

**NEW Manufacturing Alliance**  
**TALENT RISK MANAGEMENT - THE CHANGING WORKFORCE**  
**Meeting Minutes - Conference Call**  
**Tuesday, January 23, 2018 - 8:30 to 10:00 AM**

**ATTENDEES:** Linda Bartelt-NEW ERA, Kelly Janssen-Fabio Perini, Chris Linn-A-Tech, Sonia Otte-Sargento, Peter Thillman-Fox Cities Regional Partnership, Ann Franz-NEWMA, Debbie Thompson-NWTC

**RECAP OF 2017 ACTIVITIES FOR TASKFORCE**

- The Retired Worker survey was designed and administered to the membership.
- Executive Summary of the survey was written and shared with the membership.
- The survey results were featured in the media including a cover story in *Insight on Manufacturing* magazine.
- Research of best practices.

**RETIRED WORKER TASKFORCE - NAME CHANGE**

The new name will be: **Talent Risk Management - The Changing Workforce.**

**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 - MARCH 7, 2018 – FVTC'S BORDINI CENTER – 8:00 AM TO 12:00 PM**

**Marketing**

- Insight on Manufacturing (IOM) is putting a free 1/3-page ad in their January 2018 issue.
- Ann will promote the symposium and its sponsorships. Three \$5,000 speaker sponsorships are needed.
- Ann will email the IOM ad as part of the marketing.
- A clip of Steve Trautman presenting will be emailed with the marketing materials.
- SHRM may be able to approve this session for their professional development.
- Registration will be online. Teams are encouraged to attend.
- Ann will email registration information on 1/25/2018.

**Costs**

- Ann signed a \$15,000 contract for Steve Trautman, talent risk management and knowledge transfer expert, to speak.
- There is no cost for NEWMA members to attend.

**AGENDA**

**INTRODUCTION** – History/Retired Worker Survey/Demographic Problem – **10 Minutes**

**STEVE TRAUTMAN PRESENTATION - Followed by Q&A - 45 Minutes**

**EMPLOYMENT LAW** – What you can and cannot ask employees. Ann is working to find a law firm to present (a law firm that will sponsor at \$5,000). - **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 record best practices at each table.

1. *Best Practices in upskilling the workforce to replace retiring workers (Sargento and Rockwell Automation) - 25 Minutes*
2. *Best Practices in retain the aging workforce and transitional programs (Schenck, insurance company and possibly Ariens) - 25 Minutes*

**BREAK – 10 Minutes**

3. *How to develop a Talent Bench* – Steve Trautman - This is a free, takeaway tool on Steve's website. **25 Minutes**

**SYMPOSIUM RECAP & NEXT STEPS – 15 Minutes**

- Show the tools that will drive attendees to the website. Goal: Do more research to share with membership.
- Ask members to join this taskforce. Are there other concerns?
- Potential of an ad hoc committee on an issue or training program that surfaces in the meeting.

**After the meeting there will be a luncheon for sponsors, task force and Board members and Steve Trautman.**

### **SURVEY**

A short, four question survey will be administered to each attendee at the conclusion of the event. Attendee information and possible questions include the following.

- Provide your name, company, and email.
- What will your next steps at your workplace be?
- What are your key takeaways from today's session?
- Do you need help with something in order to move forward?
- Was anything not covered that you still have questions about?
- Are you interested in more information from any of today's sponsors?
- Did organizers and presenters hit the mark?
- Exceeds – Meets – Did Not Meet Your Expectations
- Offer an opportunity to provide brief comments.
- Are you interested in joining a NEWMA Talent Risk Management task force?

### **CONCLUSION**

*Steve Trautman is staying for lunch to meet with a predetermined group of people. The members of this Task Force are welcome to attend the luncheon.*

An agenda will be provided. Other possible handouts/takeaways include a hard copy of Steve's example on his website that he will be talking about. Copies of the IOM story could also be a takeaway.

Toolkit items will be put on the website.

- Provide the contact information, if possible, of those giving presentations.
- Start the research for attendees so they can put it together.

Schenck has been secured as one of the three \$5,000 sponsors.

### **DEVELOPING A BEST PRACTICES WORKING DOCUMENT – ROB PETERSON**

Members are encouraged to email Ann with any updates.

### **NEXT MEETING DATE/TIME/LOCATION/AGENDA**

The next Talent Risk-The Changing Workforce meeting will be on **Tuesday, February 27 at Fabio Perini – 3060 S. Ridge Roads- Green Bay, 8:30 to 10:00 a.m.** Members will prep for the Retired Worker Symposium.

- ✓ Agenda
- ✓ Takeaways (Handouts)
- ✓ Finalize the survey that will be administered at the end of the event.
- ✓ Review proposed toolkit website info.