

**NEW Manufacturing Alliance**  
**TALENT RISK MANAGEMENT - THE CHANGING WORKFORCE MEETING MINUTES**  
**Heartland Label Printers – Little Chute**  
**Tuesday, September 24, 2019 - 8:30 AM**

**ATTENDEES:** Linda Bartelt, Jennifer Brown-Fox Cities Chamber/FCRP, Brandon Buchholz-Heartland Label Printers, Chris Linn-A-Tech, Mike Masar-Georgia-Pacific (Retired), Chad Massner-R&R Insurance, Jon Meulemans-von Briesen & Roper, Lori Rausch-Great Northern Corp., Will Robinson-Forsite Benefit Partners, Ann Franz-NEWMA, Pam Blazei-NEWMA

**RETIREMENT INTENTIONS SURVEY RESULTS & KNOWLEDGE TRANSFER**

The Alliance is currently researching organizations that offer knowledge transfer. Andrew Schmitz with Proceed shared his new start-up business venture. His company, Proceed.app empowers employees to cultivate, distribute and access knowledge via its app. It takes employees knowledge and makes it searchable via the app. Studies show that 65% of the population are visual learners. There is a video feature that employees can use to document work flows. The work flows are demonstrated by photos, text, videos and are tagged for ease of use. He is currently seeking companies to pilot the system at no cost. To learn more go to: [www.proceed.app](http://www.proceed.app).

The Executive Statement for the Retirement Internships Survey will be shared with the membership at the December quarterly membership meeting on Dec. 5, 2019 at the KI Convention Center.

**RETIREMENT SEMINAR**

There was discussion on the value of hosting the seminar at individual companies for their employees only or having it at a neutral location with employees from a variety of companies. The seminar with multiple company employees represented will not have the specific benefits and programs that are available to them at their employer. The plus-side of having it with multiple company participants is less events and helping more people, especially those from smaller companies. It was determined to hold two pilots in 1<sup>st</sup> or 2nd quarter 2020. One pilot will be for a variety of employees from various companies and their significant other and the other pilot targeted at one large company. A survey will be given to the attendees to determine what method of delivery was better and sessions were most helpful.

Topics include:

1. Retirement readiness assessment (taken before the seminar)
2. Finances – budgeting, saving, social security, tax considerations, estate planning
3. Insurance – health insurance/Medicare, life insurance, long term care insurance
4. Future planning – wills and estate plans, funeral and healthcare planning
5. Housing – where to live, downsizing, snow birding, expense of staying in one's house
6. Health – protecting you most important asset- exercise, diet, health risk behaviors
7. Use of time in retirement – continuing education (UWGB), hobbies, volunteering
8. Employment – part-time, seasonal, consulting
9. Overview of company retirement benefits (for seminars at a company) transition and work options, company pension, 401k, health insurance
10. Mental health-the emotional impact of retiring

Companies will be encouraged to meet with their employee after the seminar to follow-up with company specific information and encourage them to take action. The seminar will be free for the employees. Hosting the event at the technical college will offset the cost of renting a venue.

**Taskforce members are asked to share content speakers or ideas for session by November 15, 2019.** Ann will also reach out to other Alliance member organizations about potential speakers.

The taskforce is also interested in working on a Hall of Fame talent pool of retired individuals that are no longer employed at their company. One of the difficulties for companies having part-time/gig workers is the issue of compliance and managing their hours in order not to violate and state or federal laws. This is an issue that will be addressed at a future meeting.

#### **RETENTION STRATEGIES FOR NEW HIRES & WOMEN**

The Alliance is currently conducting a study of 18-30 year old manufacturing employees on why they chose a job in manufacturing, how do they look for jobs and why do they choose to live in northeast Wisconsin. The respondents are asked if they are male or female. The data will be used in developing messaging for females in promoting manufacturing careers.

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

The next Talent RISK Management meeting will be on Tuesday, November 26, 2019 at Great Northern Corp. (Appleton) 8:30 to 10:00 a.m.