



# 8<sup>TH</sup> ANNUAL MEETING & WINTER CONVENTION 2023

BRIDGEPORT CONFERENCE CENTER | BRIDGEPORT, WV  
DECEMBER 4-5

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# 8<sup>TH</sup> ANNUAL MEETING & WINTER CONVENTION

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## 2023 CORPORATE PARTNERS

### DIAMOND



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### SILVER



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# **Exploring Manufacturing Competitiveness in West Virginia**

**Ted Abernathy, Economic Leadership LLC**

Economic



# 2024





**Working in 29 states**

**Statewide Competitiveness Strategies  
(CT, HI, CO, LA, NE, NH)**

**Locational Analysis for Companies  
Future Trend Analysis (trendspotting)**

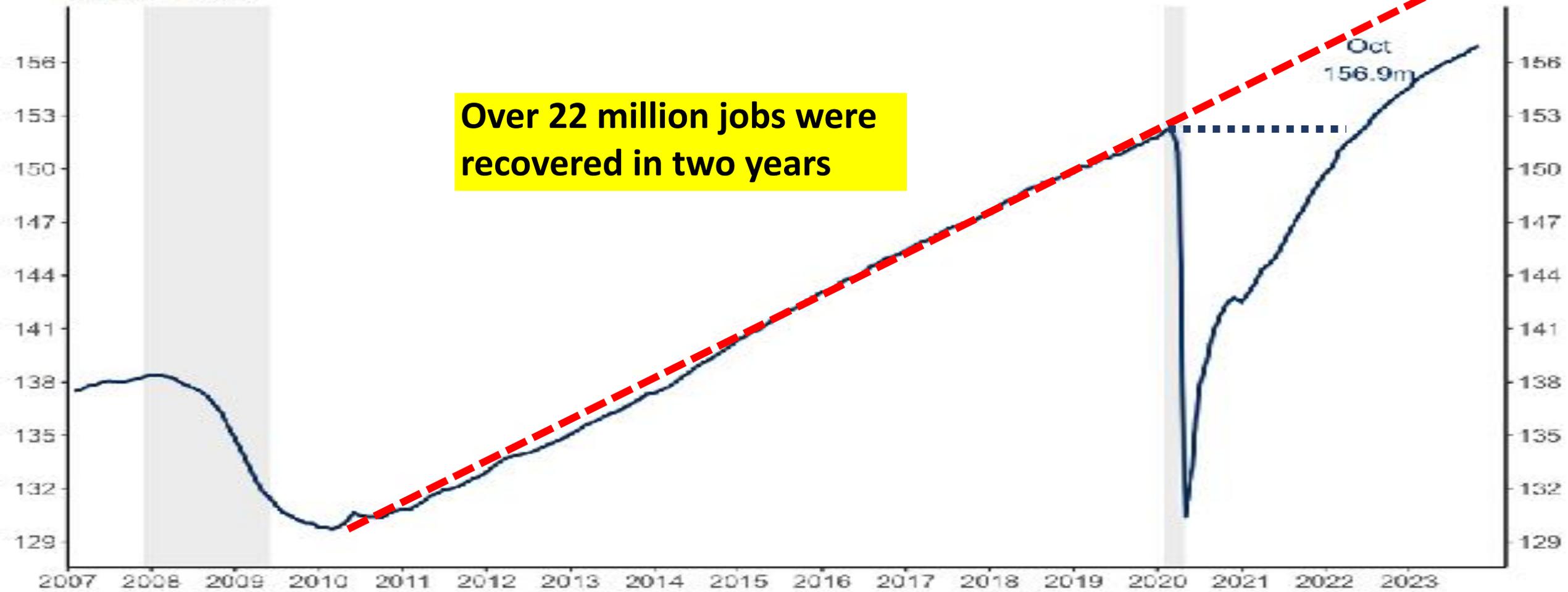
- **Specialized Research**
  - Workforce (LA)
  - Public Safety (MO)
  - Manufacturing (VA)
  - Technology (CO)
  - Transportation (MO)
  - Immigration (NE)
  - Financial Services (NY)
  - Health & Safety (FL)

**State and Local Economic Strategies  
Group Leadership Assessments  
Corporate Communications**

**[www.econleadership.com](http://www.econleadership.com)**

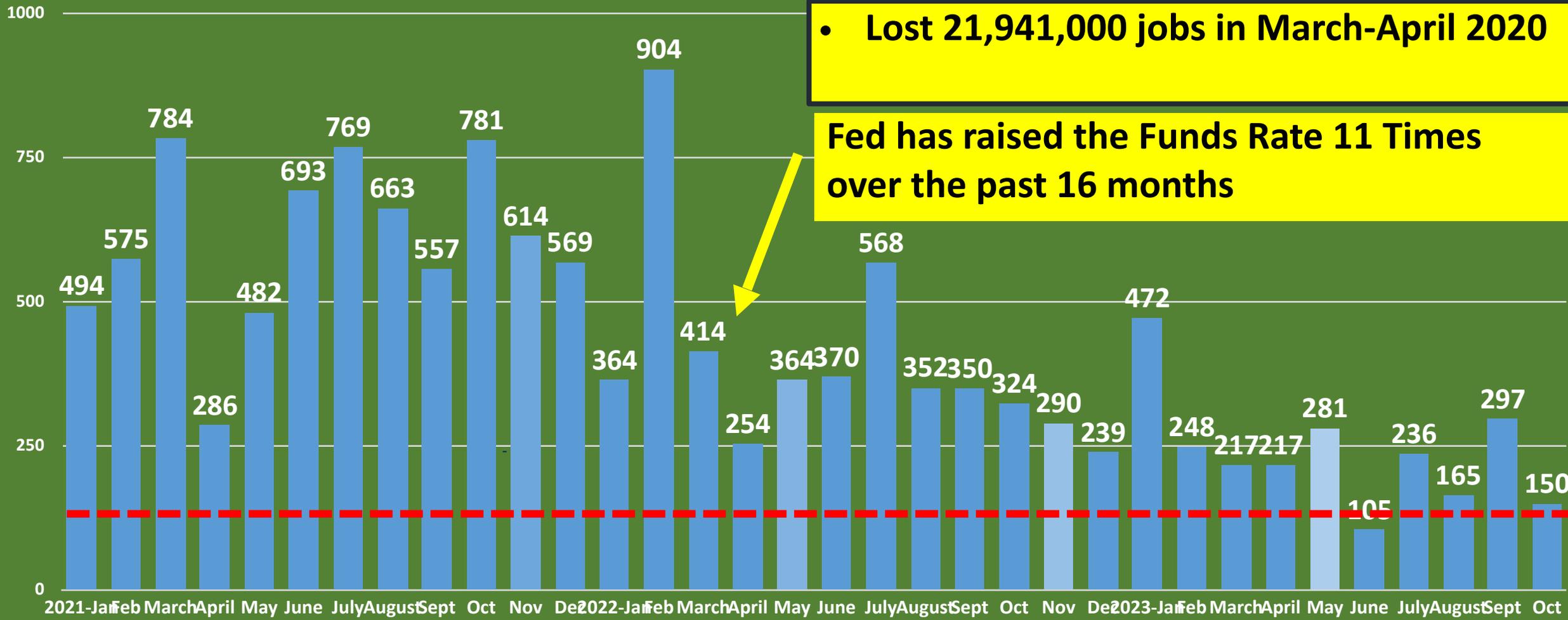
# Nonfarm Payroll Employment

Nonfarm Payroll Employment  
Millions of Persons

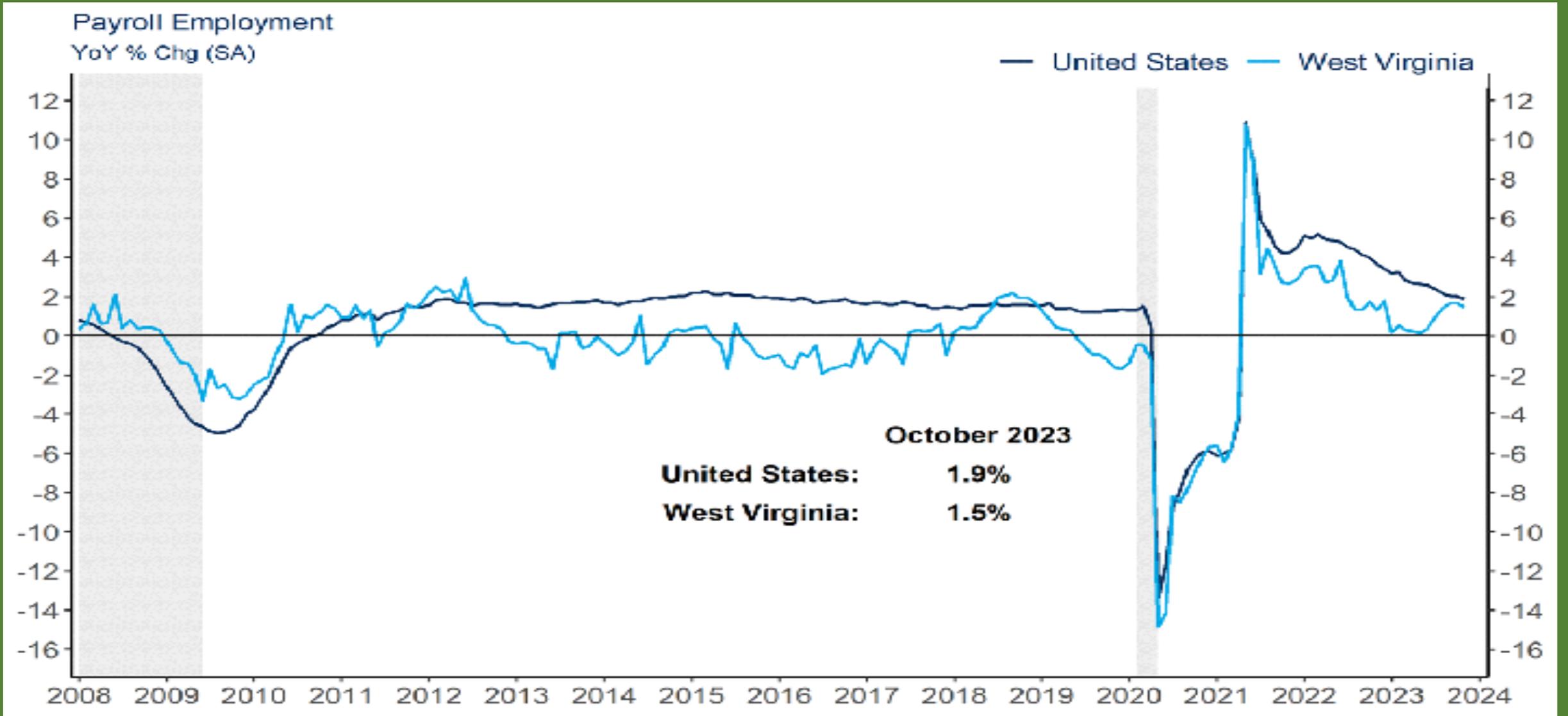


Over 22 million jobs were recovered in two years

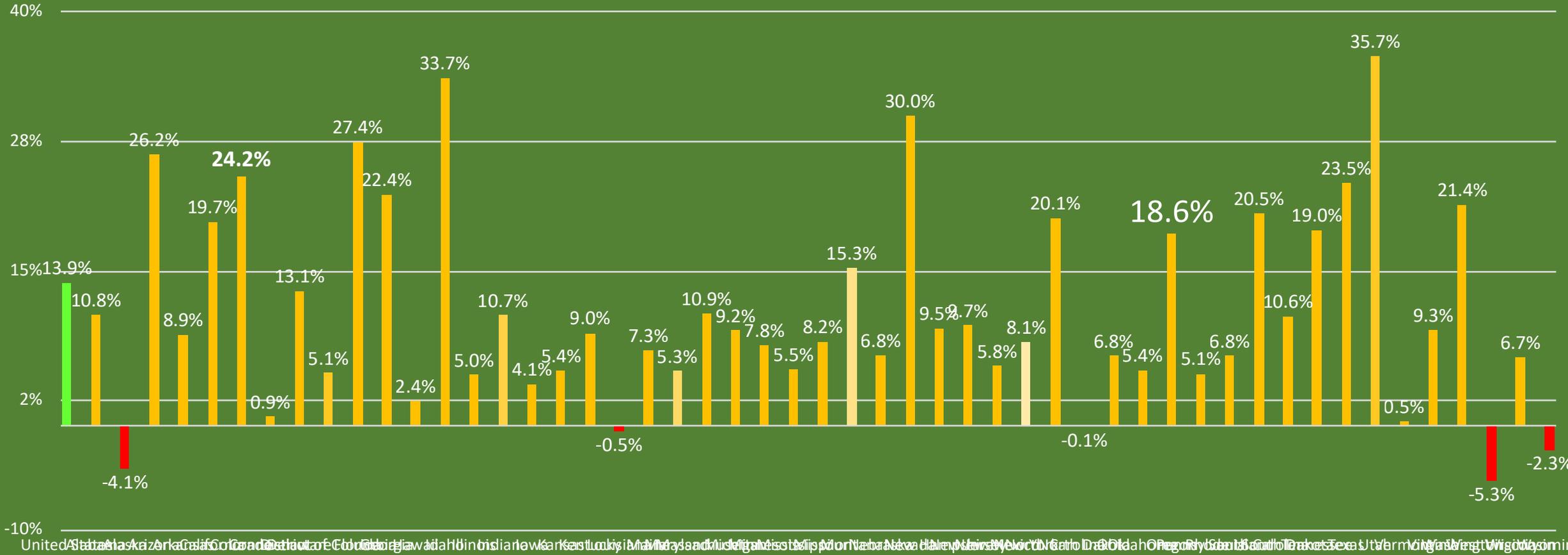
# USA Nonfarm Payroll Employment Monthly Growth in Thousands



# West Virginia Payroll Employment



# Change in Average Annual Jobs 2012-2022

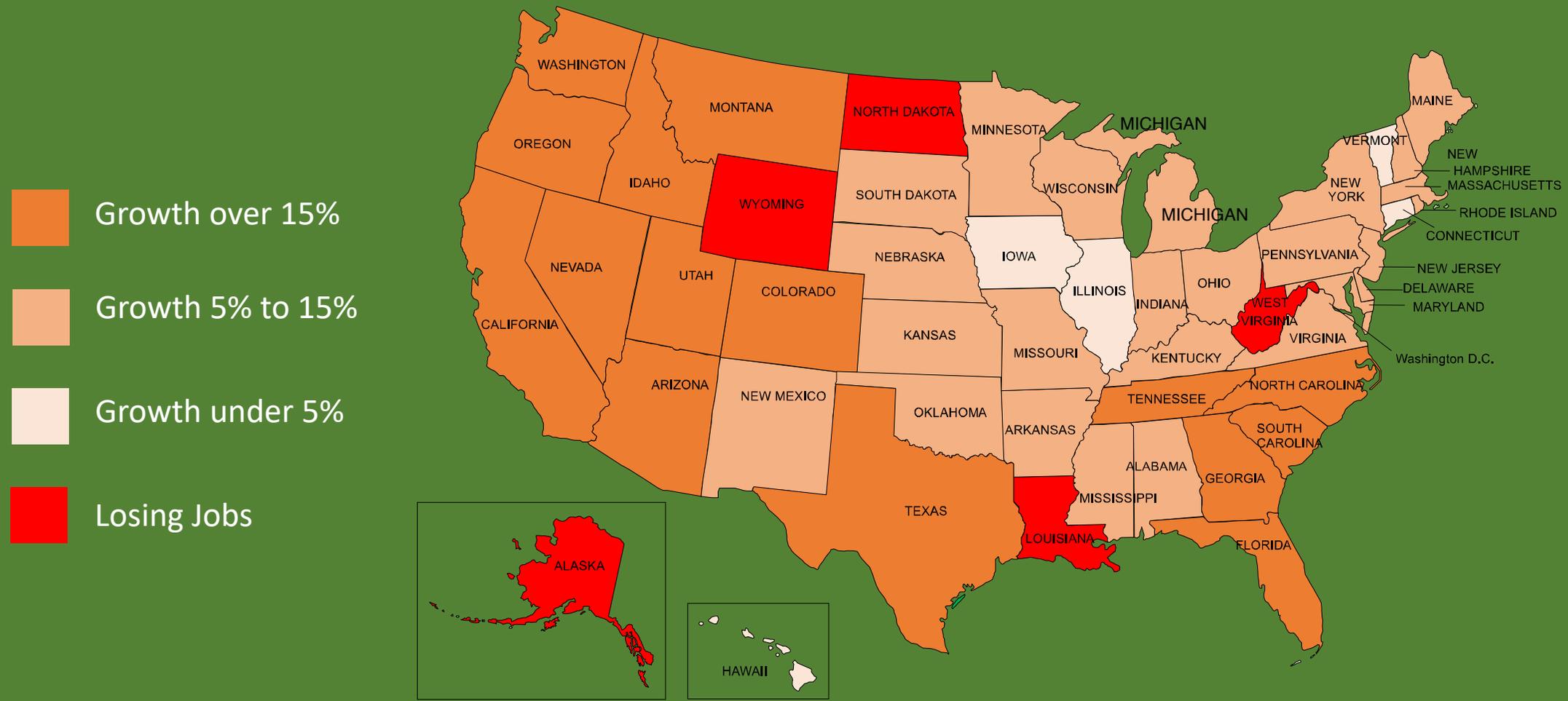


**The United States has added 13.9% more jobs.  
 Leading states have added 25-35% more jobs  
 Only 5 States have lost jobs  
 WV has the highest percentage loss (-5.3%)**



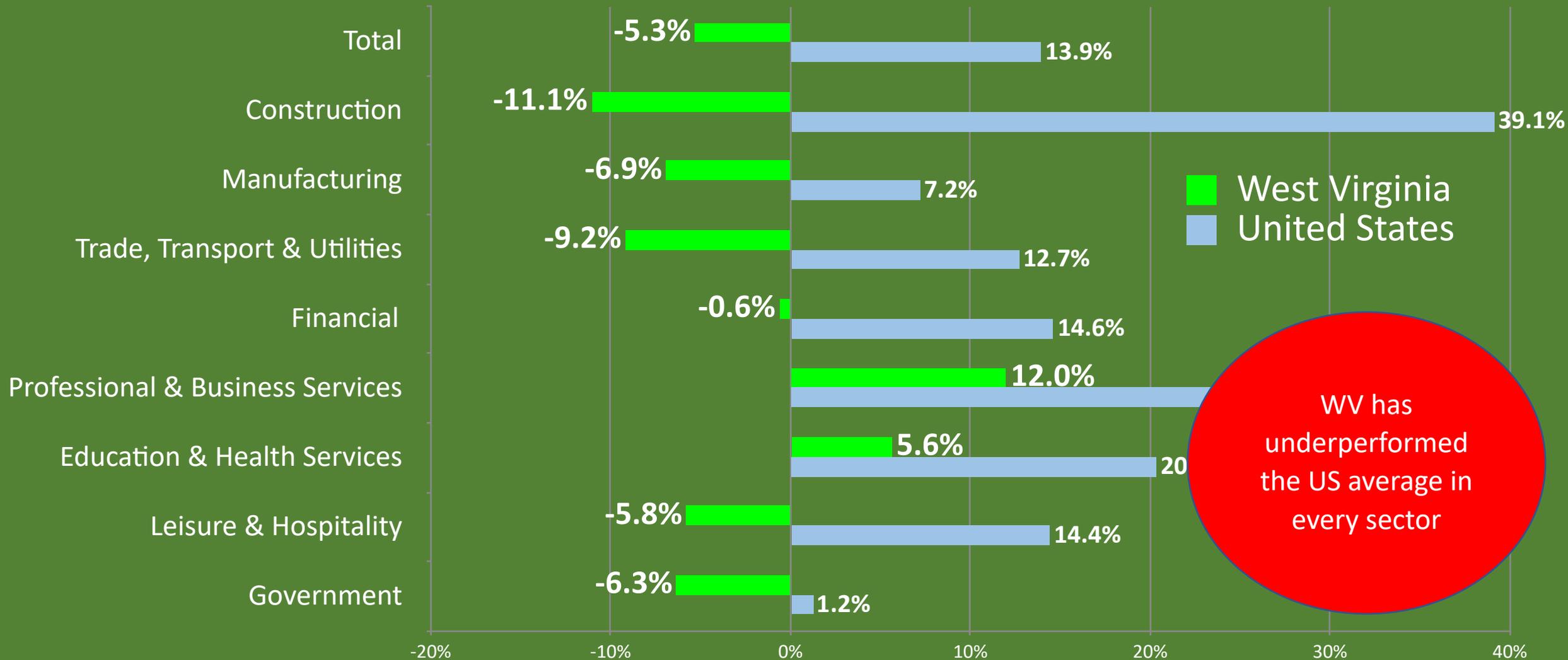
Source: Bureau of Labor Statistics QCEW

# Change in Average Annual Jobs 2012-2022



# 10 Year Job Gains By Sector for WV and U.S.

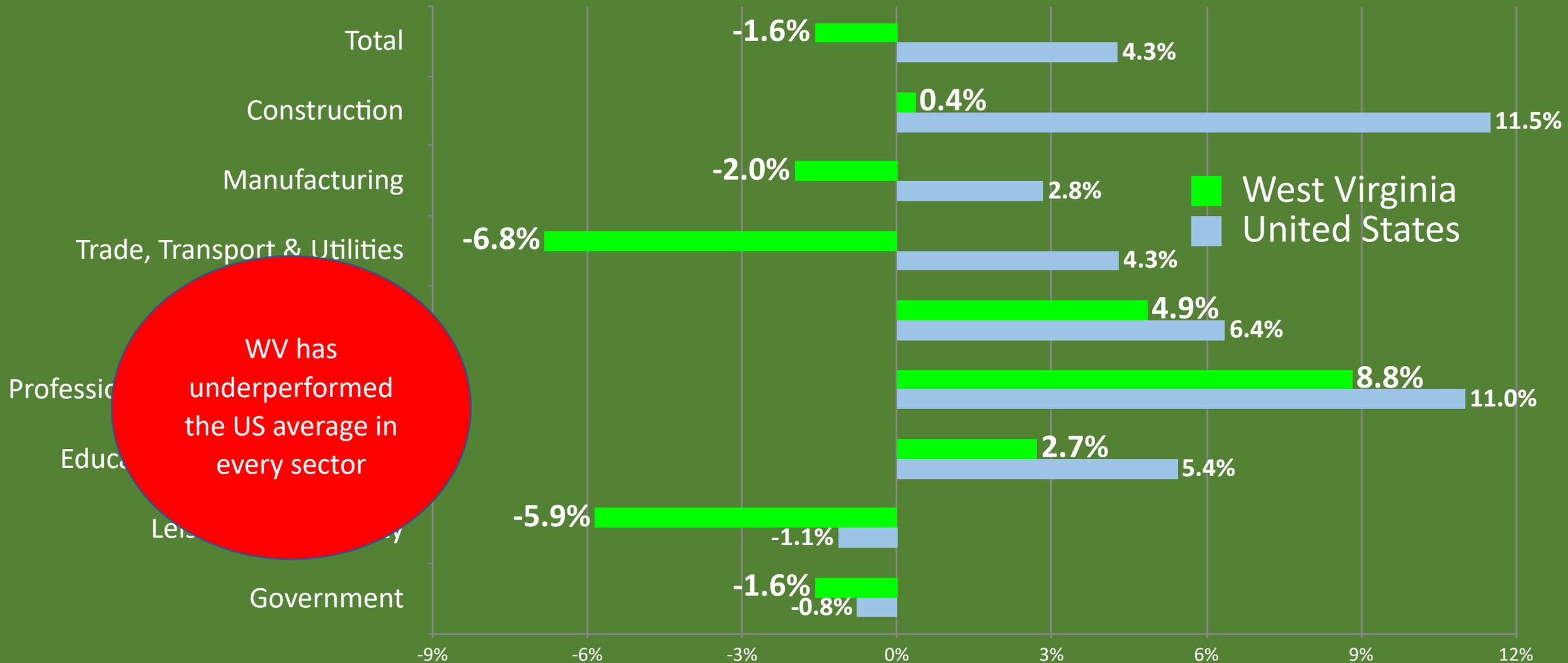
2012-2022



Source: US Bureau of Labor Statistics QCEW

# 5 Year Job Gains By Sector for WV and U.S.

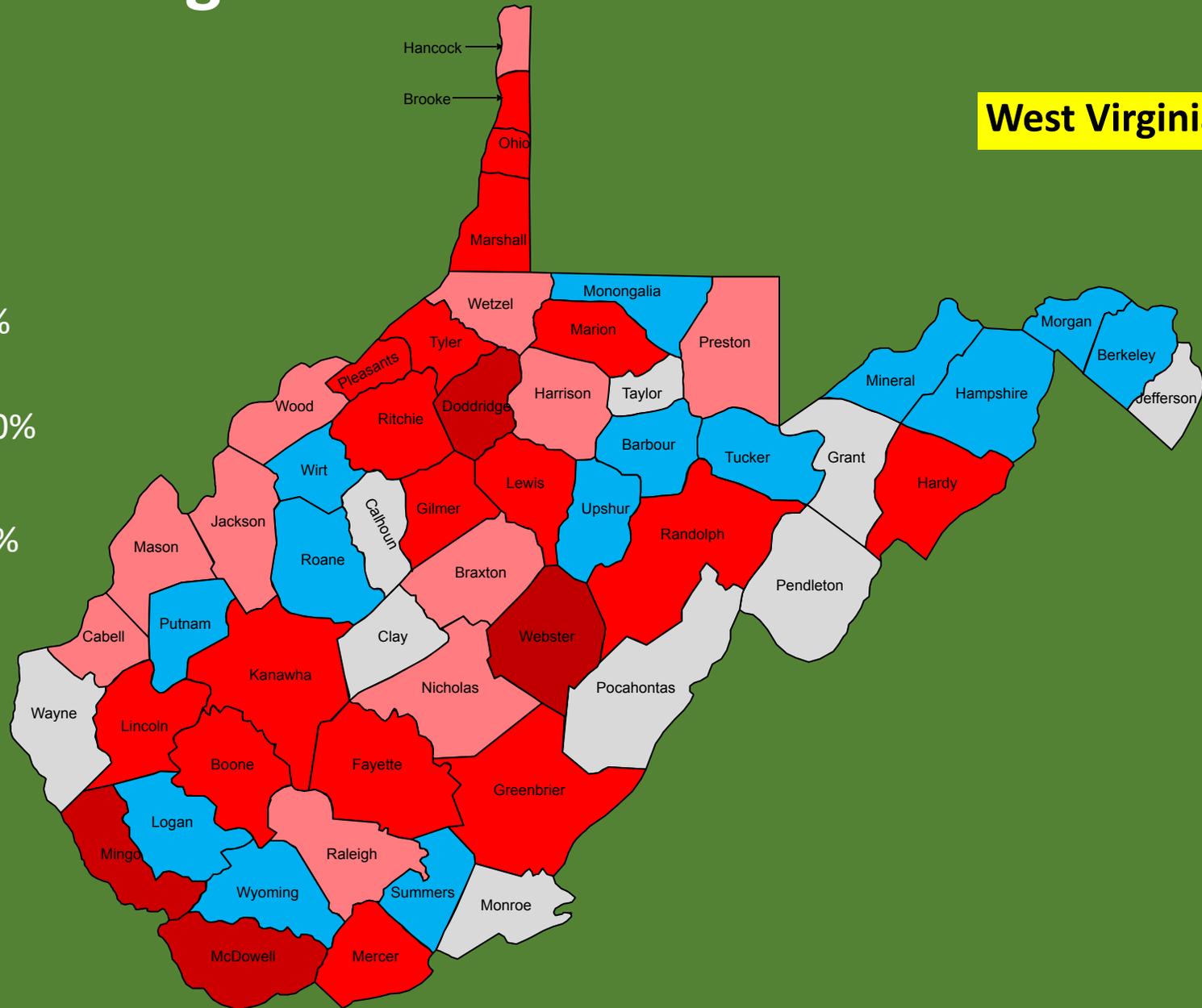
2017-2022



WV has underperformed the US average in every sector

# West Virginia 5 Year Job Growth 2017-2022

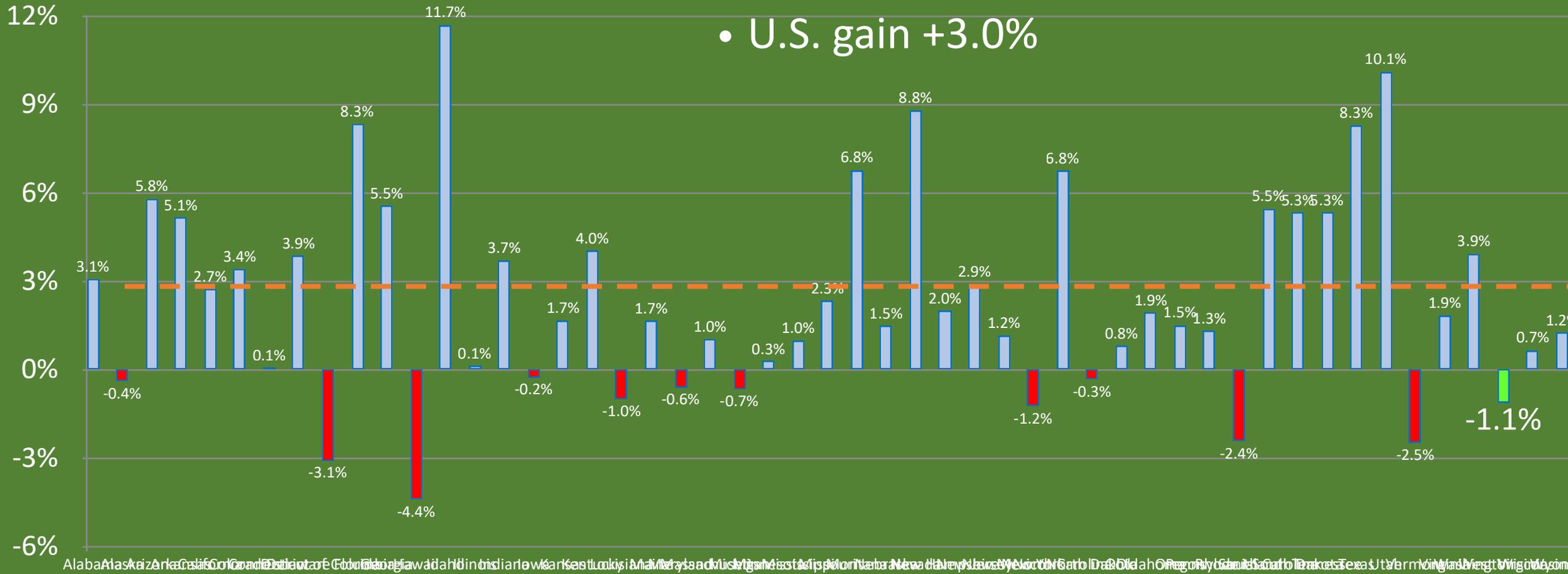
**West Virginia average -1.6%**



Source: Lightcast 2023.4

# All States Since Start of Covid

Total Non-Farm Employment Percentage Change Feb 2020 to October 2023

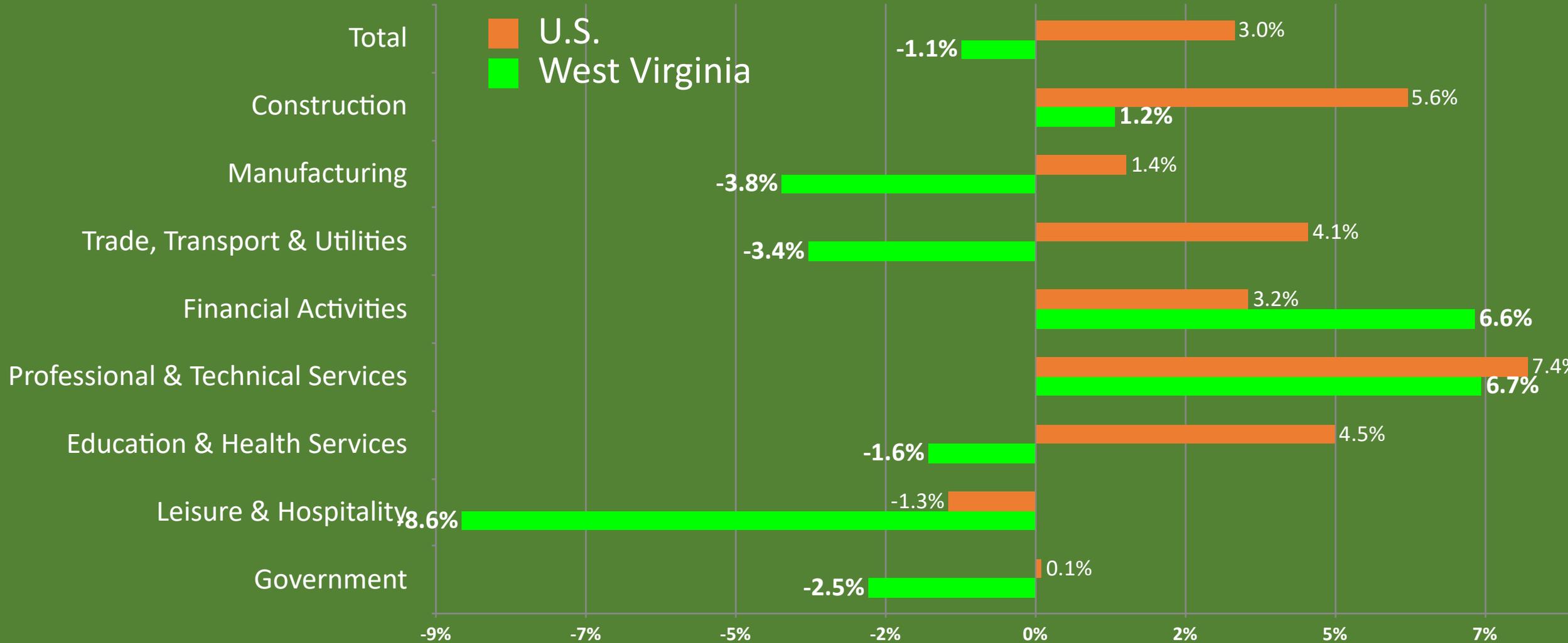


Source: U.S. Bureau of Labor Statistics



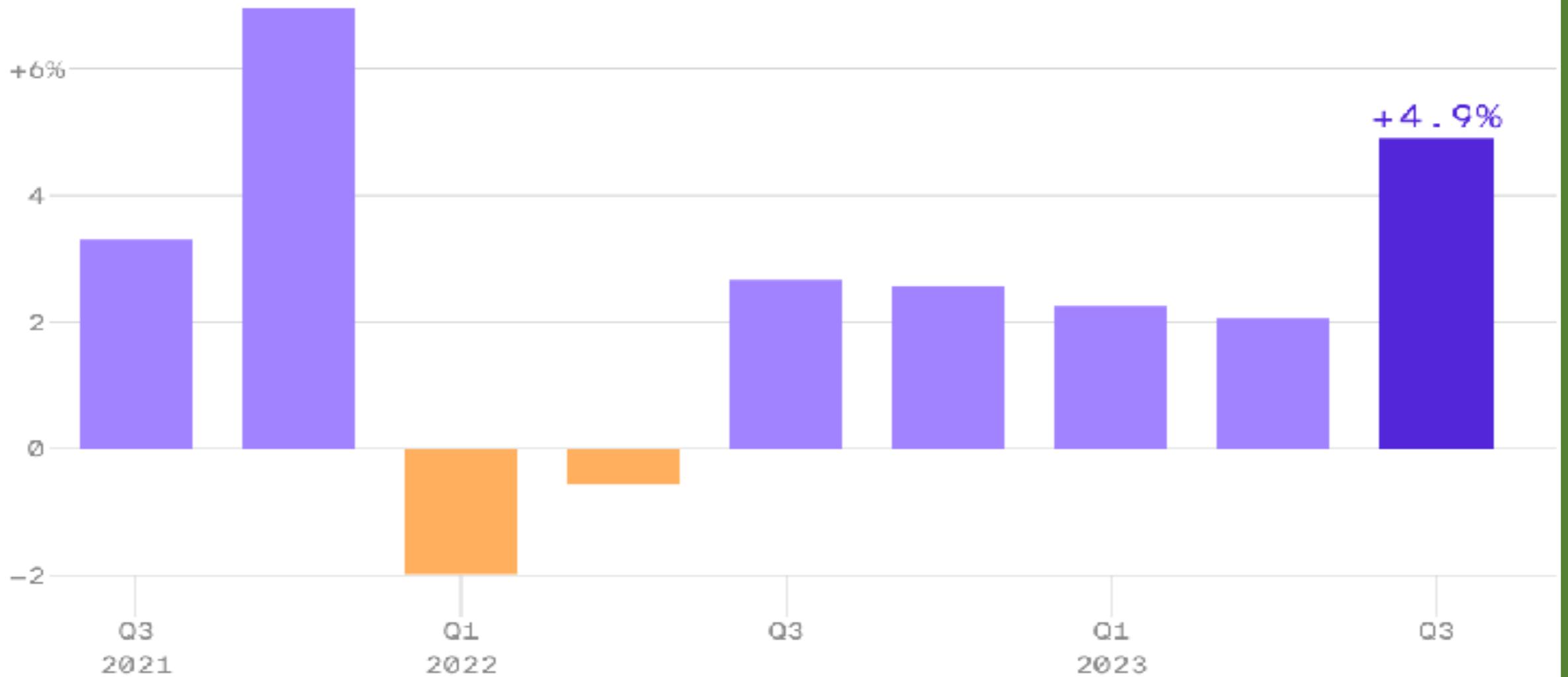
# Nonfarm Employment Change by Sector for WV & US

February 2020 – October 2023

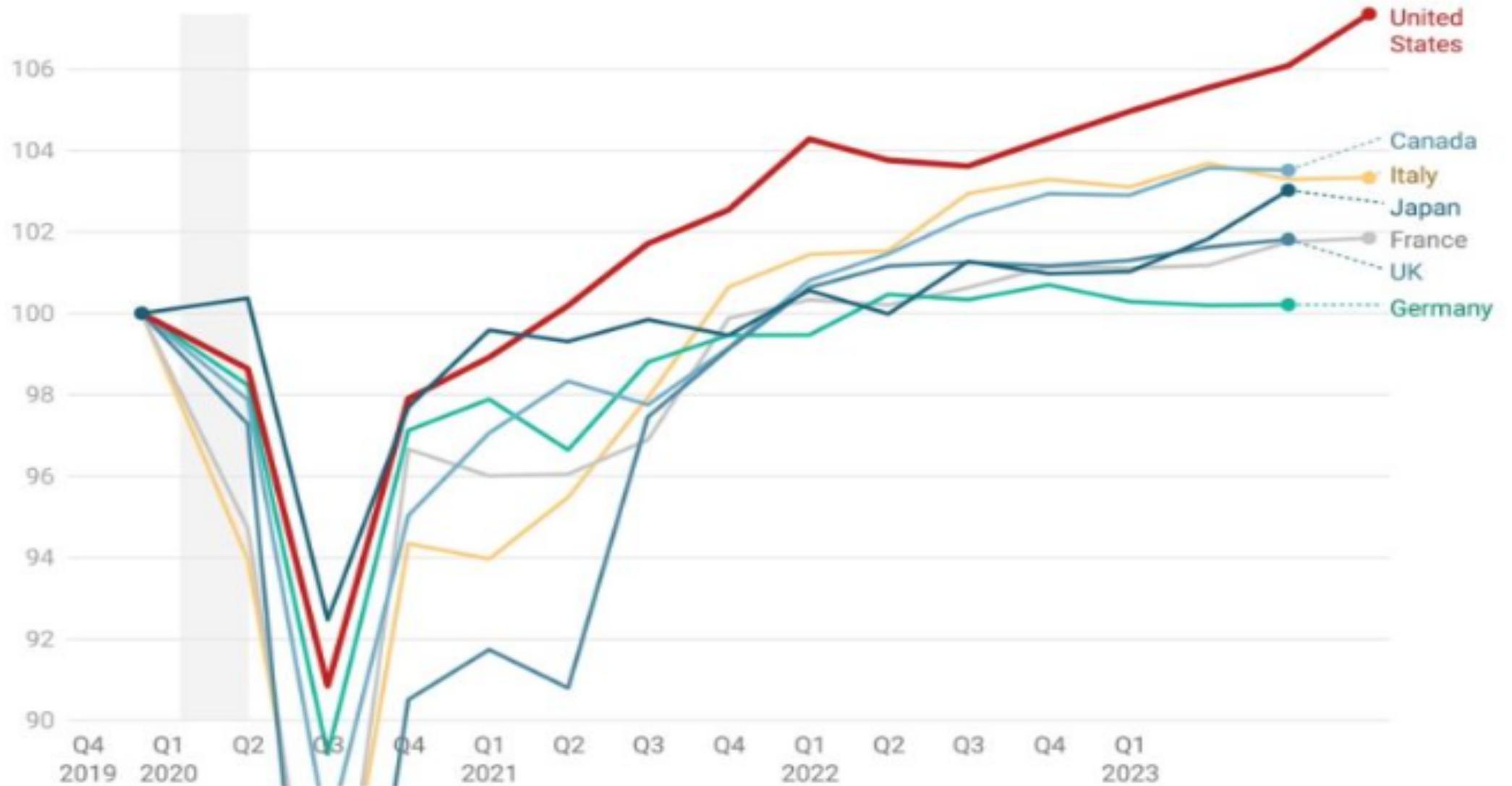


# Change in U.S. real GDP

Annualized rate; Quarterly, Q3 2021 to Q3 2023



# Real GDP (Index: Q4 2019 = 100)

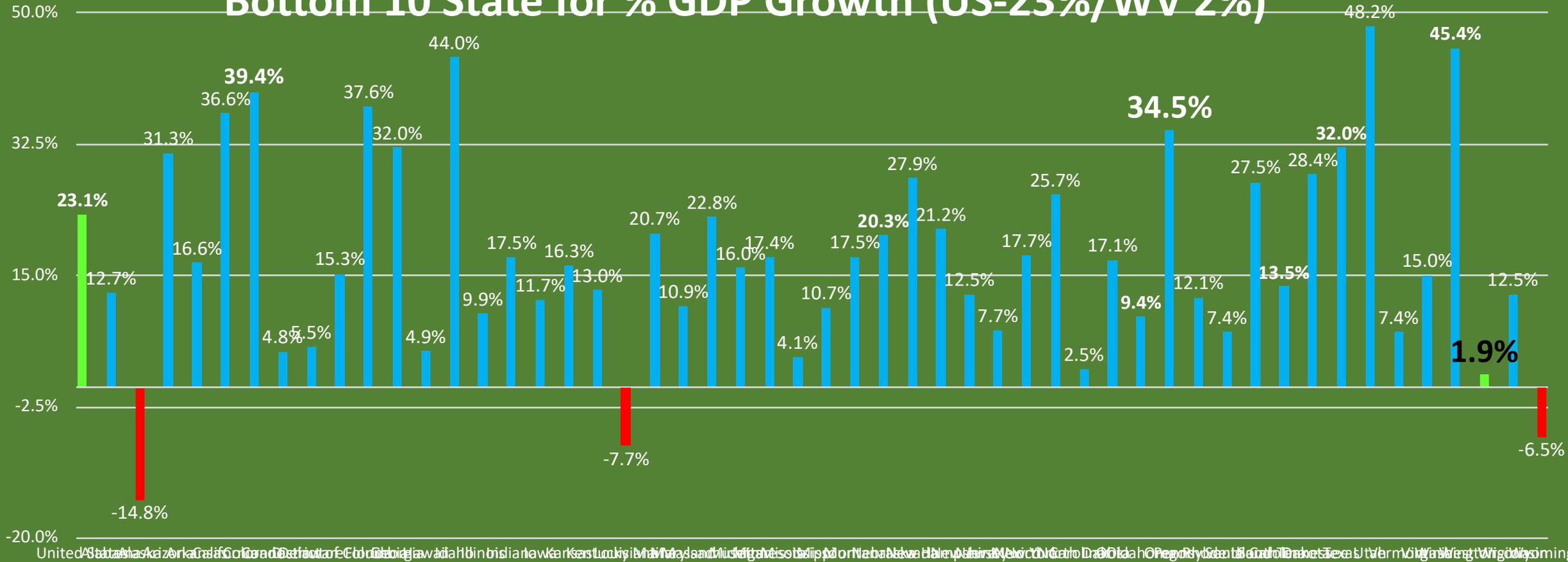


\*Real denotes inflation-adjusted figures.

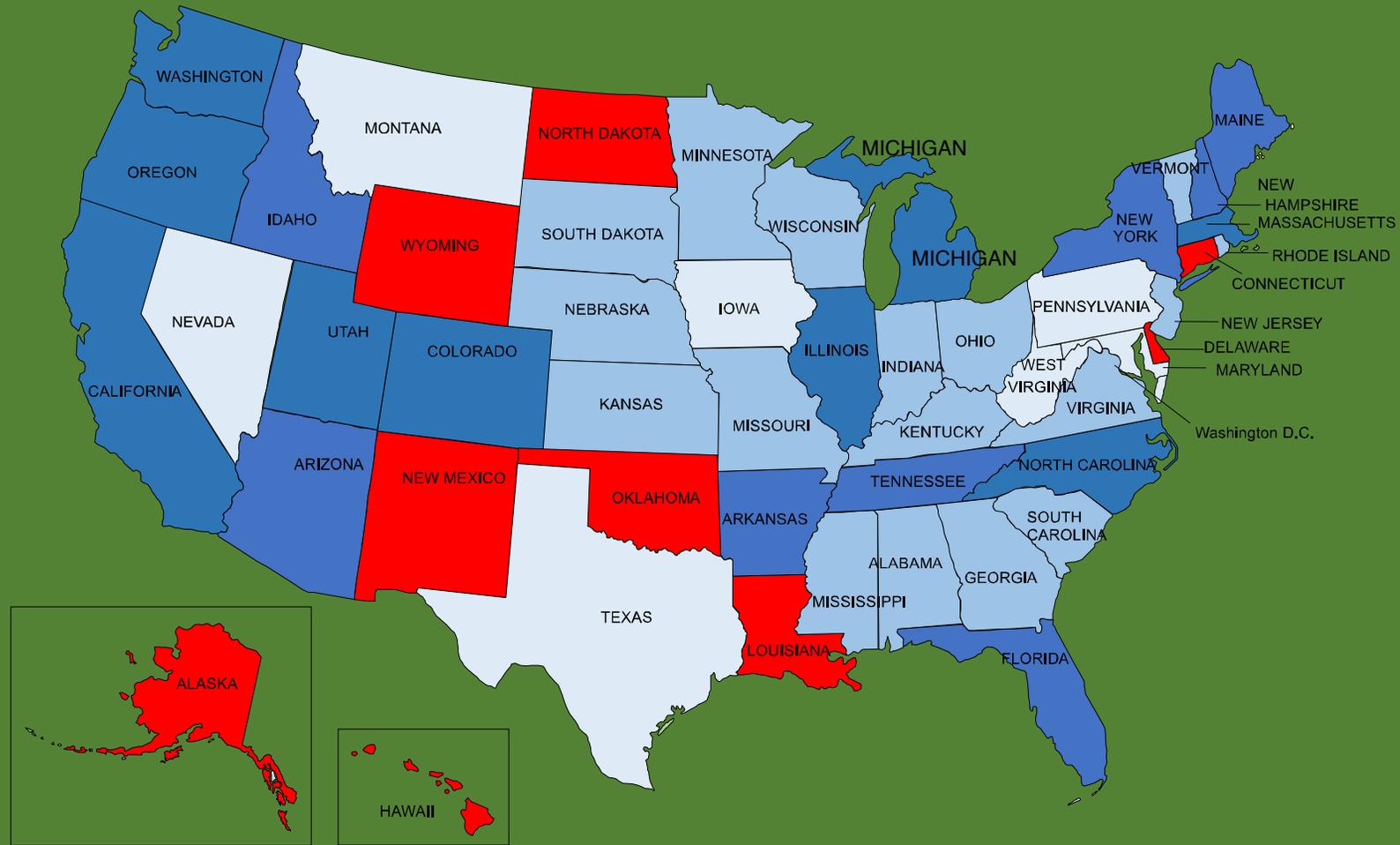
Source: Country statistical agencies accessed through Bloomberg. • Created with Datawrapper

# 10 Year Change in GDP 2012 - 2022

## Bottom 10 State for % GDP Growth (US-23%/WV 2%)



# GDP Per Capita Three Year % Growth 2019 - 2022

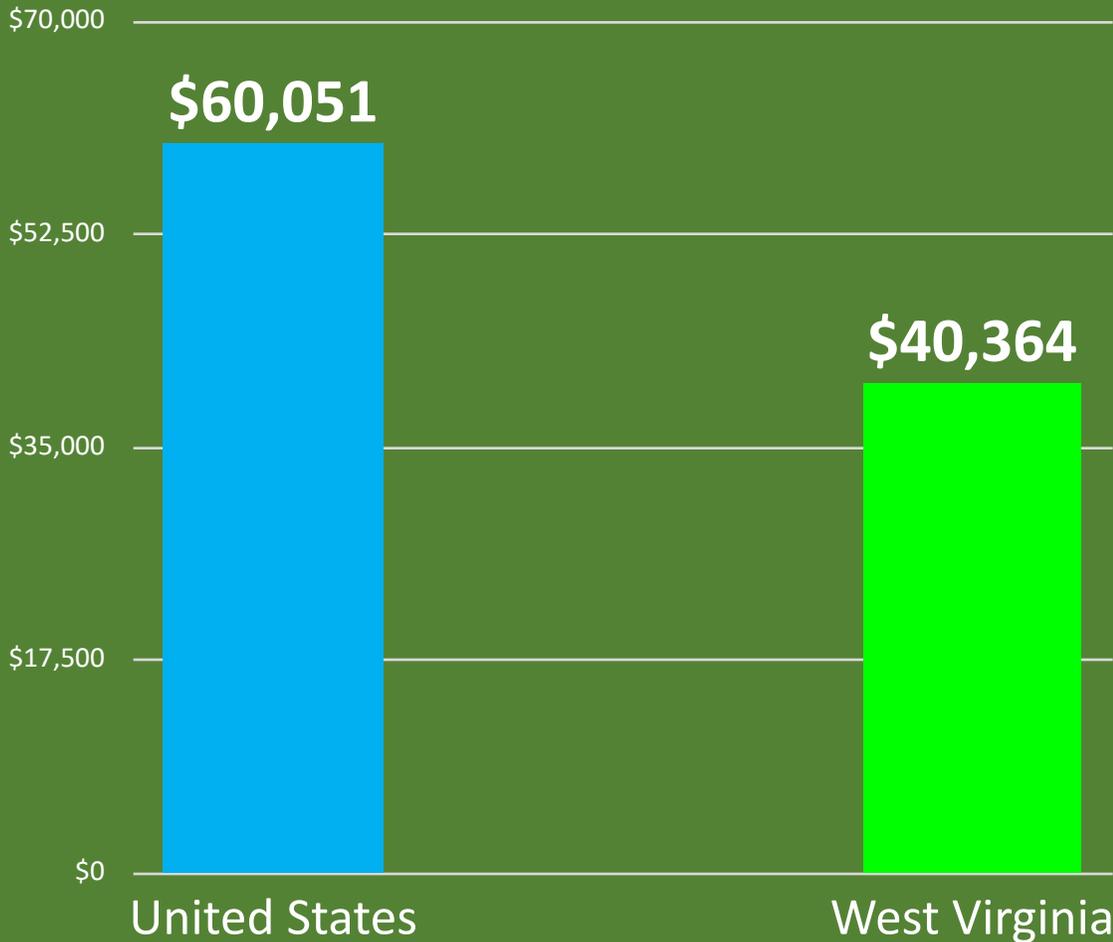


**U.S. 4.2%**  
**WV 0.1%**

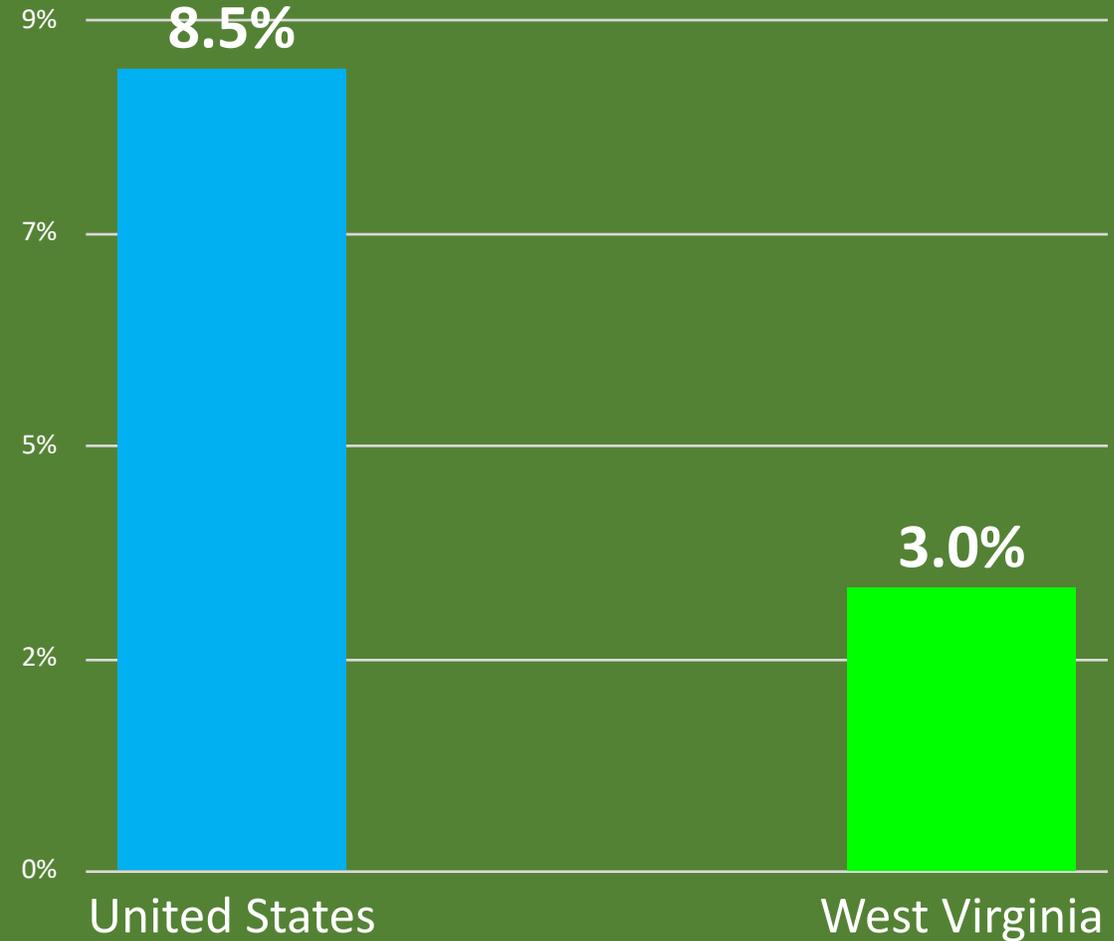
Loss      Under 2%      2.0% - 5.0%      Over 5.0%

# West Virginia Compared to US Average

## GDP Per Capita 2022

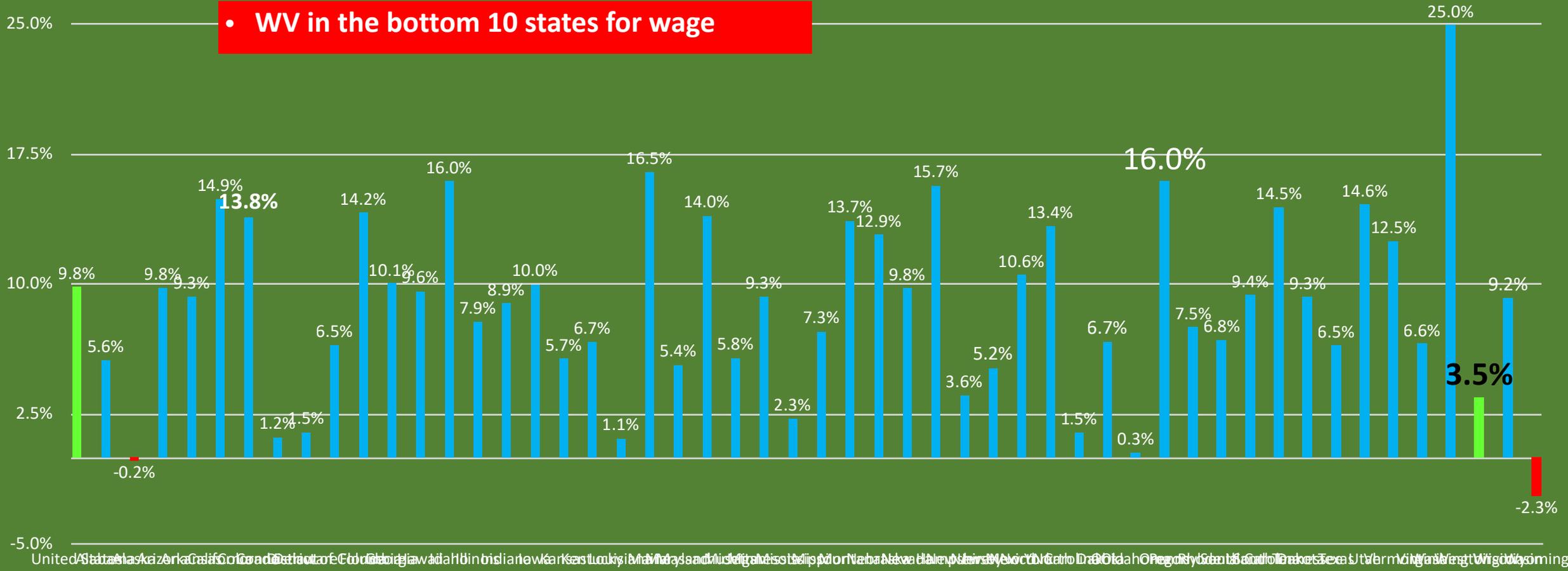


## Change in GDP Per Capita 2017-2022



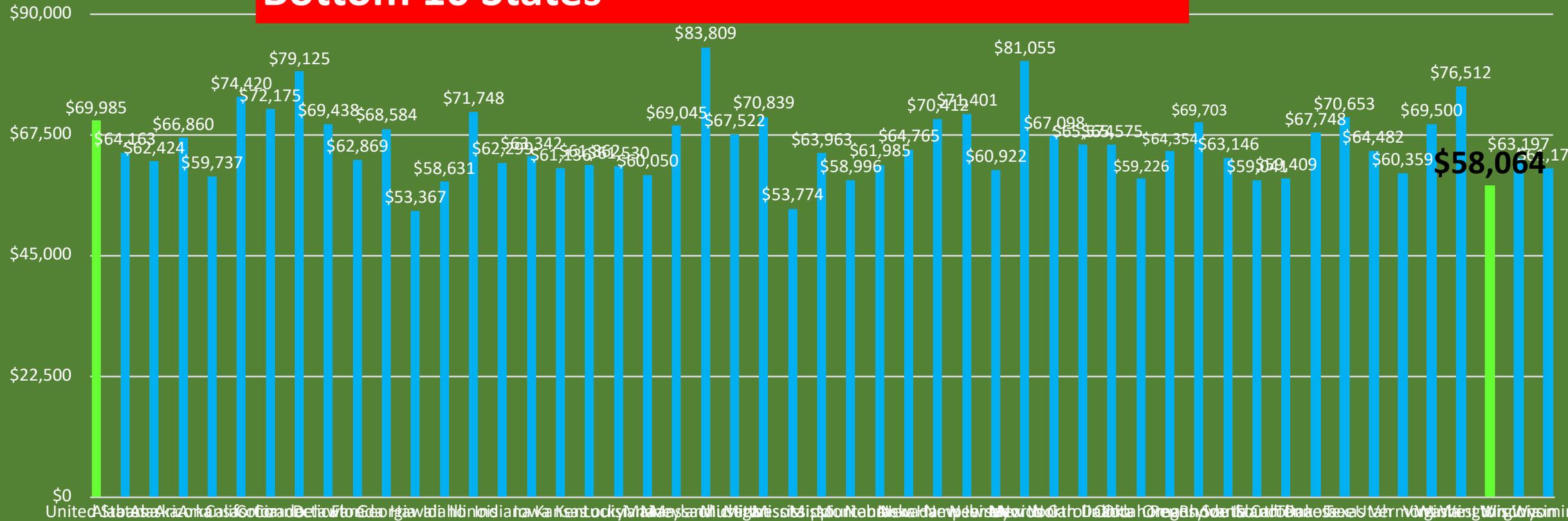
# Change in Average Annual Wage 2012-2022

• WV in the bottom 10 states for wage



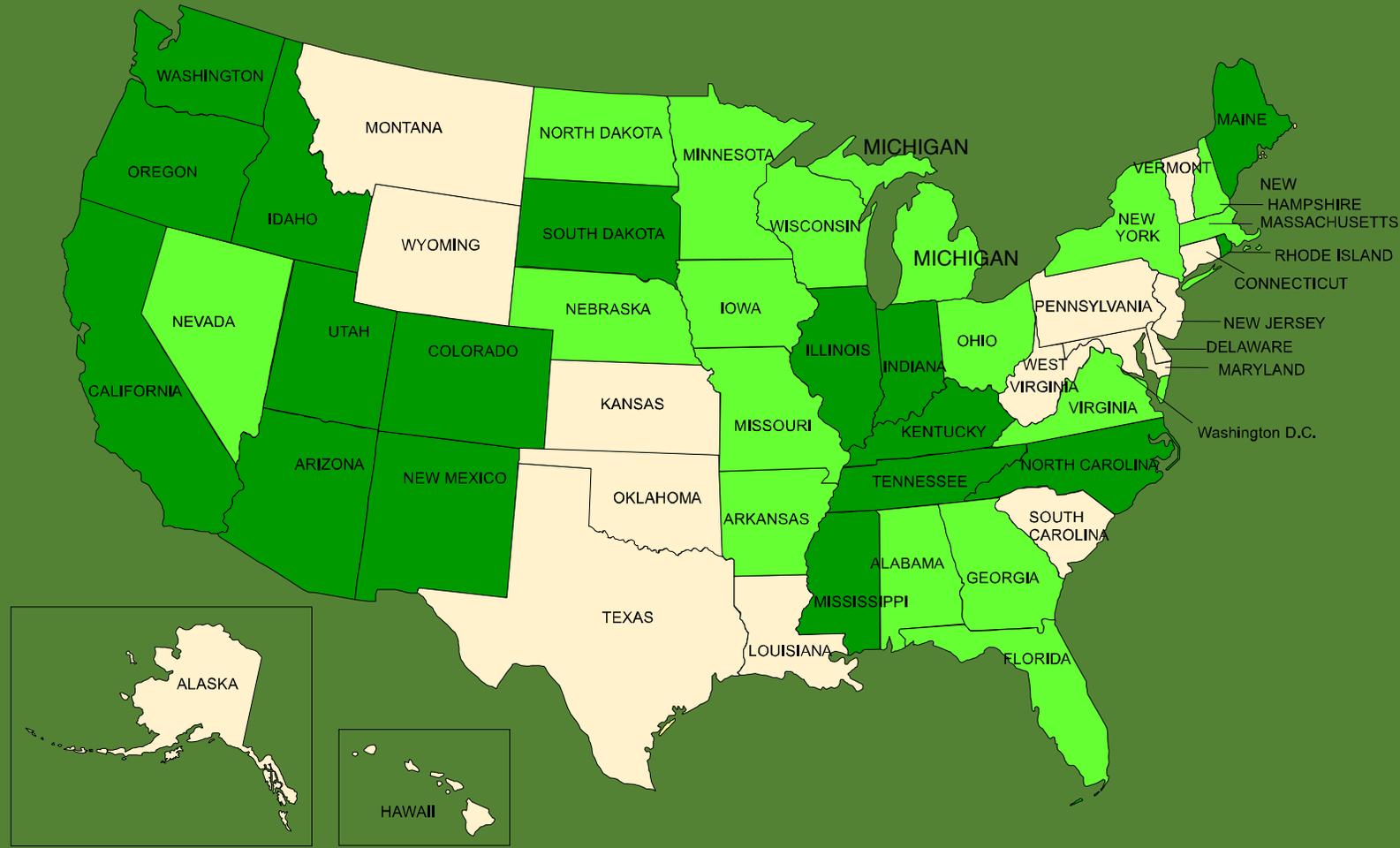
# Average Annual Wage 2022 Adj for Value of \$100

**Below the National Average Adjusted Wage-  
Bottom 10 States**



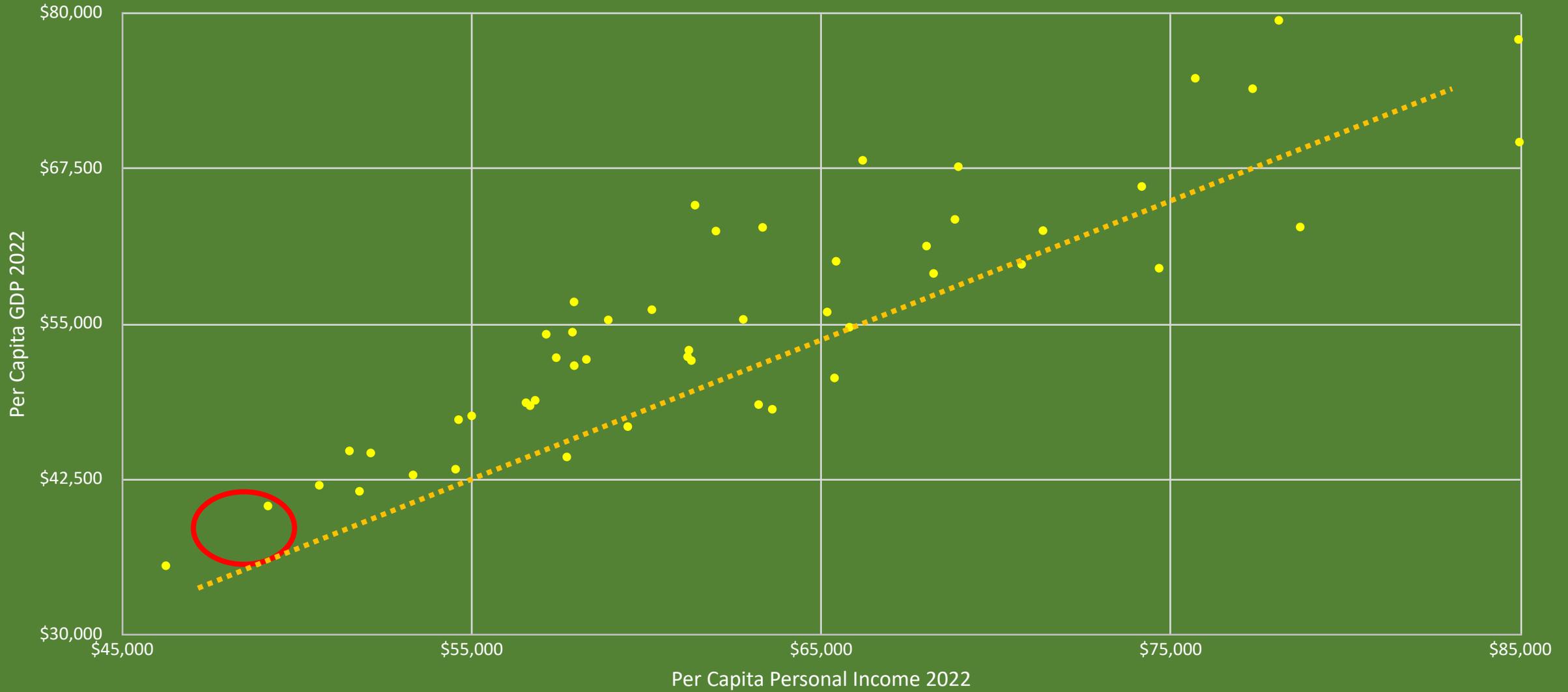
# Per Capita Personal Income 2019 - 2022

**U.S. 16.3%**  
**WV 14.5%**

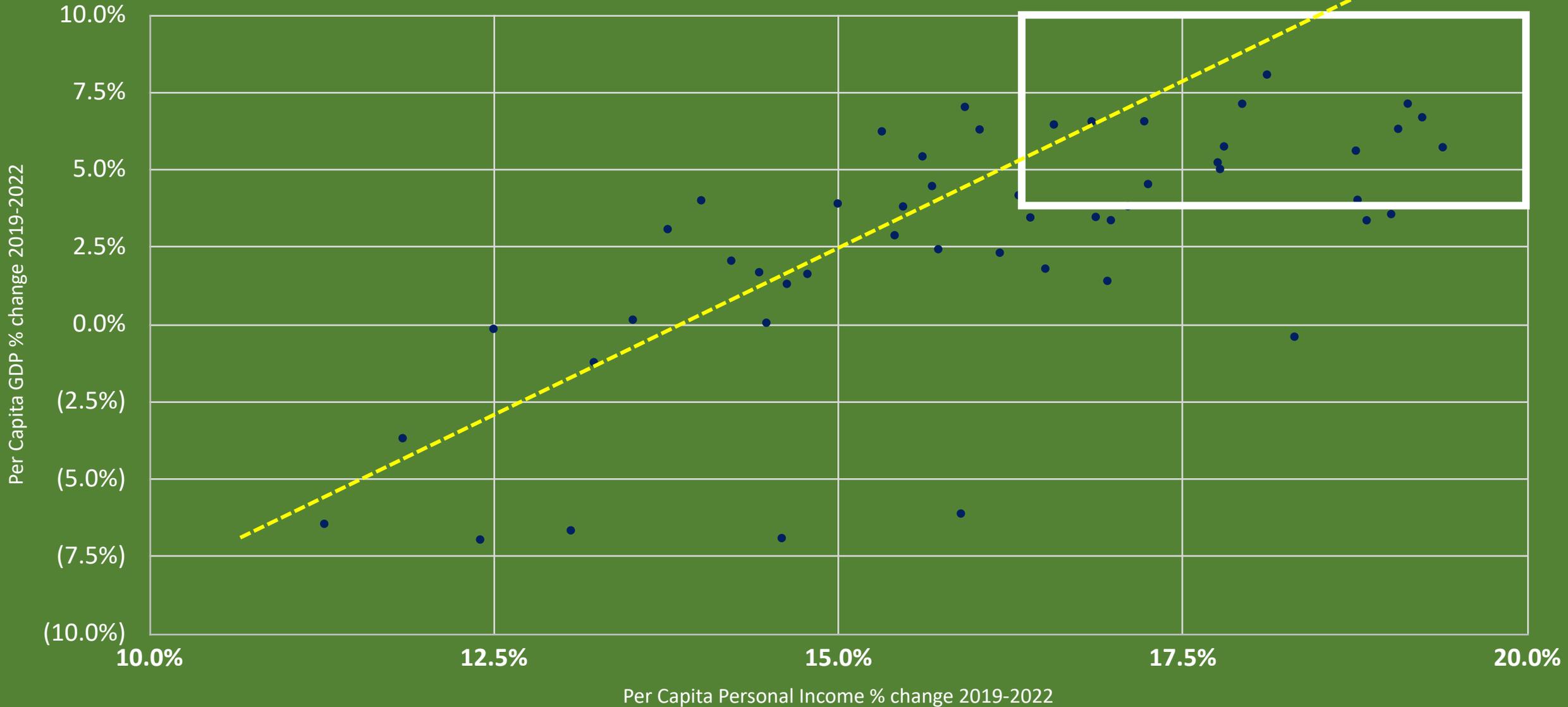


**Top Third – over 17%**      **Middle Third – 15% to 17%**      **Bottom Third – under 15%**

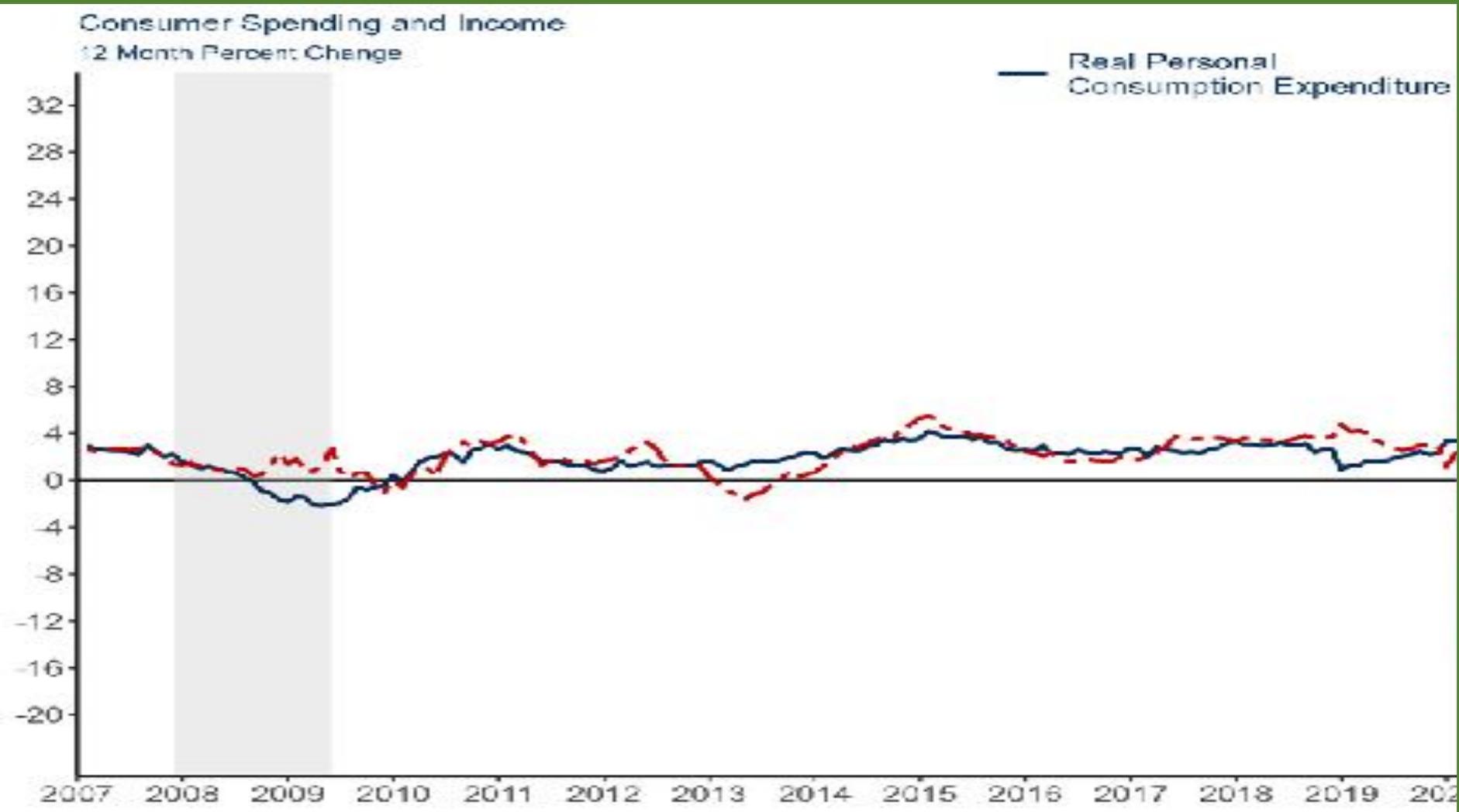
# Per Capita GDP vs Per Capita Personal Income



# 3 Year Growth in Per Capita GDP vs Per Capita Personal Income

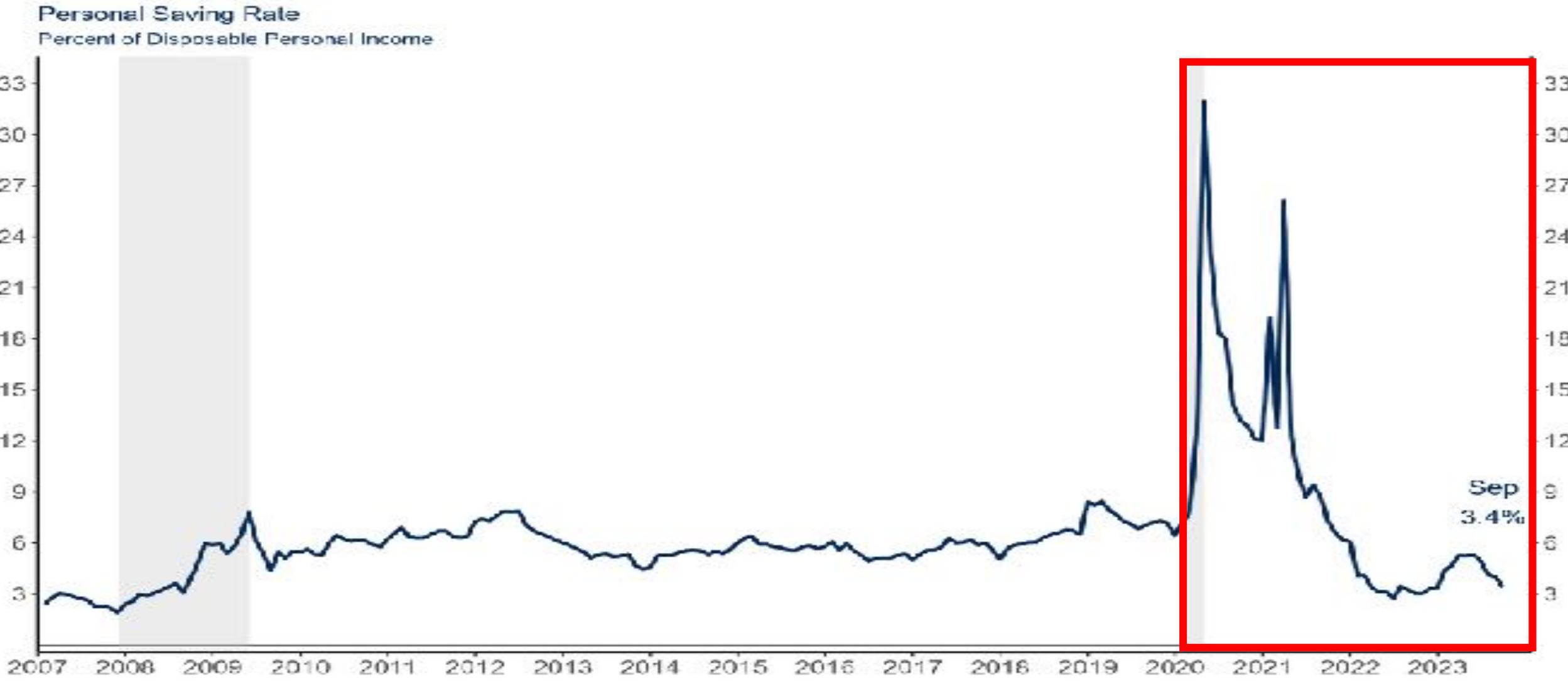


# Consumer Spending and Income

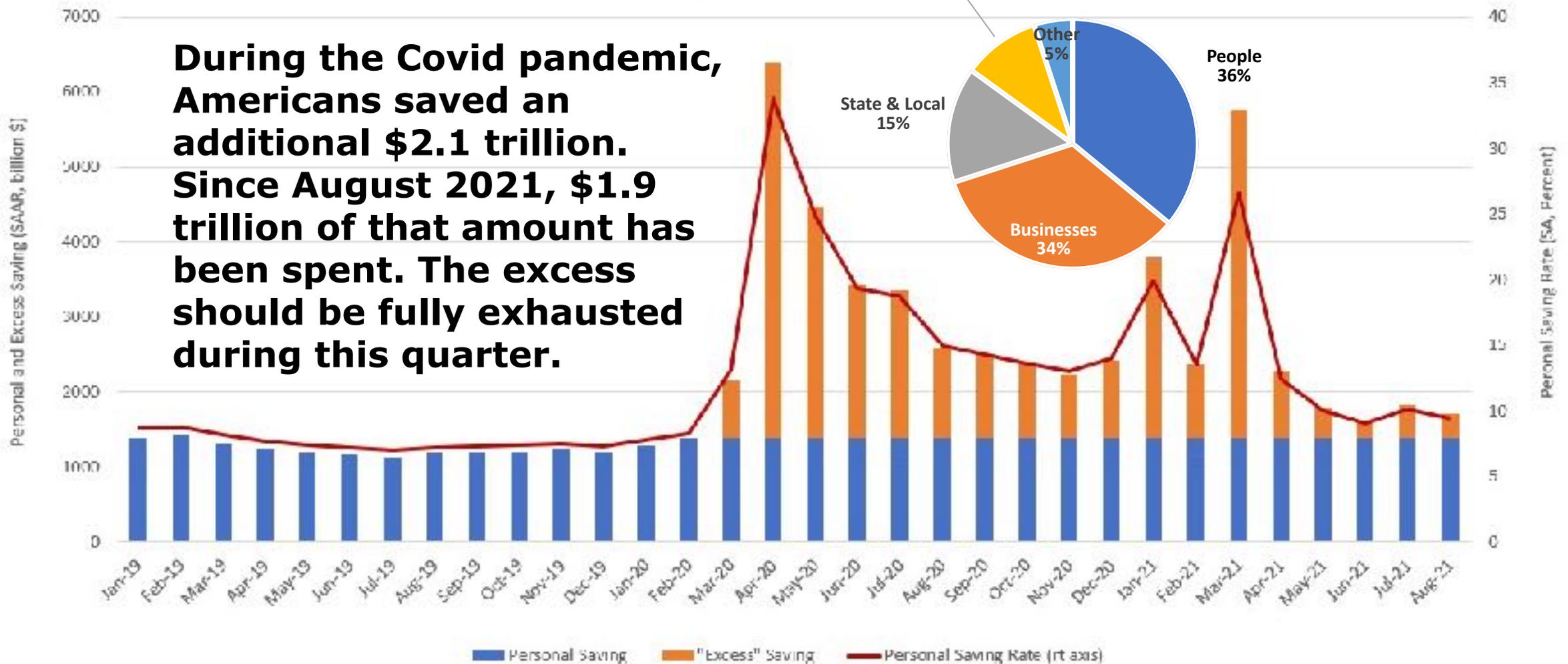


Source: Bureau of Economic Analysis via Haver Analytics

# Personal Saving Rate



## Personal Saving and Personal Saving Rate



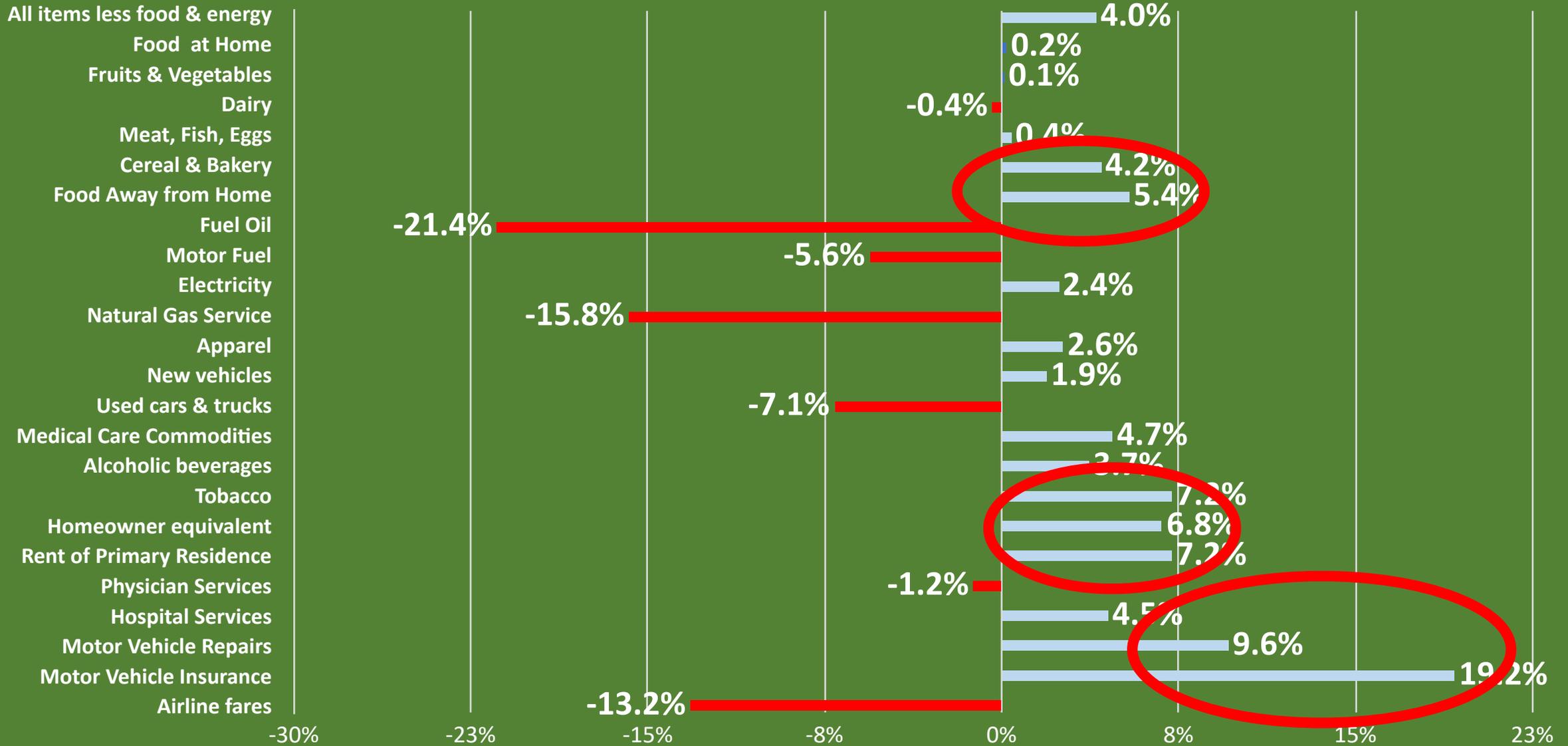
SOURCE: Bureau of Economic Analysis

# Change in Personal Consumption Expenditures Price Index

Monthly from a year ago; September 2003 to September 2023



# Consumer Price Index Percent Change Oct 2022 – Oct 2023

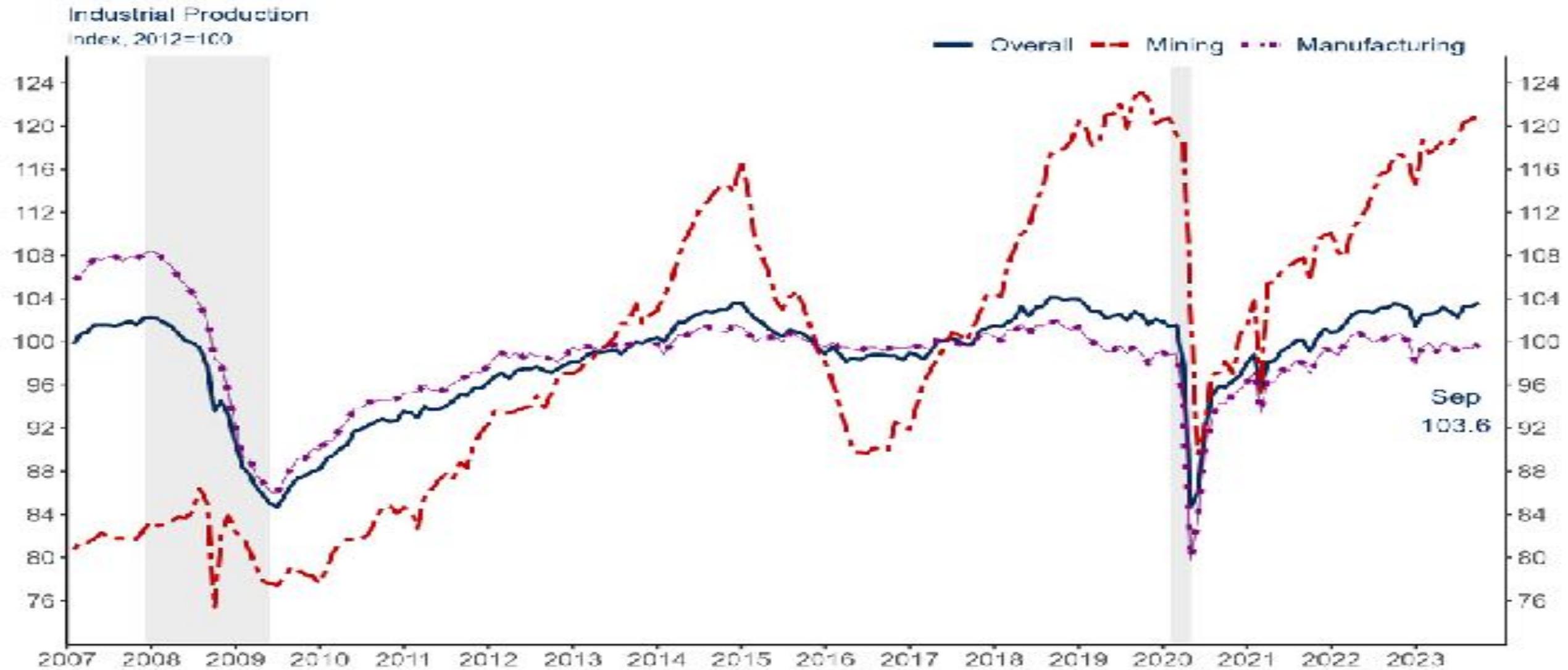


Source: U.S. Bureau of Labor Statistics



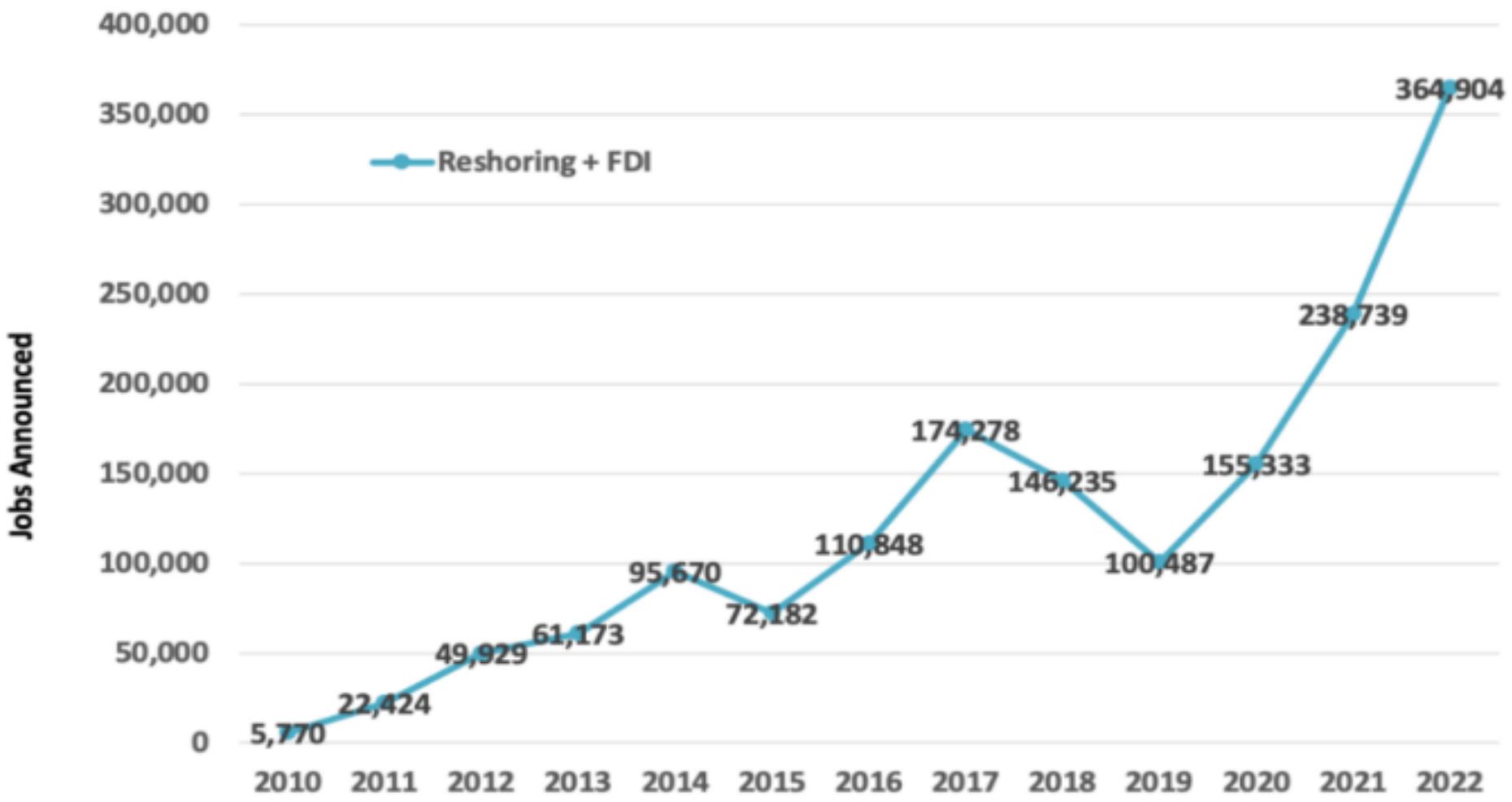
Manufacturing

# Industrial Production



Source: Board of Governors via Haver Analytics

# Manufacturing Job Announcements per Year, Reshoring + FDI, 2010 thru 2022

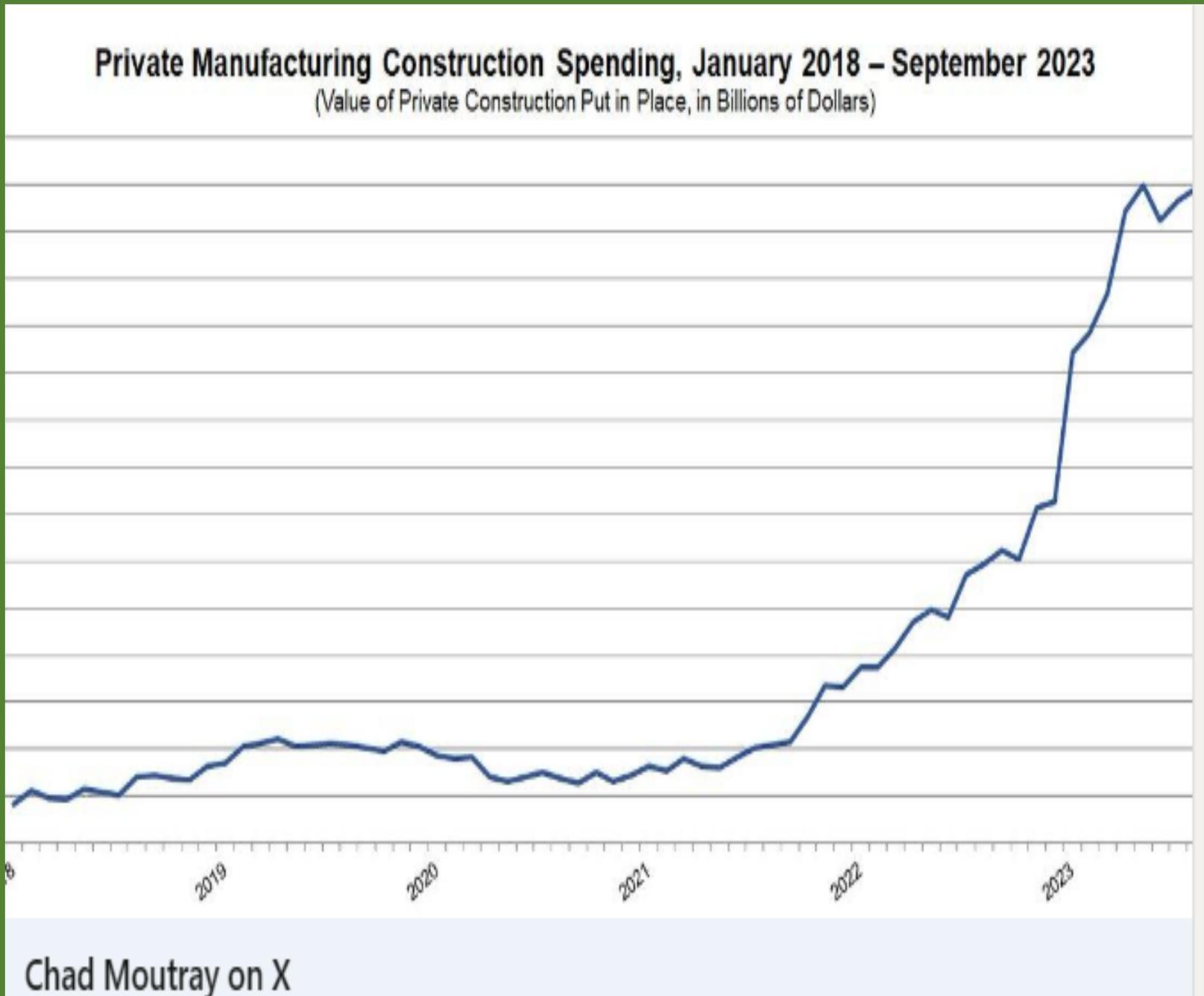


Source: Reshoring Initiative Library data

“Manufacturing construction put in place has soared dramatically, up 62.5% year-over-year, as the sector continues to make significant increases in the capacity in the United States.”



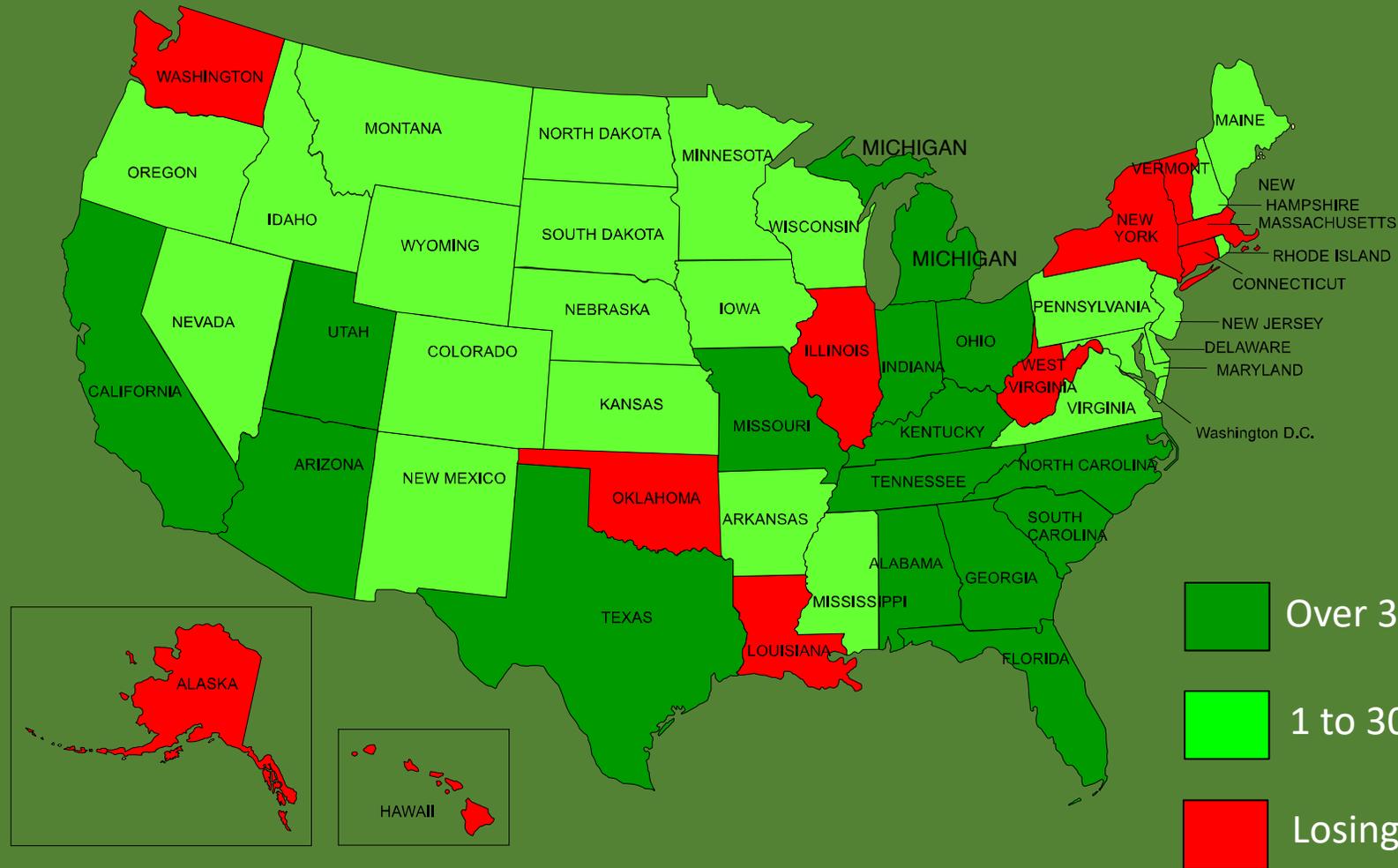
Chad Moutray • 1st  
Chief Economist, National Association of Manufacturers, and Director, Cente...  
1d • 5



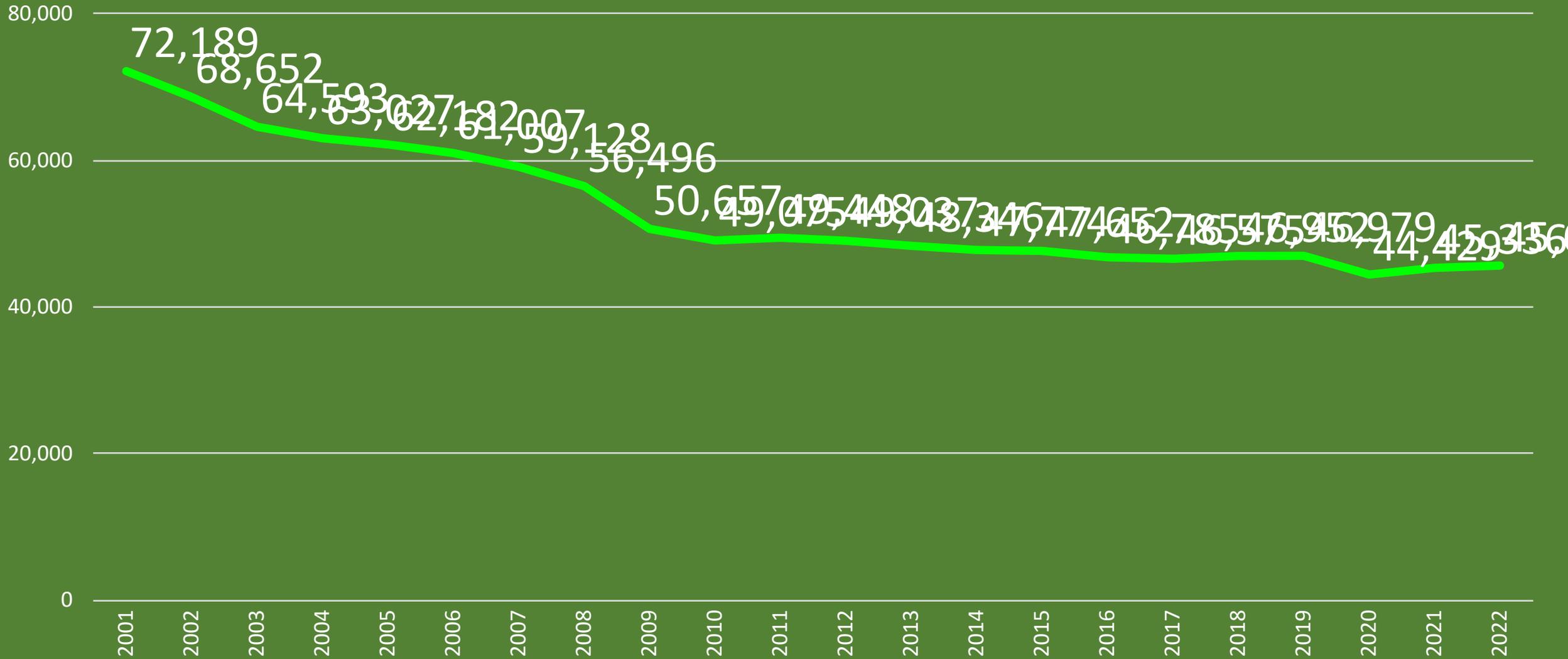
2022					2019
Rank	Industry	Jobs	Companies	% of jobs	% of jobs
1	Electrical Equipment, Appliances & Components	151,905	381	42%	4%
2	Computer & Electronic Products	93,445	375	26%	13%
3	Chemicals	28,350	303	8%	11%
4	Transportation Equipment	25,938	146	7%	34%
5	Medical Equipment & Supplies	14,468	105	4%	4%
6	Apparel & Textiles	10,674	138	3%	6%
7	Primary Metal Products	9,569	49	3%	3%
8	Machinery	5,971	88	2%	3%
9	Food & Beverage	4,408	44	1%	2%
10	Miscellaneous, Including Hobbies	3,863	25	1%	1%
11	Castings/Foundries - Subset of Primary Metal Products	3,450	20	1%	1%
12	Fabricated Metal Products	2,984	33	1%	5%
13	Plastic & Rubber Products	2,913	36	1%	3%
14	Wood & Paper Products	2,815	21	1%	4%
15	Nonmetallic Mineral Products	2,276	26	1%	1%
16	Furniture and Related Products	1,880	30	1%	3%

# Change Manufacturing Jobs 2013-2023

**U.S. 8.7%**  
**WV -3.1%**



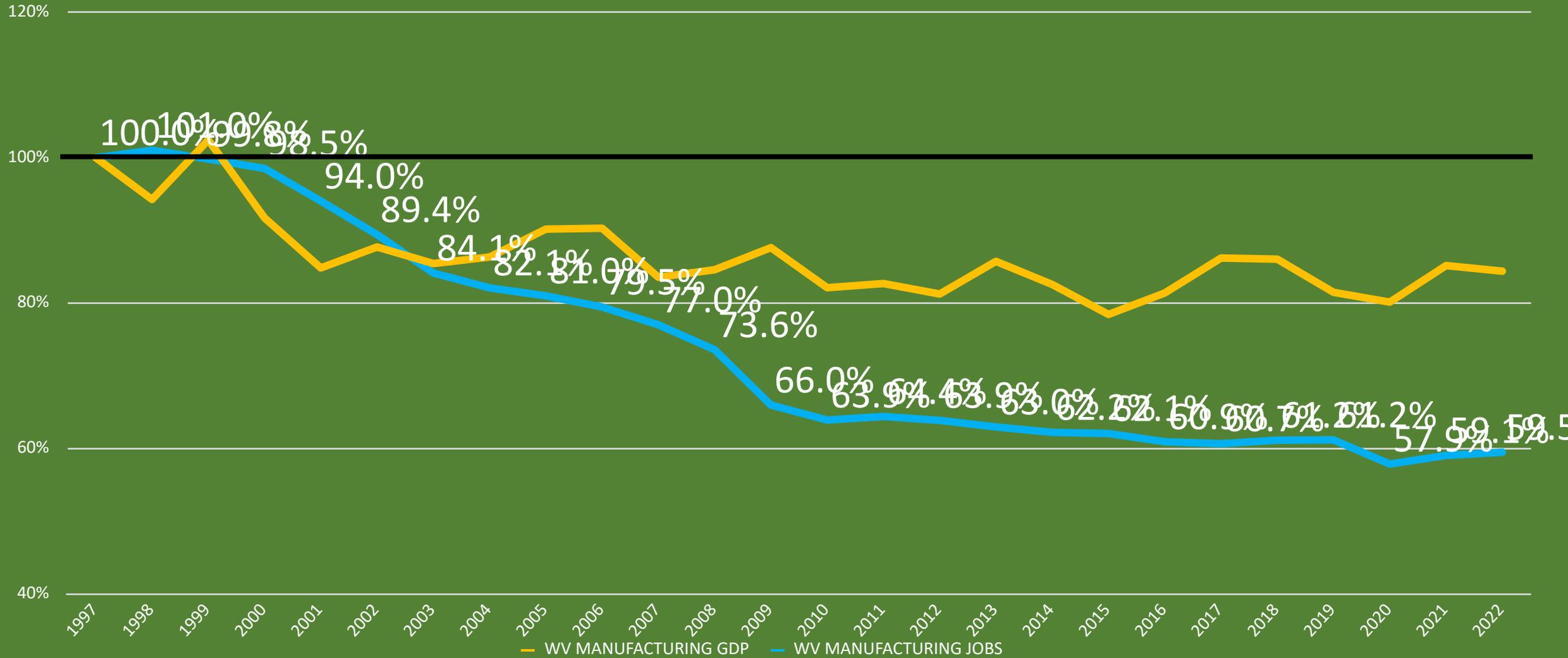
# West Virginia Manufacturing Jobs 2001 – 2022



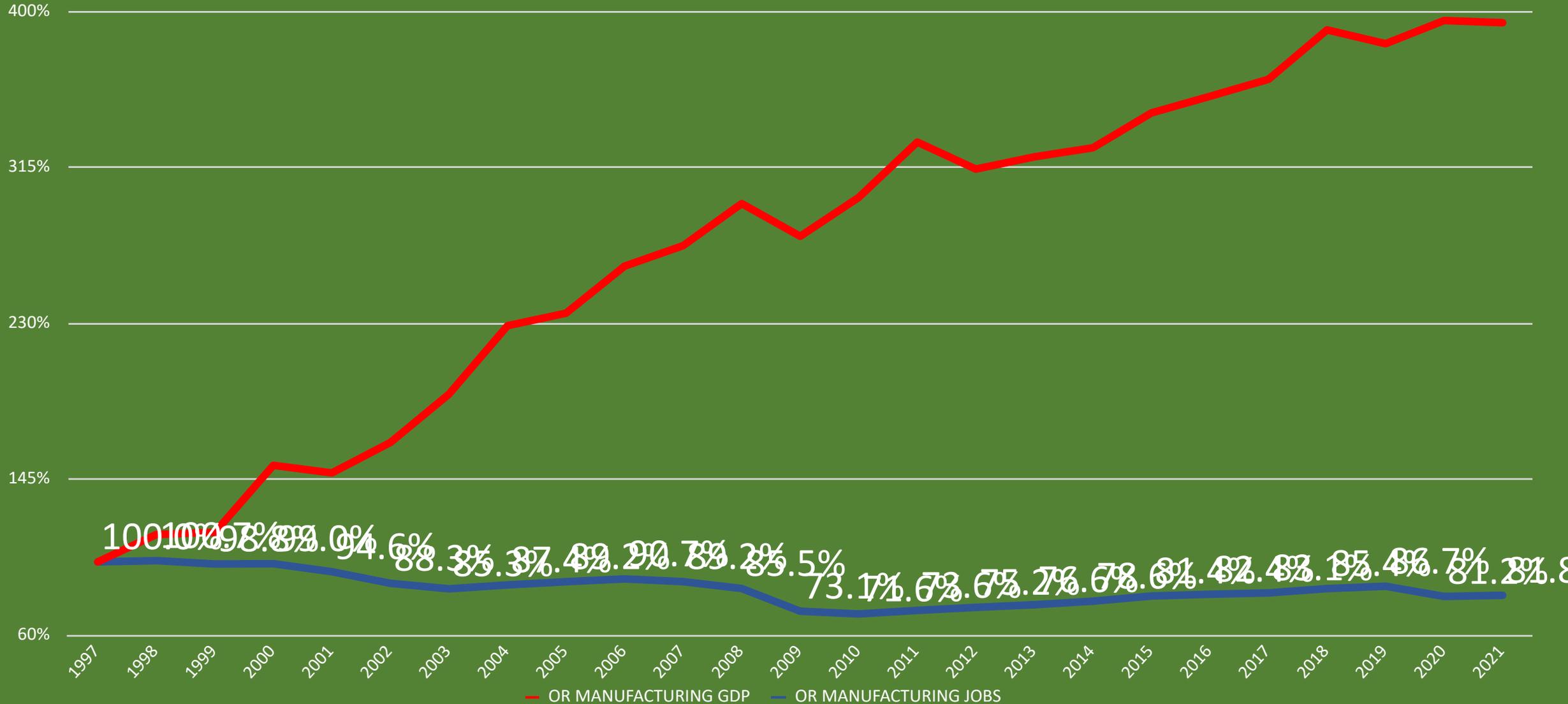
Source: US Bureau of Labor Statistics QCEW

# West Virginia Manufacturing Jobs and Manufacturing GDP Growth

1997 – 2022 (normalized as percent of levels in 1997)



# Oregon Manufacturing Jobs and Manufacturing GDP Growth 1997 – 2021 (normalized as percent of levels in 1997)



In 2017, our 1<sup>st</sup> rankings, West Virginia was ranked 50<sup>th</sup>. It was ranked 46<sup>th</sup> in the latest.

The business climate has improved from 46<sup>th</sup> to 31<sup>st</sup> and infrastructure from 36<sup>th</sup> to 15<sup>th</sup>.

## Top 10 States

- 1) Utah
- 2) North Carolina
- 3) Tennessee
- 4) Idaho
- 5) Texas
- 6) Florida
- 7) Virginia
- 8) Kentucky
- 9) Arizona
- 10) Georgia

2023 OVERALL STATE RANKINGS						
		BUSINESS CLIMATE	WORKFORCE	INFRA-STRUCTURE	INNOVATION	ECONOMIC STRENGTH
1	Utah	3	2	3	11	8
2	North Carolina	1	3T	18	6	19
3T	Tennessee	6T	20	22	19	7
3T	Idaho	5	21	12	15T	21
5	Texas	20	26	6	7	16
6	Florida	9	15	14	12	26
7	Virginia	6T	6	7	34	35
8	Kentucky	15T	24	9	40	1
9	Arizona	12	27	27T	13	11
10	Georgia	24T	13	13	15T	30T
11	Nebraska	17	5	24	33	18
12	New Hampshire	29	3T	33	21	13T
13	Indiana	14	7	41	35	5
14T	Colorado	27	1	50	3	28
14T	South Dakota	2	18	5	44	40
16T	Washington	31T	8	49	1	22
16T	Michigan	15T	34	40	20	2
18	North Dakota	8	19	1	47	39
19	Wisconsin	34	11T	34T	27T	10
20	Kansas	35	30	8	32	13T
21	New Jersey	49	11T	23	8	29
22	Iowa	43	14	19	43	3T
23T	Wyoming	4	23	27T	36T	34
23T	Ohio	18	28	36	25	17
23T	Oregon	36T	46	25T	4	13T
26	California	50	25	42T	2	6
27	Maryland	38	17	10	15T	46
28	Missouri	10	40	39	14	24T
29	Mississippi	13	45	17	42	11
30T	Connecticut	33	10	37	23	30T
30T	New Mexico	21	47	2	18	45
32	Vermont	39	16	11	27T	42
33	Alabama	26	39	27T	36T	9
34	Massachusetts	40	9	48	5	36
35	South Carolina	19	37T	34T	29	20
36	Pennsylvania	46	31	21	10	32
37	Illinois	48	22	45	24	3T
38	Montana	22	33	4	36T	48
39	Minnesota	47	32	16	26	27
40	Delaware	28	29	32	30	37
41	Oklahoma	11	43	20	41	43
42	New York	44T	37T	30T	9	41
43	Arkansas	23	41	30T	45	23
44	Maine	36T	44	38	22	24T
45	Nevada	24T	26	47	31	28
46	West Virginia	31T	50	15	50	44
47	Rhode Island	41	35	44	38	47
48T	Hawaii	30	42	42T	49	49
48T	Alaska	42	49	25T	46	50
50	Louisiana	44T	48	46	48	33

top 15

bottom 15

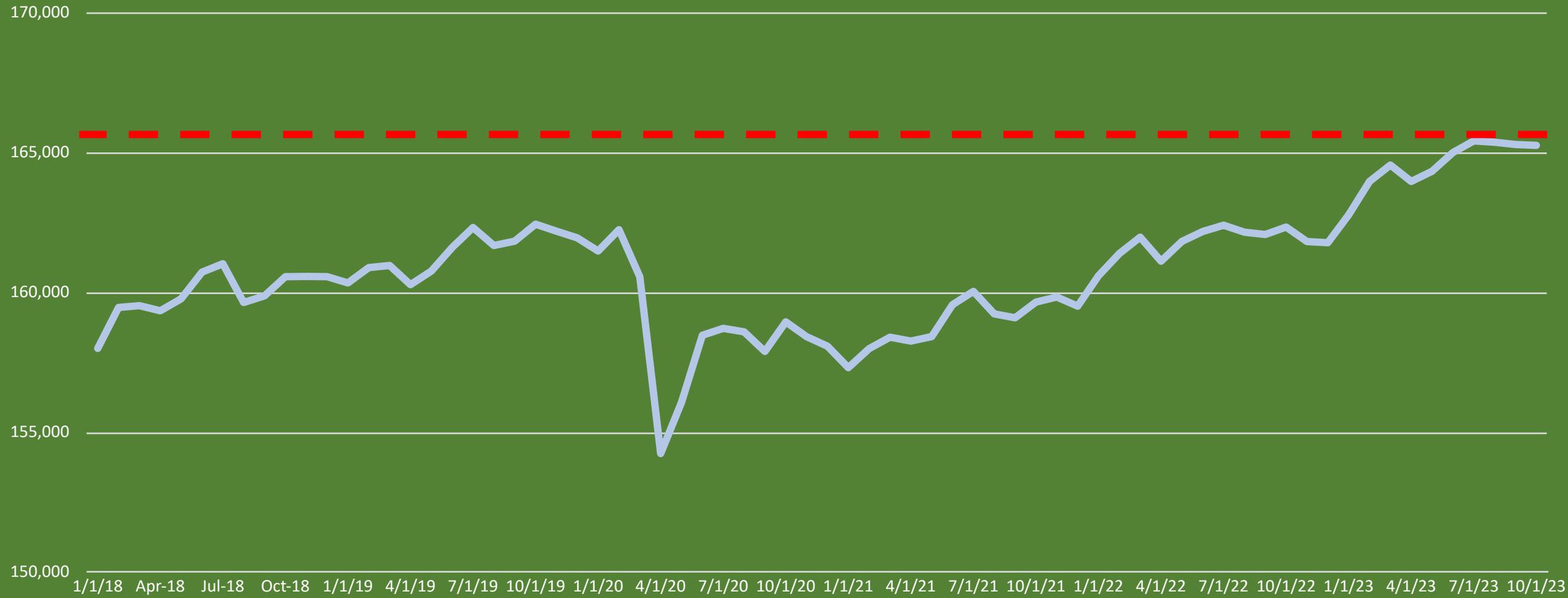
# Top Site Selection Issues 2023

- 1-Availability of Skilled Labor
- 1-Energy Availability
- 3-Labor Costs (tie)
- 3-Proximity to Major Markets
- 3-State and Local Incentives
- 6-Energy Costs
- 7-Highway Accessibility
- 7-Proximity to Suppliers
- 7-Availability of Land
- 10-Expedited/fast-tracked Permitting
- 10-Construction Costs

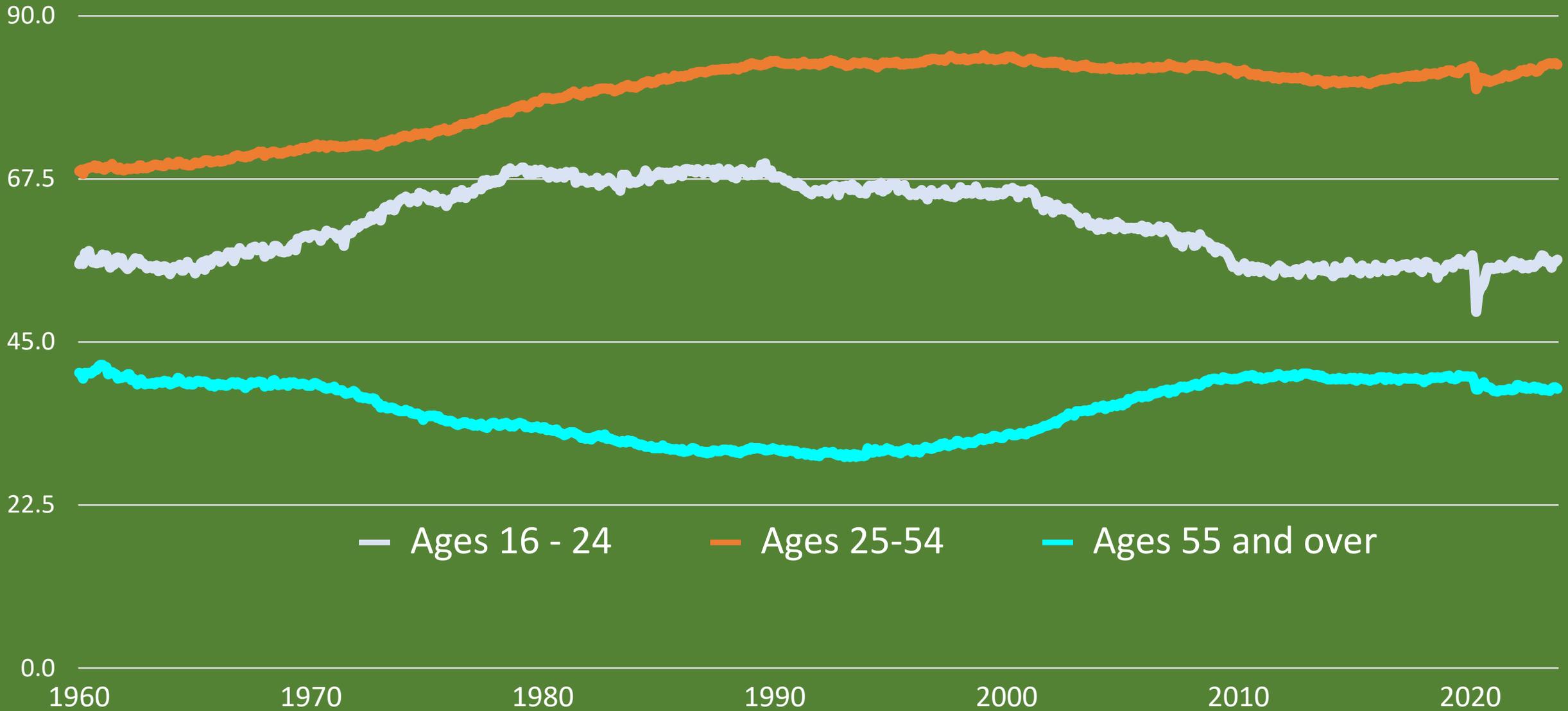


# U.S. Labor Force

18 & older (in \$thousands)



# US Labor Force Participation Rate 1960 - 2023



— Ages 16 - 24

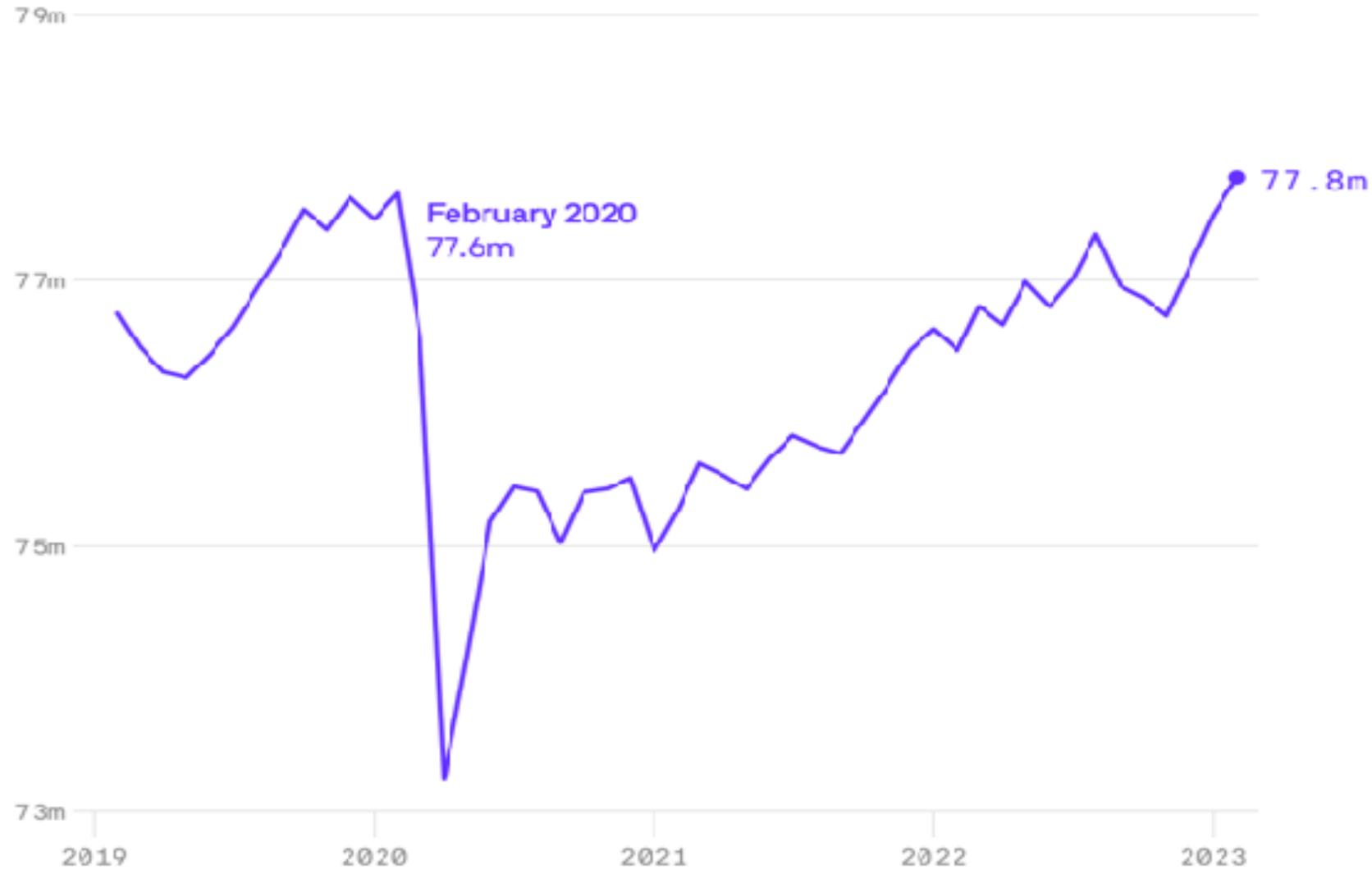
— Ages 25-54

— Ages 55 and over

Source: US Bureau of Labor Statistics

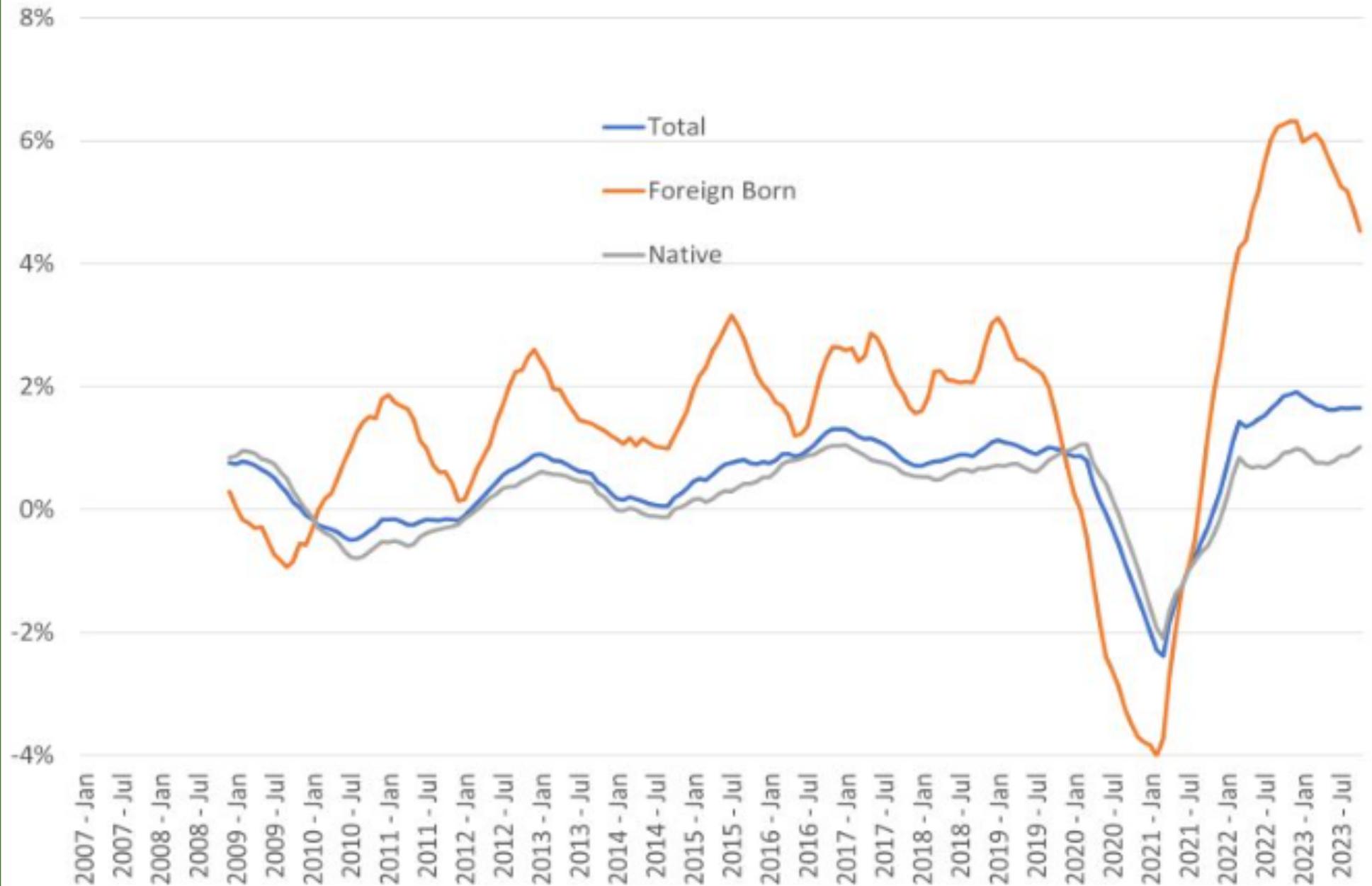
# Women in the U.S. labor force

Monthly; February 2019 to February 2023



Women's labor force participation is at 57.2%, back to the February 2020 rate and more women work today than anytime in history.

Percent Change in the labor Force, Last 12 Months versus Previous 12 Months



PREMIUM



**Gad Levanon**

Chief Economist at The Burning Glass Institute

# Workforce: A Throttle on American Growth

Last year Economic Leadership completed a national study- the lack of workers, and workers with specific skills has slowed growth in our economy!

Ted Abernathy    Economic Leadership

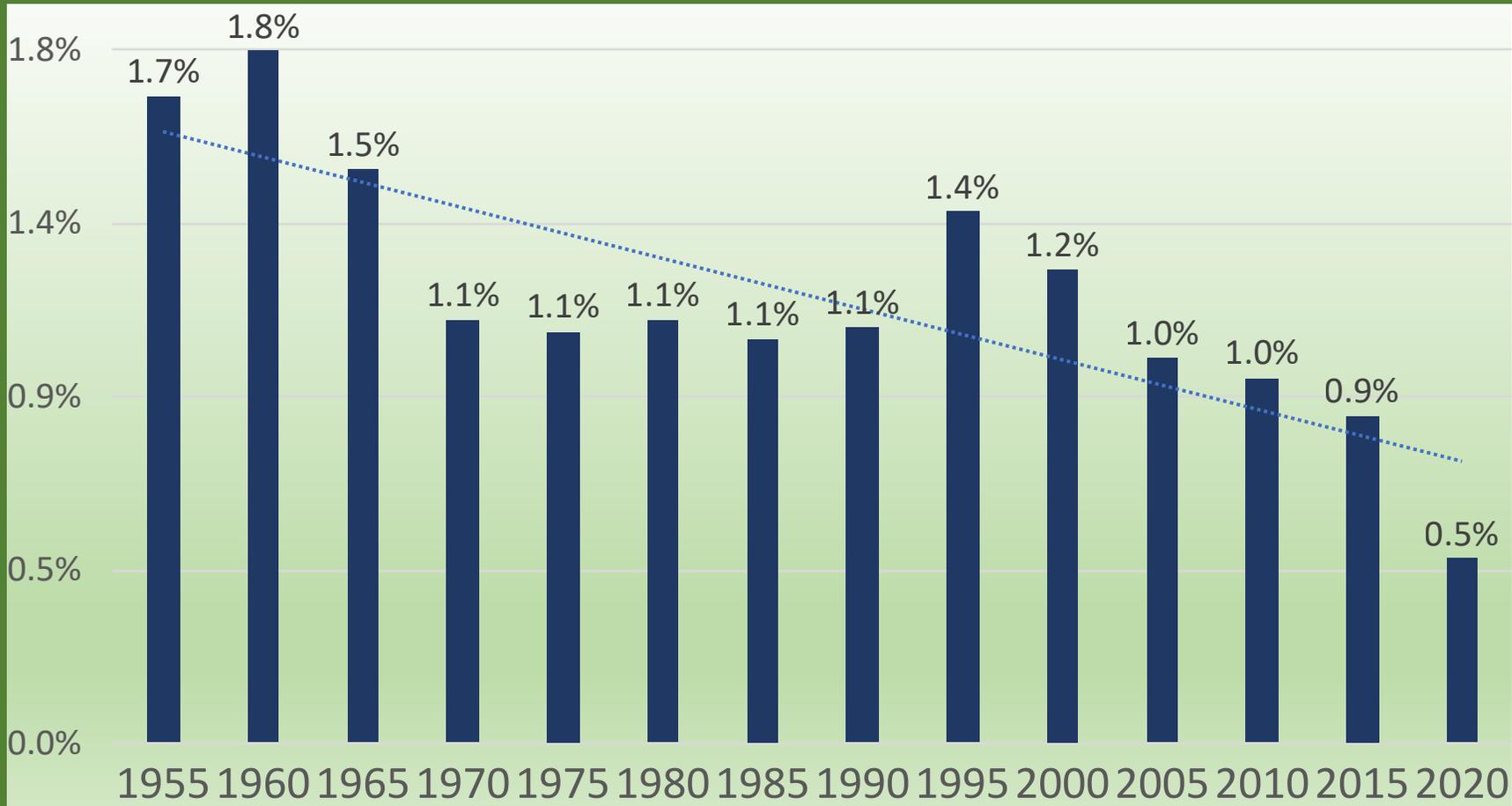
**A 50-State Scan of Business Efforts to  
Address the National Workforce Challenge**



August 2022

# US Population Growth Rate

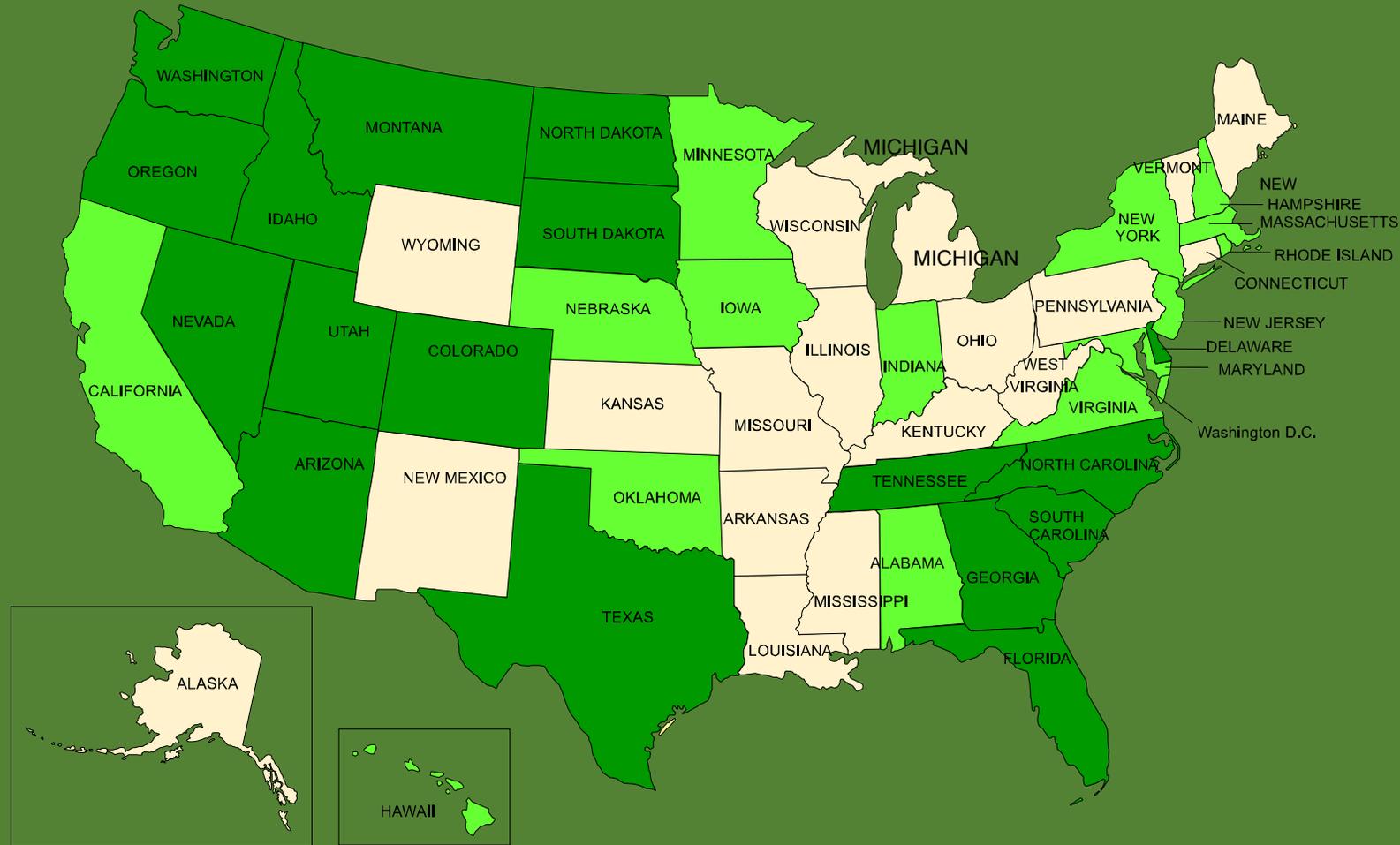
1960 US Fertility Rate-3.7 children-2020 it was 1.6 children



# Population 10 Year Annual Growth Rate

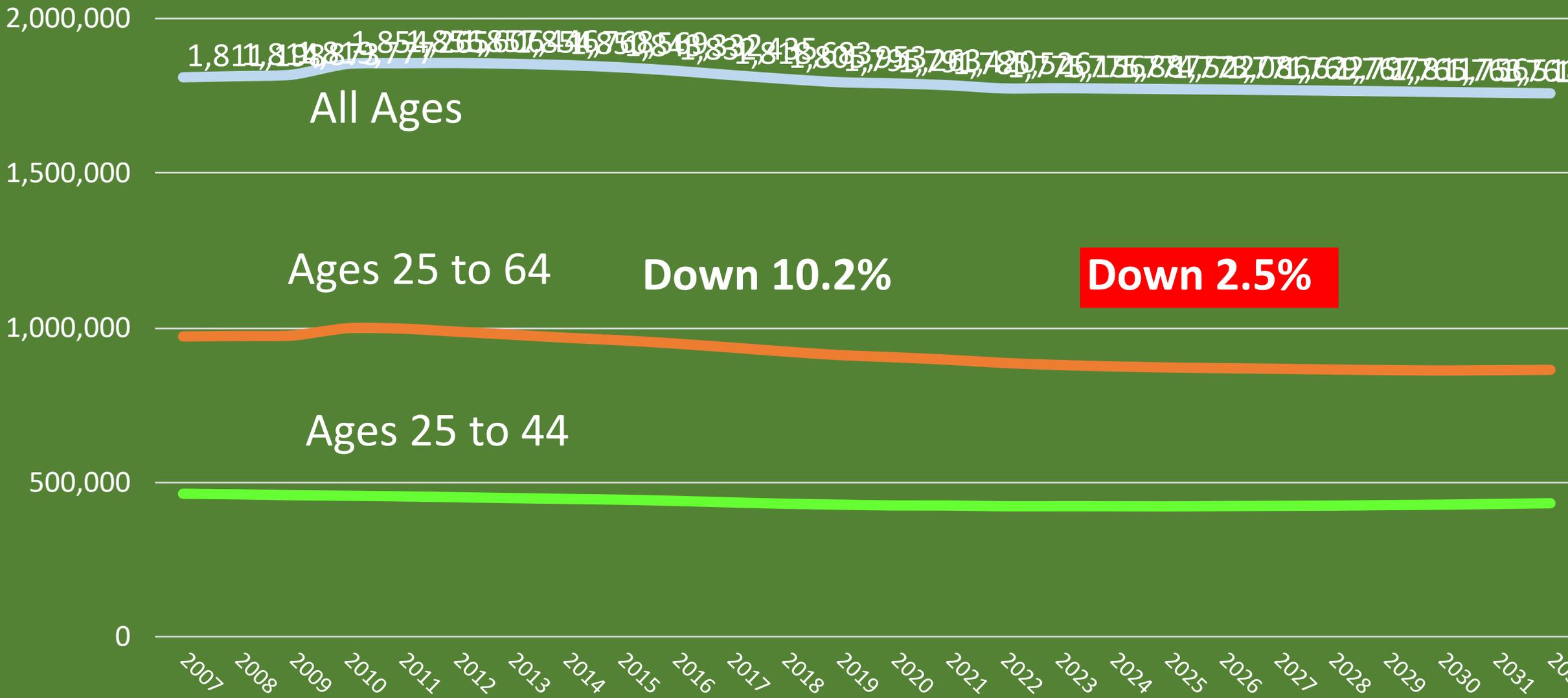


People are voting with their feet



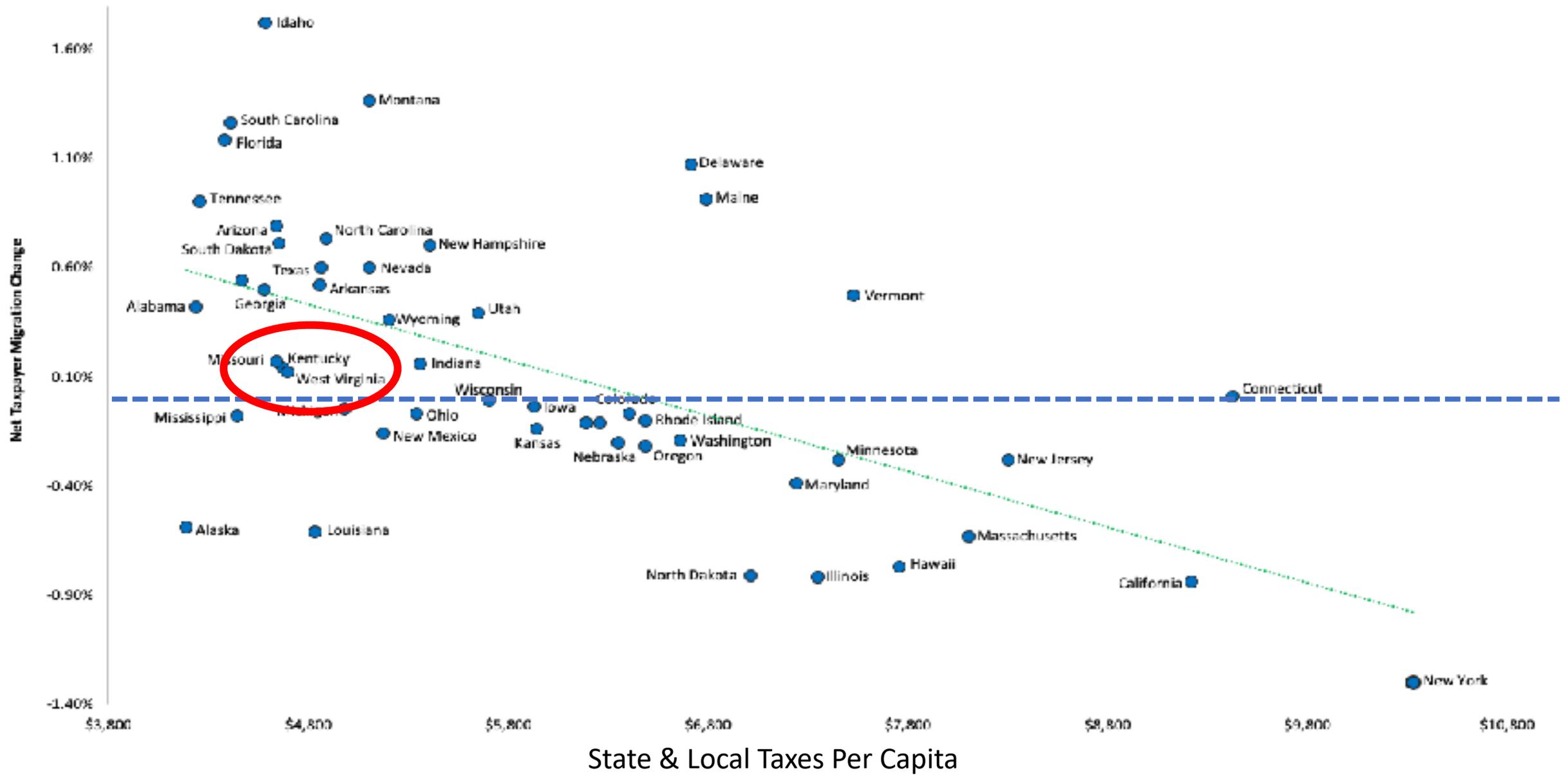
 Top Third – over 0.8%  Middle Third – 0.4% to 0.8%  Bottom Third – under 0.4%

# WV Population by Age Group 2007-2032

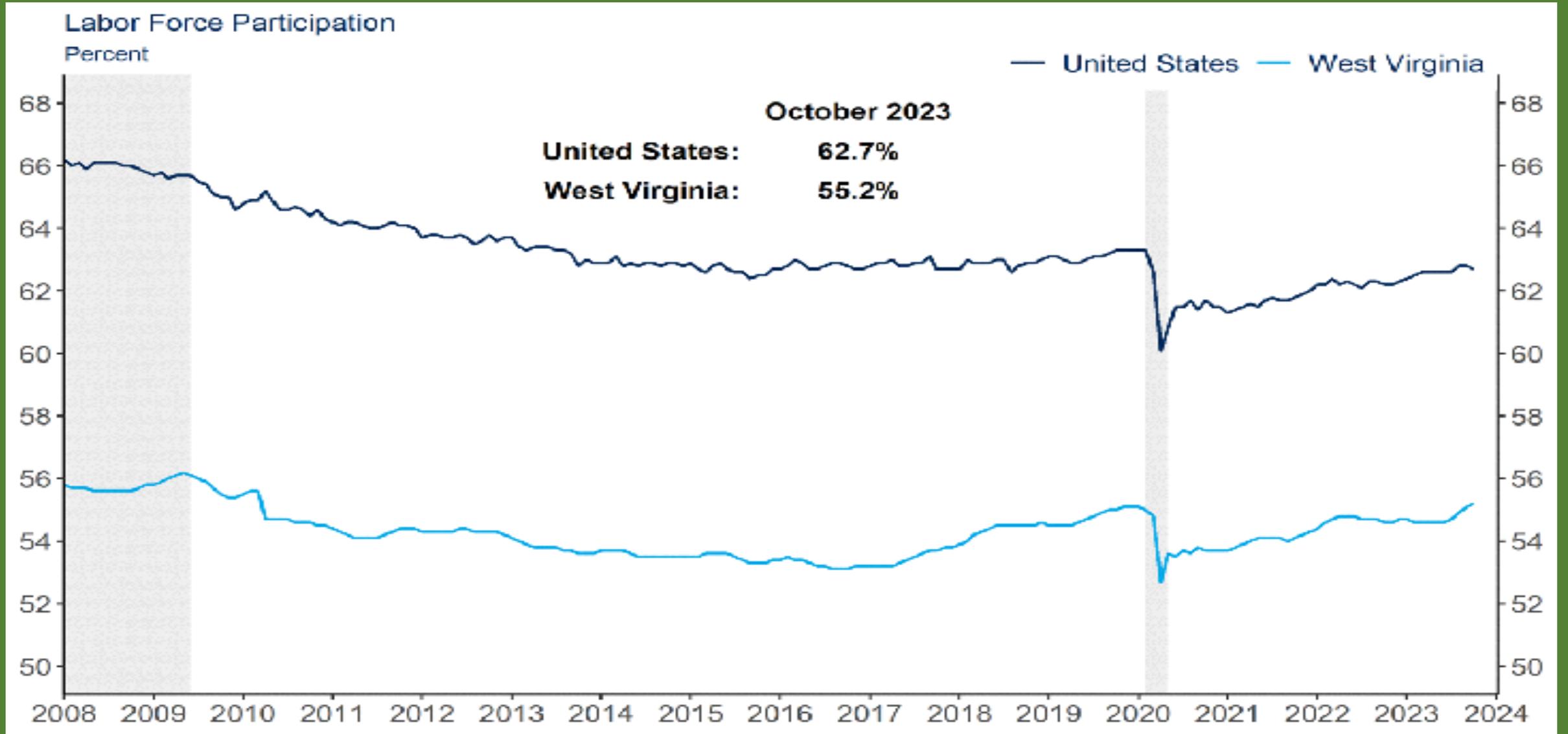






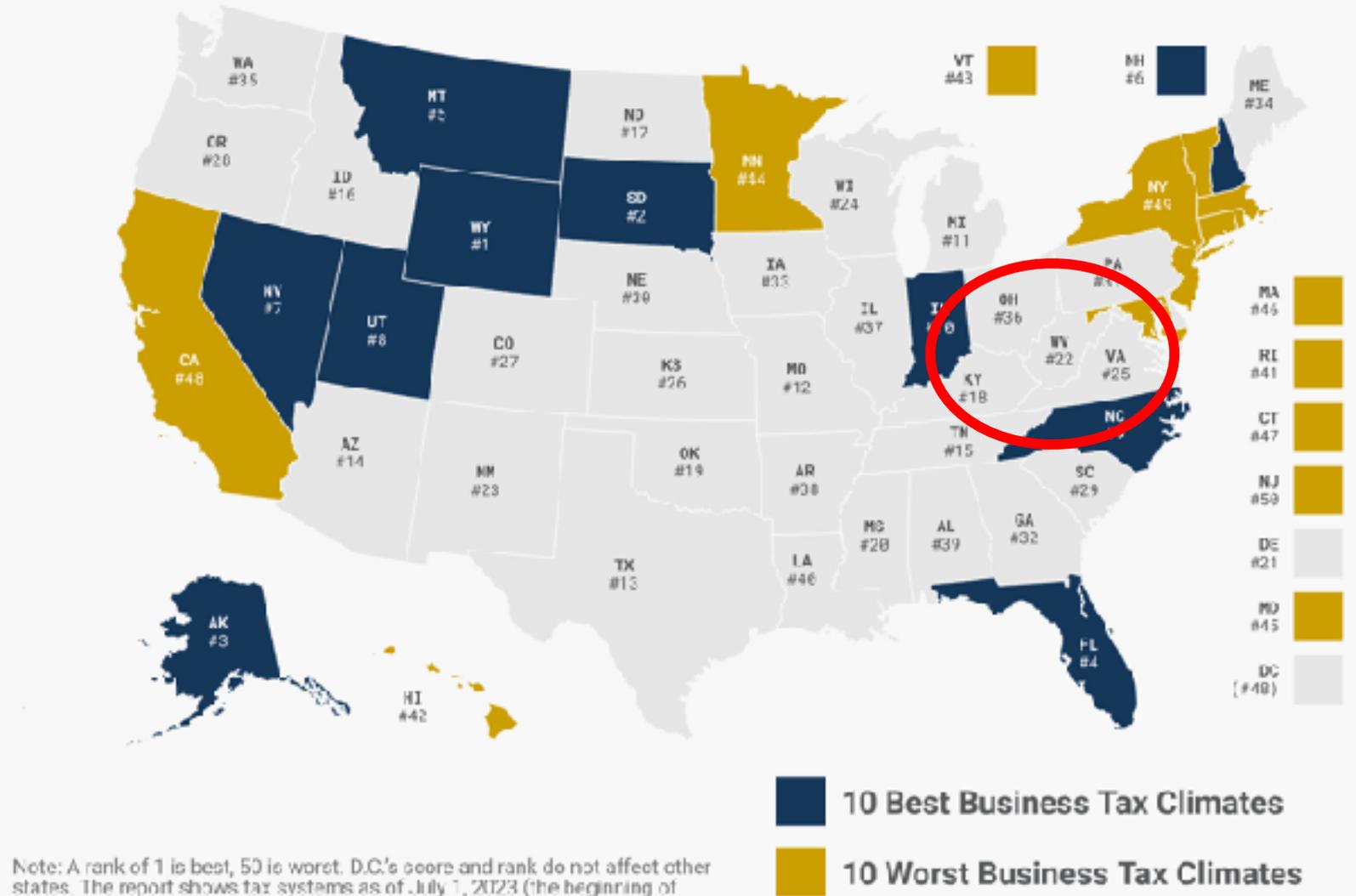


# West Virginia Labor Force Participation



# West Virginia #22

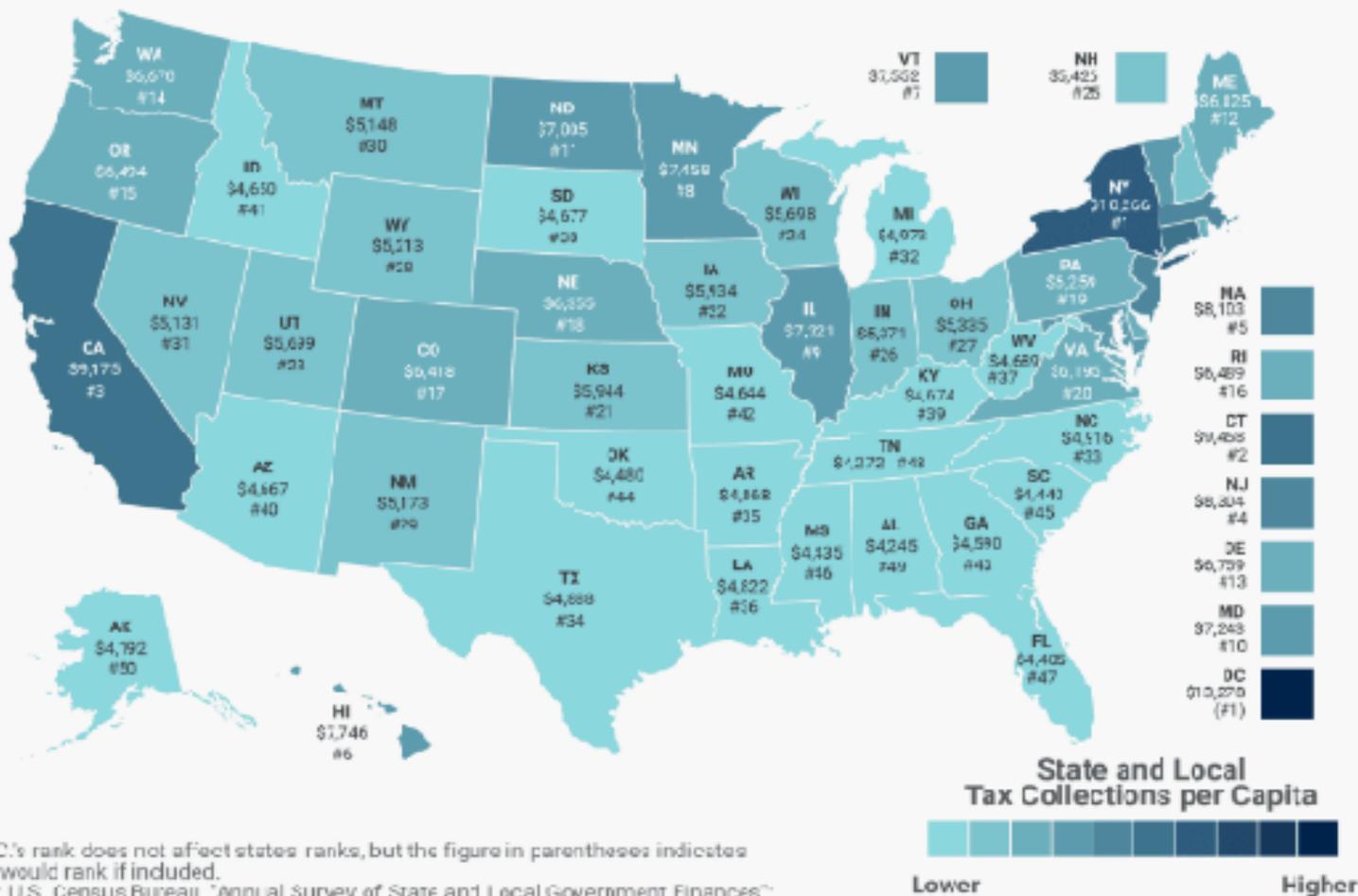
## 2024 State Business Tax Climate Index



Note: A rank of 1 is best, 50 is worst. D.C.'s score and rank do not affect other states. The report shows tax systems as of July 1, 2023 (the beginning of Fiscal Year 2024). Source: Tax Foundation.

# How High are State and Local Tax Collections in Your State?

State and Local Tax Collections Per Capita, Fiscal Year 2021



Notes: D.C.'s rank does not affect states ranks, but the figure in parentheses indicates where it would rank if included.  
Sources: U.S. Census Bureau, "Annual Survey of State and Local Government Finances"; Tax Foundation calculations

West Virginia ranks 37<sup>th</sup> in State and Local taxes collected per capita. (Among the lowest states)

# West Virginia Ranked Compared to All States

	<u>Job Growth</u>	<u>Wage Growth</u>	<u>GDP Growth</u>
1 Year 2021 – 2022	49	22	41
5 Year 2017 – 2022	45	41	45
10 Year 2012 - 2022	51	43	48

DC is included so that all rankings are of 51 “states”

# Latest Best States for Business Rankings

	Site Selection	CNBC	CEO Magazine	Business Facilities
1	Virginia	North Carolina	Texas	Texas
2	Georgia	Virginia	Florida	North Carolina
3	Texas	Tennessee	Tennessee	Virginia
4	North Carolina	Georgia	North Carolina	Utah
5	Arizona	Minnesota	Arizona	Tennessee
6	Ohio	Texas	Indiana	Colorado
7	Florida	Washington	Georgia	Washington
8	Indiana	Florida	South Carolina	Nevada
9	California	Utah	Nevada	Georgia
10	Illinois	Michigan	Utah	Florida

# WV 3<sup>rd</sup> Party Multifactor General Rankings

- U.S. News (2023) - 46<sup>th</sup>
- CNBC (2023) - 46<sup>th</sup>
- Chief Executive (2023) - 37<sup>th</sup>
- WalletHub- (2023) – 48<sup>th</sup>

(Not in top 25 for Site Selection)

# WV 3<sup>rd</sup> Party Multifactor General Rankings

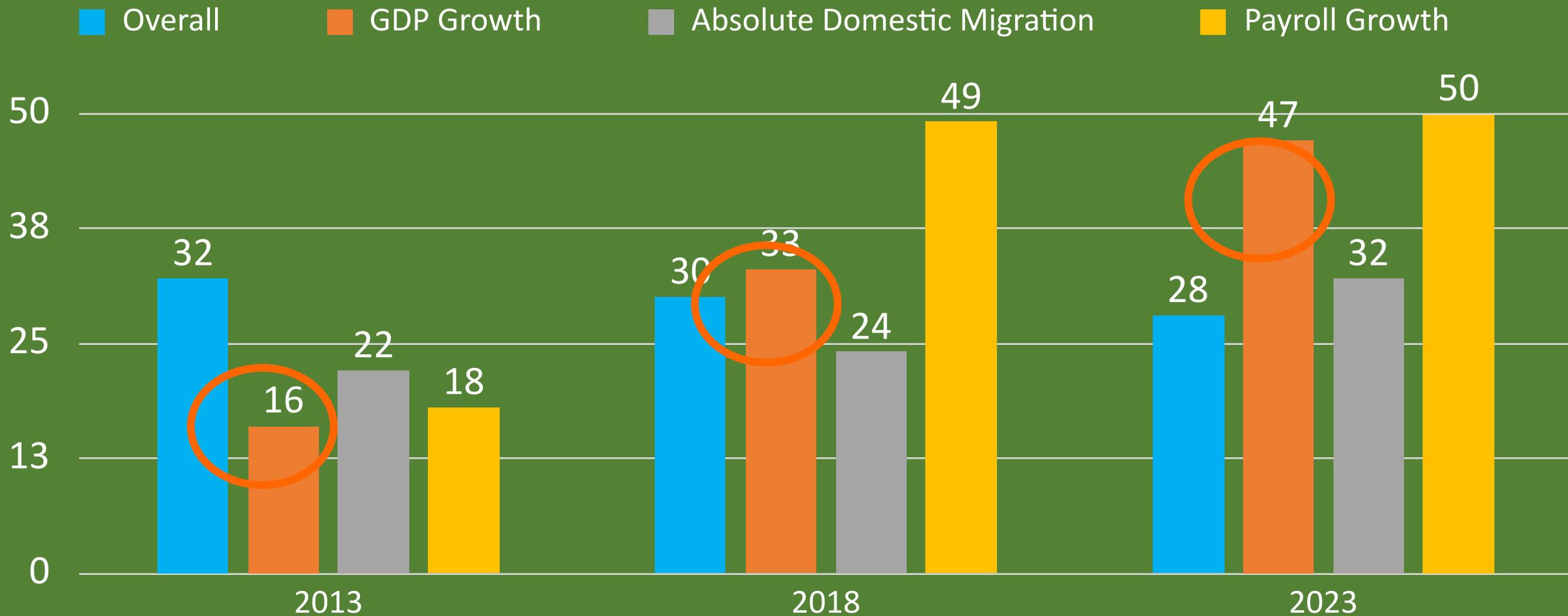
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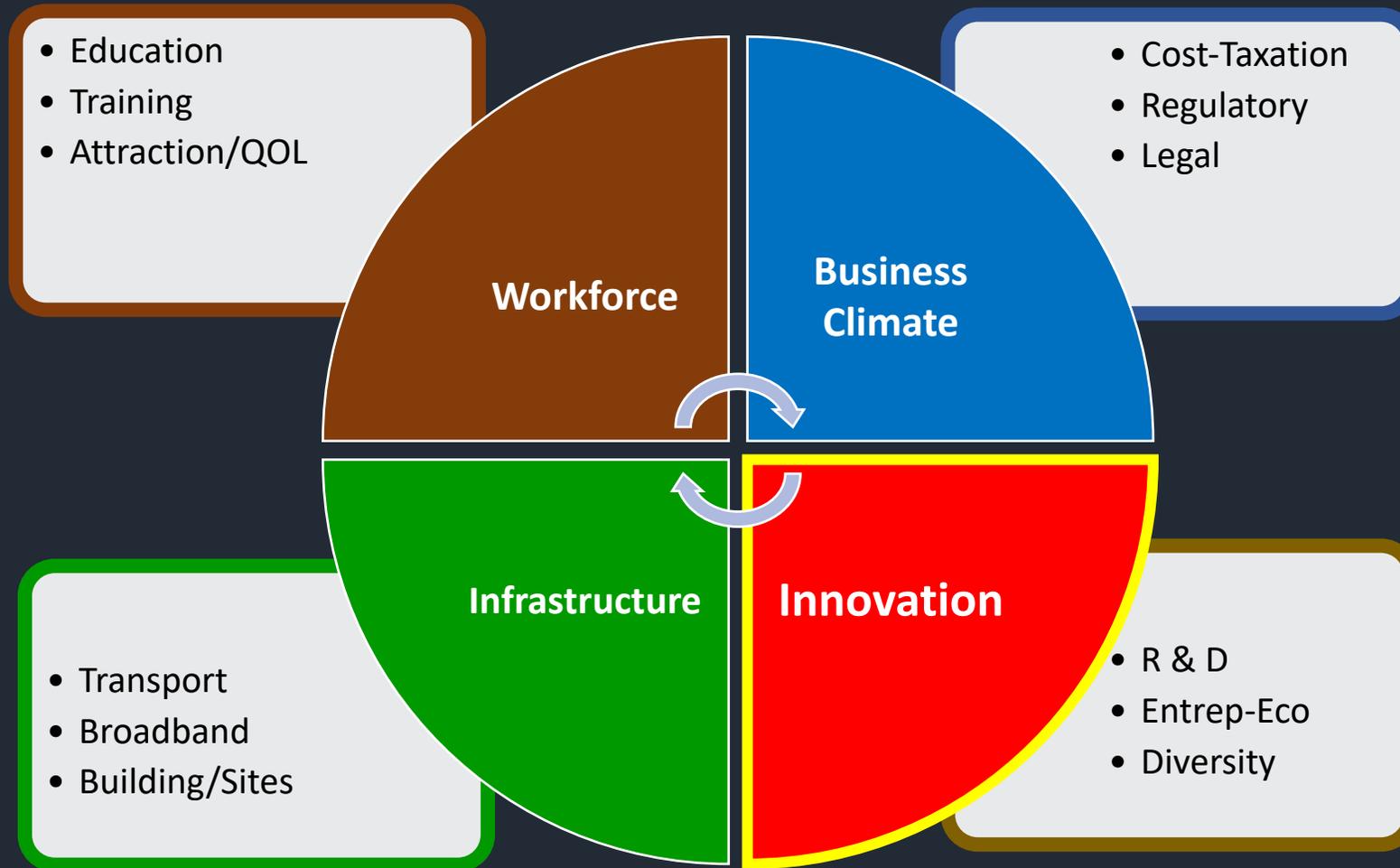
Workforce	50 <sup>th</sup>
Infrastructure	41 <sup>st</sup>
Cost Doing Business	1 <sup>st</sup>
Economy	48 <sup>th</sup>
Life-Health-Inclusion	26 <sup>th</sup>
Tech-Innovation	47 <sup>th</sup>
<b>Business Friendly</b>	<b>49<sup>th</sup></b>
Education	32 <sup>nd</sup>
Access to Capital	39 <sup>th</sup>
Cost of Living	5 <sup>th</sup>

# ALEC- Rich States Poor States

## WV Economic Performance Rankings



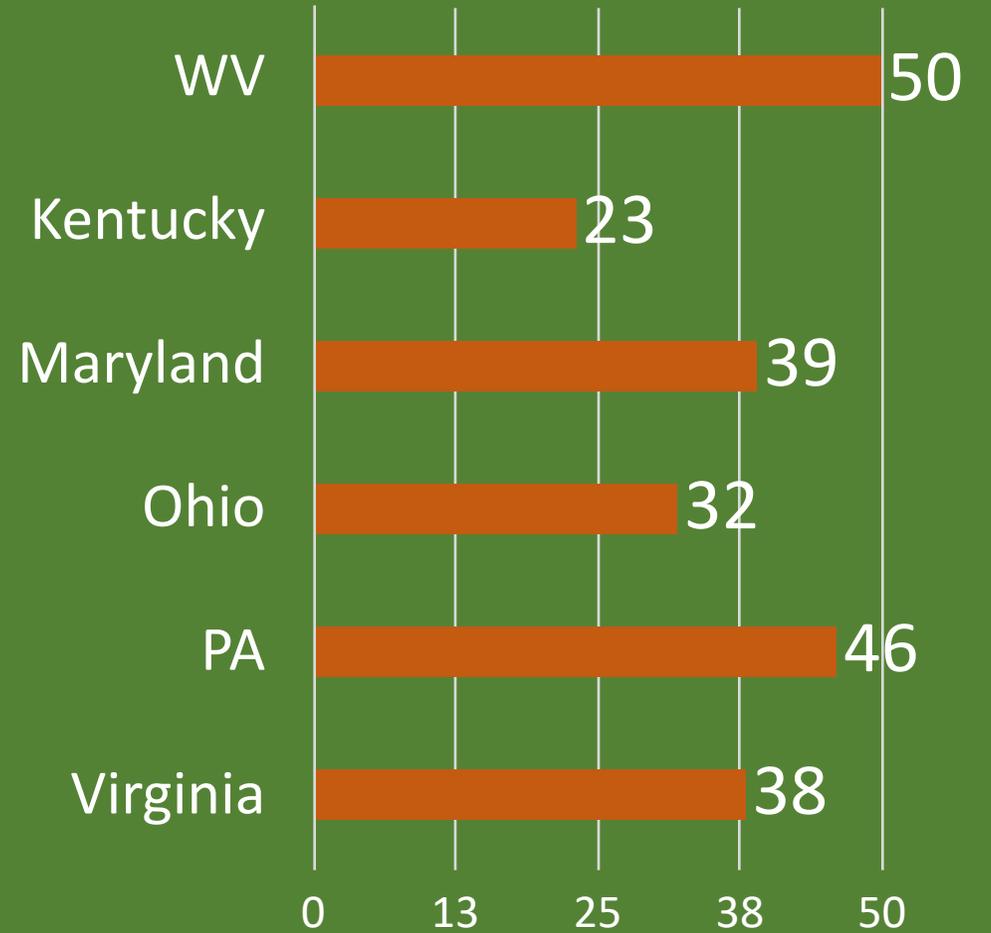
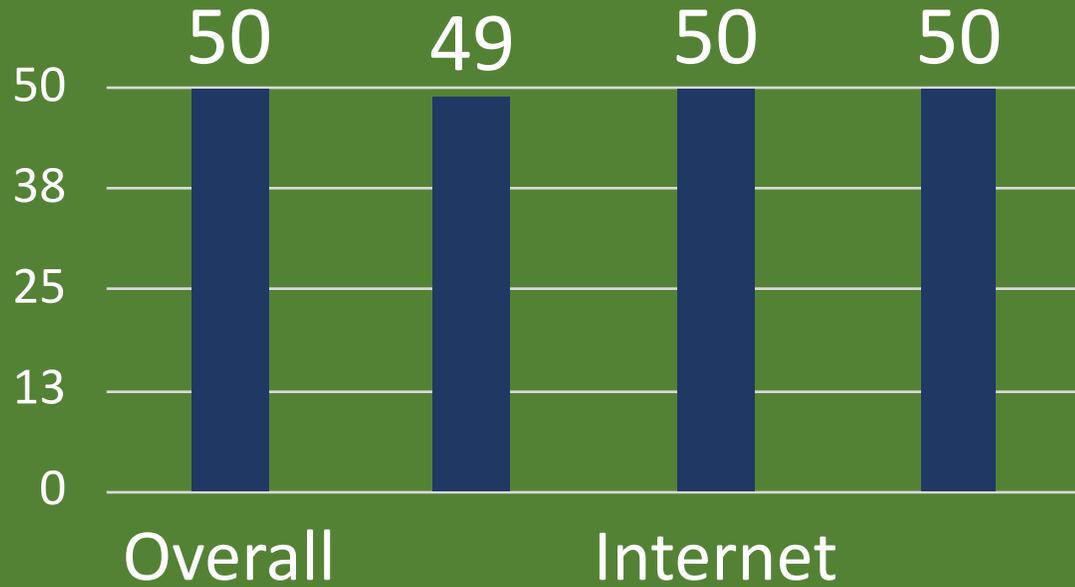
# Components of Competitiveness



# US News Infrastructure Rankings

Neighbor Overall  
Rankings

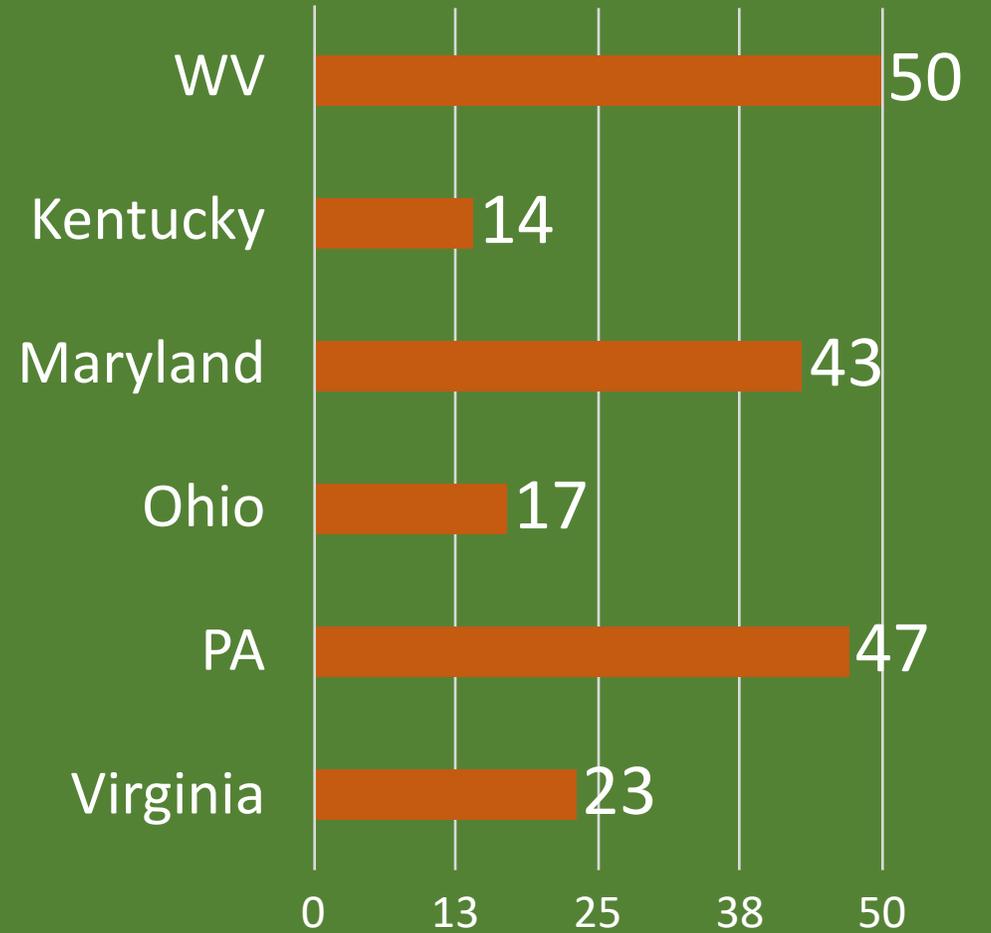
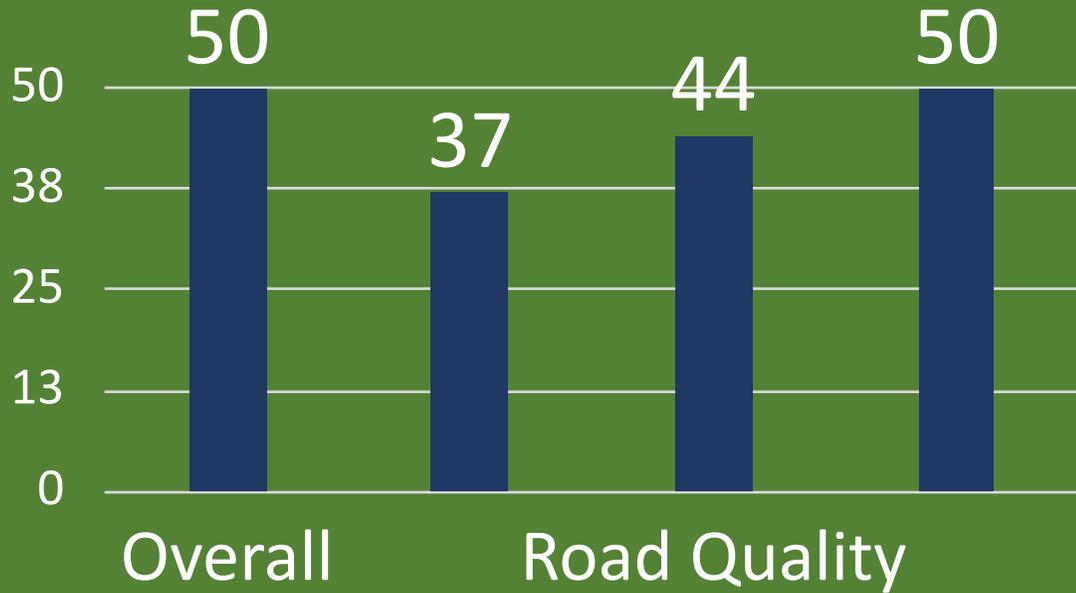
## West Virginia



Source: US News 2023

# US News Transportation Rankings

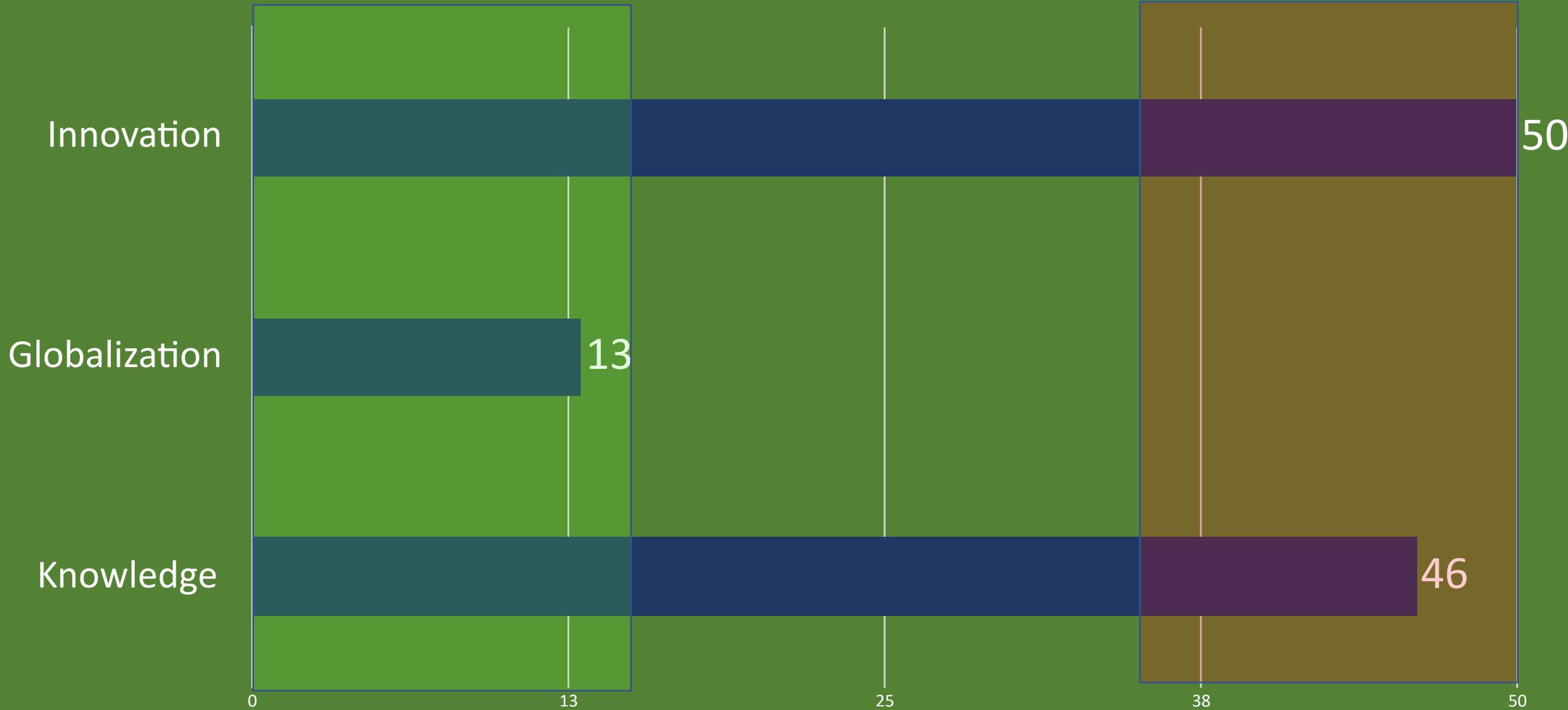
## West Virginia



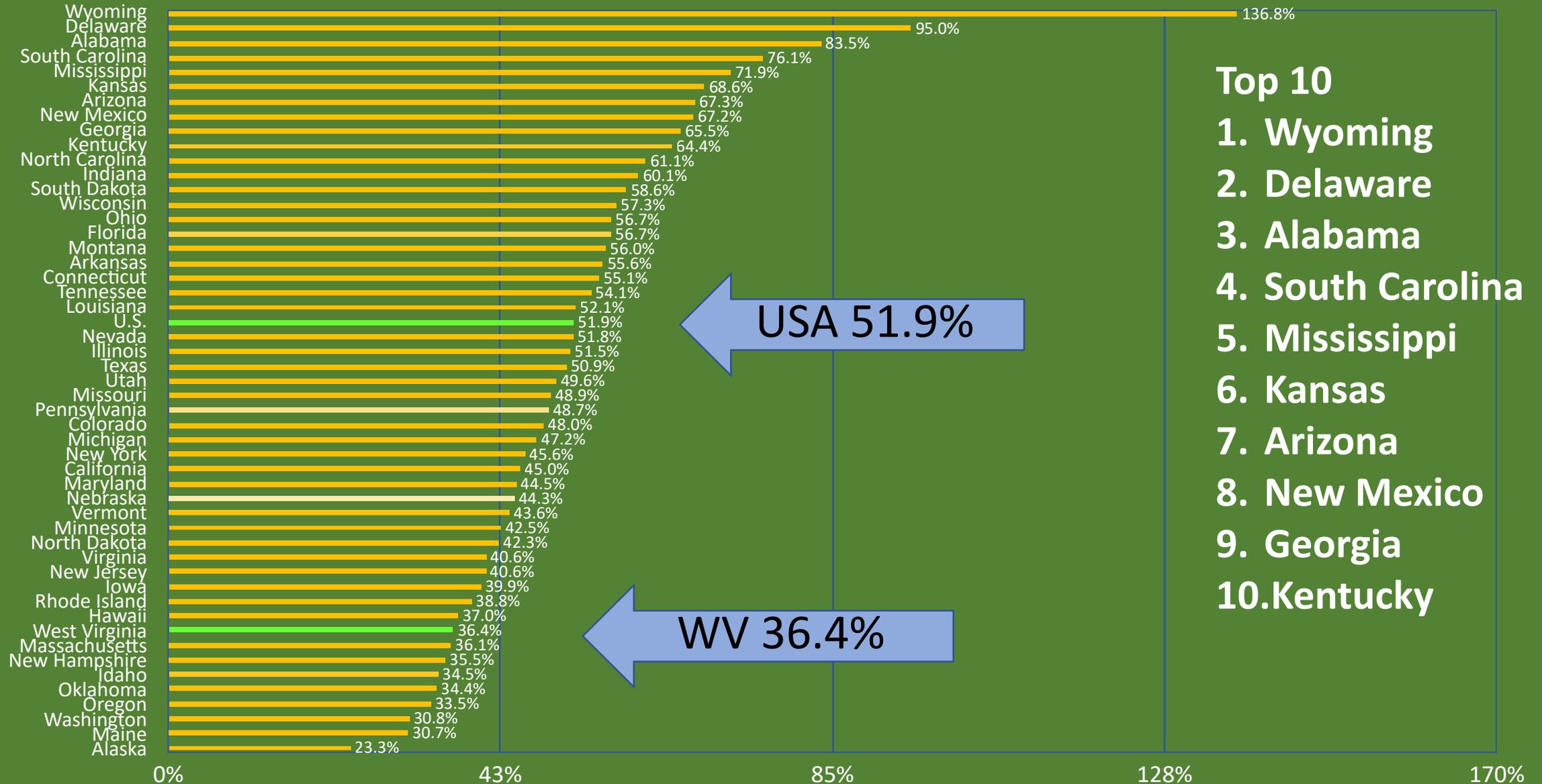
Source: US News 2023



# West Virginia Rankings for Innovation Scores

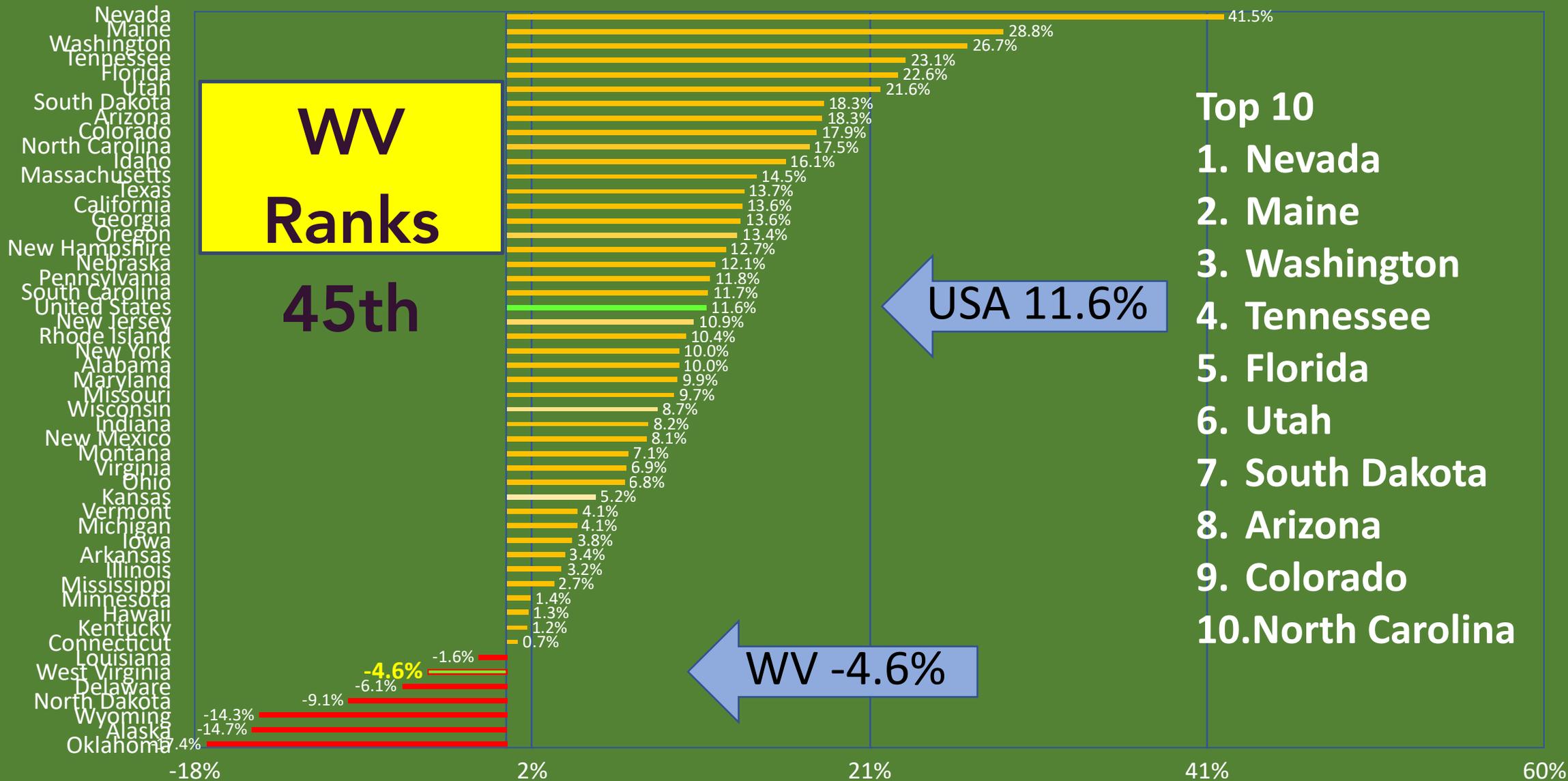


# U.S. Business Formations Jan 2020 - Sept 2023



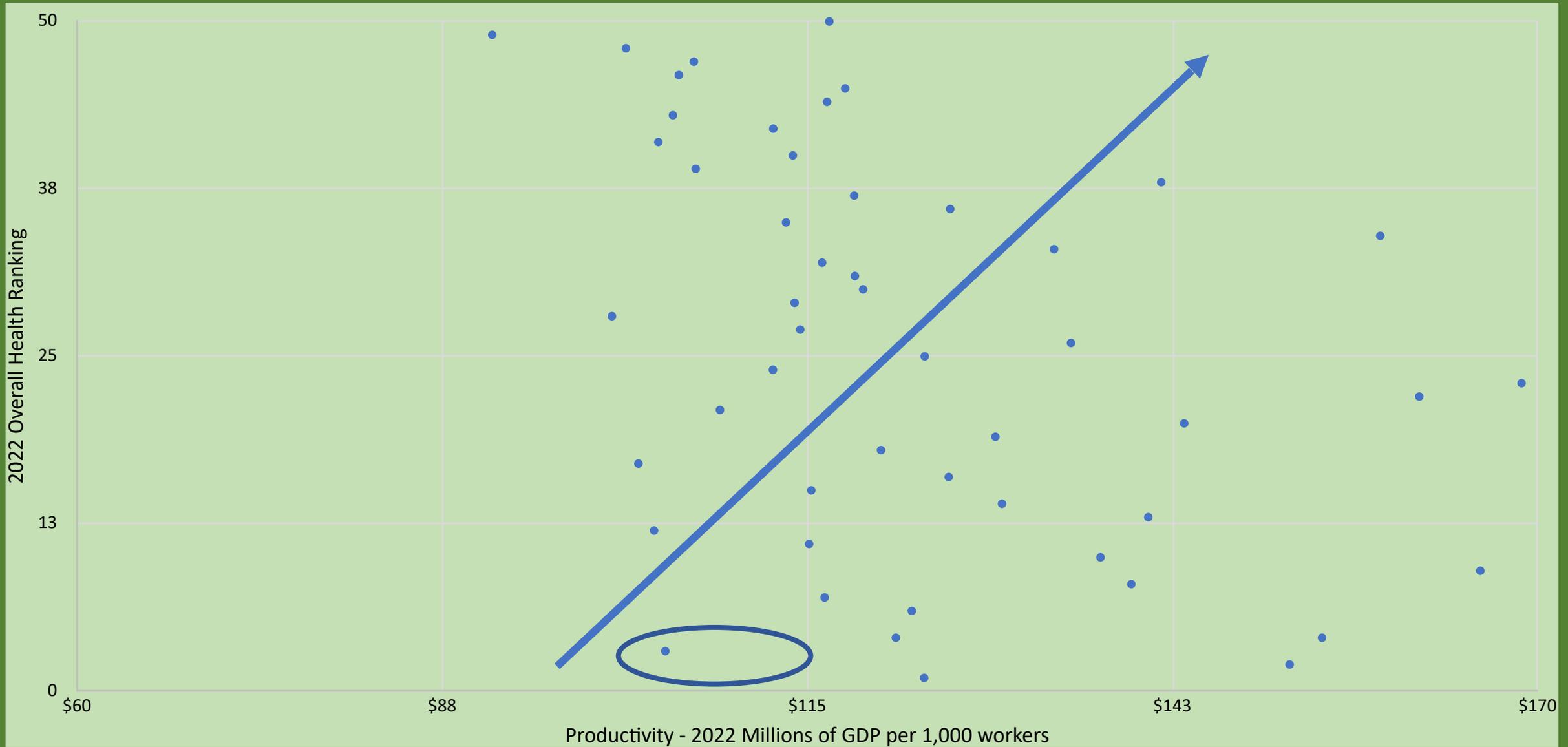
Source: U.S. Census

# Tech Industry Employment Growth, 2017-2022

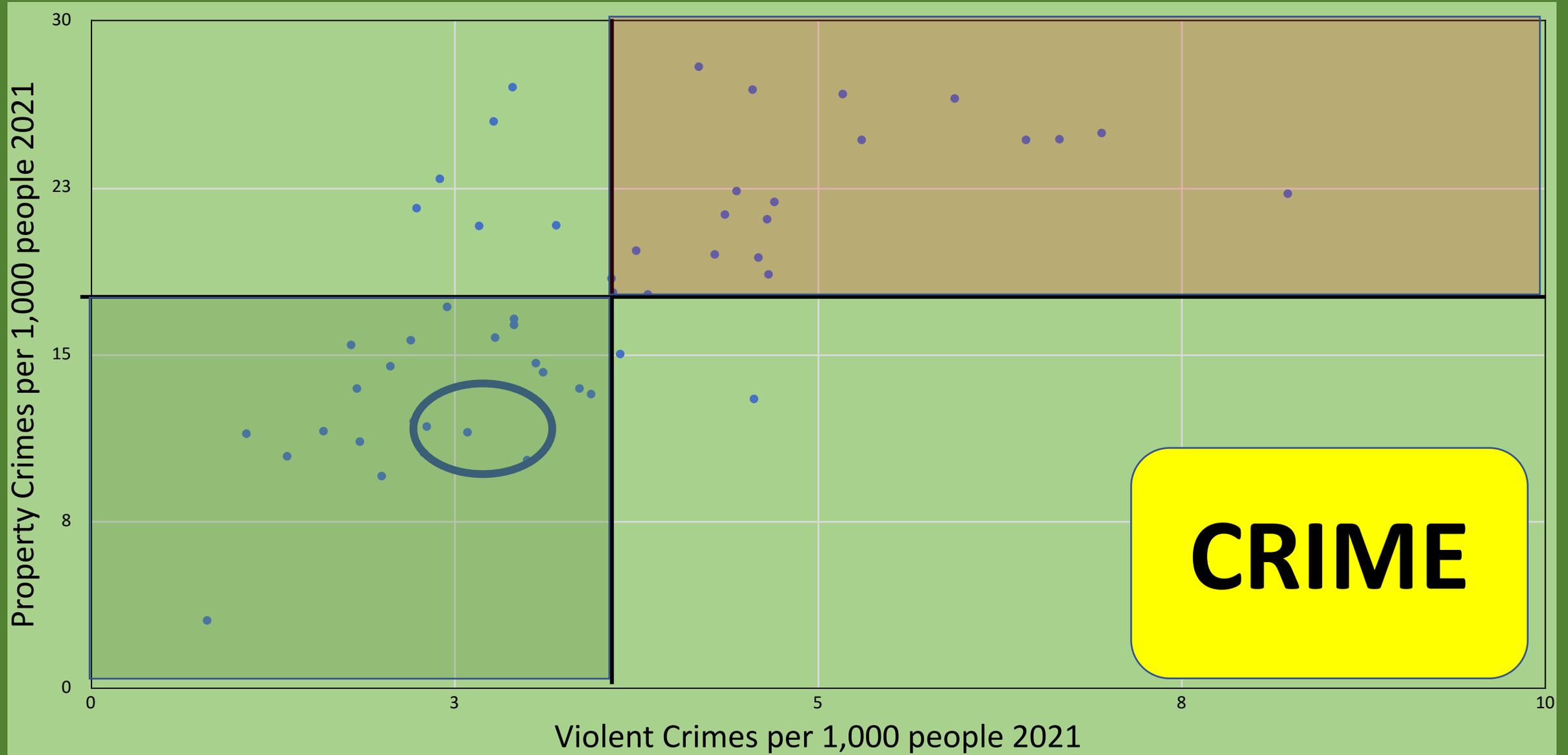


Source: Lightcast 2023.4

# Health Ranking and Productivity



# Violent Crime vs Property Crime





**Business Climate:** WV needs a consistent, fair, and predictable regulatory and legal environment, with taxes that position the state as a desirable state in which to live and do business.

**Workforce:** WV needs to ensure that there are enough workers with the education and skills for business to grow.



**Infrastructure:** WV needs roads, bridges, railroad, waterways, air service, broadband, water and sewer, housing, childcare, and buildings and sites that support and enable the workforce and businesses.



**Innovation:** WV needs to support new ideas and new and existing companies through commercialization of research, attraction of global investment, the availability of risk capital, high quality entrepreneurial ecosystems, attraction of supply chains, and continuous improvement in labor productivity.

8 Things Shaping Our  
Future & Knotting  
My Brain

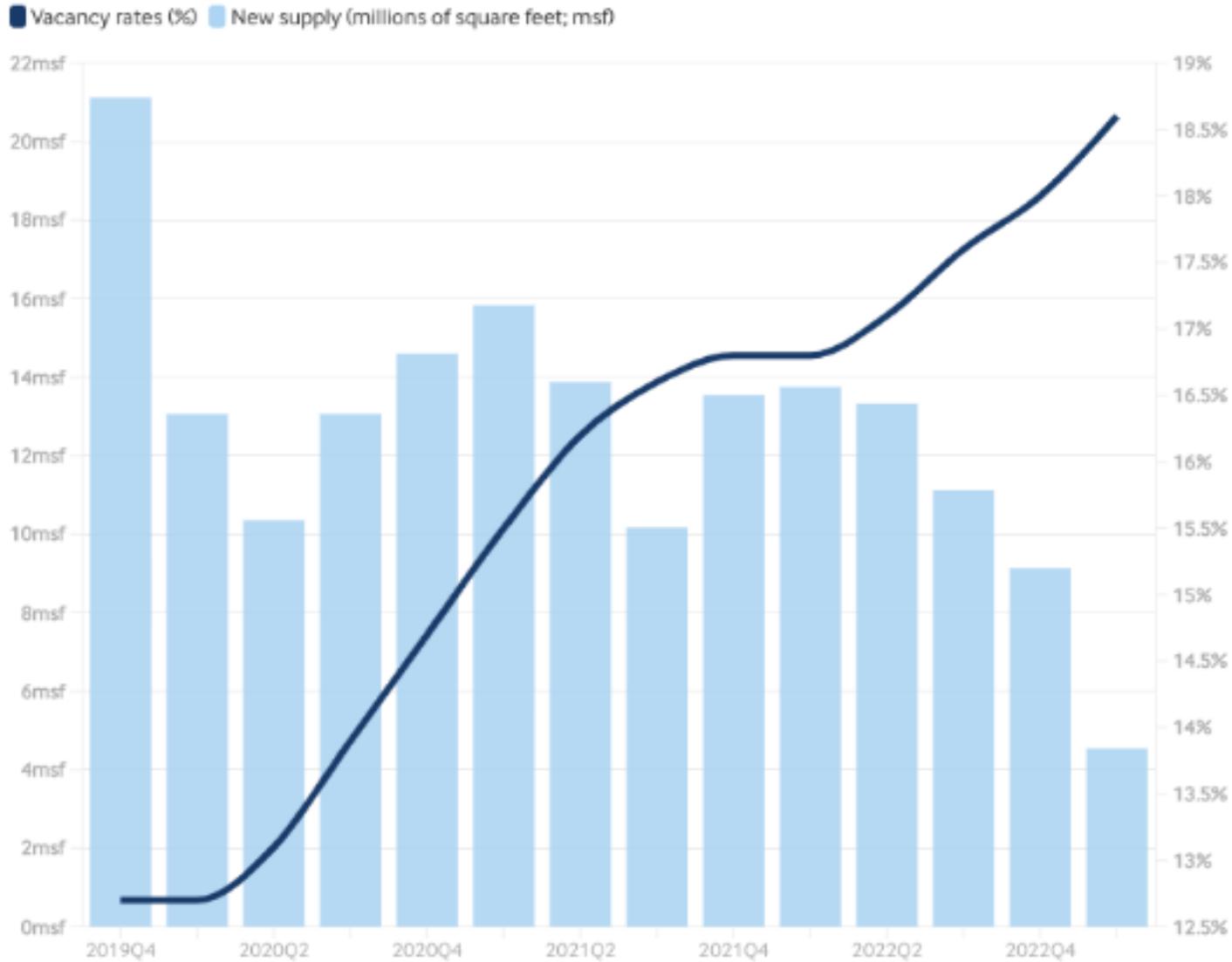
FINAL  
THOUGHTS

TODAY



## Office imbalance

Rising national US office vacancy rates have coincided with falling levels of new supply



Source: [Cushman & Wakefield](#)

**fDi** Intelligence





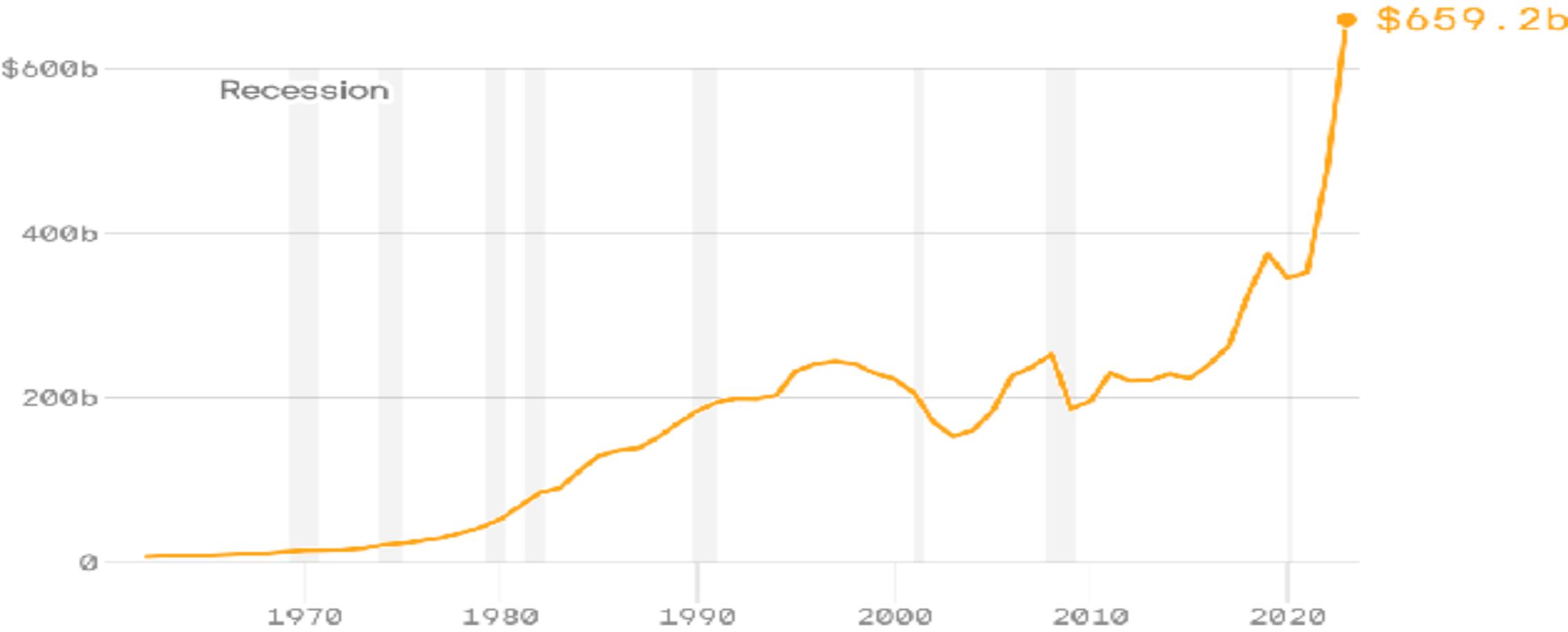
## 30-year fixed mortgage rate

Daily; October 5, 2018 to October 5, 2023



# Net interest payments on U.S. federal debt

Fiscal years; 1962-2023



Data: Treasury Department; Office of Management and Budget; Chart: Axios Visuals

The percentage of women and men with a college degree in 2021, by 5-year age group.

Age group

25 to 29

Men ● 33%

Women ● 43%

30 to 34

● 36%

45% ●

35 to 39

● 36%

● 44%

40 to 44

● 35%

● 43%

45 to 49

● 35%

● 40%

50 to 54

● 34%

● 37%

55 to 59

30% ●

● 32%

60 to 64

30% ●

● 30%

0%

10%

20%

30%

40%

Percentage of women and men with a college degree

The educational gap between men and women is growing.

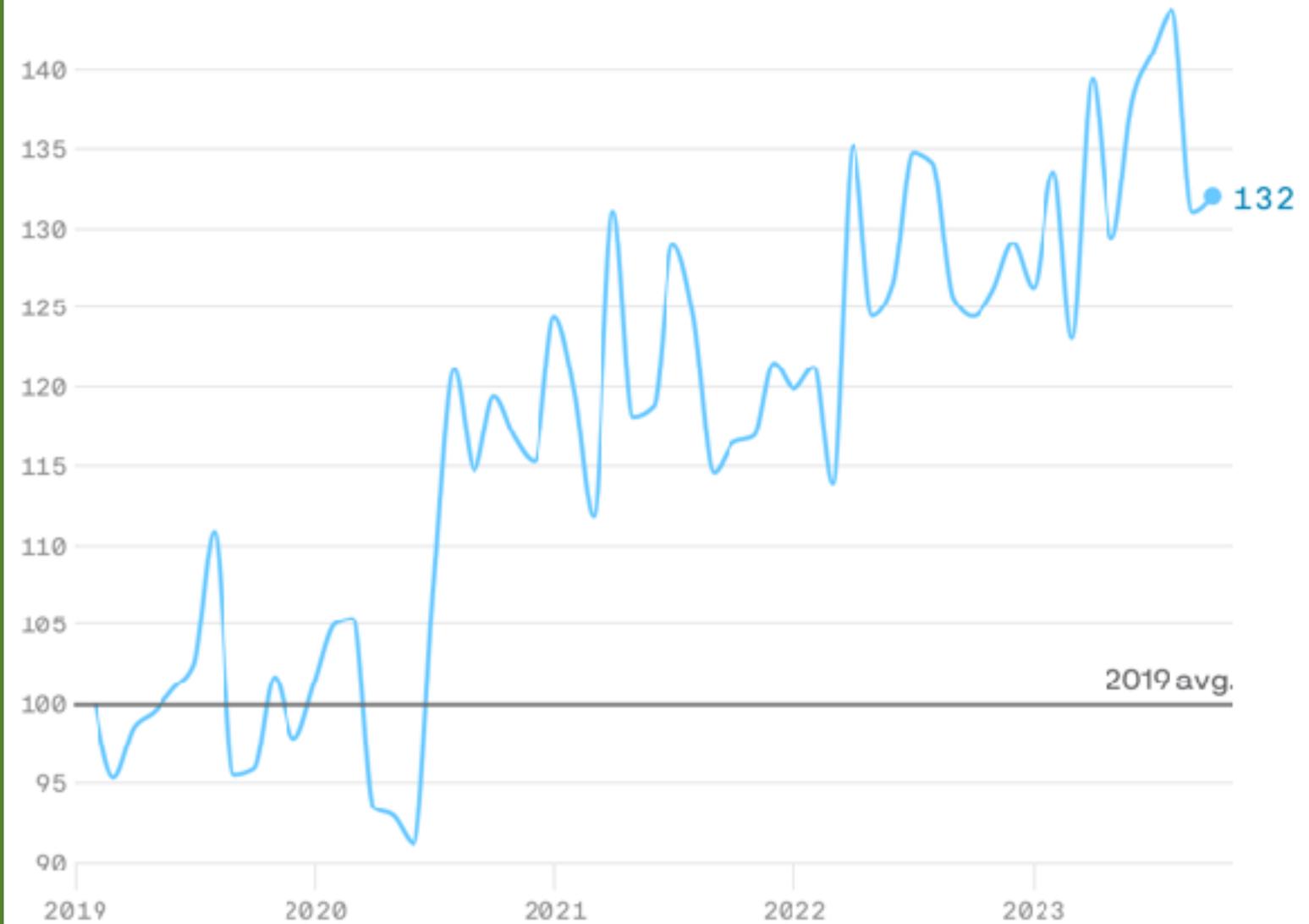
Sources: IPUMS-ACS, University of Minnesota; Burning Glass Institute

The average child care payment is up 32% from 2019, according to new data from the Bank of America Institute.

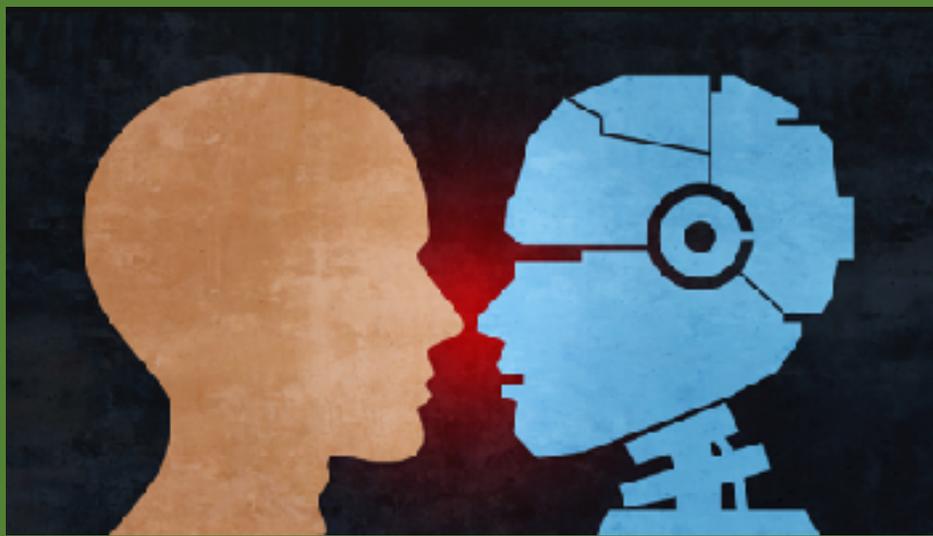
The price surge outpaced overall inflation; the Consumer Price Index was up 20% over the same period.

## Average household child care cost index

January 2019 to September 2023

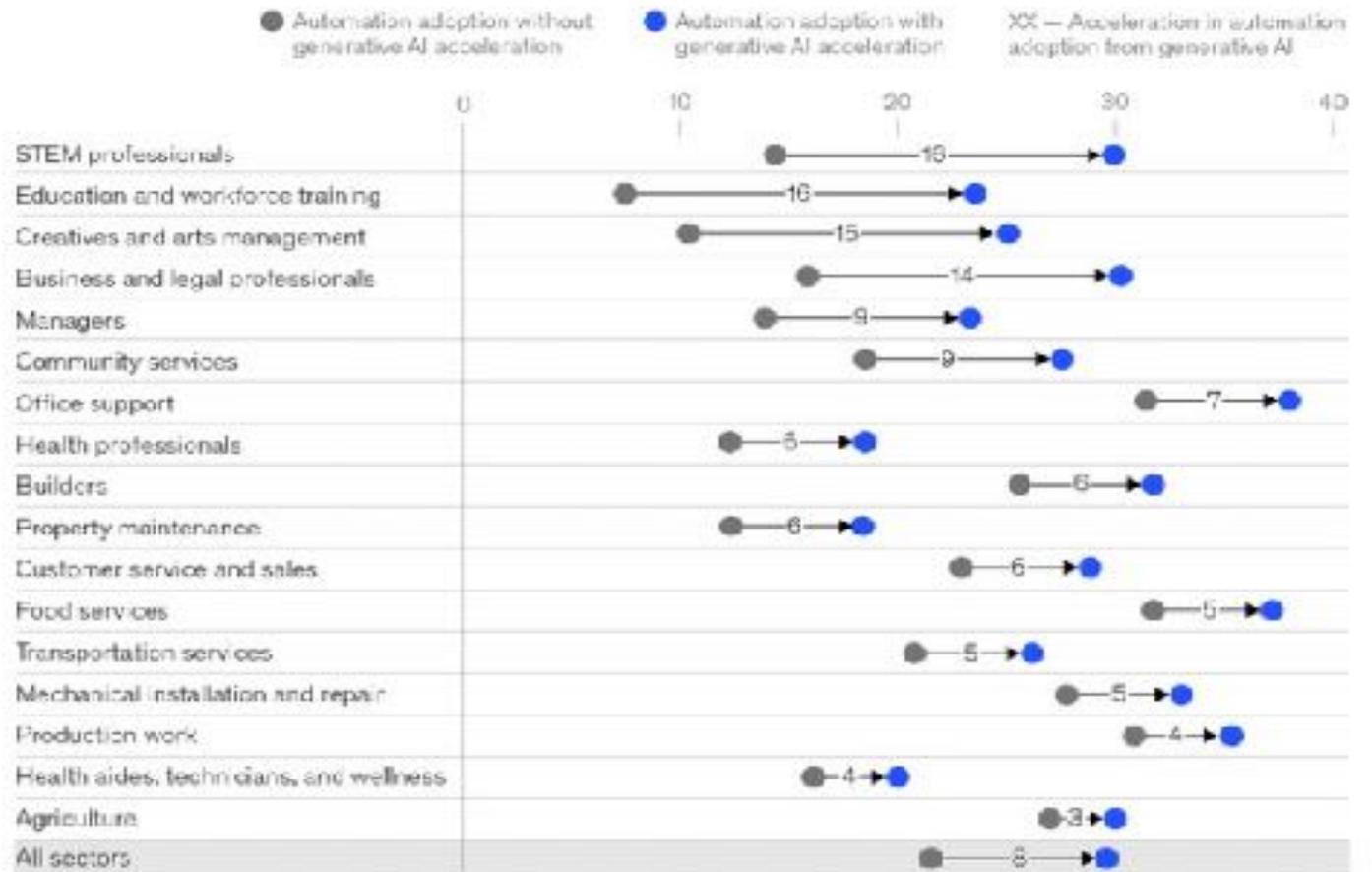


Data: Internal Bank of America data, [Bank of America Institute](#); Chart: Axios Visuals



# With generative AI, 30 percent of hours worked today could be automated by 2030

Midpoint automation adoption by 2030 as a share of time spent on work activities, US, %



Source: O\*NET; US Bureau of Labor Statistics; McKinsey Global Institute analysis

McKinsey  
Global Institute

# Critical Positions

**CRISIS**





# Rapidly Changing Globalization Geo-Politics & Geo-Economics

**Economic  
Domestic  
Tribalizing**



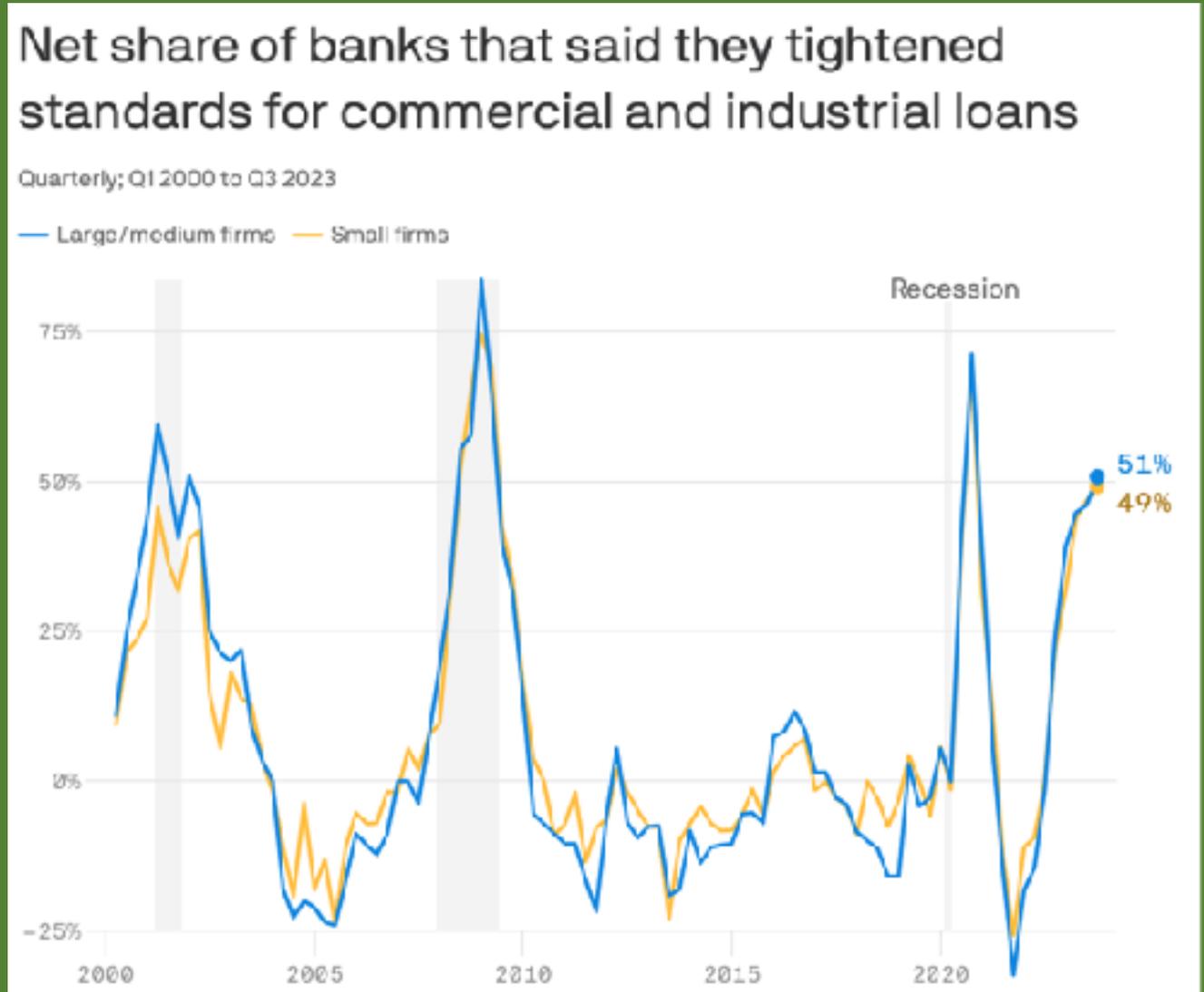
# 2023 Economic News



- ✓ GDP growth higher than expected
- ✓ People went back to work (No She-cession)
- ✓ Real wages growing above inflation
- ✓ Productivity rising
- ✓ No banking crisis
- ✓ Gas prices moderated
- ✓ Soft landing, so far

# I Expect a Slower 2024

- End of excess savings
- Interest rates/ home building
- OPEC
- Bank lending tightening
- Student loans
- Election year



Data: Federal Reserve, FactSet; Note: Large/medium firms are those with annual sales of at least \$50 million; Chart: Axios Visuals



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**LinkedIn Ted Abernathy**

**Serendipity is Not a Strategy**

# **Policy Possibilities: What to watch in 2024 and why it matters**

**Danielle Waltz, Dinsmore & Shohl, Moderator**

**Mark A. Behrens, Shook, Hardy & Bacon, LLP**

**Rachelle Mortimer, US Chamber of Commerce Institute of  
Legal Reform**

**Sean Redmond, US Chamber of Commerce**

# Recent Reforms in West Virginia

- 2015
  - Wage Payment and Collection Act
  - Wrongful and Retaliatory Discharge Claims
  - Reinstating the Open and Obvious Doctrine in Premises Liability
  - Asbestos Bankruptcy Trust Claims Transparency Act and Asbestos and Silica Claims Priorities Act
  - Punitive Damages
  - Non-Partisan Election of Judges
  - Comparative Fault
  - Workers' Compensation Disbursements where an Injury is Self-Inflicted or Intentionally Caused by Employer

# Recent Reforms in West Virginia, cont.

- 2016
  - Workplace Freedom Act (Right to Work)
  - Repeal of Prevailing Wage
- 2017
  - Disqualification for Unemployment Benefits
  - W. Va. Safer Workplace Act
- 2019
  - Third-Party Litigation Funding
- 2020
  - Prohibiting Misleading Lawsuit Advertising Practices
- 2021
  - Admissibility of Nonuse of Seatbelts in Civil Actions
  - Creation of Intermediate Court of Appeals
  - Independent Contractor reform
- 2023
  - Deliberate Intent Non-Economic Damages Cap



# Public Nuisance – The Next Super Tort?

- Weaponized by the Plaintiff's Bar
  - Right “wrongs” caused by “societal ills”
    - Opioids
    - Climate Change
    - Environmental Clean Up
    - Car Manufacturers
    - Gun Manufacturers
  - Problems for Industry
    - Nuclear Verdicts and Large Settlements
    - Insurance Coverage?
  - What Can be Done?



# Medical Monitoring

- What is it and When is it Recoverable?
- West Virginia Law on Medical Monitoring
  - Justice McGraw's decision in *Bower v. Westinghouse Elec. Corp.*
  - No present physical injury required
- Present Physical Injury – Principle of Tort Law?
- Risks for Business
  - Mass Exposure Cases
  - Bankruptcy
- What Reforms Can be Enacted?

# The Collateral Source Rule & Phantom Damages

- West Virginia's Collateral Source Rule
  - *Kenney v. Liston*
    - Precludes the offsetting of payments made by health and accident insurance companies against damages claimed by a plaintiff
  - Rational
    - Plaintiff's benefit of the bargain with his insurance company
    - Prevent defendants from benefiting from their wrongful conduct
- Phantom Damages
  - What are they?
  - Compatible with traditional understanding of compensatory damages?
- Reforms that Can be Enacted

# Preemption

- What is it?
- State Government v. Local Government
  - Minimum Wage
  - Paid Sick Leave
  - Plastic Bag Bans
  - Local Bans on Fracking
- Why it Matters
- What Can be Done

# Employment Reforms

- Recent Reform Attempts in West Virginia
  - Indexing of Unemployment Benefits
  - Weekly “Work Search Activities” Requirement
  - Occupational Licensing
- Why it Matters?
- What Can be Done?



Questions?

# Coffee Break

# **Got Milk? The making of Mountaintop Beverage**

**Jeff Sokal, Mountaintop Beverage**

**Joe Hatton, West Virginia Department of Agriculture**

**Rachel Coffman, Coffman Collaborative, Moderator**







# **The AI Evolution**

**Michael O'Brien, BSA**  
**Thorsten Wuest, WV University**

# 2023 Encova Safety Award

# WVMA-Encova Safety Award

Winter Meeting 2023









POWER ON POWER OFF



EMERGENCY STOP



HANDLE JOG



CYCLE START FEED HOLD



**MAG START UP**

1. Press the [MAG] button.  
2. Press the [CYCLE START] button.  
3. Press the [FEED HOLD] button.  
4. Press the [MAG] button.  
5. Press the [CYCLE START] button.  
6. Press the [FEED HOLD] button.  
7. Press the [MAG] button.  
8. Press the [CYCLE START] button.

SYSTEM 1	POST-TOOL MACHINE	TIMERS & COUNTERS
SPINDLE 1: 0.0000	0.0000	1.0000
SPINDLE 2: 0.0000	0.0000	0.0000
SPINDLE 3: 0.0000	0.0000	0.0000
SPINDLE 4: 0.0000	0.0000	0.0000
SPINDLE 5: 0.0000	0.0000	0.0000
SPINDLE 6: 0.0000	0.0000	0.0000
SPINDLE 7: 0.0000	0.0000	0.0000
SPINDLE 8: 0.0000	0.0000	0.0000
SPINDLE 9: 0.0000	0.0000	0.0000
SPINDLE 10: 0.0000	0.0000	0.0000

1. Press the [MAG] button.

KEYBOARD

OVERRIDES

ALPHABETIC KEYS

















**LEVEL 1**

**FASTENERS**

# **Networking Lunch**

**Sponsored by the Marshall Advanced  
Manufacturing Center**

**Cost of Care: An Inside Look**  
**Jim Kaufman, WV Hospital Association**  
**Melanie Dempsey, WV Hospital Association**

# Strong Hospitals. Strong Communities.

West Virginia Manufacturers Association  
Annual Meeting & Winter Convention  
December 5, 2023



# WEST VIRGINIA HOSPITAL ASSOCIATION



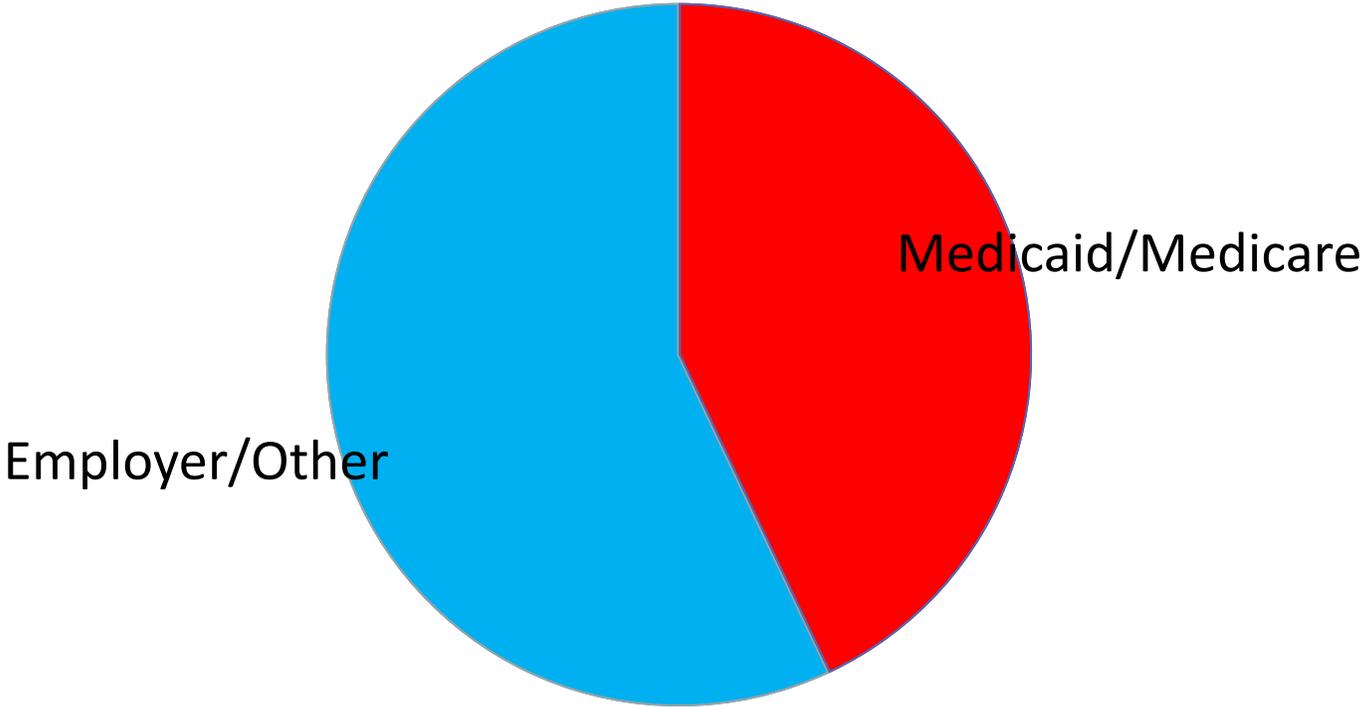
# Focus on the Hospitals' Mission



Behind every number,  
is a patient

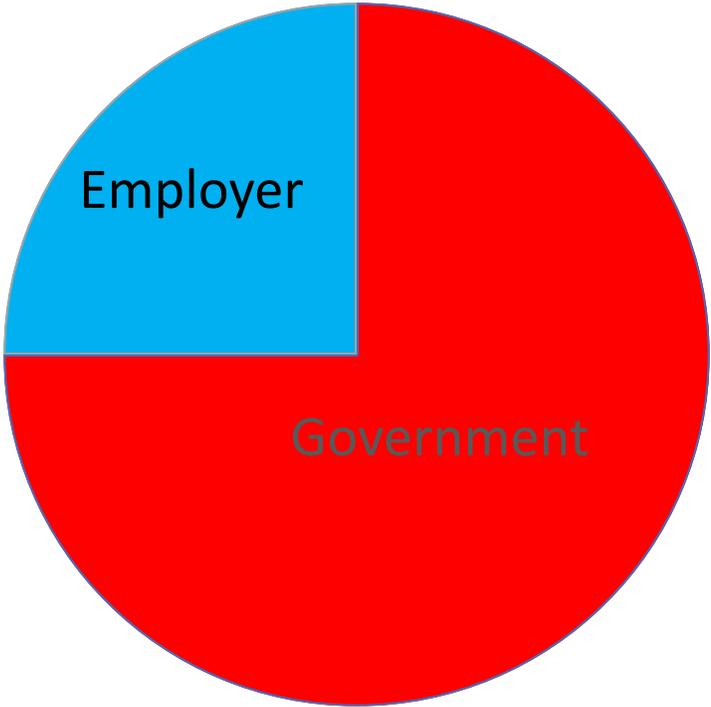
# Challenge: Hospital Fiscal Challenges

U.S. Hospital Revenue by Source



Source: National Health Care Expenditures, 2020  
Centers for Medicare and Medicaid Services

West Virginia Hospitals Revenue by Source

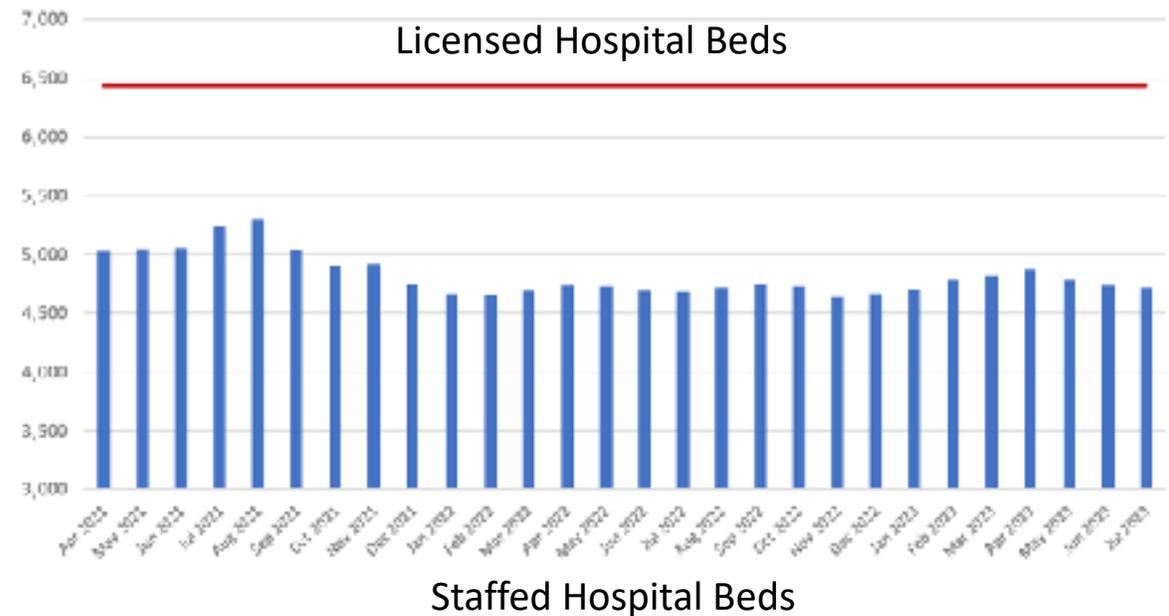


Source: Medicare Cost Report

# Challenges & Opportunities: Staffing and Declining Capacity

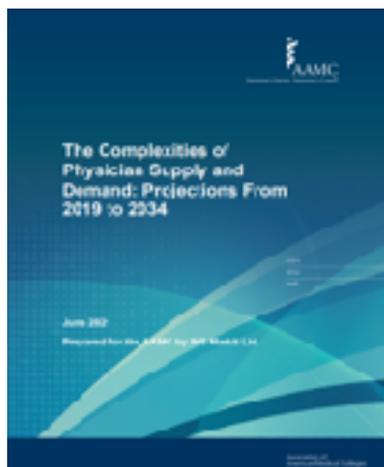
- West Virginia is currently licensed for 6,441 acute care hospital beds under Certificate of Need (CON)
- Staffing challenges have limited ability to operate all approved beds
- In August 2020, West Virginia hospitals staffed approximately 5,600 beds
- In March 2023, West Virginia hospitals staffed an average of 4,800 beds, a 14% decline in staffed beds from August 2020

## Staffing Challenges: Fewer Staffed Hospital Beds in West Virginia



# Core Challenges: National Staffing Shortages

U.S. Bureau of Labor Statistics 194,500 average annual openings for registered nurses between 2020-2030 with employment projected to grow 9%



By 2034, estimated shortage of more than 100,000 physicians according to Association of American Medical Colleges

**Entire West Virginia hospital employment base nearly 49,000**

# Challenges & Opportunities: Offering Competitive Salaries

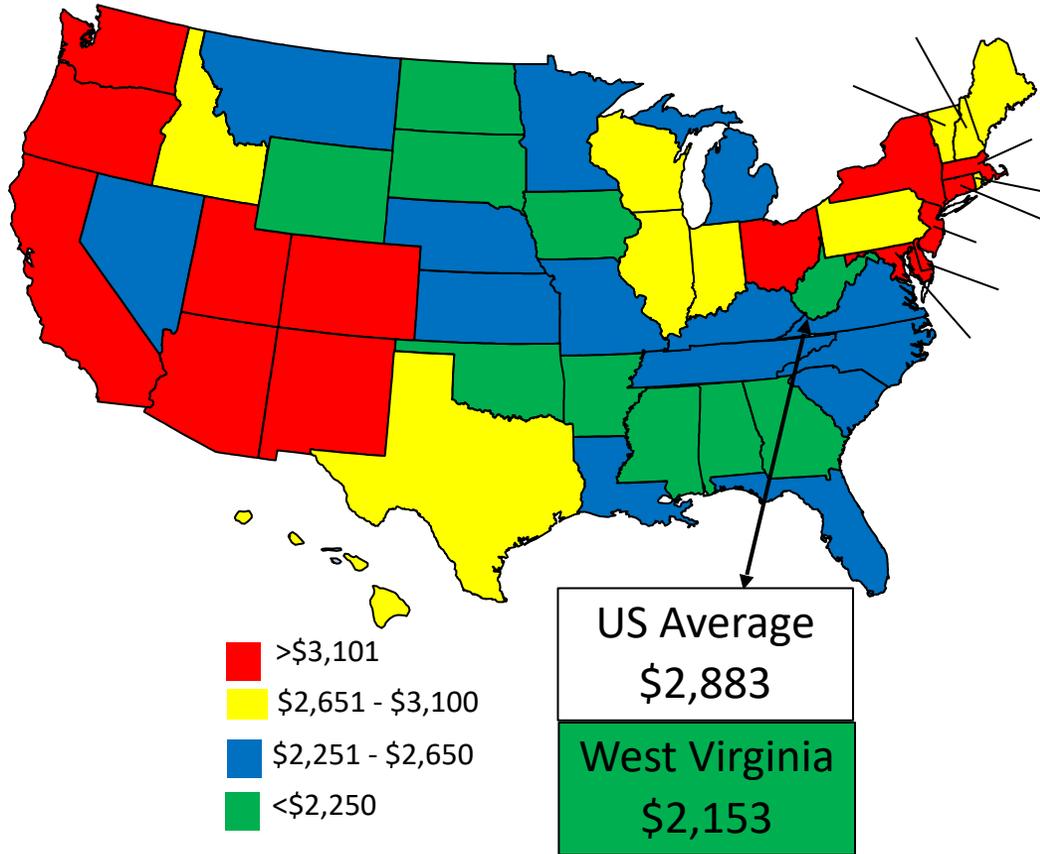
	West Virginia	Virginia	Kentucky	Ohio	Penn.	Maryland	United States
<b>Nursing Assistants</b>	\$31,320	\$32,620 (-1300)	\$32,280 (-960)	\$34,990 (-3670)	\$36,340 (-5020)	\$36,290 (-4970)	<b>\$35,760</b> <b>(-4440)</b>
<b>Lic. Practical Nurses</b>	\$44,410	\$51,150 (-6740)	\$49,210 (-4800)	\$50,590 (-6180)	\$54,370 (-9960)	\$69,890 (-25480)	<b>\$54,620</b> <b>(-10210)</b>
<b>Registered Nurses</b>	\$74,160	\$79,700 (-5550)	\$75,800 (-1640)	\$76,810 (-2650)	\$78,740 (-4580)	\$83,850 (-9690)	<b>\$81,220</b> <b>(-7060)</b>
<b>Radiological Tech.</b>	\$60,300	\$66,570 (-6270)	\$61,050 (-750)	\$63,860 (-3560)	\$62,400 (-2100)	\$74,880 (-14580)	<b>\$65,140</b> <b>(-4840)</b>
<b>Medical Lab Tech.</b>	\$56,480	\$55,180 (+1300)	\$50,080 (+6400)	\$57,380 (-900)	\$56,630 (-150)	\$51,920 (+4560)	<b>\$57,380</b> <b>(-900)</b>
<b>Respiratory Therapists</b>	\$60,320	\$65,790 (-5740)	\$61,010 (-690)	\$65,760 (-5440)	\$65,860 (-5540)	\$78,140 (-17820)	<b>\$70,540</b> <b>(-10220)</b>
<b>Surgical Tech.</b>	\$46,850	\$58,420 (-11570)	\$49,360 (-2510)	\$51,650 (-4800)	\$50,020 (-3170)	\$60,110 (-13260)	<b>\$55,960</b> <b>(-9110)</b>

Source: Bureau of Labor Statistics

# West Virginia Hospitals: Low Cost, but Sick Population

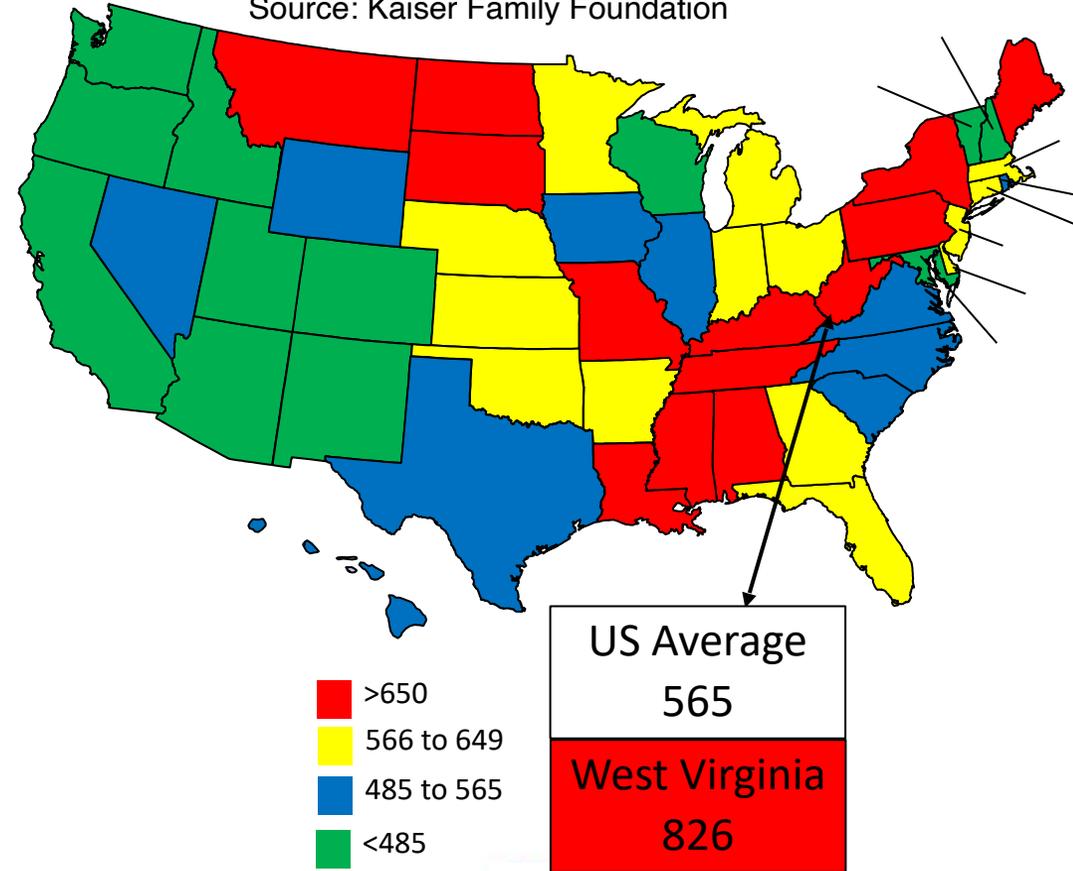
## Hospital Expense per Inpatient Day (2021)

Source: Kaiser Family Foundation



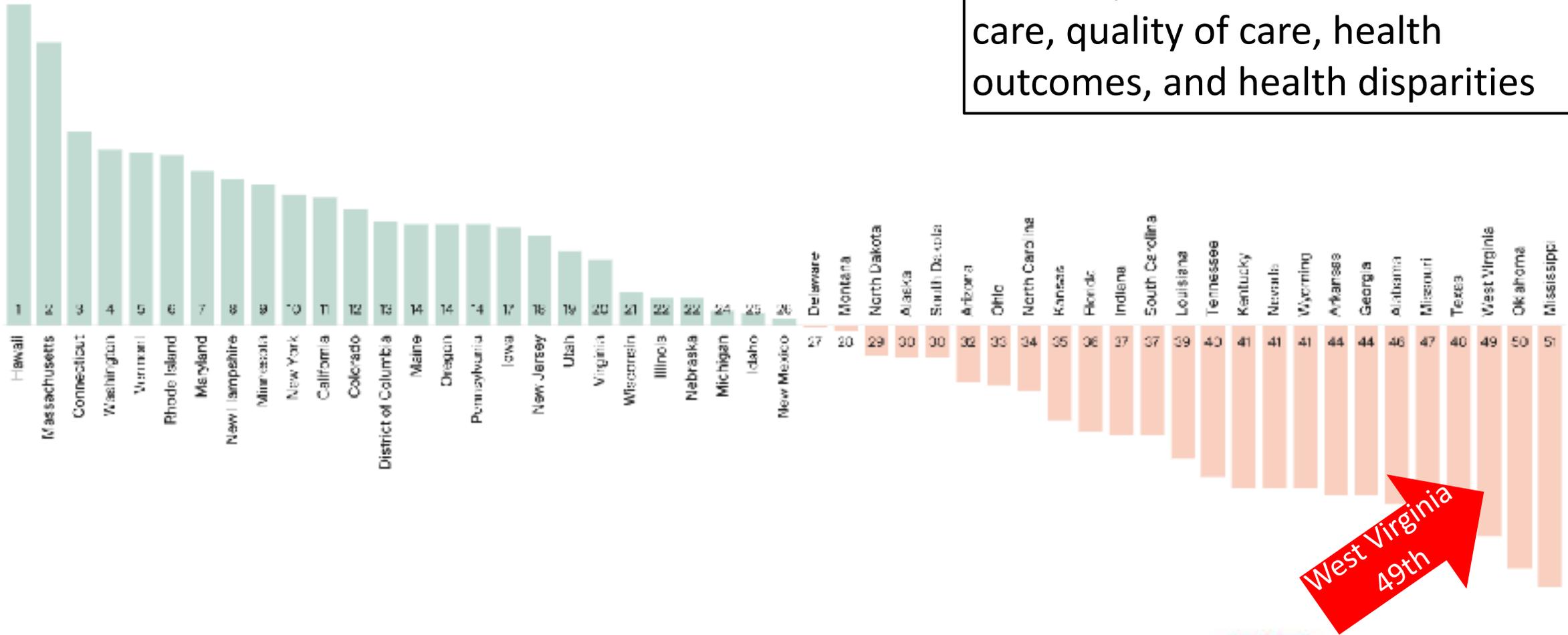
## Hospital Inpatient Days Per 1,000 (2021)

Source: Kaiser Family Foundation



# Challenges: Population Health

2022 Report measures access to care, quality of care, health outcomes, and health disparities



# Challenge: Public Health

Vaccination rates are decreasing worldwide

- Global childhood immunization rates dropped from 86% in 2019 to 81% in 2021
- U.S. kindergartners experienced a drop in receiving required immunizations to 94%
- States are weakening their immunization policies, leading to outbreaks in previously eradicated diseases
- Increasing health care cost that were preventable

Infectious Disease • Public Health

## Measles Outbreak Racked Up Dozens of Cases in Central Ohio

— Outbreak in late 2022 affected almost exclusively unvaccinated children

by Michele Sullivan, Contributing Writer, MedPage Today August 3, 2023



**Columbus, Ohio Measles Outbreak:  
\$1.3 million in hospital costs**

# West Virginia Hospitals: Partners in Care

Community Benefit	Impact
Provider Taxes	\$214 million
Medicare & Medicaid Shortfalls	\$523 million
Community Programs & Education	\$102 million
Uncompensated Care	\$177 million
Total	\$1.02 billion

## Hospitals are caring for West Virginia

by advancing wellness and driving economic growth in the communities they serve.



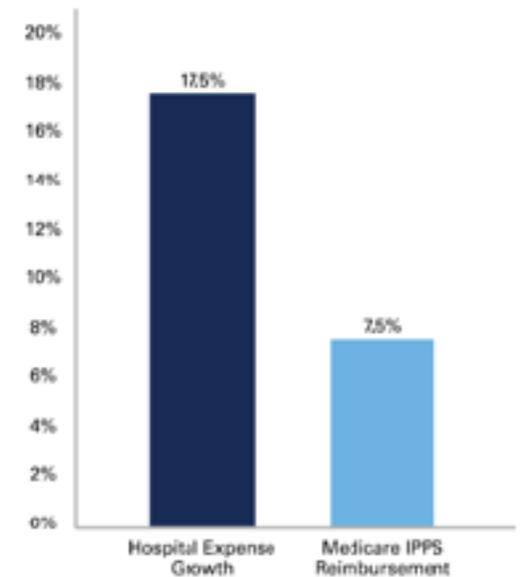
\$1.02B  
\$12.5B

West Virginia hospitals contribute \$1.02 billion in community benefit and drive \$12.5 billion in economic impact.

# Core Challenges: West Virginia Health Care Costs

- Hospitals across the country and in West Virginia continue to face unprecedented financial challenges due to skyrocketing expenses
- American Hospital Association report notes overall hospital expenses per patient between 2019 and 2022 rose:
  - 20% overall
  - 21% for medical supply
  - 19% for labor
  - 37% for drugs
- During this time, Medicare reimbursement for inpatient care did not keep up with cost, further widening the gap between payment and cost
- Half of hospitals nationally ended 2022 operating at a financial loss, and others with razor-thin margins
- Today, the average West Virginia hospital has negative operating margins and is facing even larger financial challenges

**Figure 1. Cumulative Hospital Expense Growth is More Than Double the Cumulative Increases in Medicare IPPS Reimbursement, 2019-2022**



Source: FY 2020-2022 IPPS Final Rule

# Challenge: Hospital Fiscal Challenges

## Healthcare is Expensive...Where does all of that money go?



# West Virginia Hospitals: Partners in Care

## Prescription for Your Health

- starts with your Primary Care Provider (PCP)
- provides medical oversight and personal plan of care
- goals for improved health factors
- health coaches and fitness trainers to support your plan
- Health education includes:
  - fitness program
  - Basic Nutrition
  - Healthy Cooking
  - Diabetes Management
  - Tobacco Cessation



# Vandalia Health Network

Is a Clinically Integrated Network (CIN) that is physician-led and patient centered committed improving the quality of health care, enhancing the patient experience, and reducing healthcare cost.

---

## Key Initiatives:

- ✓ Identify and address social drivers of health (SDOH)
  - Screen for SDOH needs and engage community-based organizations
- ✓ Improve access to specialty services and preventative screenings
- ✓ Develop patient specific prevention plans
  - Promote and implement annual wellness visits
- ✓ Drive PCP care management model
  - Chronic Care Management
  - Transitional Care Management
- ✓ Decrease re-admissions and promote safe care transitions
  - Collaborate with Post Acute and community partners
- ✓ Develop and grow payer partnerships
- ✓ Design and expand targeted programming and point of care screening opportunities
  - Farmacy
  - Diabetic Retinal Eye Cameras at point of care

# WVU Medicine: Areas of Focus

## Redesigning Care Through:

- Disease Management Coordination
- Improving Access
- Prevention and Wellness Strategies
- Ensuring and Improving Quality
- Predictive Data Analytics



## With the Goal of:

- Improved Patient Self-Management
- Improved Patient Outcomes and Quality of Life
- Easier Access to Care
- Reduced ED, UC and Hospital Utilization (reduced cost)
- **Home, Healthy, Happy**

Chronic Care Management

Rising Risk

Transitions of Care

Predictive Scores for Outreach

Behavioral Health Integration

Social Determinants of Health

Diabetes Management

Patient Assistant Program

Non-Emergent Medical Transportation

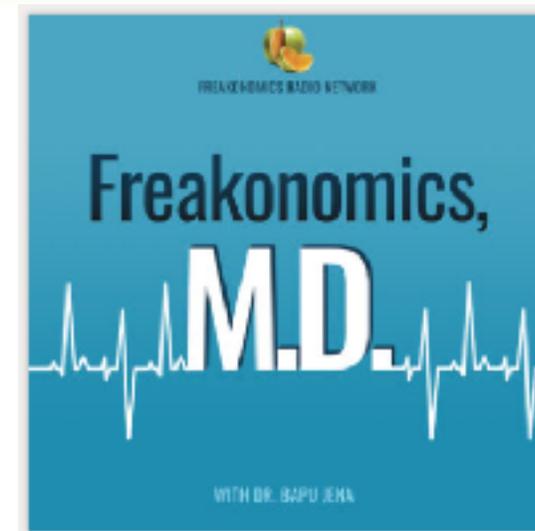
# What Happens When a Hospital Closes?

## Effects of rural hospital closure

- Medicare spending goes down, driven by a decrease in hospital admissions
- mortality rates go up for patients with time-sensitive health conditions, like a heart attack or a stroke
- West Virginia has had 5 hospital closures since 2005, while 14 have been forced to reduce services,
- According Centers for Healthcare Quality and Payment Reform, 10 West Virginia hospitals are at the risk of closing



**RURAL HOSPITALS  
AT RISK OF CLOSING**



## BECKER'S **Hospital CFO Report**

**65 hospitals closing departments or ending services**

Andrew Cass October 24, 2023



**Strong Hospitals.  
Strong Communities.**

[www.wvha.org](http://www.wvha.org)

# **West Virginia's Role in the Future of Energy**

**Derrick Williamson, WVEUG/Moderator**

**Chris Hall, Orion Strategies**

**Chris Hamilton, WVCA**

**Evan Vaughan, MREC**

# Break

# **What's Happening with West Virginia's Workforce**

**Jeff Green, Workforce WV**

**Andy Malinoski, WVDO**

**Pat Winkelman, Proctor and Gamble, Moderator**



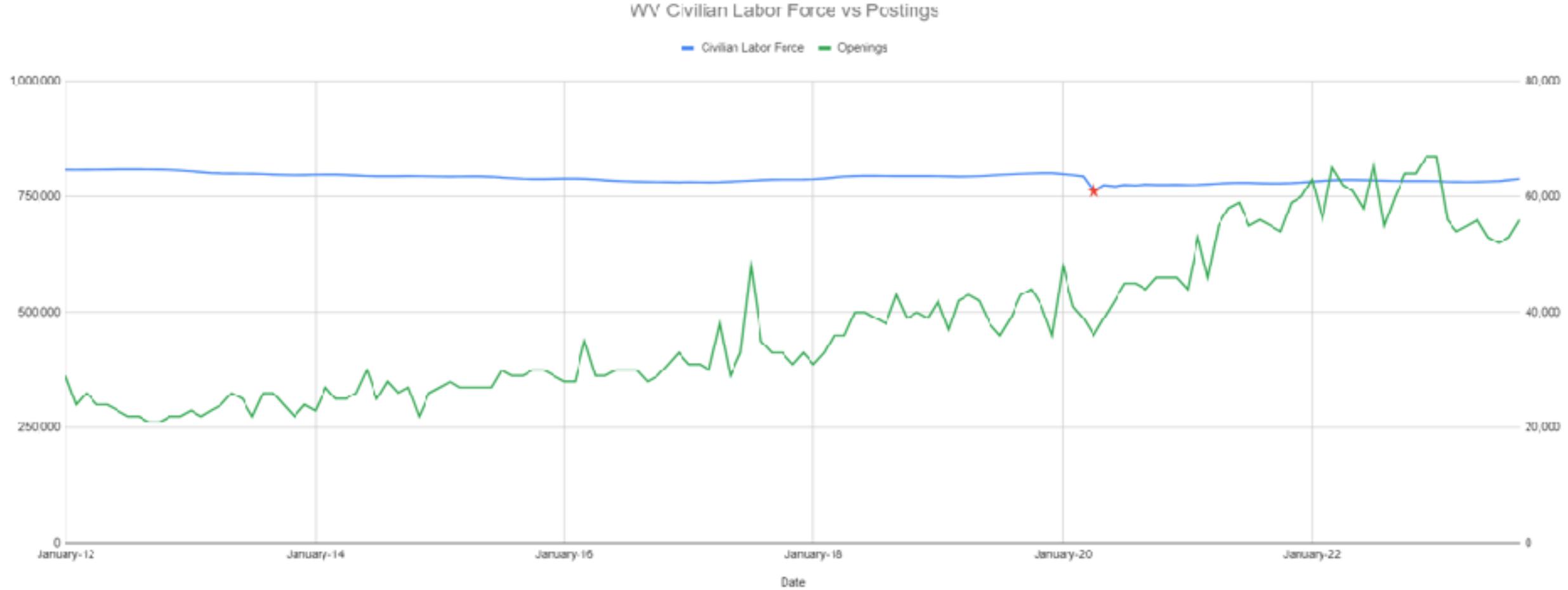
**WorkForce**  
WEST VIRGINIA

A DIVISION OF THE WEST VIRGINIA DEPARTMENT OF COMMERCE

## WV Labor Force Dynamics

THE POST-PANDEMIC ECONOMY

# Labor Supply vs Job Postings 2012-2023





# Manufacturing and Service Sector Activity (Oct 2013 - Oct 2023)

Fifth District Survey of Manufacturing Activity

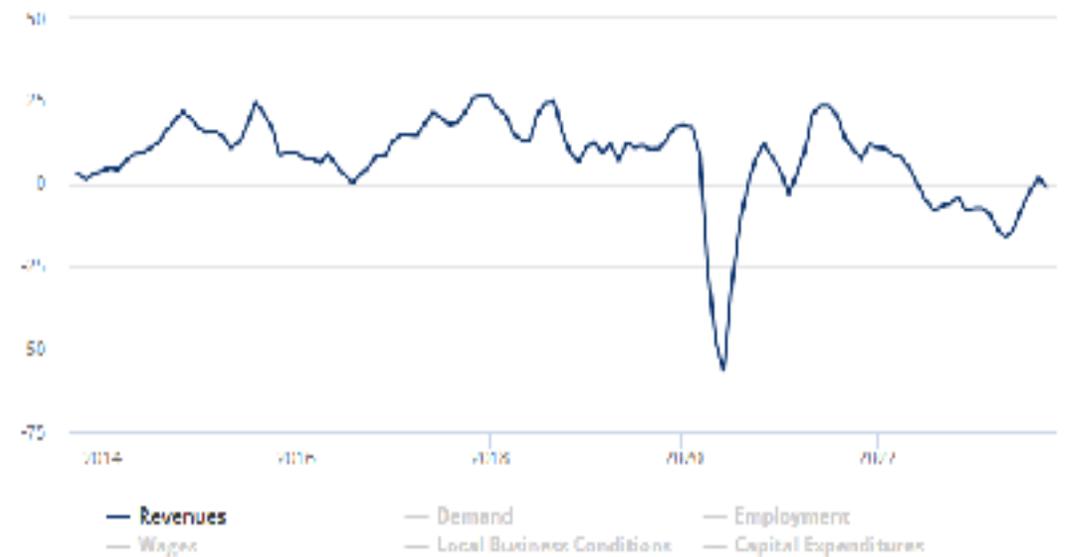
Diffusion Index, Seasonally Adjusted Q-MMA



Source: Federal Reserve Bank of Richmond

Fifth District Survey of Service Sector Activity

Diffusion Index, Seasonally Adjusted Q-MMA

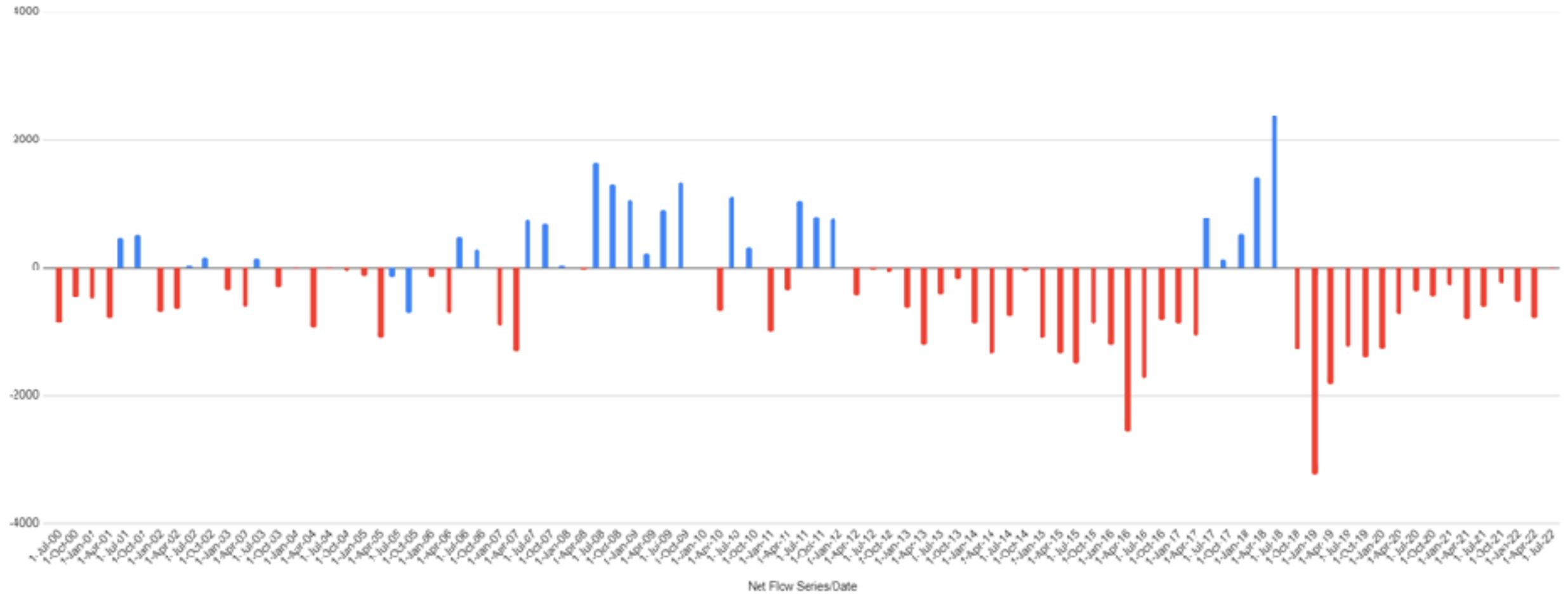


Source: Federal Reserve Bank of Richmond

# Reasons for not working: WV vs US (Dec 1/26/22-2/7/22)

Select characteristics	Total US	Total WV	Percent US	Percent WV	Difference
<b>Total</b>	102,261,969	595,529			
<b>Reason for not working</b>					
I did not want to be employed at this time	4,941,929	13,677	4.83%	2.30%	-2.54%
I was caring for someone or sick myself with coronavirus symptoms	7,772,708	41,078	7.60%	6.90%	-0.70%
I was caring for children not in school or daycare	5,049,124	41,180	4.94%	6.91%	1.98%
I was caring for an elderly person	1,403,102	20,466	1.37%	3.44%	2.06%
I was concerned about getting or spreading the coronavirus	3,016,462	8,441	2.95%	1.42%	-1.53%
I was sick (not coronavirus related) or disabled	6,792,498	74,408	6.64%	12.49%	5.85%
I am retired	42,522,245	256,908	41.58%	43.14%	1.56%
I was laid off or furloughed due to coronavirus pandemic	3,072,846	11,449	3.00%	1.92%	-1.08%
My employer closed temporarily due to the coronavirus pandemic	1,365,354	3,030	1.34%	0.51%	-0.83%
My employer went out of business due to the coronavirus pandemic	1,205,653	1,762	1.18%	0.30%	-0.88%
I did not have transportation to work	1,153,780	576	1.13%	0.10%	-1.03%
Other reason	18,205,194	96,838	17.80%	16.26%	-1.54%
Did not report reason	5,761,073	25,716	5.63%	4.32%	-1.32%

# WV Net Job Flows (2000-2022)



# Working Outside State of Residence (2021)

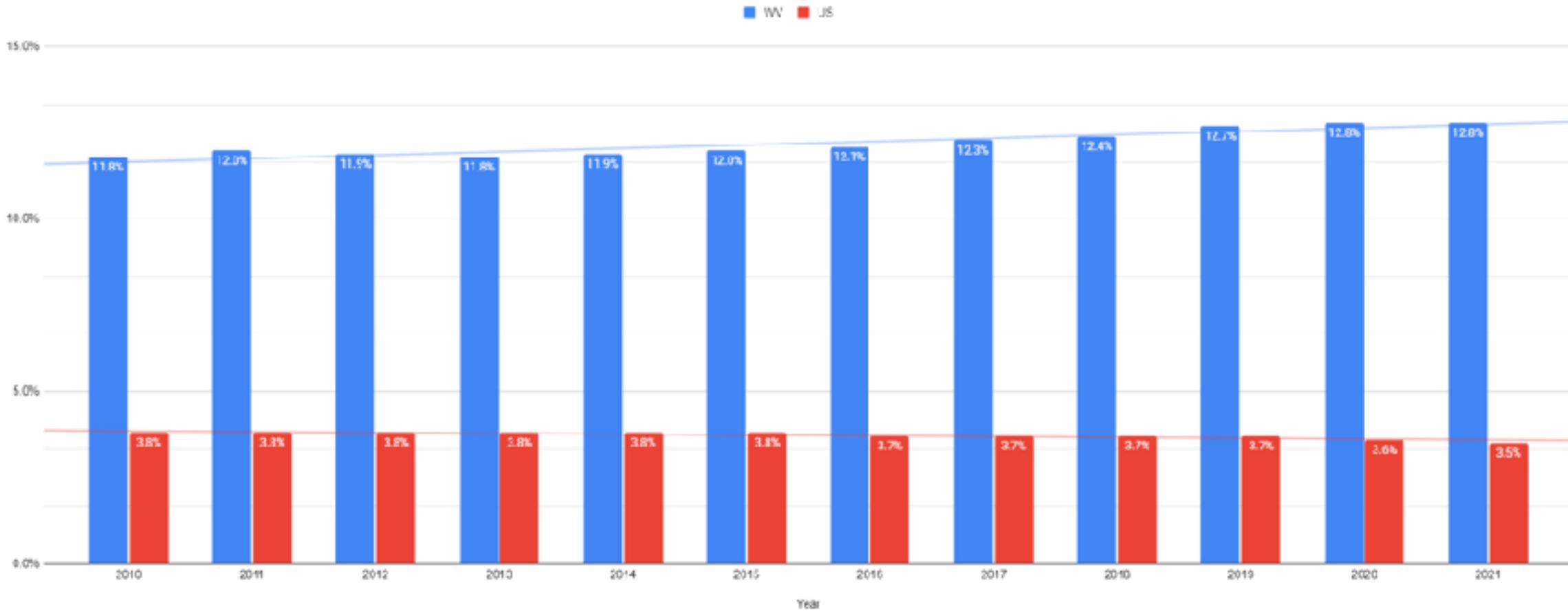
WV

12.8 %

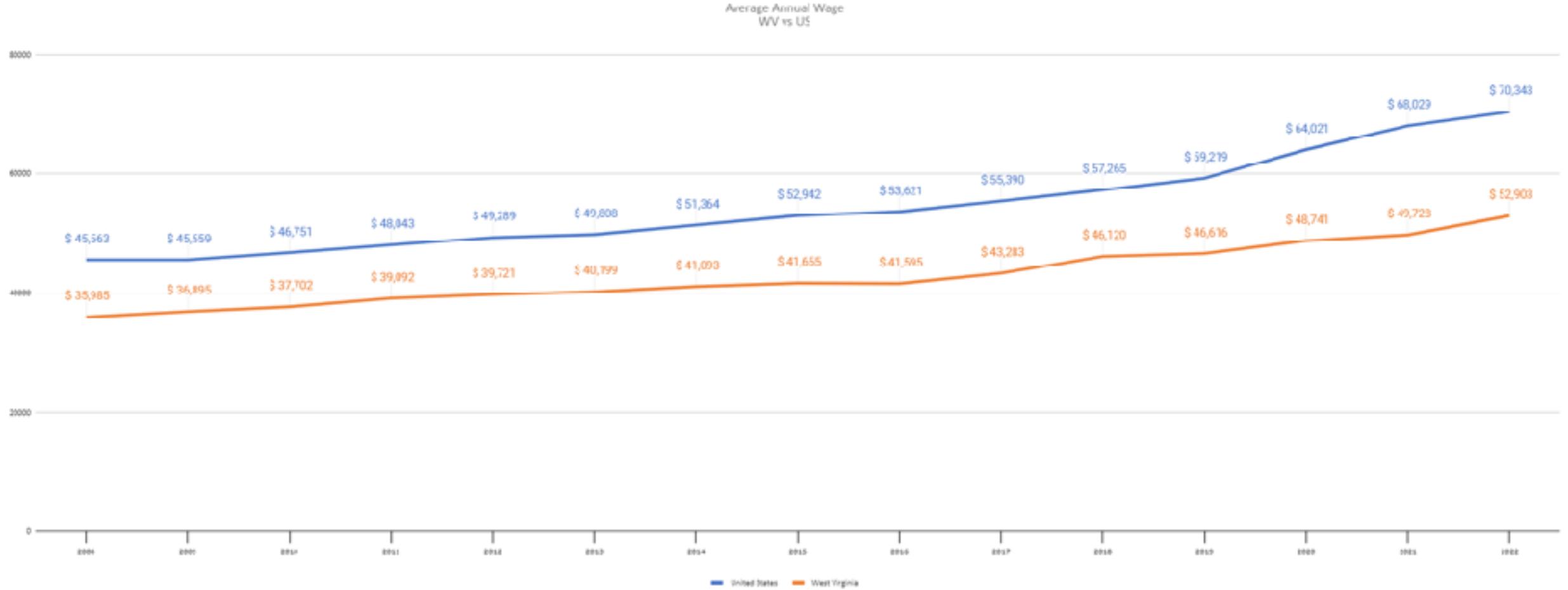
US

3.5 %

# Working Outside State of Residence (2010-2021)

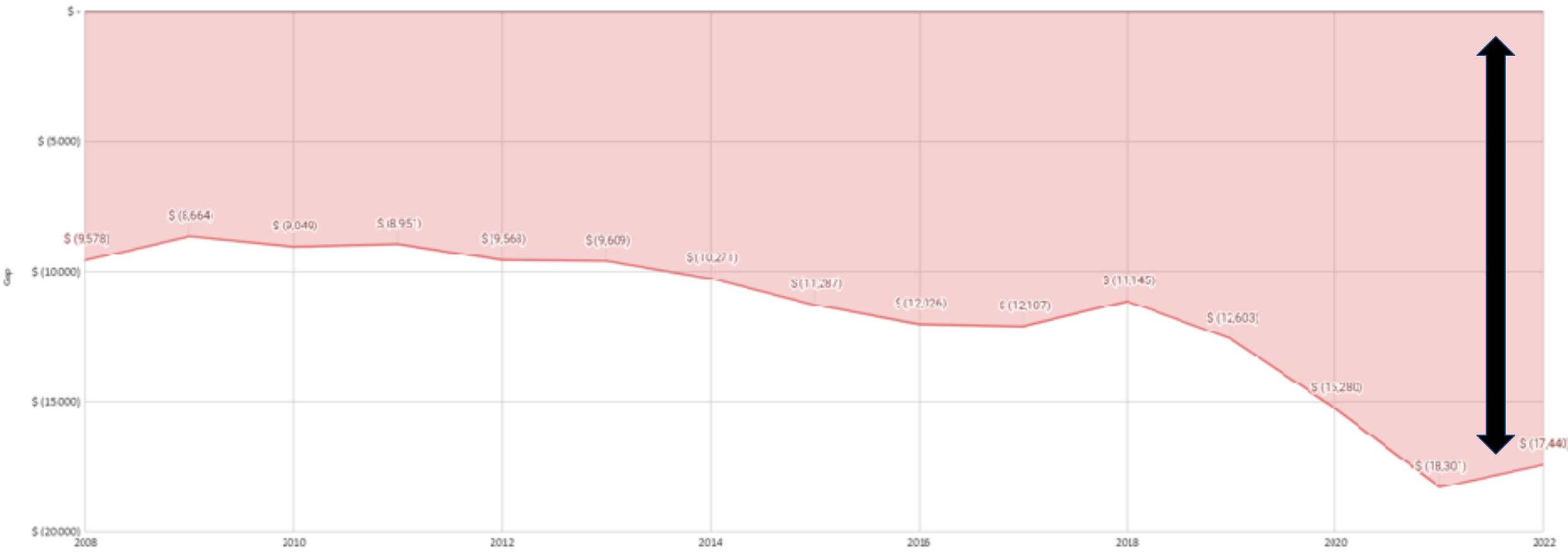


# Average Annual Wage Comparison



# Wage Gap – US vs WV

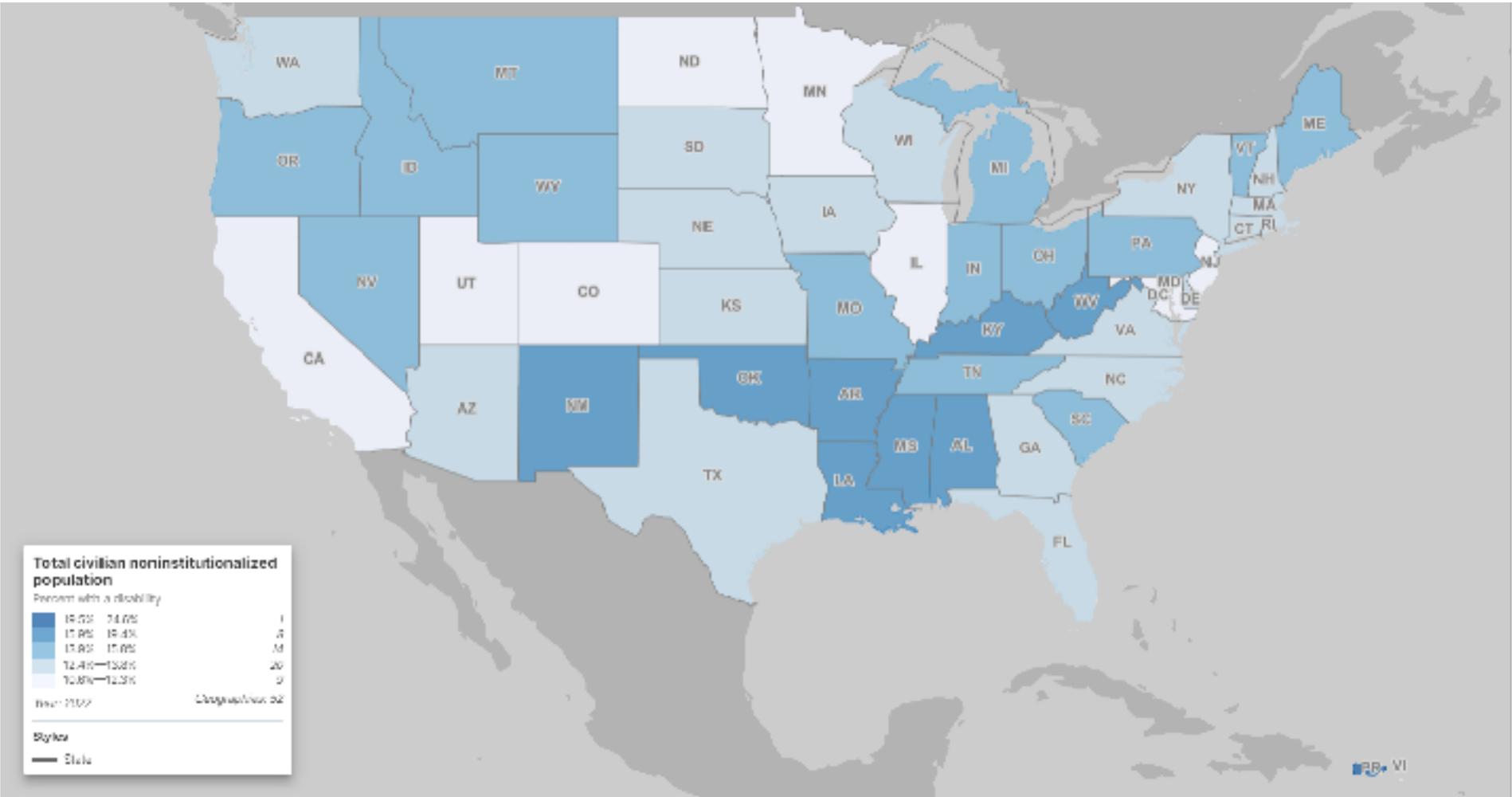
Average Annual Earnings Gap (US vs WV)



# States with the lowest Cost of Living (Q3 2023)

Rank	State	Index	Grocery	Housing	Utilities	Transportation
1	West Virginia	85.2	98.0	62.3	96.0	91.6
2	Mississippi	86.7	96.8	72.6	87.0	85.3
3	Oklahoma	86.8	94.2	71.1	94.5	94.1
4	Kansas	87.4	96.5	38.2	104.9	89.6
5	Alabama	88.2	95.8	70.5	101.8	89.1
6	Missouri	88.3	95.2	76.4	101.5	88.8
7	Arkansas	88.5	94.8	73.4	91.5	89.9
8	Iowa	89.9	96.3	72.6	95.7	98.8
9	Tennessee	90.4	96.8	82.2	93.0	87.1
10	Louisiana	90.7	94.2	80.5	83.0	94.4

# Disability Status: 2022



State	Rate
Puerto Rico	24.6
West Virginia	19.4
Mississippi	18.4
Kentucky	18.1
Arkansas	18.1

19%

Of West Virginia citizens with a disability are employed



# Thank You

Jeff Green

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# WEST VIRGINIA

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DEPARTMENT *of* COMMERCE



# WEST VIRGINIA

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DEPARTMENT *of* COMMERCE

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# Reality We Face ...

1. Media Fragmentation
2. Marketing Channel Effectiveness
3. Migration to Mobile
4. Migration to Social



WhatsApp



Skype



Vimeo



YouTube



Tumblr



Vine



LinkedIn



Facebook



Twitter



Instagram





“AND” Strategies

Aggregator Market

Quality of Life

Unique approaches

**Tell the story of #AlmostHeaven #YesWV**

Build Reach Frequency and Trust

Get the jobs

Get the data

Amplify jobs

**Tell the story of #AlmostHeaven #YesWV**

Build Reach Frequency and Trust

# www.jobs.wv.gov

The screenshot shows the homepage of the West Virginia job portal. At the top, the URL 'https://www.jobs.wv.gov' is visible in the browser's address bar. Below the address bar, the main heading reads 'Find your job in #YESWV' in a large, bold font, with 'Powered by Jobcase' in a smaller font to the right. A 'Get Job Alerts' button is located below the heading. The main visual is a large banner image of a steel truss bridge spanning a lush green valley. Overlaid on the banner is the text 'Search #YesWV jobs now'. Below this text is a white search bar with two input fields: 'Job Title or Keywords' and 'Charleston, WV'. A green callout bubble on the right side of the page contains descriptive text about the site's purpose and target audience.

This is a CONSUMER-FACING site that is aggregating all publicly available jobs IN West Virginia.

**Target: Job Seekers**  
**Purpose: Connect them with WV Opportunities**

This is a second CONSUMER-FACING site that is aggregating CONTENT and available jobs about West Virginia.

Target: Job Seekers

Purpose: Connect them with WV Opportunities

# Content

## Jobcase.com/wv

The screenshot shows the Jobcase website for West Virginia. The browser address bar displays <https://www.jobcase.com/wv/West-Virginia>. The website header includes the Jobcase logo, navigation links for Community, Jobs, and Resources, and buttons for Join, Log In, and Employers. Below the header, there are category links: Getting Hired, Popular Workplaces, Unemployment, Coronavirus, and Government Programs. The main content area features a grid of four articles, each with a featured image, a date (June 27, 2023), a title, an author name, and interaction buttons (Like, Comment, Share).

- Article 1:** "Shaping the Future With WV HEPC – Supporting #YesWV's Higher Educatio..." by Jobcase Team. 24 likes.
- Article 2:** "Get hired into West Virginia's tech ecosystem" by Kai Dickerson. 11 likes.
- Article 3:** "Latest startups and career growth opportunities happening in West Virginia" by Yiming Shuang.
- Article 4:** "Smart career change to remote IT jobs with CentralApp" by Yiming Shuang.

This is an EMPLOYER-FACING site that provides FREE listings in the Job Aggregator Space for West Virginia employers.

Target: WV Businesses

Purpose: Place WV Jobs in the right format to be marketed and found on Jobcase and the Aggregator Market

# Capture

[Jobcase.com/wv/post](https://www.jobcase.com/wv/post)

The screenshot shows a web browser window with the URL <https://hirenow.westvirginiajobcase.com/purchase/post-now/>. The page header includes the logos for WEST VIRGINIA Economic Development, WorkForce WEST VIRGINIA, and Jobcase, along with a 'View Pricing' link. The main content area features a woman with glasses looking at a laptop, with the text 'Create a free job post - provided by the WV Dept of Economic Development & Jobcase' and a 'Post a job' button. Below this is a section titled 'Take your jobs online with the WV Dept of Economic Development & Jobcase' with a subtext 'Choose an option & get a package discount.' Three pricing options are listed: 'Basic' (FREE), 'Advanced' (\$249 per job), and 'Professional' (\$525 per job). Each option includes a 'Post a job now' button and a list of benefits.

Package	Price	Registration Fee
Basic	FREE	None
Advanced	\$249 per job	Registration once only
Professional	\$525 per job	Registration once only

**Basic**  
Get your jobs on Jobcase today!

**Advanced**  
Get your jobs on Jobcase and more today!

**Professional**  
Our next level job advertising package

**Benefits:**

- Distributes your job on Jobcase.
- Searchable by the thousands of jobseekers in your area!

[Home](#) / [Individuals](#) / Job Fairs

## Job Fairs

A WorkForce Job Fair gives you the opportunity to meet with employers in person and apply for a new job. Please check back to find a job fair in your area or contact your nearest WorkForce West Virginia Regional Office for listings of job fairs in your area.

### VIRTUAL JOB FAIRS

Are you a West Virginia job seeker looking to change or advance your career?

Through the Virtual Statewide Job Fairs, you can chat with multiple organizations that are hiring all across West Virginia! As an attendee, you can apply, live chat, video chat and interview virtually with employers participating in the event. Job seekers are encouraged to dress professionally and have a solid, clutter-free background, as employers may request to see your video interview.

Not sure how it works? The [Virtual Statewide Job Fair portal](#) features a Job Seeker Training video, a list of participating employers, and channels for attendees to register and login. For more information about WorkForce West Virginia and the Statewide Virtual Job Fairs, contact [workforcewv@wv.gov](mailto:workforcewv@wv.gov).

Are you a West Virginia employer with open positions?

Join public, private and nonprofit organizations across the state to connect with qualified jobseekers from all across the state! Whether you have one open position, or 100, register today to meet – and even interview – your next employee! Upon [registration](#), employers will create a "Virtual Booth" to connect with job seekers. After completion, this booth will be available during subsequent job fairs.

#### JOB AND TRAINING FAIR

Huntington, WV

Date: 04/26/2023

[LEARN MORE](#)

#### AMERICAN CONSOLIDATED NATURAL RESOURCES, INC.

Triadelphia, WV

Date: 04/26/2023

[LEARN MORE](#)

#### STATEWIDE VIRTUAL JOB FAIR

Statewide

Date: 04/26/2023

[LEARN MORE](#)

# WorkForce WV Virtual and In-Person Job Fairs



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# **Upskilling the Talent Pipeline**

**Carol Howerton, Marshall Advanced Manufacturing Center**

**Staci Miller, West Virginia University Industrial Extension**

**David Goldberg, SeeMore Impact**

**Mychal Schulz, Babst Calland, Moderator**



ADVANCED  
MANUFACTURING  
CENTER



# Apprenticeship *works!*

National Advanced Manufacturing  
Apprenticeship Partnership

# BACKGROUND



## ADVANCED MANUFACTURING CENTER

- Founded in 1990
- Initial funding from DoD to support defense suppliers
- 31 staff, multiple locations in West Virginia
- Serve 350 manufacturers in over 23 states per year

# Technical Services

- More than 700 years of industry experience
- \$22million in leading-edge equipment
  - Multi-axis CNCs
  - Waterjet, laser cutters & injection molding
  - 3D printing in polymers, resins, carbon fiber & metals
- Design Engineering
- Reverse Engineering
- Product Development/ Prototyping



# Quality Implementation



Quality practices open diversification opportunities in new markets and ensure customer satisfaction with continuous improvement.

- ISO 9001 Standards, including:
  - AS 9100 aerospace
  - IT 16949 automotive
  - ISO 14001 environmental
  - ISO 17025 testing labs
  - ISO 13485 medical devices
- Lean & Six Sigma
- Environmental & Energy
- Leadership training
- 99 percent certification rate

# Workforce Development Career Skills

- Academic Programs
  - 1 and 2 Year academic degree programs
  - Partnership with Mountwest CTC
  - Machinist Technology/CNC with NIMS Credentials
  - Welding with AWS Credentials and a mobile lab
  - Coming Soon – Adv. Manufacturing with maintenance, electronics, process controls, and robotics.
- Public Programs
  - Fast Track – individualized training
  - Special Programs - Military-to-Mfg & WV Women Work
  - Open Courses – public group courses (Fusion 360 upcoming)
- More than 3,000 industry credentials



# Workforce Development Customized Industry Training

Training customized specific to need industry needs and delivered on-site or at MAMC

- Over 26,000 employees trained
  - New hires
  - Upskilling incumbent workers
- Most popular topics
  - CAD/CAM software training
  - Machining/CNC Programming
  - Welding
  - Cross training
  - Precision measurement
  - Blueprint reading
  - Design engineering
  - Safety
  - Leadership/management
  - Emotional Intelligence



# Workforce Development Apprenticeship and Pre-Apprenticeship

- **What is Apprenticeship Works?**

- Nationally recognized model for apprenticeships
- \$4.5M funded initiative with the Department of Labor
- Assistance with development and alignment of pre-apprenticeship programs
- Designed to reduce cost to businesses
- Assist with the development of standards for uncovered occupations



**Apprenticeship**  
*works!*

# Apprenticeship *works!*

## What we offer

- Consulting services to develop, customize and implement a registered apprenticeship using nationally recognized standards
- Program sponsorship (management of DOL paperwork)
- Train-the-Trainer program for mentors
- Pre/post-assessment of employees' knowledge and skills
- Access to online materials (Tooling U or 180Skills/Workforge)
- Facilitation of online instruction via Tooling U
- Tracking software for On-the-Job Learning
- Reporting and tracking of Related Training Instruction (RTI)
- Follow-up assistance with apprentices
- Reporting assistance to provide feedback for company leadership
- Connection to other services and providers for additional training

# Common Occupational Skill Sets for Customized Training or Apprenticeship



- Additive Manufacturing/ 3D Printing Technician
- CNC Operator/ Programmer
- Assembly Technician
- Tool and Die Maker
- Maintenance Technician
- Welding Technician
- Industrial Maintenance Technician
- Die Setter
- Press Brake Operator
- Quality Control Technician
  - Press Operator
  - Molder
  - Core Maker
  - Pattern Maker
  - Maintenance Electrician
  - Engineering Assistant
- Composites Technician

# High Performance

I have rock-solid math and literacy skills

I can use my skills to solve real-world problems

When needed, I learn new skills on my own

I execute my skills with care and persistence,  
striving for excellence

My self-confidence is well-earned

hard to hire / hard to train





The CSM Course builds High Performance  
Used in high schools, adult education, workforce development, workplaces

The CSM Certificate certifies High Performance  
College credit + Hiring recognition





- ▶ WV Office of Adult Education
  - ▶ CSM is free for all adults with a personal coach
- ▶ WVU, other 4-years, WV Community and Technical Colleges
  - ▶ Satisfies gen-ed math requirements an associate/bachelor's degree
- ▶ Workforce West Virginia
  - ▶ Alternative to job search requirements for unemployment benefits
  - ▶ Employer checkbox for CSM hiring preferences in the state jobs database
- ▶ WV Manufacturers Association / WV Hospital Association / WV Oil & Gas Association / Chemical Alliance Zone
  - ▶ Encourage member endorsement of CSM in hiring
  - ▶ Use in employee upskilling
- ▶ CSM is an option for the 4<sup>th</sup> year high school math course

# West Virginia

49<sup>th</sup> in high school math scores

44<sup>th</sup> in college-going

50<sup>th</sup> in percentage of adults with a bachelor's degree

Students graduating high school  
with college math requirement completed

Other states →

West Virginia <sup>3-4%</sup> → 60-70%

- ▶ deep remediation
- ▶ college math credit
- ▶ employability skills course & certificate
  - ▶ High Performance skills
- ▶ hiring preferences

Working 3-4-year target:  
20,000+ West Virginians/year  
(including 12,000+ high school students)

- I agree that our organization will indicate that it “recognizes the value of the CSM Certificate in hiring decisions” in its job descriptions for applicable positions
- I agree that by checking this box, I am authorizing Excel Together West Virginia and the Workforce West Virginia state jobs database to list my company as one that recognizes the value of the CSM Certificate in its hiring decisions.

In return for checking  
the boxes on  
hiring preferences...

## Your *free* benefits

- ▶ Excel Together WV will point CSM Certificate holders to your company
  - ▶ Access to highly qualified candidates
- ▶ Help arrange upskilling for your employees
  - ▶ General upskilling
  - ▶ Prior to advanced training, promotions
- ▶ Help in community outreach
  - ▶ CSM in schools
  - ▶ employee volunteers in the community

# Closing Remarks



# 8<sup>TH</sup> ANNUAL MEETING & WINTER CONVENTION

## 2023 EVENT SPONSORS



ADVANCED  
MANUFACTURING  
CENTER



*COPPER SPONSOR*



## 2023 CORPORATE PARTNERS

### DIAMOND



### PLATINUM



### GOLD



### SILVER



### BRONZE

