

**NEW Manufacturing Alliance**  
**TALENT RISK MANAGEMENT - WEBEX MEETING MINUTES**  
**Tuesday, August 24, 2021 - 8:30 to 9:30 AM**

**ATTENDEES:** Scott Beyer-Green Bay Packaging, Pam DeLeest-The H.S. Group, Beth Kleinke-BPM, Inc., Chris Linn, Adam Skarie-von Briesen & Roper, Trisha Tetzlaff-Core Financial Resource, Ann Franz-NEWMA, Debbie Thompson-NWTC

**RETIREMENT READINESS SEMINAR | NWTC'S GREEN BAY CAMPUS | SATURDAY, OCTOBER 2, 2021 | 7:30 AM TO 12:00 PM**

The event will be in-person, with the exception of the SSA speaker who will present via Zoom. Ann will reserve the NWTC – Green Bay campus auditorium.

**AGENDA DRAFT**

**7:30 – 8:00 AM CHECK-IN**

8:05 – 8:10 AM Welcome – Chris Linn  
8:10 – 9:00 AM Social Security - Rhonda Whitnaker, SSA  
9:00 – 9:10 AM BREAK  
9:10 – 10:00 AM Medicare – R & R Insurance  
10:00 – 10:30 AM Financial Planning – Core Financial Resources  
10:30 – 10:40 AM BREAK  
10:40 – 11:20 AM Estate Planning – von Briesen  
11:20 - 11:50 AM 15 Keys to Retirement Success - The H.S. Group  
11:50 – 12:00 PM Next Steps - Chris Linn  
12:00 PM Conclude

The H.S. Group will offer their assessment at a reduced rate, per person, for NEWMA members. The assessment becomes more valuable for the employee when they can have a one-on-one discussion with a consultant regarding their results. Pam DeLeest will write an informational summary for Ann to include with the invite that will be sent next week. Employers will also be made aware of any additional items they may want to address with their employees, prior to the seminar.

Chris feels it is important for HR leaders to follow-up with their employees that attend the seminar. He will write some questions and tips that the HR leader should use with their employee.

The event will not be videotaped, due to cost. Videotaped versions of the previous seminar are housed on the NEWMA website. The plan is to offer the Retirement Readiness Seminar again in February or March 2022. Due to possible inclement travel weather, the event will be held virtually and recorded.

**HUMAN RESOURCES EVENT ON KNOWLEDGE TRANSFER – FALL 2021**

Ann spoke with Steve Troutman, knowledge transfer expert, regarding speaking at this event. Due to the cost and value of Steve's presentation, it was decided to have him present at the 2022 Manufacturing First Expo & Conference (MFEC). This would allow for a much larger audience.

Andrew Schmitz's proceed.app is a software application for capturing knowledge transfer before employees leave an organization. The app is used to create standard SOPs using photos and videos. KI has expressed some interest in participating in the proceed.app pilot that will be funded by NEWMA. **BPM Inc. and Green Bay Packaging, Talent Risk Task Force reps, are asked to contact Ann if they are interested in participating in the pilot.**

**GRANT OPPORTUNITY**

The Federal Government has provided the states with millions of dollars for COVID initiatives. NEWMA, in partnership with New North, will be writing for this grant. There will be three areas the grant dollars, if awarded, could be applied: job seeker training, incumbent worker training, and marketing for careers. Possible trainings/uses of the grant dollars include:

- Individuals who lost their job due to COVID.
- Training that would allow for an understanding of a person's capabilities.
- Paying a wage to job seekers that are training to work at a company.
- Remote technician work enhancements.
- Mentorship and succession training for incumbent workers.
- Market research regarding the target populations that would likely or could potentially pursue a manufacturing career. Locally, some companies have reported great success recruiting people from Puerto Rico to move to northeast Wisconsin to work at their company.

**Members are encouraged to contact Ann with any additional ideas and/or uses of the potential COVID related grant funding.**

#### **UPCOMING ALLIANCE EVENTS**

- August 31 – Manufacturers Outreach Survey - Completion Deadline
- October 5 – Get Real Math / Science Premiere at the Meyer Theatre
- October 12 – Virtual Boat Build
- October 26 – ACP Partnerships Meeting at the KI Convention Center
- October 26 – Excellence Awards Dinner at the KI Convention Center
- October 27 – Manufacturing First Expo & Conference at the KI Convention Center
- November 4 – Internship Draft Day at Lambeau Field

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

The next Talent RISK Task Force Webex meeting will be on Tuesday, November 23, 2021, 8:30 to 9:30 a.m.

Agenda:

- ✓ Fall 2021 Retirement Readiness Seminar
- ✓ Attracting & Retaining Younger Workers
- ✓ Grant Opportunity
- ✓ Upcoming Alliance Events
- ✓ Next Meeting Date/Time/Agenda