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It is MEDA's privilege to submit this report for the current contract to 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 2016.

ACTIVITY REPORT FOR FEBRUARY 2016 MONTANA BEAR PROGRAM HIGHLIGHTS

GUIDANCE FROM THE BEAR WORKING GROUP

On February 9th, the MEDA BEAR Working Group met to review the 2015 Annual Report and to share ideas on gathering BEAR data. It was realized that business expansion and retention activities are strong across Montana. What is not being captured: the data that demonstrates this activity.

For example, Gallatin County recently reported seven business visits in a month. What was not captured was the number of referrals that were made to reach out to those businesses to provide assistance and the other BEAR Team members who took the time to meet with each business. The follow-up and success of those referral visits were also not reflected.

Thus, BEAR activity is strong across the state but those doing the outreach are reluctant to report for both their employer and use the BEAR online form. To capture a clearer picture of BEAR activity, the Working Group suggested simply gathering the data in the same format as a current employer requests and/or as the person keeping track of the data records it. This would eliminate double reporting.

Regarding aggregation of the data, it was suggested that other entities gathering data such as the SBDC, or the IWT Grant Program would serve this purpose. The monthly BEAR Report could best serve by sharing how Montana's various BEAR Teams are structured, share their success stories, and list data provided by each.

FEBRUARY BEAR REPORTS

Below are various reports of BEAR activity across the state for the month of February. In all, 19 businesses were reached with a multitude of referrals made to assist each business.

| BEAR Team | Report for February |
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| Rural BEAR: Beartooth RC&D and Stillwater County Ec Dev Reports by: Joel Bertolino | BEAR Google Form Report: One business visit in Stillwater County; Challenges: Managing Growth, Marketing, Sales, Financing Referrals: SBDC and SBA |

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| and Marissa Hauge | |
| Livingston/Park County BEAR Report by: Katie Weaver, MSU Park County Extension | BEAR Google Form Report: Two business visits in Livingston, Park County. Challenges: Marketing, Workforce, Cost Containment, Sales Referrals: Job Service, Magpie Consulting, Markouture, BluHeron Coaching, SBDC, Rachel Anderson, Ivy Burford, Chieko Horn, Job Service, Stephanie Cunningham |
| Bitterroot Job Service BEAR Team Report by: Michelle Twist | BEAR Google Form Report: One business visit in Hamilton, Ravalli County. Challenges: Competition, Cost Containment, Internet Connectivity Referrals: IWT Grant Program |
| Kalispell BEAR Team Reports by: Michael Jackson, Mora McCarthy, Joe Unterreiner | ExecutivePulse Report: Six businesses visited in Kalispell, Flathead County. Challenges: Inventory Control, Human Resources/Professional Development, Financing, Machinery/Equipment, Design and Engineering, Production Issues Referrals: Flathead Job Service, Kalispell Chamber, Made in MT, IWTG, FVCC, SCORE, SBDC, BSTF, Workforce Training Grant, OJT, MWED, PTAC, Growth through Ag, SBIR/STTR, MMEC, Safety Programs, Tradeshow Assistance |
| Gallatin County BEAR Team Report by: Warren Vaughan | Spreadsheet: Eight clients (3 new businesses, 5 existing businesses) Business types: Construction, Art Education, Architect, Entertainment, Clothing (2), Fitness, Alternative Health Action Items or Referrals: (37 total): Accounting (4), Attorney (1), Basic Business Planning (3), Financial Strategy (5), Industry Connection (5), Insurance (3), IWT Applications (5 – totaling \$10,207), Market Strategy (1), Quickbooks (2), Real Estate (1) and Website (5). |
| Billings BEAR Team Report Info from: Chad Moore | The Billings BEAR Team gathered and reviewed one client and made referrals to the BEAR Team. A business presented at the meeting. Business type: new manufacturing industry. Action Item: Strategic Planning Referral. The Billings Team uses SBDC to submit IWT Applications. |
| SW MT BEAR Team (Deer Lodge, Butte, Anaconda, Dillon) | This BEAR Team meets every other Monday via conference call. Several client visits are pending; outreach taking place regarding succession planning. |

SAVE THE DATE: APRIL 20 - 22

A BEAR focus will be part of the Friday morning “Plug into Montana’s Talent” MEDA Spring Conference, in Butte. Warren Vaughan (Gallatin County/BEAR) and Jeff Batton (HomeStake Partners)

will present on: Building Capacity Where It Matters - helping small business owners and startups add the specific skills and systems they need to succeed. Stay tuned for registration to open!

BEAR REPORTING OPTIONS

Many across Montana are engaging in business expansion and retention efforts. Be sure to document your work by entering data into the BEAR Survey or submit your spreadsheet to MEDA by 6pm the last day of each month. [New MT BEAR Survey](#) If choosing this method of reporting, users must enter the information directly into the survey for results to be collated accurately.

TRAINING: Mike and Gloria are available either via webinar or in person to conduct a BEAR training, refresher course, or organize presenters for a specialized business topic. Contact the office by dialing 406.563.5259 or emailing gloria@medamembers.org.