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It is MEDA's privilege to submit this report for the current contract 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-MEDA-ED-12-01 for the month of February 2013

## **ACTIVITY REPORT FOR FEBRUARY 2013**

### **BEAR WORKING GROUP TO MEET**

The MEDA BEAR Working Group is scheduled to meet via conference call on March 20<sup>th</sup>, from 10:30am – 11:30am. Agenda items thus far include: IWT Update, 2013 BEAR Roundup, Training Needs, and Open Discussion. Working Group Members include: Meagan Lannan, Lorene Hintz, Warren Vaughan, Chad Moore, DeAnn Thomas, Mike Jackson, Amy Eisenman, Roy Jones, Barbie Durham, Joe McClure and Chris Wilhelm. Anyone is welcome to join this MEDA Working Group.

### **IWT INTERESTING DATA**

In January, Chris Wilhelm shared the following data gathered from March 1, 2011 to December 17, 2012:

Just over 505 workers were trained from the following types of businesses:

- 34 nonprofits
- 4 associations
- 183 corporations
- 23 LLCs
- 29 sole proprietors

These are the types of training received:

- 107 soft skills
- 153 hard skills (competency based)
- 108 resulted in certification
- 28 received other credentials
- 77 conference training

### **TESTIMONY DURING THE 63RD LEGISLATIVE SESSION**

Bob Upton, Managing Member, Corporate Image Outfitters, LLC, of Columbia Falls, testified on February 15<sup>th</sup> to the Joint Appropriation Sub-Committee on General Government during the 63<sup>rd</sup> Legislative Session. Bob shared the impact of IWT and BEAR on his business. Bob has been a small business owner since 1986 and operates two businesses. At one time, Bob served as a BEAR program volunteer and worked with the Kalispell/Flathead area BEAR Team. Here are a few excerpts:

- I strongly believe the IWT program is the most effective economic development tool out there.
- The training provided is specific to the critical needs of the individual business, and the resulting improvements are immediate. Corporate Image Outfitters, LLC (CIO) had three full-time employees with 300,000 in sales when I was introduced to the IWT program through BEAR. The following year sales went to 1 million, then to 1.7 million with 6 employees. Much of the benefit to CIO came from the staff attending Eureka Jump Start

classes. This was clearly an expense I would not have incurred without the encouragement of economic development professionals and IWT funding.

- For my employees, the IWT program has led to promotions, higher wages, greater job satisfaction, and provided skill sets they can take anywhere.

## OUTREACH VISITS IN FEBRUARY

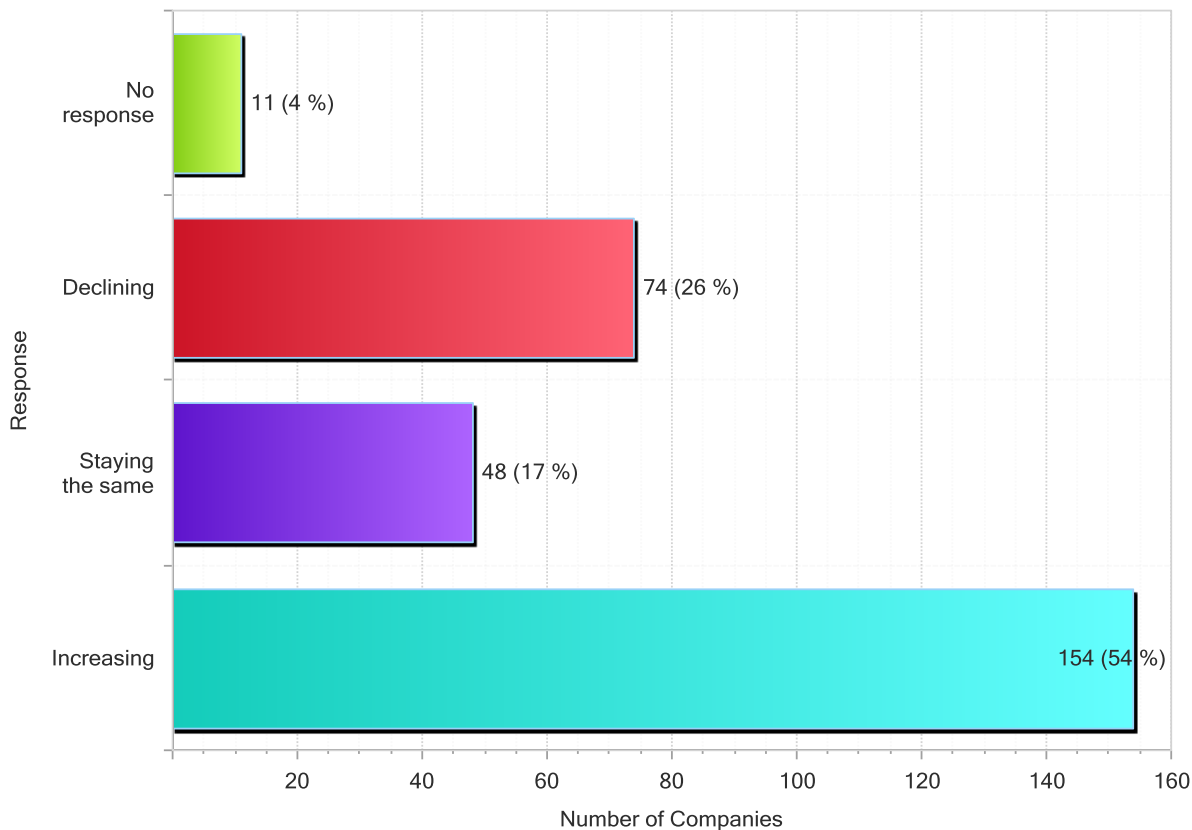
Thirteen business visits were held in February; 15 action items were generated with 5 closed. Visits in each County: Flathead – 2, Gallatin – 6, Lewis and Clark – 1, Missoula – 1, Stillwater – 2, and Yellowstone – 1.

### Outreach Specialists in February and number of business visits:

Allen Kawasaki - 1	Laura Rhodes - 1
Amy Eisenman - 4	Lynn Talarico - 1
Deborah McAtee - 2	Mark Albee - 2
Drew Schug - 1	Mary Lannert - 1
Emily Shellabarger - 1	Meagan Lannan - 1
Joel Bertolino - 1	Mike Jackson - 1
JR Strand - 1	Sarah Stewart - 1
Karleen Hansen - 1	Warren Vaughan - 1
Kendall Hartman - 1	

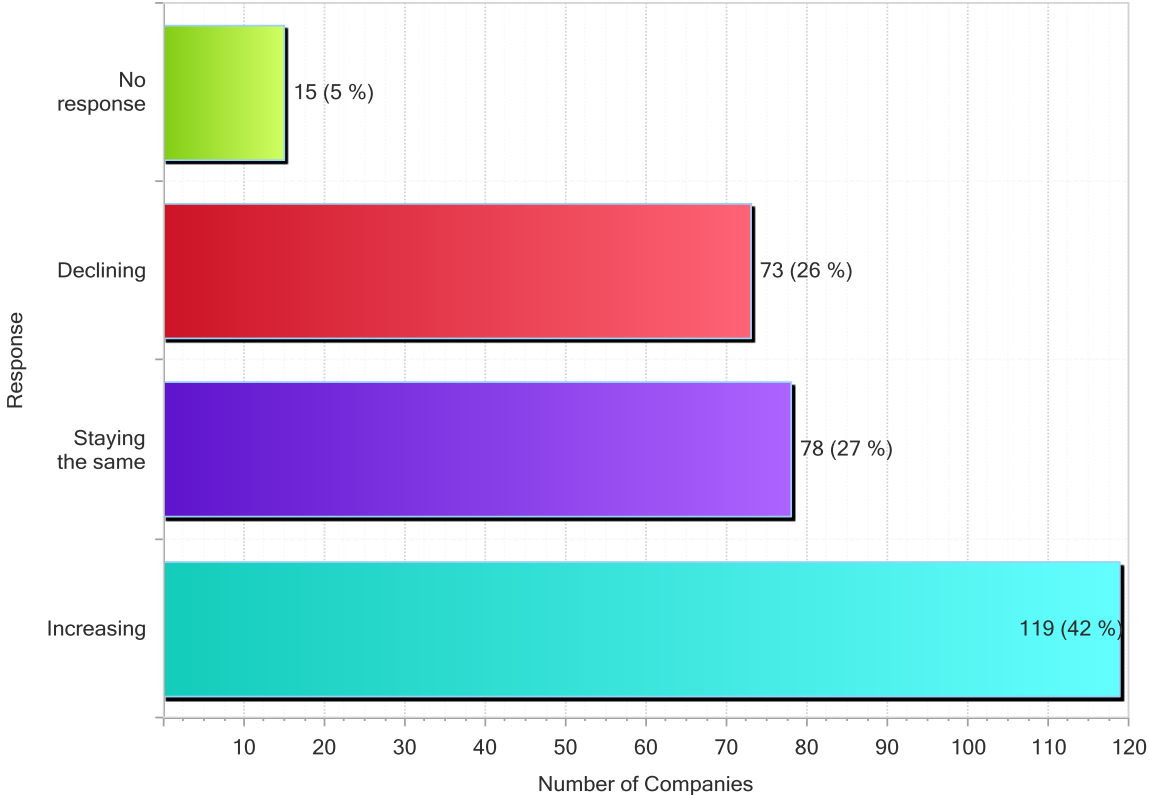
## SALES TRENDS AS REPORTED BY BUSINESS VISITS IN 2012

Historical sales trend at this facility



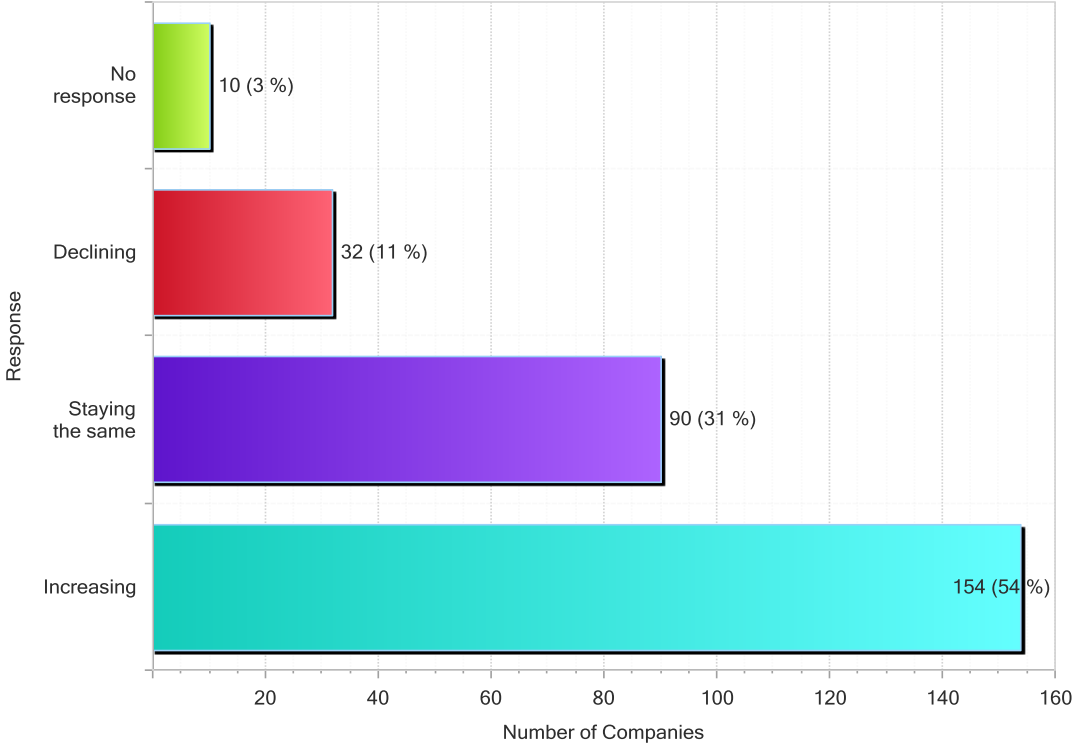
# HISTORICAL PROFITABILITY OF BUSINESSES VISITED IN 2012

Historical profitability at this facility



# HISTORICAL EXPENSES OF BUSINESSES VISTED IN 2012

Historical expenses at this facility



# BUSINESSES INTERVIEWED IN 2012 THAT ENGAGE IN GOVERNMENT CONTRACT WORK

Engage in contract work for government.

