

First Annual BEAR Roundup

February 7-8, 2008

Butte, Montana



Back row standing: Andy Zdinak, Lisa Wheeler, Shirley Cortright, Tom Gorman, Gloria O'Rourke, Bridgette Evans, Kathy Moody, Marilyn Ohman, Dale Mahugh, Cheryl Zobenica, Deanna Johnson and Betsy Pahut. Seated L to R: Charlie Wright, Al Maurillo, Linda Beck, Joe Strelnik, Beth Hutchinson, Linda McNeill, Rick Edwards, Brian Obert, Terry Myhre and Deborah Hayden.

Following introductions, facilitator Mike O'Rourke asked each BEAR team to break into small groups of five or six with BEAR team members separated as much as possible. Each group was asked to respond to each of the scenarios below, record their ideas and be prepared to report to the whole group. Below is a summary of responses.

Scenario One: *You are forming a local BEAR Team. You have invited several key players to have a role in the process and most are attending your meetings. However, many have not yet engaged in the process and seem to be reluctant to become active. How do you get your BEAR Team members to become more active?*

- BEAR Invite, invite and invite – personalize the invitation
- BEAR Meet the interest of the interviewer, tap their talents
- BEAR Provide treats at the meeting
- BEAR Show the benefit of the program
- BEAR Involve the individual in the entire process
- BEAR Communicate goals and purpose of the program to team members
- BEAR Develop trust among team members
- BEAR Review the collaborative framework of BEAR
- BEAR Do collective brainstorming to address the issue
- BEAR Emphasize three C's: credibility, competence and commitment
- BEAR Give individuals specific tasks
- BEAR Divide and conquer
- BEAR Define success: brainstorm ways to get there and create an action plan
- BEAR Assign interviews
- BEAR Match up with a veteran as mentor
- BEAR It is self-serving to participate in the BEAR process

Scenario Two: *You are part of a new BEAR Team. You have trained interviewers ready to go and just need to get businesses to willingly engage in the process. How will you do this?*

- BEAR Provide incentives
- BEAR Ensure Economic Development Organization involvement
- BEAR Engage media – radio, newspaper, etc.
- BEAR Target a group (sectors/clusters)
- BEAR Chamber involvement
- BEAR Be aware of business climate
- BEAR Utilize referrals and partnership with Job Service
- BEAR Share information – including statistics from past interviews
- BEAR Educate business owners as to the purpose of BEAR – get them talking
- BEAR Follow-up: 2nd interview, involve key players
- BEAR Comfort level – make sure the local business owner is comfortable with the process: exchange interviewers with a neighboring community, match expertise of interviewers with business owner, provide immediate support.
- BEAR Hook and engage partners:
 - Incumbent Worker Training Grant
 - Connect BEAR interview with CDBG and RLF programs
 - Chamber of Commerce – Education taskforce
 - Newspaper employee on a team
- BEAR Target major employees
- BEAR Testimonials
- BEAR Make it a part of a loan requirement

Scenario Three: *Your BEAR Team is on the move. Your interviewers have conducted several interviews and your review team has started to make referrals. However, most of your referrals seem to be rather canned. (i.e. “Contact SBA, SBDC, etc.) How does your BEAR Team begin to get make referrals that are more meaningful, needs specific, and often more effective?*

- BEAR Keep it simple
- BEAR Eliminate acronyms
- BEAR Have a conversation
- BEAR Check for understanding
- BEAR Establish one of the BEAR team interviewers to be a lifetime advocate with that business (like a case manager)
- BEAR Ask business owner how they felt about the interview
- BEAR Team members should give no advice during the interview – leave that to the referral agency/individual
- BEAR Don't be afraid to ask questions – but know the level of familiarity
- BEAR RAT:
- BEAR Personalize the response
- BEAR Require resource providers to link back to interview
- BEAR Probe and ask questions to define true needs
- BEAR Educate interviewee of resources that could meet needs – provide a brochure that lists all resources for reference

Scenario Four: *A local community leader wants proof that BEAR makes a real difference to the businesses in your community. What will you share with her?*

- BEAR Testimonials and impact on the community
- BEAR Success stories i.e., BEAR interview retained a Great Falls business
- BEAR Real feedback = asset to supporter

- BEAR State wide program – best practices
- BEAR One voice of an interview becomes part of a larger voice on issues such as Worker’s Comp, Health Care, etc.
- BEAR Assist and acknowledges existing businesses
- BEAR Reports show an increase in employees
- BEAR Business has expanded
- BEAR Utilize the data to demonstrate referrals, main areas of need, interest, etc.
- BEAR Educate, educate, educate – share statistics and information, needs were met and addressed
- BEAR Keep leadership informed, include and engage them in the process
- BEAR Business to business impact

After a break, BEAR teams were joined by the Montana Ambassadors. A PowerPoint was shown by Rick Edwards, President of Montana Ambassadors and Gloria O’Rourke, Statewide BEAR Coordinator. The presentation explained the purposes and activities of each group and demonstrated how the groups could assist each other in building capacity within their programs.

Following the presentation, BEAR Teams and Montana Ambassadors gathered according to their community/region to discuss collaborative options in that community/region. Feedback on this activity indicated new partnerships were formed and new channels of communication were opened.

Next, Rick Edwards demonstrated to both Montana Ambassadors and BEAR Teams a new tool, **Solution Mountain**, which is being provided by NorthWestern Energy. This rich database contains multiple features and includes an impact calculator with data from **IMPLAN** to give accurate answers for economic impact questions and scenarios.
<http://www.solutionmountain.com>

Finally, the BEAR Roundup concluded with a presentation on a unique program called **World in Motion** that is a focus of Montana’s 1st Lady, Nancy Schweitzer. The program is a school curriculum that encourages use of math and science in all subjects and all grades.

Overall feedback indicated the BEAR Roundup was very worthwhile and should be repeated on an annual basis.