



**MEDA BEAR WORKING GROUP  
CONFERENCE CALL**

**MARCH 20, 2013 10:30am – 11:30am**

**On the call:** Barbie Durham, Headwaters RC&D; Roy Jones, Lewistown Job Service; Chad Moore, Big Sky EDA; Adam de Yong and Chris Wilhelm, Montana Dept. of Labor; Amy Eisenman and Meagan Lannan, Livingston Job Service; Warren Vaughn, Gallatin County; Mike Jackson, Kalispell Job Service; DeAnn Thomas, Kalispell Chamber of Commerce; Mike O'Rourke, BEAR; Winona Bedell, MBAC and Gloria O'Rourke.

**1. Introductions and Background**

Following introductions, Gloria shared a brief background of the purpose for the MEDA BEAR Working Group.

**2. BEAR Roundup**

Those on the call felt the 2013 BEAR Roundup should contain an IWT update, a review of the focus and purpose of BEAR, and a review of the process for new BEAR Team members. Time should also be made to match up mentors for those in need of guidance. The MEDA BEAR Working Group would also like to plan a one day BEAR "retread" meeting to get back to the basics of business expansion and retention and to share the outcomes of the March 25<sup>th</sup> and 26<sup>th</sup> meetings. It was suggested to hold a BEAR meeting at 7:00am, Friday morning, May 10<sup>th</sup>, during the MEDA conference.

**3. IWT Update – Adam de Yong, Chris Wilhelm**

- a. Adam provided a legislative update and explained that as HB2 now reads, funding for IWT will be taken from the Uninsured Employer Fund. Those on the call felt this is not the best funding mechanism for IWT as it is unstable. BEAR has sent a letter to the Senate Finance and Claims Committee requesting funds to be found in the General Fund. MDOC Primary Sector Workforce Training Funds are now being taken from the previous IWT source in ESA. MEDA is requesting MDOC Primary Sector Workforce Training Funds remain in HB2.
- b. Chris reported on a lengthy January meeting of about 30 attendees who reviewed the IWT program. As a result, two working groups were formed: one to address forms; another to address procedures. These groups will meet March 25<sup>th</sup> and 26<sup>th</sup> to dig into technical details of the program.
- c. Chris shared the following statistics which indicate a steady increase of program use: 98% of funds were granted in FY2012 with 324 applications, 695 workers trained. There were on average two workers trained per application with an average of \$1,679 granted per worker.

Discussion:

- When marketing BEAR to business clients, what is your approach?
  - Some teams use IWT as a door opener, others use access to resources and others use an emphasis on BEAR and include Profit Mastery. The conclusion was that each team needs to find what works best for it.

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#### **4. Training Needs**

In addition to the training needs mentioned above, training on ExecutivePulse is needed. It was pointed out data is not being entered into the system regarding time spent, dollars leveraged and what happened after the BEAR visit.

#### **5. Next meeting**

Gloria will set up a meeting for the MEDA BEAR Working Group to plan the BEAR Roundup during Friday morning, 7:00am, on May 10<sup>th</sup>.