BUILDING CAPACITY WHERE IT MATTERS

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WHERE THE HELL IS ROSCOE?
WHAT THE HECK IS THE BEAR PROGRAM?

- A conduit for the Incumbent Worker Training Grant?
- A volunteer network of mentors?
- A standalone organization?
- A space for service providers around the community to convene?
- A way for the Department of Labor to collect data?
- A cohesive program across the state?
- An economic development program? A workforce development program? A business assistance program?
BOZEMAN BEAR CIRCA 2011
ELEMENTS OF THE PROGRAM

• 6 page interview

• Three teams: interview, assessment, resource

• Assessment team twice a month

• Heavy emphasis on IWT

• Uneven/uncertain use of volunteer network

• Confusion around mission - collecting data vs serving the client
Bozeman BEAR Process
Circa 2011

Initial Interview

Assessment Team Meeting

Reconnect with the client

Business has forgotten about us
CHALLENGES WITH THE OLD MODEL

INEFFICIENT PROCESS

OVER-RELIANCE ON AND INEFFECTIVE USE USE OF THE IWT GRANT

NO MEANINGFUL COMMUNITY INVOLVEMENT

BOTTOM LINE = WE WEREN’T MOVING THE NEEDLE
TAKING STOCK - PART I

• Who were our clients?
  • Majority are small businesses
  • Majority in their first 3 years of business or less
  • Community-focused businesses
  • Many in the professional services
TAKING STOCK - PART II

• What questions were business owners asking us?
  • Questions around money
  • Questions around marketing
  • Questions around management
  • Questions around their product/service/operations

Primarily, our clients asked for KNOWLEDGE - and that’s been our focus
TWEAKING THE MODEL - PART I

• Traditional BEAR survey out the window

• Deliberate focus on building the team

• Move away from reliance on the IWT grant (2012)

• Less formality around the process in general

• Blurred lines between team and client

• BEAR team organizer has dual responsibility:
  • on the one hand, to the clients
  • on the other hand, to the team
TWEAKING THE MODEL - PART II

• Getting creative with the IWT grant
  • “skills-based training” can mean a lot of things
    • building customized training to directly meet a client’s needs
• Experimenting with crowdfunding
  • Kiva Zip
  • The Local Crowd
Brokering Connections

Creative IWT

Micro Loans via crowdfunding
WHAT’S THIS MEAN ON A DAILY BASIS?

• There are 1-2 individuals serving as central organizer/hub

• Deliberately attentive to the network (“network weaver”)

• The process is fluid, loose, and fast

• Every client is potentially a team member

• Most referrals go to private sector community members

• Many decisions are made outside of the traditional BEAR assessment team meetings - the team is less involved in assessment, more involved in providing resources

• IWT applications are dealt with quickly and efficiently, and the majority are customized trainings

• The focus is on helping business owners act with knowledge - i.e., building the capacity -
• 48 clients

• 139 specific actions taken on behalf of the client (Not including IWT applications)

• 47 different individuals used for these connections (43 of them private sector volunteers)

• 21 IWT applications (13 customized trainings, 8 traditional trainings/certifications)
WHAT DID CLIENTS NEED? (AND WHAT DID WE DO?)

- 33 = industry connections
- 17 = business strategy
- 15 = marketing strategy
- 14 = website help
- 10 = financial strategy/money management
- 8 = market connections
- 7 = accounting
- 6 = human resources/management
- 4 = insurance
- 4 = business plans
- 3 = marketing specifics (logos, ads)
- 3 = manufacturing
- 3 = financing

- 2 = quickbooks
- 2 = leadership
- 2 = attorney
- 1 = real estate
- 1 = personal finance
- 1 = fundraising strategy (nonprofit)
- 1 = financing strategy (bank vs equity)
- 1 = business systems/organization
- 1 = nonprofit basics
EXAMPLE #1

- Shelter (product targeting new moms/pregnant women)
  - marketing strategist #1
  - marketing strategist #2
  - marketing strategist #3
  - business strategist/coach
  - former CEO of The Natural Baby Company
  - SBDC (finances)
  - support for MT Shark Tank competition (3rd place statewide)
EXAMPLE #2

- Heather (handmade wooden cutting boards)
  - Web developer
  - A business owner selling a similar-but-noncompeting product
  - SBDC (finances)
  - Business consultant to talk strategy
  - Kiva Zip loan to pay for new photos and a website ($5,000)
EXAMPLE #3

- Mina and Ian (letterpress)
  - MMEC (process ideas)
  - Personal finances
  - Marketing strategist
  - Market connection in Big Sky
  - Former owner of a restaurant (business planning)
  - Business strategy (plus IWT for training)