way. Questions can be about anything: current events or policy issues, including healthcare, retirement savings, education, trade. It is best to avoid any questions about controversial policy issues, politics (i.e., elections), or any topic that may take the focus from the reason the Member is visiting your ESOP company. It is OK to ask general questions of the Member to start Q&A sessions such as:
 - *What are some of your policy priorities?*
 - *What do you see Congress working on this session?*
- **For specific questions on S ESOPs, employee-owners can ask:**
 - *As employee-owners, what can we do to ensure S ESOPs are protected in federal tax policy?*
 - *As a Member of Congress, what resonates with you about employee-owned companies like mine?*
 - *What did you find most interesting or impactful about your visit today to our ESOP company?*
 - *How can my company, and ESCA, work with you to promote S ESOPs with your colleagues?*

118th Congress
Tax Writing Committee Rosters

U.S. House Ways and Means Committee	
Republicans	Democrats
Rep. Jason Smith (R-MO), <i>Chairman</i> Rep. Vern Buchanan (R-FL) Rep. Adrian Smith (R-NE) Rep. Mike Kelly (R-PA) Rep. David Schweikert (R-AZ) Rep. Darin LaHood (R-IL) Rep. Brad Wenstrup (R-OH) Rep. Jodey Arrington (R-TX) Rep. Drew Ferguson (R-GA) Rep. Ron Estes (R-KS) Rep. Lloyd Smucker (R-PA) Rep. Kevin Hern (R-OK) Rep. Carol Miller (R-WV) Rep. Gregory Murphy (R-NC) Rep. David Kustoff (R-TN) Rep. Michelle Steel (R-CA) *** Rep. Blake Moore (R-UT) *** Rep. Beth Van Duyne (R-TX) *** Rep. Michelle Fischbach (R-MN) *** Rep. Nicole Malliotakis (R-NY) *** Rep. Claudia Tenney (R-NY) *** Rep. Mike Carey (R-OH) *** Rep. Brian Fitzpatrick (R-PA) *** Rep. Randy Feenstra (R-IA) *** Rep. Greg Steube (R-FL) ***	Rep. Richard Neal (D-MA), <i>Ranking Member</i> Rep. Lloyd Doggett (D-TX) Rep. Mike Thompson (D-CA) Rep. John Larson (D-CT) Rep. Earl Blumenauer (D-OR) Rep. Bill Pascrell (D-NJ) Rep. Danny Davis (D-IL) Rep. Linda Sanchez (D-CA) Rep. Brian Higgins (D-NY) Rep. Terri Sewell (D-AL) Rep. Suzan DelBene (D-WA) Rep. Judy Chu (D-CA) Rep. Gwen Moore (D-WI) Rep. Dan Kildee (D-MI) Rep. Don Beyer (D-VA) Rep. Dwight Evans (D-PA) Rep. Brad Schneider (D-IL) Rep. Jimmy Panetta (D-CA)
*** <i>New to Ways and Means Committee for the 118th Congress</i>	

U.S. Senate Finance Committee	
Democrats	Republicans
Sen. Ron Wyden (D-OR), <i>Chairman</i> Sen. Debbie Stabenow (D-MI)* Sen. Maria Cantwell (D-WA) Sen. Bob Menendez (D-NJ) Sen. Thomas Carper (D-DE) Sen. Benjamin Cardin (D-MD) Sen. Sherrod Brown (D-OH) Sen. Michael Bennet (D-CO) Sen. Bob Casey (D-PA) Sen. Mark Warner (D-VA) Sen. Sheldon Whitehouse (D-RI) Sen. Maggie Hassan (D-NH) Sen. Catherine Cortez Masto (D-NV) Sen. Elizabeth Warren (D-MA)	Sen. Mike Crapo (R-ID), <i>Ranking Member</i> Sen. Chuck Grassley (R-IA) Sen. John Cornyn (R-TX) Sen. John Thune (R-SD) Sen. Tim Scott (R-SC) Sen. Bill Cassidy (R-LA) Sen. James Lankford (R-OK) Sen. Steve Daines (R-MT) Sen. Todd Young (R-IN) Sen. John Barrasso (R-WY) Sen. Ron Johnson (R-WI) *** Sen. Thom Tillis (R-NC) *** Sen. Marsha Blackburn (R-TN) ***
Bold: <i>Running for reelection in 2024</i> * <i>Retiring at the end of the 118th Congress</i> *** <i>New to Senate Finance Committee for the 118th Congress</i>	