



The Montana Bear Program is a partnership with the Montana Department of Commerce, Montana Department of Labor, and Montana Economic Developers Association (MEDA).

## **MONTANA STATEWIDE BEAR REPORT FOR 2016**

### **IT'S ALL ABOUT BEAR**

Research continues to show that small businesses conceived, incubated, and grown locally offer opportunities for the most growth, wealth creation, and expansion capabilities for Montana communities. For the past eleven years, these are the businesses Montana BEAR Teams have targeted. While business expansion and retention are an essential part of economic development, it cannot nor should it replace recruitment. However, recruitment is enhanced and made easier by thriving, growing existing local businesses. A functioning partnership between a business expansion and retention process and a strong recruitment effort has, we believe, helped to sustain strong economic development growth in Montana.

Business expansion and retention needs to be an essential piece to any successful economic development effort. The Montana BEAR Process which includes outreach, relationship building, resource connections, accountability, and follow-up with the purpose of strengthening Montana's businesses is a strong business, expansion, and retention model.

### **CHANGE IN THE BEAR MODEL AND PROCESS**

BEAR Teams in 2016 continue to look very different. Several BEAR Teams follow the original model; other teams have modified the process to fit their community, staff capacity, business needs, and/or geography. Billings, for example, no longer enters business expansion and retention visits into the BEAR database, but instead uses its SBDC. The Bozeman BEAR model is innovative and has a person compensated at least part-time for his/her BEAR outreach efforts. The Kalispell Team has a good base of volunteers but is adjusting to no longer having staff devoted exclusively to BEAR. Teams that serve smaller populations around the state continue to strive to meet small town business needs even with limited capacity. Thus, the BEAR model across the state continues to evolve to meet local needs and local capacity.

### **BEAR BY THE NUMBERS**

Numbers of BEAR visits in 2016 were like those in 2015 with 144 business visits entered in the database. The number of counties involved with BEAR increased from 11 to 13 this year. In addition, a jump in Outreach Specialists increased from 30 to 40 in 2016. Outreach Specialists are those individuals that visit face-to-face with the business owner or representative and provide follow-up if resources are needed.

It should be noted that those working in economic development around the state are daily involved with business expansion and retention activities. These numbers simply reflect those items that were recorded as part of the BEAR process. Because the Montana BEAR process is volunteer based, the capacity of these volunteers to have time to enter the data based on the services provided will always be an issue. The Montana BEAR Process could greatly benefit by following the example of several other states in providing funding for full time BEAR staff with assigned regions to do nothing but business expansion and retention.

## BEAR AND IWTG – Partnering to Train Montana’s Small Business Workforce

Serving as a gateway to the IWTG funding, BEAR has proven its worth. The partnership between BEAR and MT Dept. of Labor’s Incumbent Worker Training Grant (IWTG) has proven to be an effective tool for helping Montana’s small businesses train incumbent workers. In addition to offering many resources to business owners, the availability of up to \$2,000 per full time employee for training is of great benefit.

Here are the statistics for the Incumbent Worker Training program in SFY16. Thanks to Christine Wilhelm, IWTG Program Manager for providing this data:

State Fiscal Year	Current Level Funding	Total Amount Granted	Percent Granted	Number of Applications Approved	Number of Workers Trained
SFY16	\$541,496	\$503,827	93%	259	440

Should HB88 pass, BEAR Teams will no longer serve as a gateway to IWT; businesses will submit directly to MT Dept. of Labor for the funds. It is hoped that a way can be found for IWT to make referrals to Economic Development Organizations and SBDCs if additional resources may be required.

For SFY 2016 Chris Wilhelm reported;

- BEAR clients submitted 243 applications, of which 183 were awarded and paid out. Several were withdrawn or cancelled. The majority of the applications were from Gallatin County.
- SBDC clients submitted 65 applications, of which 49 were awarded and paid out. Several, again, were withdrawn or cancelled.

## 2016 KEY STATISTICS FROM MONTANA’S STATEWIDE BEAR PROGRAM

Montana BEAR now uses a simple Google Form to gather data on BEAR business visits. Each business visit can quickly and easily be entered, saving the outreach specialist the time and effort to learn new software or enter cumbersome data. There is always a tradeoff, however: the current form has very limited data analysis. [View the BEAR Survey Online Form](#) The information that follows is a summary of the activities of Montana’s outstanding business, expansion and retention teams.

### OUTREACH STATISTICS

Montana BEAR Teams reached out to businesses of all shapes and sizes to support and retain businesses in Montana. In 2016, 144 businesses were interviewed and assessed. The chart below right details the number of visits since the program’s statewide inception in 2006.

#### 144 BUSINESS VISITS in 2016

YEAR	VISITS
2006	142
2007	233
2008	275
2009	186
2010	205

#### 2,474 VISITS TO DATE

YEAR	VISITS
2011	312
2012	320
2013	175
2014	295
2015	187
2016	144

### Outreach Visits by County

2016 Participating Counties	Retention Visits	2015 Participating Counties	Retention Visits
Butte/Silver Bow	7	Lake	3
Carbon	1	Lewis and Clark	2
Deer Lodge/Anaconda	2	Missoula	12
Dawson	6	Park	13
Fergus	1	Ravalli	6
Flathead	30	Stillwater	3
Gallatin	56		

### Outreach Specialists in 2016

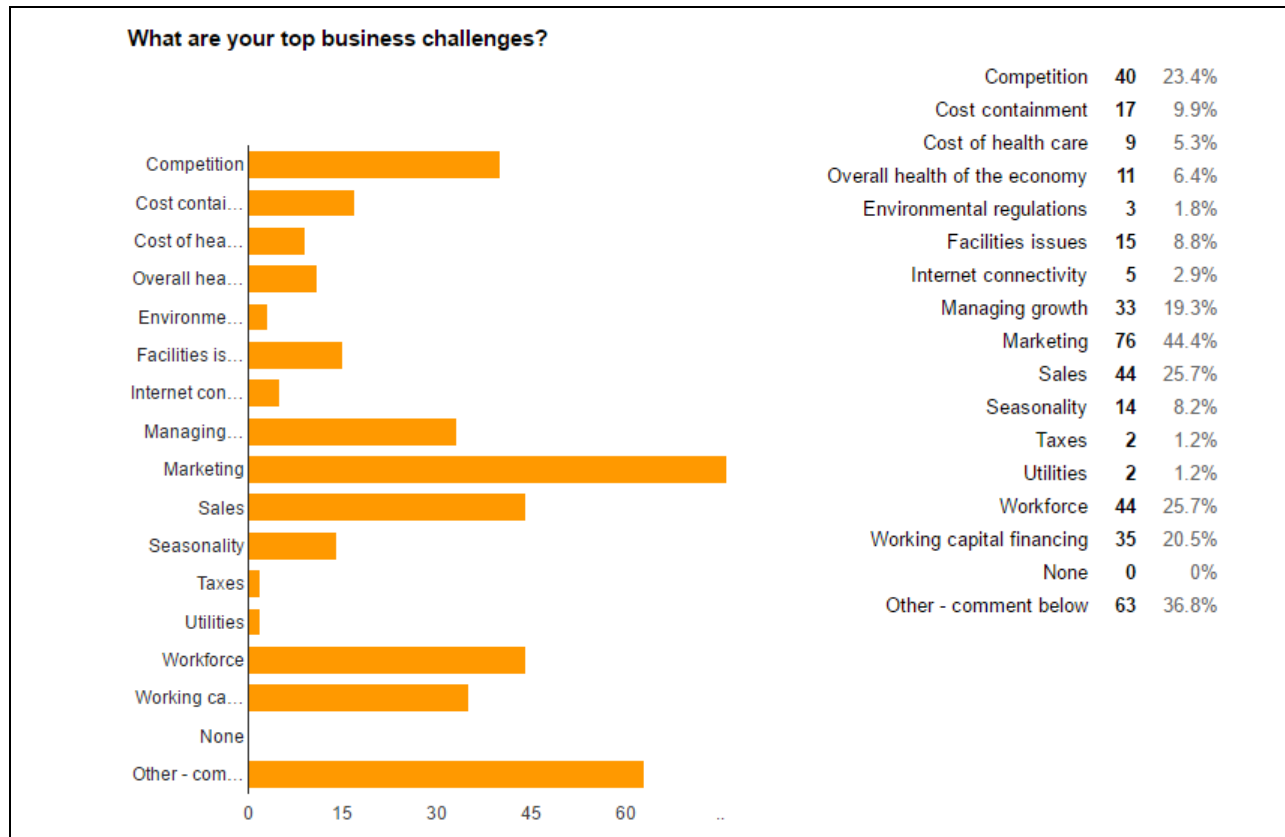
While most BEAR Teams have Assessment members, Resource and Referral members, Outreach Specialists are those that make the face-to-face contact and conduct follow-up activities with the business. Here is a list of Montana Outreach Specialists and the number of interviews conducted in 2016. As stated previously, for most of Montana's BEAR Teams, individuals work as volunteers or as their job allows.

### Outreach Specialist and Visits

Those with multiple visits:			Those with one visit:	
Carol	Cunningham	2	Cal	Boyle
Shannon	Kadmas	2	Whitney	Cantlon
Dave	Laber	2	Stephanie	Cunningham
Krista	Lammers	2	Jim	Davison
Kathy	McLane	2	Angie	Frazier
Gloria	O'Rourke	2	Marie	Hirsch
Kristopher	Schock	2	Julie	Jaksha
Joel	Unterreiner	2	Karl	Janovits
Joel	Bertolino	3	Kristy	McKay
Amy	Deines	3	Gypsy	Ray
Lynn	Lagerquist	3	Kristin	Rutten
Carlye	Markum	3	Rick	Schalk
Mike	Jackson	4	Sarah	Skofield
Cathy	Kirkpatrick	4	Sue	Taylor
Marissa	Hauge	5	Christine	Whitlatch
Meagan	Lannan	5	John	Winegart
Chany	Ockert	5		
Pam	Haxby-Cote	6		
Michelle	Twist	6		
Angie	McDonald	9		
Katie	Weaver	9		
Mora	McCarthy	16		
Warren	Vaughan	56		

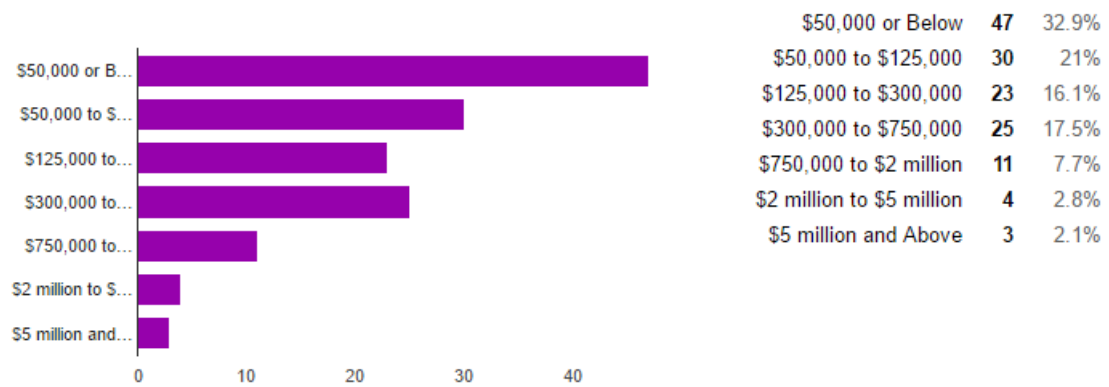
### DATA SUMMARIES

The following graphs indicate some survey results from July 1, 2015 to December 31, 2016.



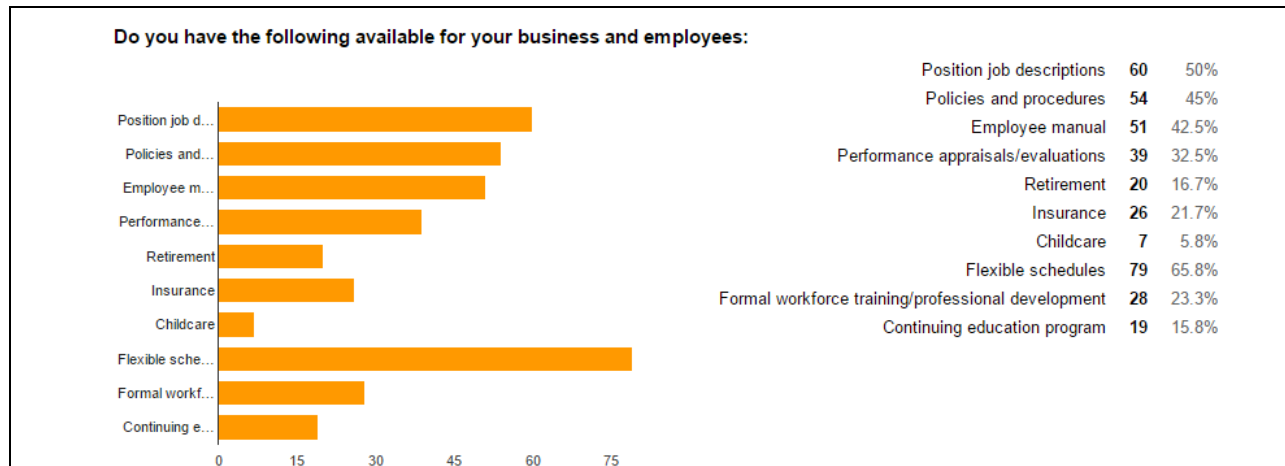
## Marketing and Sales

### Annual Sales



### Indicate the business employment trends:





**In Conclusion:**

Looking forward, the Montana BEAR process must continue to develop avenues to encourage volunteer involvement, encourage local and state financial investment in business expansion and retention, and improve meaningful data collection to accurately identify business needs. Now entering its 11<sup>th</sup> year, it is hoped the partnership can work through the changing needs reflected in this report and strengthen economic development efforts to further build Montana businesses.

Respectfully submitted,




Michael and Gloria O'Rourke, Montana BEAR Statewide Coordinators

BEAR\_Annual\_Report\_for\_2016.doc