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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 March 2014.*

## ACTIVITY REPORT FOR MARCH 2014

**ExecutivePulse Webinar:** A webinar is scheduled Tuesday, April 15<sup>th</sup> at 10:00am, to build BEAR Team skills in the use of ExecutivePulse. In the last two and a half months, ExecutivePulse released over 20 new features and functions for the BEAR database. During the webinar, Laith Wardi will review basic navigation and then show participants the many new features and functions of the system. *Please buddy-up at your desk as only 20 ports are available.* Here are log in and audio instructions for the upcoming webinar. Times are Eastern.

1. Please join my meeting, Apr 15, 2014 at 12:00 PM EDT. (10:00AM MST)  
<https://global.gotomeeting.com/join/876659517> 2. Use your microphone and speakers (VoIP) - a headset is recommended. Or, call in using your telephone. Dial [+1 \(213\) 493-0622](tel:+12134930622) Access Code: 876-659-517 Audio PIN: Shown after joining the meeting

**IWT Update:** BEAR Team members attended a IWT Procedures Review in Helena to further fine tune the process of Incumbent Worker Training Grant awards. Three items were emphasized for BEAR Teams: **1. Follow-up is essential in six months and a year following an employer's IWT grant award. This information is to be entered in ExecutivePulse.** 2. More attention needs to be paid to the Strategic Plan piece of the application and make sure it reflects the goals of training and addresses measurable outcomes. 3. The day is coming when the entire process will be paperless; all forms filled out online.

**Bozeman BEAR:** Warren Vaughan, Gallatin County Planning and Community Development, reported on some milestones for the Bozeman Bear Team. In the past 2 years, Bozeman BEAR has worked with over 100 businesses (107 to be exact). Additionally, the team connected those businesses to about 275 resource providers/mentors, and directed around \$50,000 in IWT training dollars into this community. Twelve IWT applications have been submitted in the last three weeks.

**Butte/Anaconda/Deer Lodge/Dillon BEAR:** On March 4<sup>th</sup>, a meeting was hosted by the Butte Chamber of Commerce to gather the area's BEAR Team(s) and explore ways of expanding the existing team and its outreach. Jim Smitham, Butte Local Development, is initiating a BEAR

Enhancement project involving paid interns from Montana Tech who work with local businesses needing assistance. NorthWestern Energy is a partner in the project.

**March Retention Visits**

There were 37 Retention Visits held in March! Montana BEAR Teams are on the move!  
 Counties with retention visits: Deer Lodge – 1, Flathead – 9, Gallatin – 9, Lake – 1, Missoula – 5, Ravalli – 1, Silver Bow – 1, Stillwater – 3, and Yellowstone – 7. Gallatin County had six action items listed with two closed.

**March Outreach Specialist Visits:**

Angie McDonald – 1	Ann Clancy – 1	Bill Silverman - 2	Brigitta Miranda Freer - 1
<b>Chad Moore – 7</b>	Deborah Derrick Gass – 1	Dena Johnson – 3	Gloria O’Rourke – 2
Jim Davison – 1	Jim Smitham – 1	Joel Bertolino- 1	JR Strand – 1
Kathy Wojcik – 1	Kiki Huls – 1	Lynn Lagerquist – 1	Marissa Hauge – 2
Michele Letendre – 1	Michelle Twist – 1	<b>Mike Jackson – 9</b>	Mike Williams – 2
Mora McCarthy – 3	Todd Erickson – 2	Vickie Steele – 1	Vida Wilkinson – 1
<b>Warren Vaughan - 8</b>	John Balsam - 3		

**SAVE THE DATE: 2014 BEAR ROUNDUP** [Online Registration](#) is now open!

The 2014 BEAR Roundup will take place in Havre, on Wednesday, May 7<sup>th</sup>, 12:30pm– 2:00pm. A luncheon will be held toward the end of the MEDA conference with Montana BEAR Teams to hold a roundtable with MT Dept. of Commerce program officials. Time will also be set aside for training on Montana Dept. of Labor programs that are a fit with economic development projects.

Important: BEAR Team Outreach Specialists are still strongly encouraged add information in ExecutivePulse: 1. Click Add; 2.: Metrics Survey; 3. Last business contacted, and input their time spent, jobs retained or created, private and/or public funding, etc. Entering this data will further demonstrate the value of the program. **Thank you for taking the time to input this data!**