

**NEW Manufacturing Alliance**  
**RETIRED WORKER TASK FORCE MEETING**

Sargento - Hilbert, WI  
May 23, 2017 – 8:30 to 9:30 a.m.  
*Minutes*

**Topic 1: Review results of survey**

55 companies participated in the survey. In total, the manufacturers that answered the survey employ 30,431 people in northeast Wisconsin. There are 110,000 employed in manufacturing in northeast Wisconsin, so the survey accounted for 28% of all of the workers in the region.

The first question was “Is the company concerned with losing skills/knowledge due to retirements?”

- 85% of the respondents stated ‘yes’.
- Only 35% of respondents stated that their company had in place a program addressing the knowledge loss due to retirements. Many of these companies stated they only have minimal activity around this subject and need more of a plan to address the retired worker issue.

The average tenure for production was 11 years. Average age for production was 43 years old.

The average tenure for engineering was 9.5 years. Average age for engineering was 40 years old.

Most companies offer a wage increase for 2<sup>nd</sup> and 3<sup>rd</sup> shifts. The average wage increase for 2<sup>nd</sup> shift is \$50 cents. For 3<sup>rd</sup> shift the average increase is \$50 cents.

The task force reviewed a handout:

**Occupations with the most people potentially retiring (56 or older):**

General Labor – 2127	Machinists – 285
Operators – 950	Manufacturing Engineers – 115
Maintenance Mechanics – 330	Electrical Engineers - 70
Production Supervisors – 295	

**Occupations with the most people potentially retiring (61 or older):**

General Labor – 778	Machinists – 125
Operators – 345	Sales Reps - 105
Maintenance Mechanics – 145	Manufacturing Engineers – 60
Production Supervisors – 95	

**Occupations with the largest percentage of employees in the age range of 56 or older:**

Maintenance Mechanics – 37%	Electro-Mechs – 33%
Electricians – 35%	Research & Development Engineers – 38%
Sales Reps – 34%	Electrical Engineers – 32%
Service Techs – 33%	Mechanical Engineer Techs – 32%
Machinists – 33%	Electrical Engineer Techs – 31%

**Occupations with the largest percentage of employees in the age range of 61 or older:**

Maintenance Mechanics – 16%	Research & Development Engineers – 3%
Electricians – 21%	Electrical Engineers – 10%
Sales Reps – 18%	Mechanical Engineer Techs – 9%
Service Techs – 14%	Electrical Engineer Techs – 10%
Machinists – 15%	Manufacturing Engineer – 10%
Electro-Mechs – 16%	Chemical Engineer – 17%

**Topic 2: Best practices – Ernie Remondini with Lindquist Machine discussion on their risk matrix**

Tabled until the next meeting.

**Topic 3: Discuss information learned from last meeting regarding other best practices**

Best practices shared by respondents included:

- Part-time/flexible schedule for older employees to stay on the job – 7 companies
- Cross training – 7 companies
- Documentation & SOPs – 6 companies
- Internships/Co-ops – 5 companies
- Apprenticeship – 4 companies formal apprenticeship
- Youth Apprenticeship – 4 companies
- Succession planning – 3 companies

Review best practice overviews:

- **Training programs** – Bemis has an electro-mechanical maintenance training program.
- **Succession Planning** – KI
  - Every six months all employees are asked what their short term and long term career goals are. The manager and the individual then discuss these goals to determine what steps may be needed as far as further education or experience. As needs are established, these people are then prepared for that role.
  - In some cases, in order to get the appropriate experience, we have gone so far as to create a position (opportunity) for the individual to help be prepared. My current position for example was originally for a Plastics Engineer. Knowing my career goals and the fact that our current Engineering/Production manager will be retiring in a couple years or so, my current position was created to be his successor.
- **Sunset Transition Plan** – Ariens
  - Slowly transition workers to retirement. It is a mutually-beneficial approach giving retiring employees more flexibility and time-off while sharing their knowledge and skills with current employees.
  - Retirement is determined by the employee with at least 2 months written notice.
  - Last official day of work is a free day, no work is done by employee.
  - Transitions then to part-time (sunset) status – determine position, working hours that are no more than 24 hours a week, start date, anticipated length of assignment and compensation.
- **Leadership Legacy Training** – Waupaca Foundry
  - 2 part program, the first part is classroom activity (32 hours) and the second part consists of tours and actually performing work in all the production departments that we have (32 additional hours). The employees are sent to other departments to learn the “full process”. The focus is to capture the knowledge/experience that would otherwise walk out the door as each retiree leaves.
  - Second part of the program is classroom consists of:
    - An in depth history of our company
    - Practicalities of being a Leader
    - Identifying leadership style and personality style and how to approach each of the different styles
    - Mix newer people along with legacy employees so our discussions involve all generations and seniority throughout all the topics.
- **Talent Bench Review** - : <http://www.halogensoftware.com/learn/how-to/proven-tools-for-identifying-and-developing-your-organizations-talent-pipeline> . 9 Grid approach.
- Job Shadowing – Hire an internal candidate to shadow the person that is about to retire.

The task force would like to develop a database of best practices that can be viewed by members on the Alliance’s website. Ann will invite companies to meet with the task force to discuss their best practices.

**Topic 4: Prepare results to be shared at 6/1 full membership meeting**

Sonia will be sharing the findings of the survey at the June 1 full membership meeting.

**Topic 5: Retired Worker Symposium**

Over the year, the task force will research best practices and explore local, state and national speakers on the topic of addressing the retired worker issue. From the research, the committee will develop the programming for a spring 2018

Retired Worker Symposium. Potential speakers:

- Steve Baue – ERC on the emotional impact of a person going into retirement
- Family Business Forum – Succession planning
- Feature employers that have best practices
- Potential of having speakers directed toward newly or soon to be retirees and have an accounting firm speak to them about working after retirement. The people invited could be ‘Hall of Fame’ employees that could be part of a database of individuals interested in short-term or part-time work. Possible location for the symposium could be the Packer Hall of Fame.
- Knowledge transfer

It is important to have speakers that are from large and small companies as presenters at the symposium.

To do:

1. Linda will contact the 2 and 4 year colleges regarding any research they have done related to the retired worker issue.
2. Ron will start developing a working document so best practices can be documented for their work product using a common form.
3. Ann will research effective mentoring programs.

**Topic 6: Next steps and next meeting**

The task force will meet the fourth Tuesday of each month at 8:30 a.m. The next meeting will be held on **July 25, 2017 at 8:30 a.m. at Lindquist Machine Corp.**