

**INSURANCE CONSORTIUM MEETING MINUTES**  
**Wednesday, March 25, 2015 – 1:00 to 2:30 PM**  
**NWTC Green Bay Campus – BA101**

**ATTENDEES:** Linda Bartelt-NEW ERA, Scott Borley-FVTC, Jim Golebeski-BAWDB, Joe Marin-UnitedHealth Group, Tina Norman-Ameriprise, Scott Schlicher-DVR, Ann Schermetzler-Acuity, Paul Stelter-FVWDB, Colleen Wall-Thrivent Financial, Ann Franz and Debbie Thompson

**WELCOME AND INTRODUCTIONS**

Attendees were welcomed and introduced themselves.

**REVIEW NEW INSURANCE CONSORTIUM WEBSITE**

Attendees reviewed and are pleased with the new website created by Sandy Folsom. **Members are encouraged to review the [website](#) mockup and email Ann with any comments.** Site suggestions included the following.

- Further define on the home page the region the Insurance Consortium is serving.
- Spotlight customer service and other insurance careers.
- Edit to one line the 'Industry Job Profiles' that currently extend to two lines.
- Hyperlink the Job Center logo to their insurance main web page.

**K-12 OUTREACH SUBCOMMITTEE REPORT**

The K-12 subcommittee is planning to host a fall group career exploration event for students. Schools will be contacted during May/June. The subcommittee also plans to connect with the tech colleges, as many of their students are still deciding on a career pathway. Middle and high school career events will also be posted on the website.

Colleen Wall created a Career Jeopardy game that focuses on insurance industry careers and is featured on the website. The game also includes definitions, fun facts, while focusing on insurance careers. Ann from Acuity suggested including some of the fun facts about their flag. Youth apprenticeship information is on the site, as well. **Members are encouraged to contact Ann to coordinate school youth apprenticeships.**

**POSTSECONDARY SUBCOMMITTEE REPORT**

New North colleges and universities are listed on the website. Attendees determined the following insurance careers they would like to focus on.

1. Claims Adjuster
2. Commercial Processor-Detailed Data Entry
3. Compliance-Auditor
4. Customer Service
5. Inbound Sales
6. IT-Systems Analyst
7. IT-Database Administrators
8. IT-Help Desk
9. IT-Web-based programmers
10. Underwriters

A survey will be sent to the insurance sector members in April requesting information regarding the aforementioned occupations. The survey will include:

1. How many people will they be hiring in each occupation in the next year?
2. How many people will they be hiring in each occupation in the next 3 years?
3. In the occupations listed above, what percentage of your hires are internal candidates?
4. What is the minimum degree attainment for each position?
5. Do you have college internship opportunities in each career field and how many?
6. If the company does not have an internship currently being offered in that field, is there a potential opportunity to host an internship in the future?

UW – Oshkosh has a college internship program with Thrivent. Ann from Acuity shared that many of her applicants are not passing its typing test. A potential training need for the postsecondary colleges to consider. The committee believes

one group of technical college graduates that should be targeted is students in the Administrative Assistant program. Hosting an Open House at an insurance company for students in this program might be a good avenue to find talent. This topic will be discussed at a future meeting.

### **CAREER PATHWAYS SUBCOMMITTEE REPORT**

The career pathways website page lists 'Industry Job Profiles' and links each profile to [www.mynextmove.org](http://www.mynextmove.org) for more information. A work product for this subcommittee is to implement a more visual customer service representative job description.

Millennials are often interested in advancement opportunities when they consider job opportunities. The insurance industry has many advancement opportunities that should be marketed to this population. The committee will work on developing a career pathway in Customer Service that showcases the variety of pathways one can take in the industry. In addition, the committee will reach out to UWGB's Psychology program to connect students with careers within the industry.

Baby boomers who leave/retire from healthcare and teaching are often good candidates for insurance careers. Discussion centered on how to encourage these individuals to pursue insurance careers. Jim Golembeski shared that Career Explorer on the Job Center of Wisconsin website assists job seekers to match skill sets with available careers.

Scott Schlicher discussed the successful six week, customer service training sessions at NWTC. The program has had an 85% success rate and was funded through the Fast Forward Grant and W2. The goal for graduates is to be job ready. United Health Group has made 13 job offers, in addition to other insurance companies making job offers to program graduates. The program is expanding in 2015 to Wausau and Schneider National. It was suggested having the program spotlighted on the new website.

### **DISCUSSION ON FOCUS OF CONSORTIUM: ALL INSURANCE CAREERS OR CUSTOMER SERVICE CAREERS ONLY**

Insurance company representatives agreed to move forward focusing on a variety of insurance careers, not just customer service. The committee would like a special focus on customer service. The careers that will be spotlighted are listed on the previous page. A possible metric for the organization could be to increase the number of students going to college in insurance-related degree fields. The NEW Manufacturing Alliance has this as one of its chief metrics. Since the inception of the organization, manufacturing-related degree students have doubled or tripled in most degree areas over the eight years.

In the future as the organization develops, it was suggested that a meeting be held with leadership from the insurance companies be held to share the work product of the group. The meeting could be held in person or via a webinar.

### **PLAN NEXT STEPS**

Ann will facilitate the following next steps.

- Email a Doodle poll to determine the next subcommittee meeting dates for the month of May.
- Continue to work with the K-12 subcommittee in an effort to host a fall group career exploration event.
- The Career Pathways subcommittee will work on a customer services career pathway.
- Email the survey in April and discuss its results at each subcommittee meeting.
- After the subcommittee meetings, a Doodle poll will be sent to determine the next full membership meeting.
- Invite insurance organization leadership to an upcoming meeting, as determined by members. Attendance can be via conference call.
- Burning Glass will be updating in May. A demo can be offered at a future meeting.