

NEW Manufacturing Alliance
RETIRED WORKER TASK FORCE MEETING MINUTES
NWTC – Green Bay, WI
Tuesday, November 28, 2017 – 8:30 to 10:00 AM

ATTENDEES: Chris Linn-A-Tech, Sonia Otte-Sargento, Rob Peterson-Fox Cities Regional Partnership, Ann Franz-NEWMA, Debbie Thompson-NWTC

RETIRED WORKER TASK FORCE – NAME CHANGE

Members proposed changing the name to Talent Risk Management task force (TF). The name change will be finalized at the January 23 meeting. In the meantime, members are welcome to consider other names for this TF.

RETENTION VALUE ANALYSIS – MARK HATZENBELLER, WMEP

This topic was tabled for a future meeting, as Mark was unable to attend today's meeting.

RETIRED WORKER SYMPOSIUM – FVTC BORDINI CENTER - MARCH 7, 2018

A large room and two smaller rooms have been reserved for the entire morning of March 7. Steve Trautman will be the main speaker, at a cost of \$15,000. Steve will discuss talent risk management and knowledge transfer. Attendees will be given methods and takeaways. The Symposium will be a major first step and will include networking opportunities.

- Costs of not getting a handle on talent risks.
 - Employment laws – Questions that can be asked of an employee about their retirement desires.
 - Aging Workforce Benefits
 - Benefits – Are benefits attractive to keep the employee?
 - Keeping Older Workers Engaged
- Sharing Best Practices in Upskilling the Workforce
 - Bemis
 - Sargento
- Transitional Plans
 - Mentorship
 - Succession
 - Sunset Program - Ariens
 - Benefits
 - Engagement -KI
- Talent Bench
 - Lindquist Machine Tools
 - Trautman

Agenda

Introduction including the history/retired worker survey/demographic problem – **10 Minutes**

Steve Trautman, followed by Q&A - **45 Minutes**

Employment Law - **10 minutes**

Break – **10 minutes**

Three focused 25 minute sessions will feature 15 minutes of presentation, 5 minutes of individual table collaboration, followed by 5 minutes of shared best practices. A note taker will be at each table.

1. Best Practices in upskilling the workforce to replace retiring workers - **25 Minutes**
2. Best Practices in retain the aging workforce and transitional Programs - **25 Minutes**

Break – **10 minutes**

3. Talent Bench - **25 Minutes**

Symposium Recap & Next Steps - **15 minutes**

- Show the tools that will drive attendees to the website.
- Ask members to join this taskforce.
- Potential of an ad hoc committee on an issue or training program that surfaces in the meeting.

Survey given at end of the meeting:

- What will your next steps be?
- What do attendees need to go forward? Do they need help with something to move forward?

Put toolkit items on the website.

- Provide contact information, if possible, of those giving presentations.
- Start research for attendees so they can put it together.
- Ann will promote the symposium and its sponsorships. Three \$5,000 sponsorships are needed for the speaker.

DEVELOPING A BEST PRACTICES WORKING DOCUMENT – ROB PETERSON

Chris and Rob met since the last TF meeting and reviewed what is in place. Chris recommends connecting with people coming close to or in retirement. Consider how to decrease employee retirement fears. An event for employees close to retiring could be held. Information could also be taken on the road as lunch & learn sessions.

Rob modified the framework as an outline in preparation for setting up the website. If members agree to the topics that makeup the framework, the TF can develop the content under the topics. Content pages can be added as PDFs for quick open. Rob asked for any suggestions members may have to further develop the outline.

The information will be housed under the 'Manufacturers' tab on the website. The main webpage will be titled 'Talent Risk Management System', with subpages of specific topic areas. Ann will add data and research shared.

NEXT MEETING DATE/LOCATION/AGENDA

The next Retired Worker Task Force meeting will be on Tuesday, January 23 at Sargento in Hilbert, 8:30 to 10:00 a.m.

Agenda items are as follows.

- ✓ Retired Worker TF – Name Change
- ✓ Retention Value Analysis – Mark Hatzenbeller
- ✓ Retired Worker Symposium
- ✓ Developing a Best Practices Working Document – Rob Peterson