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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 September 2011.

## ACTIVITY REPORT FOR SEPTEMBER 2011

### MEDA BEAR WORKING GROUP TO MEET

The MEDA BEAR Working Group will meet during the MEDA Conference on Friday morning, October 7<sup>th</sup>, at the Red Lion in Kalispell. Dave Morey will update everyone on the latest IWT numbers. MEDA Conference Agenda and Registration is available [here](#).

### NEW IWT FORMS

Chris Wilhelm released new IWT forms that make the application process more efficient and easier to understand. If you have an application in the works with the old forms, Chris will accept them. Everyone should soon be switched to the new format.

### BEAR TEAM ACTIVITY

If your BEAR Team needs a refresher, contact the BEAR office to set a date, location and time. We are happy to train in person, conference call or via webinar.

- The Helena BEAR Team held a training on September 16<sup>th</sup> and is revitalizing BEAR activity in the area.
- The Havre Job Service is taking on leadership for the area BEAR Program. Training is pending.

### STATEWIDE BEAR UPDATE

#### Activity by Geography

These figures demonstrate the number of businesses contacted per region in September 2011

TOTAL INTERVIEWS: 21

Flathead County – 5                      Ravalli County - 1                      Yellowstone County - 11  
 Lewis and Clark County - 1              Gallatin County - 2                      Missoula County - 1

#### Activity By Outreach Specialists and Volunteers September 2011

Outreach Specialist	Records	Percent
Allen, Beth	4	19
Bennert, Tammy	2	10
Bretz, Dustin	1	5

Edwards, Brian	11	52
Graetz, Kara	2	10
Hansen, Ryan	1	5
Hedegaard, Rebecca	1	5
Jackson, Mike	5	24
Kennedy, Barb	1	5
McCarthy, Mora	3	14
Mousley, Heather	1	5
Myhre, Terry	1	5
Parson, Chris	1	5
Rasmussen, Jodie	1	5
Rhodes, Laura	1	5
Schubring, Del	1	5

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 September 2011***

Generated referrals: 23

Successfully closed: 5

### ***Type of Need for Generated Referrals***

The referrals provided resources on:

Domestic/global marketing and sales 2

Entrepreneur/Management 1

Finance/Capital 2

### ***HEARD AROUND THE STATE***

Business owners and managers had the following to share about sales during interviews in September:

- Employee sales skills need to be developed
- Employee willing to train in sales those individuals with desire to work.
- Sales are up from two years ago but down from three years ago.
- Sales are up 3.7% this year over 2010
- Business owner believes we need a sales tax in Montana.

MEDABEARReportSep11.doc