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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 2014.*

## ACTIVITY REPORT FOR SEPTEMBER 2014

### BEAR TRAINING HELD IN HAMILTON (pictured below)



Vickie Steele, Bitterroot Job Service, organized an in-depth BEAR Team Training on September 19<sup>th</sup>, at the Bitterroot Job Service Conference Room. The training provided program details, hands-on worksheets, and other information to build and/or strengthen a BEAR Team.

### ONE DOWN THREE TO GO – EXECUTIVE PULSE LUNCH AND LEARN WEBINARS

The second Lunch and Learn Webinar will take place Wednesday, October 15<sup>th</sup> at Noon. There were about 20 participants for the first webinar; feedback was very positive. These sessions will help users maximize the BEAR database and keep apprised of the continual updates that are being made to it. In addition, these lunch and learn sessions give ExecutivePulse staff the opportunity to listen and learn from you—what's working and what's not.

| Date/All times at Noon                | Webinar Info   | Topic   |
|---------------------------------------|--|---|
| Wednesday<br>October 15 <sup>th</sup> | <a href="https://global.gotomeeting.com/join/727564525">https://global.gotomeeting.com/join/727564525</a><br>Use your microphone and speakers (VoIP) Or, call in | Explore day-to-day use of the BEAR platform for economic, workforce and |

|  |   |  |
|--|---|--|
| Noon   | using your telephone.<br>Dial <a href="tel:+16467493122">+1 (646) 749-3122</a> Access Code: 727-564-525<br>Audio PIN: Shown after joining the meeting<br>Meeting ID: 727-564-525  | community development needs. This session with cover business retention functionality and much more.   |
| Wednesday<br>November 19 <sup>th</sup><br>Noon | <a href="https://global.gotomeeting.com/join/893913565">https://global.gotomeeting.com/join/893913565</a><br>Use your microphone and speakers (VoIP) Or, call in using your telephone.<br>Dial <a href="tel:+16467493122">+1 (646) 749-3122</a> Access Code: 893-913-565<br>Audio PIN: Shown after joining the meeting<br>Meeting ID: 893-913-565 | Reports and Analytics. This session will focus on getting reports and analytics out of the BEAR database. Review both user-defined and custom reports for a variety of purposes. You'll see how to easily generate these reports and then export, print, e-mail and even map them. |
| Wednesday<br>December 17 <sup>th</sup><br>Noon | <a href="https://global.gotomeeting.com/join/737111317">https://global.gotomeeting.com/join/737111317</a><br>Use your microphone and speakers (VoIP) Or, call in using your telephone.<br>Dial <a href="tel:+16467493122">+1 (646) 749-3122</a> Access Code: 737-111-317<br>Audio PIN: Shown after joining the meeting<br>Meeting ID: 737-111-317 | This session will focus on advanced group and communication features in the BEAR platform. You'll learn how to create groups and communicate with these groups efficiently using integrated system functions.  |

### INCUMBENT WORKER TRAINING (IWT) UPDATE

Chris Wilhelm reported on September 19: *To date we have formally granted \$212,657 statewide on 89 applications, and have \$39,478 in the pipeline. Factoring in both granted and pipeline applications, we have \$289,361, or 53% remaining available.* Remember new forms must be used for each application and are available at <http://wsd.dli.mt.gov/service/iwtagents.asp>

### DATA HIGHLIGHTS FROM EXECUTIVEPULSE FOR SEPTEMBER

- ☞ There were 18 BEAR Retention Visits held in September.
- ☞ Counties with retention visits: Flathead – 5, Gallatin – 9, Missoula – 2, Park – 2.
- ☞ Action Items: There were 35 Action Items opened with 26 Closed. The following numbers reflect Action Items that were conducted for businesses across Montana, meaning a Bear Team member made a referral to assist a business. If the Action Item was completed, meaning the referral was able to contact the business and provide assistance, the Action Item becomes Closed.

| Location          | Action Item Opened | Action Item Closed |
|-------------------|--------------------|--------------------|
| Deer Lodge County | 1                  | --                 |
| Flathead County   | 1                  | --                 |
| Gallatin County   | 25                 | 20                 |
| Missoula          | 1                  | 1                  |
| Park County       | 7                  | 5                  |

### ☞ September Outreach Specialist Visits and Business Updates

The following BEAR Team members completed Business Retention Surveys and/or update reports for the businesses they have contacted.

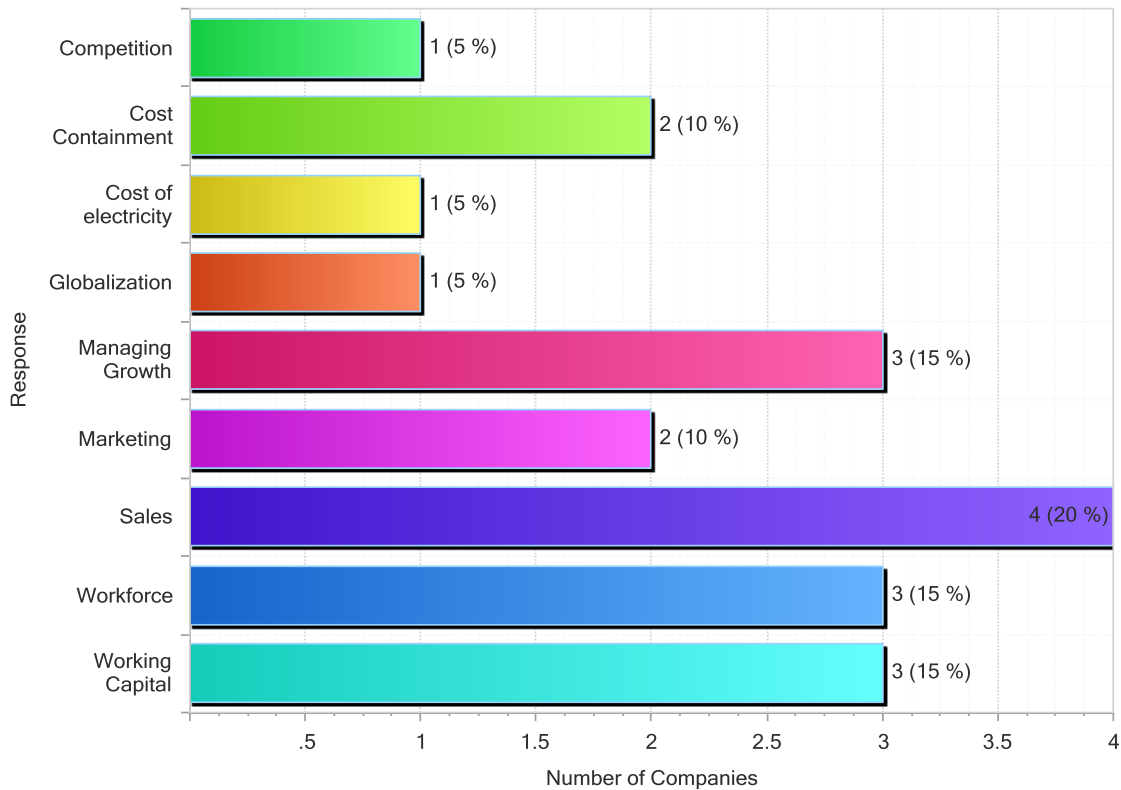
|                     |                          |                   |
|---------------------|--------------------------|-------------------|
| Warren Vaughan - 11 | Mike Jackson - 5         | Mike Williams - 2 |
| Caitlin Brandl - 2  | Deborah Derrick Gass - 1 | Katie Weaver - 1  |
| Kristin Rutten - 1  | Denise Rabe - 1          | Kim Morisaki - 1  |
| Lynn Kinnaman - 1   | Meagan Lannan - 1        | Kathy Wojick - 1  |

## REGISTER BY OCTOBER 20<sup>TH</sup> TO RECEIVE EARLY RATE

“MEDA Fall Conference 2014: Harvesting Partnerships across Montana” will be held October 27<sup>th</sup> and 28<sup>th</sup>, in Helena, at the Great Northern Hotel Helena. Sessions are being planned that will be of prime interest to Montana BEAR Teams. Please review the [agenda and register](#) before October 20<sup>th</sup>. BEAR Team members register at the MEDA Membership rate.

## FEEDBACK FROM BUSINESSES VISITED IN SEPTEMBER

List your top three most significant business challenges



This business will apply for Incumbent Worker Training Grant funds.

