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It is MEDA's privilege to submit this report for this contract period to the Governor's Office of Economic Development, Montana Department of Commerce, Montana Department of Labor and Industry and Montana BEAR Team participants regarding Business Expansion and Retention (BEAR) Program activity in the state.

The following is a summary of MEDA BEAR activities as provided for in the Scope of Work under Amended Contract MT-MIM-ED-11-01 for the month of October 2010.

ACTIVITY REPORT FOR OCTOBER 2010

2010 BEAR ROUNDUP WEBINAR

[Register today](#) for the 2010 BEAR Roundup Webinar to be held November 15th, 10:00am – 11:30am. As many businesses are asking Outreach Specialists how insurance reform will affect them, Payne Financial has offered to make a presentation during the Roundup. Following the Payne Financial presentation, Dave Morey, 21st Century Workforce, MDLI, will provide an update on IWTG. Finally, Laith Wardi, ExecutivePulse will wrap up by encouraging local BEAR Teams to utilize ExecutivePulse for community and/or regional needs.

IWT UPDATE

Chris Wilhelm recently shared a link to determine if an employer is registered with the Secretary of State. You can perform a free search on any business by visiting <https://app.mt.gov/bes/>. To be in good standing, the registration must not indicate "expired" or "inactive."

It appears that IWT applications continue to flow into the MT Dept. of Labor at a fast and steady rate. At the end of this report is a Process and Application Check List provided by Chris Wilhelm to expedite the IWT grant process.

NEW MONTANA RETENTION SURVEY

Many of you have now used the new Montana Retention Survey. Your feedback is welcome so that the survey can be fine-tuned. Be sure everyone on your BEAR Team has a copy of the new survey. The new version is user-friendly and encourages a more conversational style of interview. The old data is still available under Historical Data Downloads. Thanks to the MEDA BEAR Working Group for making the revised survey a reality.

MACE PRESENTATION

Co-Directors Mike and Gloria O'Rourke presented on the BEAR and IWTG programs during the Montana Association of Chamber Executives conference, in Dillon, on October 11th. Thanks to MACE for providing the opportunity to share information on BEAR and the IWTG program to chamber leadership across the state.

Photo: Mike O'Rourke presenting to MACE



SIDNEY TRAINING

On November 9th, conference call training will be held with business owners and community representatives in the area. The goal will be to promote BEAR in the region and educate on the IWTG process.

STATEWIDE BEAR UPDATE

Productivity by Geography

These figures demonstrate the number of businesses contacted per region in October 2010

TOTAL INTERVIEWS: 15

Stillwater County – 1

Gallatin County – 1

Yellowstone County - 3

Missoula County - 2

Ravalli County - 4

Flathead County – 4

Productivity By Outreach Specialists and Volunteers OCTOBER 2010

Outreach Specialist	Records
Detrick, Dale	1
Edwards, Brian	2
Graetz, Kara	1
Hartman, Kendall	2
Jackson, Mike	4
Kennedy, Barb	1
Kramer, Melissa	1
Long, Sandra	2
Mousley, Heather	4
Roos, Bobbie	1
Wolf, Jeremy	1

The count of interviews will not equal the number of outreach specialists due to the inclusion of other outreach specialists in the data collection.

Referral Reports for October 2010:

Generated Referrals: 8

Successfully Closed: 1

Type of need of successfully closed referrals:

Finance/Capital - 1

HEARD AROUND THE STATE

Montana business owners had the following best practices to share:

- Training the employees is key to staying competitive
- They are continually revising their business plan and working with business mentors
- Recent employee recruits have been from the University Internship program
- The assistants and other staff are encouraged and provided educational opportunities to make them more effective at their jobs
- Export sales trends are increasing with Canada.
- Working with MMEC on flow and production layout issues

- Owner is very community oriented and donates to the community throughout the year.
- Owner knows the personal relationships she creates with clients will keep them coming back.

MEDABEARReportOct10.doc

INCUMBENT WORKER TRAINING

Process

1. Employer applies for grant to Recommending Agency
2. Recommending Agency reviews application and makes recommendation for approval / denial (both must be forwarded to Central Office).
3. Application received at Central Office for determination.
4. Central Office reviews application (120 applications since April 15, 2010)
5. Determination made, applicable package mailed.

NOTE: Denials are processed through Central Office in order to provide appeal rights to the applicant.

6. Follow-up received –
 - a. Application re-processed
 - i. Enter employer in MWorks (if applicable)
 - ii. Enter IWT application in MWorks
 - iii. Enter employer as vendor (if applicable)
 - b. Payment processed.
 - i. Enroll Workers.
 - ii. Process Payment
7. Signed copy of financial agreement returned to employers with approved applications.

Backups:

Policy – Dave Morey 444-3478 dmorey@mt.gov

Process Applications – Kay Strayer 444-9081 kstrayer@mt.gov

Assistance processing applications – Beth Ann Martin

Assistance entering applications into MWorks – Adrienne Piccono

Application Review Checklist

GENERAL APPLICATION

- Physical Address - demonstrates it is a Montana business
- Mailing Address (if different than physical address) – must have city, state and zip code
- Telephone Number
- Fax Number (optional)
- E-Mail (optional)
- Owner's Name
- Title – if not on application, is it on the W-9?
- FEIN or SSN – required to enter employer into MontanaWorks
- UI-ID – not required by program, but tracked
- No UI Indicator – if UI-ID is blank, this element should indicate there is no UI
- Probationary Period – if none provided, default to Montana standard 6-months
- # Employees in the location being applied for – no more than 20
- # Employees statewide – no more than 50
- Date Business Started in Montana – must be at least a year from date of application
- Business Type (Sole Proprietor, Corporation, Partnership, LLC, Association)
- Registered with Secretary of State –eligibility requirement; implies current and in good standing
- Signature – must be signed by employer or designated officer
- Recommendation – must be signed by recommending agency before we can process the application

FOR EACH WORKER RECEIVING TRAINING

- Employee Name
- SSN or last 4 of SSN
- Date of Hire – must be beyond probationary period
- Full Time / Part Time – determines grant limit
- Base Wage – required to track impact of program on workers
- Job Title – required to determine which industries/job titles are receiving training
- In-State / Out-of-State – determines match requirement calculation
- Training/Materials – is everything included that is outlined in the application?
- Travel – mileage or airfare? If airfare, are all associated fees included (baggage, shuttle, etc.)?
- Lodging – ensure does not exceed allowable limits per GSO website
- Above Grant Limit – any costs exceeding applicable grant limit for individual worker
- Minimum Match Training – 20%
- Minimum Match Travel/Lodging – In-state 20% of allowable, Out-of-State 50% of allowable
- Minimum Match Requirement – target, or point of reference
- How Match is Met – ensure match is being met in full
 - Wages for match – Are calculations demonstrated? Can be applied toward all training/travel/lodging (in-state); Can only be applied toward training (out-of-state)
 - Training match – make up any portion not met with wages
 - Travel/lodging – make up any portion not met with wages (in-state); 50% cash match required (out-of-state)
- Grant Amount – amount of grant individual worker is eligible for
- Application reflects numbers from Match Worksheet
- Total all grant amounts from application is used for Financial Agreement