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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 October 2015.

ACTIVITY REPORT FOR October 2015 MONTANA BEAR PROGRAM HIGHLIGHTS

WARNING: Don't endanger your business client's IWT Grant!

BEAR Team members must complete and submit their BEAR visits **prior** to a business completing an IWT grant application. If there is no entry in the database for a company, there is no verification that the business received a BEAR visit, an assessment, and demonstrated a need for an IWT grant. Please see the state [statute](#) that requires a business to be recognized by either BEAR, SBDC, or MMEC.

<http://wsd.dli.mt.gov/service/iwtregulations.asp>

Montana Codes Annotated (MCA)

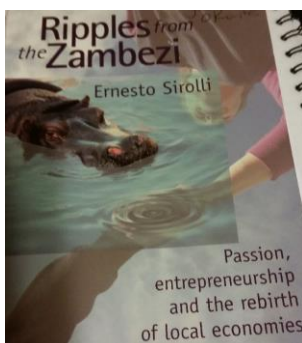
53-2-1216 IWT Definitions

- (1) "BEAR program" means a business expansion and retention program implemented by local communities that uses assessments, interviews, and surveys to assist employers and that has been recognized as a BEAR program for the purposes of [53-2-1215](#) through [53-2-1220](#) by the governor's office of economic development, the department of commerce, and the department.

53-2-1217 IWT Criteria for Applicants

- (1) An employer applying for an incumbent worker training program grant must:
 - a. have been in business in this state for a minimum of 1 year;
 - b. have a need for training incumbent workers; and
 - c. **be an existing client of a BEAR program** recognized by the department, of a small business development center, or of the Montana manufacturing extension center at Montana state university-Bozeman.

GET INSPIRED



You most likely have heard of the book that was published 16 years ago titled: Ripples from the Zambezi, by Ernesto Sirotti. The title alone is unique and will grab your attention, but the contents of the pages will truly impact and inspire you. The author shares examples of being an Enterprise Facilitator, which has similarities to a BEAR Outreach Specialist and/or an SBDC Director. The Enterprise Facilitator, however, has the luxury of time and training to assist entrepreneurs/business owners with meeting three needs:

a. technical skills, b. marketing, and c. financial management.

The idea is that no one person can excel at all three of these skills and thus the Enterprise Facilitator finds resources and/or a team to assist in the needed area. There is much, much more to the story. Thanks to Warren Vaughan, Gallatin County BEAR Director, for recommending the book; would that it be required reading of all BEAR Team members, planners, and economic developers.

BEAR OUTREACH DATA FOR OCTOBER

- **Number of business surveys or contacts:** 3 - all from Flathead County
- **BEAR Team members conducting visits:** Mora McCarthy – 2; Kim Morisaki - 1

BEAR at the SOUTHWEST MONTANA BUSINESS EXPO

BEAR had program information available at the Southwest Montana Business Expo in October. About 100 people participated in the event and at least eight business referrals were made to BEAR Teams in southwest Montana.



BEAR SURVEY LINK

[New MT BEAR Survey](#) Users should enter the information directly into the survey for results to be collated accurately.

IWT FUNDING 1ST QUARTER STATS

According to the new funding schedule, Second Quarter Funds are now available (as of October 1st) for Incumbent Worker Training Grants. Chris Wilhelm shared this data as of September 30th:

FIRST QUARTER STATS – (remember, these numbers change as grant status changes)

Applications Reviewed: 69 BEAR; 6 SBDC

Applications Awarded : 53 Paid: 24

Cancelled after the award was made: 5

Withdrawn by applicant: 10

Not Awarded (ineligible): 2

In the Queue (awaiting final determination and available funding): 12

In Editing Status 23 (started but not submitted)

Workers Trained: 109

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.