Following introductions, facilitator Mike O’Rourke asked each BEAR team to break into small groups of five or six with BEAR team members separated as much as possible. Each group was asked to respond to each of the scenarios below, record their ideas and be prepared to report to the whole group. Below is a summary of responses.

**Scenario One:** You are forming a local BEAR Team. You have invited several key players to have a role in the process and most are attending your meetings. However, many have not yet engaged in the process and seem to be reluctant to become active. How do you get your BEAR Team members to become more active?

- Invite, invite and invite – personalize the invitation
- Meet the interest of the interviewer, tap their talents
- Provide treats at the meeting
- Show the benefit of the program
- Involve the individual in the entire process
- Communicate goals and purpose of the program to team members
- Develop trust among team members
- Review the collaborative framework of BEAR
- Do collective brainstorming to address the issue
- Emphasize three C’s: credibility, competence and commitment
- Give individuals specific tasks
- Divide and conquer
- Define success: brainstorm ways to get there and create an action plan
- Assign interviews
- Match up with a veteran as mentor
- It is self-serving to participate in the BEAR process
Scenario Two: You are part of a new BEAR Team. You have trained interviewers ready to go and just need to get businesses to willingly engage in the process. How will you do this?

- Provide incentives
- Ensure Economic Development Organization involvement
- Engage media – radio, newspaper, etc.
- Target a group (sectors/clusters)
- Chamber involvement
- Be aware of business climate
- Utilize referrals and partnership with Job Service
- Share information – including statistics from past interviews
- Educate business owners as to the purpose of BEAR – get them talking
- Follow-up: 2nd interview, involve key players
- Comfort level – make sure the local business owner is comfortable with the process: exchange interviewers with a neighboring community, match expertise of interviewers with business owner, provide immediate support.

Hook and engage partners:
- Incumbent Worker Training Grant
- Connect BEAR interview with CDBG and RLF programs
- Chamber of Commerce – Education taskforce
- Newspaper employee on a team

Target major employees
Testimonials
Make it a part of a loan requirement

Scenario Three: Your BEAR Team is on the move. Your interviewers have conducted several interviews and your review team has started to make referrals. However, most of your referrals seem to be rather canned. (i.e. “Contact SBA, SBDC, etc.”) How does your BEAR Team begin to get make referrals that are more meaningful, needs specific, and often more effective?

- Keep it simple
- Eliminate acronyms
- Have a conversation
- Check for understanding
- Establish one of the BEAR team interviewers to be a lifetime advocate with that business (like a case manager)
- Ask business owner how they felt about the interview
- Team members should give no advice during the interview – leave that to the referral agency/individual
- Don’t be afraid to ask questions – but know the level of familiarity
- RAT:
- Personalize the response
- Require resource providers to link back to interview
- Probe and ask questions to define true needs
- Educate interviewee of resources that could meet needs – provide a brochure that lists all resources for reference

Scenario Four: A local community leader wants proof that BEAR makes a real difference to the businesses in your community. What will you share with her?

- Testimonials and impact on the community
- Success stories i.e., BEAR interview retained a Great Falls business
- Real feedback = asset to supporter
State wide program – best practices

One voice of an interview becomes part of a larger voice on issues such as Worker’s Comp, Health Care, etc.

Assist and acknowledges existing businesses

Reports show an increase in employees

Business has expanded

Utilize the data to demonstrate referrals, main areas of need, interest, etc.

Educate, educate, educate – share statistics and information, needs were met and addressed

Keep leadership informed, include and engage them in the process

Business to business impact

After a break, BEAR teams were joined by the Montana Ambassadors. A PowerPoint was shown by Rick Edwards, President of Montana Ambassadors and Gloria O’Rourke, Statewide BEAR Coordinator. The presentation explained the purposes and activities of each group and demonstrated how the groups could assist each other in building capacity within their programs.

Following the presentation, BEAR Teams and Montana Ambassadors gathered according to their community/region to discuss collaborative options in that community/region. Feedback on this activity indicated new partnerships were formed and new channels of communication were opened.

Next, Rick Edwards demonstrated to both Montana Ambassadors and BEAR Teams a new tool, Solution Mountain, which is being provided by NorthWestern Energy. This rich database contains multiple features and includes an impact calculator with data from IMPLAN to give accurate answers for economic impact questions and scenarios. http://www.solutionsmountain.com

Finally, the BEAR Roundup concluded with a presentation on a unique program called World in Motion that is a focus of Montana’s 1st Lady, Nancy Schweitzer. The program is a school curriculum that encourages use of math and science in all subjects and all grades.

Overall feedback indicated the BEAR Roundup was very worthwhile and should be repeated on an annual basis.

First Annual BEAR Roundup Summary.doc