

NEW Manufacturing Alliance
TALENT RISK MANAGEMENT - THE CHANGING WORKFORCE MEETING MINUTES
Forsite Benefit Partners – Green Bay, WI
Tuesday, February 25, 2020 - 8:30 AM

ATTENDEES: Joel Chopin-Smet Construction, Jim Finer-Employment Resource Group, Michelle Froehlke-R&R Insurance, Beth Kleinke-BPM Inc. (*via phone*), Denise Knutson-The H.S. Group, Chris Linn-A-Tech, Jon Meulemans-von Briesen & Roper, Will Robinson-Forsite Benefit Partners, Wyatt Smet-InitiativeOne, Ann Franz-NEWMA, Debbie Thompson-NWTC

RETIREMENT READINESS SEMINAR

Saturday, May 2, 2020

FVTC's Bordini Center – Appleton, WI

Check-In Begins: 7:30 AM, Program: 8:00 AM to 12:00 PM

Attendees (age 56+), approximately 120, will have the opportunity to take the retirement readiness assessment prior to attending the seminar. Individual results will be shared with attendees by The HS Group at check-in.

All Attendees:

- Opening Remarks (Chris Linn, Emcee)
- Retirement Assessment Results (The HS Group)
- Social Security (Tim Gierke, SSA)
- Medicare (R&R Insurance)

Breakout Sessions:

Attendees will be able to attend 2 of the 3 breakout sessions.

- Health & Staying Active (Overview by Advocate Aurora)
 - (*Ann will check with ADRC to possibly present.*)
- Employment During Retirement
 - Contract Employee (von Briesen & Roper, s.c.)
 - Starting a Business (FVTC)
- Estate Planning (von Briesen & Roper, s.c. – 30 Minutes)
- Event Follow-up for employers and their employees utilizing HS Group assessment (HR Reps Only)
- Wellness Industry Trends for employees with Forsite Benefits (HR Reps Only)

All Attendees:

- Mental Health (*After the Breakout Sessions*)
 - The Reality of Change (InitiativeOne)
 - The Emotional Impact of Retiring (ERC)
- Closing Remarks & Post Evaluation

HANDOUTS - WEBSITES

- Event Booklet
- UWGB's lifelong Learning Institute
- Volunteer Organizations Overview
- [NewRetirement](#)
- [Road Scholar](#)

❖ Members are encouraged to send [Ann](#) and/or [Chris Linn](#) any links they would like included in the resources and one sentence indicating why they feel the site(s) would be valuable.

- ❖ HR leaders, unless age 56+, will not be taking the assessment and should have at least one employee in attendance.
- ❖ Breakout sessions will be 30 minutes each.
- ❖ Handouts and follow-up links will be important, especially for any sessions someone could not attend.
- ❖ The HS Group can give attendees who take the assessment 30 days portal access to their online resources; health, wellness, employment, etc.

PROGRAM BOOKLET *(takeaway)*

Beginning April 1, each presenting company will submit; their booklet information, main points they will be covering, action items, and any resources they will be providing. Links and resources will be categorized. An agenda, table of contents, and QR code will be included in the booklet. Action items will be listed with space to write their thoughts. The booklet will be available via QR version, printed, and electronically. **Presenters will have until Monday, April 13 to submit their information.**

REGISTRATION

Ann will send an event notice to Alliance HR leaders. Companies will invite their employees to attend. Registration via Eventbrite will be announced and go live on March 24.

Registration Form Information

- A dropdown to indicate their status:
 - Company HR Representative *(Indicate unless age 56 or older they will not be taking the assessment.)*
 - Employee *(Indicate they must be age 56 or older to attend.)*
 - Significant Other
- Company Name
- First & Last Name *(for Each Attendee)*
- Are you age 56 or older?
- Email *(for Each Attendee)*
- *Indicate they are not required to complete the assessment to attend.*
- *Indicate Shelly Paul, spaul@thehsgroup.com, will be contacting registrants who are taking the assessment to provide sign-on information and directions.*
- ***The assessment completion deadline is April 24. The HS Group needs time to compile and print the results.***
- *An Eventbrite 'ticket type' will be done so registrants receive a follow-up email based on their indicated status.*
- If an HR leader is attending, organizers would like for at least one of their age 56+ employees to attend as well. If they don't have an employee attending, the HR leader will be put on a waiting list.
- Inform attendees that they will receive post-event information via Eventbrite and their HR leader.

The seminar will be announced at the 3/24 full membership meeting. Ann will finalize with the speakers and those interested in serving as a resource/providing material. The April 14 Talent Risk Task Force meeting will finalize the booklet and materials. Insight will be writing a post event article.

Ann shared that NEWMA's Board is pleased with the seminar work being done and would like to continue to offer the event. Continuation will give other Alliance partners an opportunity to present as well.

HALL OF FAME TALENT POOL

The HOF talent pool will identify people retiring but their company does not have part-time employment available for them. Work on this initiative will continue following the Retirement Readiness Seminar on 5/2/2020.

UPCOMING ALLIANCE EVENTS & PROGRAMS

- March 24 – Quarterly Membership Meeting - at FVTC, 8:30 to 10:30 AM
- April 29 – Mentorship Training – at FVTC, 8:30 to 11:30 AM
- May 2 – Retirement Readiness Seminar - at FVTC, 7:30 AM Check-in, 8:00 AM to 12:00 PM Program
- May 6 – Lombardi Middle School ‘You Can Make It’ Career Expo
- May 11 – Earn & Learn Draft Day at Lambeau Field, 5:00 to 7:00 PM
- August – K/12 outreach survey will be administered to the membership to identify manufacturers’ interests at their desired school districts. Data collected becomes part of the ACP manufacturing careers toolkits.
- October is Manufacturing Month!
- October – Get Real Math & Science Premiere
- October 20 – ACP Partnerships Meeting
- October 20 – Excellence in Mfg./K-12 Partnerships Awards
- October 21 – Manufacturing First Expo & Conference – 500+ high school students attend.
- November – Internship Draft Day at Lambeau Field

NEXT MEETING DATE/TIME/LOCATION/AGENDA

The next Talent RISK Management meeting will be on Tuesday, April 14, 2020 at InitiativeOne, Green Bay, 8:30 to 10:00 a.m. Agenda:

- ✓ Retirement Readiness Seminar – Finalize Booklet, Handouts, Links
- ✓ Next Meeting Date/Time/Location/Agenda