



**MEDA BEAR WORKING GROUP  
MINTUES OF THE MEETING  
MARCH 10, 2010**

**ON THE CALL:** Heather Mousley, Terry Myhre, Deborah Jiang, Chris Parson, Paul McCarthy , Linda Beck, Terry Knutson, Kara Graetz , Debbie Berg, Barb Kennedy, Kathie Bailey, Linda McNeil, Mike and Gloria O'Rourke.

**INPUT FROM EXECUTIVEPULSE**

Gloria O'Rourke shared a summary of a conference call held with Laith Wardi and Ryan Narpes of ExeuctivePulse.

**Regarding Montana's BEAR Survey**

1. As the economy has changed dramatically since Montana's BEAR Survey was compiled, the following was suggested:
  - a. Review and condense the survey if possible. A shorter survey may be more effective. Ask the question when reviewing the survey: What do we really need to know?
  - b. Add community specific questions. This facilitates buy-in from local BEAR team members and provides area-specific information.
  - c. Remember the survey is to be used primarily to build a relationship with the business owner/representatives.
2. What questions are needed to capture information regarding the IWT program and followup as to the impact of the program?

Action Items:

- a. MEDA BEAR Working Group representatives are to review the survey and fax/email suggested changes to Gloria. Fax: 406.563.5476.
  - b. Gloria is to ask Laith for samples of how other communities have modified the survey and share with the working group. The size of the community should be noted in the sample documents.
  - c. The suggestions will be reviewed during the next MEDA BEAR Working Group call.
  - d. Questions that will track outcomes and impact from the IWT funds are needed – Brian Edwards will be asked to draft a list.
3. Regarding ExecutivePulse Training
  - a. ExecutivePulse will provide several mini-webinars lasting about 40 minutes each on specific tools within ExecutivePulse.
  - b. ExecutivePulse will provide webinars on new modules within the software as well.

118 E. Seventh St.; Suite 2A  
Anaconda, MT 59711  
Ph: 406.563.5259  
<http://www.medamembers.org/bear>  
[gloria@medamembers.org](mailto:gloria@medamembers.org)

Action Item:

Gloria is to contact ExecutivePulse and work out a schedule for the training.

**IWT ROLL OUT**

IWT Training will take place via GoToMeeting on Monday, March 15<sup>th</sup>. Gloria reported the Administrative Rules name the MEDA BEAR Working Group as the appeals group should an employer be told their business does not qualify for IWT funds. Those on the call were willing to participate in the appeals process as needed.

**2010 BEAR ROUNDUP**

For the past two years, a BEAR Roundup has been held in which teams gather to share information and learn of best practices from BEAR Teams all across the state. After some discussion, the MEDA BEAR Working felt a BEAR Roundup Conference Call would be the best format as travel budgets are tight. The group suggested the agenda remain basically the same. The Roundup will take place after the IWT funds have active for about two months. It was also suggested that BEAR Team members gather around breakfast at the MEDA Conference to share success stories and challenges as well.

Action Items:

- Gloria will organize a 2010 BEAR Roundup once the IWT funds have been operating for a few months.
- BEAR Teams will meet at breakfast during the MEDA Conference on June 12<sup>th</sup>.

**BEAR TEAM UPDATES**

Hamilton/Bitterroot Valley: Heather Mousley is planning a BEAR meeting with a focus on inviting referral representatives. Members on the call suggested she contact Anne Clancy or Kathy Moody for assistance in planning the event.

Kalispell: Chris Parson took over the program for Kalispell in January. The team recently participated on a conference call with ExecutivePulse and is looking forward to training in ExecutivePulse.

Bozeman: Debbie Berg reported the Bozeman Team could use more marketing materials that specifically describe what BEAR does as well as a marketing piece aimed at recruiting referral participants. It was suggested that some of the BEAR customers the Bozeman Team has worked with be tapped to serve as a referral resource. It was also suggested that BEAR Teams utilize their chamber's Business Development Committee for the Assessment Team.

Lewiston: Kathie Bailey reported the Snowy Mountain Team is revisiting clients and providing the business owner a resource list when they make their return visit.

Sidney: Debbie Jiang reported interviews have taken place in Sidney. The Sidney Team utilizes Billings for their Assessment Team. Debbie was encouraged to place in the Sidney newspaper an article and photo on the businesses that have been interviewed.

Great Falls: Linda McNeill reported the Great Falls BEAR Team is going through a transition at this time.

Action Item:

118 E. Seventh St.; Suite 2A  
Anaconda, MT 59711  
Ph: 406.563.5259  
<http://www.medamembers.org/bear>  
[gloria@medamembers.org](mailto:gloria@medamembers.org)

Gloria will explore marketing pieces that are more audience specific, i.e., business outreach and referral outreach.

**NEXT MEDA BEAR WORKING GROUP CALL**

The next MEDA BEAR Working Group call is set for Wednesday, May 5<sup>th</sup> at 3:00pm.

MEDA BEAR Working Group Minutes March 10 2010.doc

118 E. Seventh St.; Suite 2A  
Anaconda, MT 59711  
Ph: 406.563.5259  
<http://www.medamembers.org/bear>  
[gloria@medamembers.org](mailto:gloria@medamembers.org)