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IRN Survey Reveals Greater Business Opportunities; Stable Balance of Power

Margaret Baxter, OESA

Early results from the 2011 IRN Pricing Survey indicate that nearly 70 percent of respondents are seeing greater new business opportunities this year compared to last year. Less than 10 percent of the respondents feel that their power relative to their customers has decreased compared to last year. However, a greater percentage believes their power relative to their own supply base has decreased.

This annual pricing survey of the automotive supplier community gathers information on the dynamics of pricing negotiations between suppliers and their customers. Join OESA and IRN on Dec. 7, 2011, for an executive breakfast briefing where **Kim Korth**, president and CEO, IRN, Inc., will present survey findings and implications from results obtained from more than 145 survey responses.

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Ford Purchasing Panel Set for December Town Hall

Dave Andrea, OESA

Tony Brown, group vice president, global purchasing, Ford Motor Company, along with the Ford purchasing leadership team will participate in a panel discussion at the OESA Ford Town Hall meeting on Dec. 13, 2011, at the Dearborn Inn, Dearborn, Mich. This members-only town hall offers a unique opportunity to participate in an open question and answer session and meet with Ford purchasing executives informally before and after the meeting. This meeting is open to OESA regular and affiliate members only.



The Ford purchasing staff and its supply base have been challenged this year with supply chain disruptions from the Japan earthquake, significant material cost increases, rising global production and numerous product launches. Attendees will hear **Brown's** assessment of 2011 and his general outlook for 2012. Following his remarks, there will be a 60-minute session for attendees to ask questions and comment on Ford's procurement initiatives. Joining **Brown** for the question and answer session will be:

- **Birgit Behrendt**, Executive Director, Global Programs and The Americas Purchasing
- **Burt Jordan**, Executive Director, Global Vehicle and Powertrain Purchasing
- **Dave Velliky**, Executive Director, Global Supplier Technical Assistance
- **Jeff Wellman**, Executive Director, Facilities Materials and Services Purchasing, Business Strategy and Global Purchasing Information Management Systems

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De KOKER's CORNER

Successful Annual Meeting Caps Off a Challenging Year

Neil De Koker, OESA

The 13th annual OESA Outlook Conference provided a great capstone to 2011. I want to thank all of the OESA members and guests that made it a great success. The meeting reinforced many of the activities OESA pursued in 2011 or is proposing for 2012. Here are a few of my reflections.

Michigan Governor **Rick Snyder** kicked off the activities by setting a very positive tone for the conference. Governor **Snyder** is leading state government by creating a culture of relentless, positive action for problem solving so Michigan citizens and companies are the beneficiaries. The governor's message on remaining forward looking, being inclusive and rejecting the "blame game" is a message the auto industry can use to its benefit. The governor spoke to many issues, such as regulatory reform, that OESA and the MEMA Washington office are pursuing in our increased attention to state governmental relations.



The bottom line from the Outlook Session panelists was that while the short-term economic outlook has significant risk for the industry, the longer-term opportunities have never been stronger. Without a doubt, the lackluster economic outlook does not leave much room to fight contagion that might come from the European crisis. However, greater OEM product introduction cadence, technology commercialization and global markets offer significant supplier business opportunities. Many of these opportunities are at the heart of OESA council agendas and event plans.

The conference's lunch keynote was one of the highlights of the conference. **Bill Ford, Jr.**, executive chairman, Ford Motor Company, presented open and candid remarks about Ford, the industry and the broader issues facing our country, such as the need for a national energy policy and trade reforms. The voice of the supply base on these issues occurs through OESA member participation on the MEMA Government Affairs Committee, the annual Washington Summit and through the Action Center.

The CEO Panel with top supplier executives spoke to the OESA/McKinsey & Company Vision 2020 study. **Hans-Werner Kaas**, director and leader, automotive and assembly, the Americas, McKinsey & Company, Detroit, **Masayasu "Mike" Saito**, president and CEO, AISIN Holdings of America, Inc., **John Corey**, president and CEO, Stoneridge, Inc., and **Roger Wood**, president and CEO, Dana Holding Corporation, provided a good mix of strategic perspectives from medium and large suppliers. The Vision 2020 study paints a very challenging decade facing the industry. However, through OESA council participation, I am always amazed at the resilience and resourcefulness of the supply base to not just survive, but also thrive in the most challenging of times.

The OESA annual conference would not be complete if we did not give OEMs an opportunity to speak directly to our members about their plans. In addition to **Bill Ford**, **Olivier Francois**, head of Fiat Brand Worldwide, chief marketing officer, Chrysler and Fiat Groups, **Rebecca Vest**, vice president, purchasing, Nissan North America, Inc., and **Ray Tanguay**, chairman, Toyota Motor Manufacturing Canada, and senior managing officer, Toyota Motor Corporation, provided attendees with plenty of insights into their companies and industry outlooks. From the OESA OEM town hall meetings to the increased OEM engagement with OESA councils and events, OESA members have a great number of opportunities to interface with their OEM customers.

The OESA annual conference shows the type of collaboration we can pursue between industry, government, the financial sector and all other stakeholders that were represented at the podium and in the audience. No year is without its special challenges, and certainly, 2011 was very challenging for the industry. However, through adversity the best is brought out of this great industry. I want to thank the OESA staff and our members for all you did for OESA and the industry this year. And I want to wish all of you and your families the very best this Holiday Season and for the 2012 New Year.

As always, feel free to contact me on this topic or any other. You can reach me at 248.952.6401 ext. 224 or ndekoker@oesa.org.

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**Executive committee*

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OESA Welcomes New Members

INOAC USA, Inc.

1515 Equity Dr.
Suite 200
Troy, Mich. 48084
Phone: 248.619.7031 Fax: 248.619.7032
Http://www.inoacusa.com
Member Representative: Charles Little, CEO and President
Alternative Representative: Ed Yeaste, CFO



INOAC USA is the North American arm of the INOAC Group, a multibillion dollar polymer materials leader specializing in plastics, rubber and foam fabrication technology with automotive and non-automotive applications. For automotive, INOAC USA is an OEM supplier of interior, exterior and under hood components that include, instrument panels, consoles, headrests, armrests, rear spoilers, body side moldings, roof rails, window moldings, HVAC foam seals, headliner EA cushions, interior cushioning, foam air filters and more. INOAC products are sourced on production vehicles that include Toyota, Honda, Chrysler, Ford, Nissan and GM.

The Intec Group

666 S. Vermont St.
Palatine, Ill. 60067
Phone: 847.358.0088 Fax: 847.358.4391
Http://www.intecgrp.com
Member Representative: Steven Perlman, President and CEO
Alternative Representative: Daryl Dishong, CFO



Established in 1953, The Intec Group is a leader in designing and manufacturing precision insert molded and injection molded thermoplastic parts. The Intec Group creates manufacturing solutions that increase productivity for its customers. When the company's expertise is focused early in the design phase on customer needs and objectives, the end product is improved, lead times are minimized, production processes become more efficient and costs are reduced.

LTC Roll and Engineering

23500 John Gorsuch Dr.
Clinton Twp., Mich. 48036
Phone: 586.465.1023 Fax: 586.465.0554
Http://www.ltcroll.com
Member Representative: Russ Senkowski, Director of Sales
Alternative Representative: Drew Ligoa, Plant Manager



LTC Roll & Engineering

The LTC tradition of innovation plus quality began in 1967 with the manufacturing of high-quality roll form tooling, primarily for the automotive industry. Since then, LTC has grown to become a recognized leader in the industry. Its success is built on precision and performance. The design and process ingenuity of its technical staff and the skill of its production employees consistently yields high-quality finished products.

PNC

755 W. Big Beaver
Suite 2500
Troy, Mich. 48084
Phone: 248.729.8483 Fax: 248.729.8818
Member Representative: David L. Morrison, Executive Vice President



PNC's wide range of services can make banking easier and more convenient than ever. PNC is the smart choice for help in meeting financial goals, whatever challenges and opportunities lie ahead. PNC offers a wide range of services for all its customers, from individuals and small businesses, to corporations and government entities. No matter how simple or complicated the need, PNC has the products, knowledge and resources necessary for financial success.

MEMBERS

SAE Detroit Section Commits \$250,000 to Focus: HOPE to Establish the Eleanor Josaitis Memorial Scholarship Fund

Dave Andrea, OESA

OESA affiliate member SAE Detroit Section has worked with Focus: HOPE to establish the SAE Detroit Section Eleanor Josaitis CAT Scholarship Fund that will help provide college scholarship money to qualified students involved in Focus: HOPE's Center for Advanced Technologies (CAT) program. The fund will support students earn their four-year engineering degree and will forever honor Focus: HOPE co-founder **Eleanor Josaitis** who passed away in August.

CAT is a unique program that allows students to study engineering at local universities and gain hands-on experience by working on government research and development projects at Focus: HOPE or through internships with area businesses. Scholarships will be administered by Focus: Hope and be made available as part of the CAT program.

Currently, CAT students can apply for the college scholarships which serve as a reimbursement for the cost of their tuition. These scholarships will meet a critical gap in student funding by supporting other associated costs and allow students the freedom from student loan burden following graduation. The Section has made a five-year commitment of \$50,000 per year to fund these scholarships.

"Such scholarships from the private sector give motivated, bright students, many of whom would be unable to afford college, the opportunity to realize their dreams and build successful careers in a skilled field," said Focus: HOPE CEO **William Jones, Jr.**

"The first step to economic recovery is creating high-paying jobs and finding qualified candidates to fill those positions," **Jones** said. "The students who have graduated through our Center for Advanced Technologies just needed an opportunity. Now they have the skills that make them employable in the high-tech automotive and manufacturing sectors."

"Eleanor was a true friend of the SAE Detroit Section and our many educational programs. Her sincere passion and dedication to using education as the key to social and economic betterment is an inspiration to us all," reflected **Charon Morgan**, E2XX operations manager, global vehicle engineering, General Motors, and 2011 SAE Detroit Section Chair.

On establishing the scholarship fund, **Morgan** stated, "Working with Focus: HOPE and its Center for Advanced Technologies to establish the SAE Detroit Section Eleanor Josaitis CAT Scholarship Fund will help narrow the engineering shortage in its own unique way by assisting Detroit-area students earn a four-year engineering degree at one of our leading universities."

SAE International was founded by a small group of mobility-industry pioneers in 1905. The SAE Detroit Section was established in 1911 and is now one of SAE International's largest Sections with more than 9,000 members from Southeastern Michigan and Northwestern Ohio, including metropolitan Detroit, Ann Arbor, Jackson and Toledo. Additionally, individual members are active participants in educational programs for K-12 students, such as *A World in Motion* (AWIM). For more information about the Detroit Section of SAE International, visit www.sae-detroit.org. For more information about SAE International, please visit www.sae.org. SAE Detroit Section has student chapters on eight college campuses across Michigan, giving students an opportunity to become active professionally, while studying their chosen engineering field.

For more information, contact Dave Andrea at dandrea@oesa.org.

COUNCILS

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CEOs Project 13.55 Planning Volume for 2012

Margaret Baxter, OESA

At the fall meeting of the CEO Council, CEOs heard from peers during the “CEO Spotlight,” a regular part of each council meeting where CEOs share a presentation on something that they feel they do well at their respective companies.

Among other presenters, **Mark Sullivan**, president and CEO, North America Inergy Automotive Systems, shared a presentation on the team industrialization process that his company developed. It is a seven-phase process which utilizes the people who know the company processes in areas of line layout, equipment design, component presentation, work instructions, inventory management, lean processes, ergonomics, safety, etc. The purpose is to promote employee involvement, creating new production lines with the production team members as part of the launch team. Questions for **Sullivan** centered on union acceptance of the process, how employees have or have not embraced the opportunity, and challenges that the company has overcome to fully implement the team industrialization process.

During the member forum, CEOs compared notes on planning volumes for 2012. The average of the group’s North American planning production volume projections was 13.55 million units. The high was 15 million and the low was 13 million units.

CEOs also heard from **Ron Harbour**, partner, Oliver Wyman, during an “Off The Record” discussion. **Harbour** shared a presentation on OEM lean implementation based on assessments at more than 400 assembly plants. He discussed the importance of driving lean through the supply chain and the hallmarks of successful implementations and stumbling blocks. He further engaged in a dialogue with CEOs on benchmarking manufacturing performance, developing strategies and improving operations.

The next CEO Council meeting will take place on Jan. 11, 2012, and will include executive tours of the North American International Auto Show. Membership in the council is open to the most senior executive from OESA regular member companies responsible for North American automotive operations. For more information, contact Michelle Maki at 248.952.6401 ext. 229 or mmaki@oesa.org.

About OESA Councils:

OESA provides forums for members to address issues of common concern through 13 peer group councils. Executives from OESA regular member companies in good standing may apply for council membership. Typically, eligibility requires the individual to be the top executive of the regular member company in the area of responsibility covered by the council. For more information, and to connect with the OESA staff members responsible for facilitation and management of the councils, visit the OESA website or contact Brenna McCann at 248.952.6401 ext. 226 or bmccann@oesa.org.

COUNCILS

HR Council Members Gain Insight on Recent Detroit 3-UAW Contract

Dave Andrea, OESA

The OESA Human Resources Council focused on the labor contract negotiations between the UAW and General Motors, Ford Motor Company and Chrysler at its meeting on Oct. 27, 2011. The analysis and basis for the discussion were led by **Kristin Dziczek**, director, labor and industry group, and **Sean McAlinden**, executive vice president, research and chief economist, The Center for Automotive Research. With nearly 50 years of experience across corporate, union and academic positions between them, **Dziczek** and **McAlinden** are the leading U.S. automotive labor economists.

After exhaustive analysis of the bargaining positions and the final contract language, **Dziczek** and **McAlinden** summarized the months of preparation and negotiations between the companies and the union as follows:

- Overall, vehicle price inflation should exceed labor cost inflation
- Labor costs will fall with hiring of second tier workers and other contract provisions; Chrysler, with the largest share of second tier labor, will have a labor-cost advantage
- Wage inflation and COLA provisions have been replaced by lump sums and profit-sharing
- Active worker health care was protected for first tier employees, while employee-costs were increased in the second tier wage classification and maintaining a 20-25 percent cap

One of the most interesting elements of the negotiations was the use of social media. While all the official channels of communication were maintained between the union and company bargaining units, **Dziczek** and **McAlinden** highlighted the many ways that Facebook, Twitter and YouTube were used to allow members to exchange opinions with the bargaining committee and leadership. The committees monitored the traffic flowing on social media and used the alternative channels to gauge member reactions and explain official positions. Dissident groups also maintained their own separate channels and engaged on official UAW pages. This presented a vastly different, interactive dynamic during negotiations than the “old days” when all official UAW communications went through in-person meetings, the UAW magazine “Solidarity” and the union’s official website.

The HR Council is open to the senior most executives responsible for the HR function and their direct reports from OESA regular member companies. The council’s purpose is to identify and address strategic issues, share best practices, recommend solutions and promote the welfare of the supplier industry by supporting the effective HR-related practices. The next HR Council meeting will be held on Feb. 2, 2012. For more information, contact Karen Bohannon at 248.952.6401 ext. 230 or kbohannon@oesa.org.

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Bob McConahy

Vice President, Purchasing
Fluid Routing Solutions, Inc.

Communication Executives

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Vice President, Corporate Affairs, Marketing & Operations Support Group
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Hugh Allerton

Director, HSE, TRW Automotive

Glenn Howarth

Director, Environmental Services
Delphi Automotive LLP

Human Resources

Bernie Berrigan

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Automotive Technology Forum

no chairperson

COUNCILS

GM to Address EH&S on Energy Use Reduction and GHG

Margaret Baxter, OESA

On Dec. 5, 2011, the EH&S Council will welcome **Al Hildreth**, energy manager, worldwide facilities group, General Motors. **Hildreth** will discuss GM's efforts to reduce energy use and GHG emissions, as well as corporate strategy for tracking and reporting. The council has had ongoing discussions on energy use reduction and GHG reporting, and **Hildreth** marks the second OEM to address the council in recent months on these issues.

Other meeting offerings will include a discussion on the role of plant managers in HS&E led by **Hugh Allerton**, director, health safety & environment, TRW, and **Glenn Howarth**, director, environmental services, Delphi. **Denny Gross**, product stewardship specialist, Dow Automotive, will give a presentation entitled "Nanomaterials: The EU Definition and Possible Implications," share the recently-published EU definition of nanomaterials and lead a discussion on implications for product development and manufacturing.

The mission of the council is to provide a forum for members to exchange information and ideas, address common concerns, as well as to seek collaborative solutions for industry issues. The EH&S Council welcomes visitors at the upcoming meeting who may be considering membership in the council. Environment, health and/or safety directors and executives from regular member companies are eligible for membership. For more information, contact Michelle Maki at 248.952.6401 ext. 229 or mmaki@oesa.org.

OESA Legal Corner: GHG Accounting Within the Supply Chain – What's Expected?

Steven C. Kohl, Warner Norcross & Judd LLP

The Greenhouse Gas Protocol, a project sponsored by the World Resources Institute and the World Business Council on Sustainable Development, recently finalized standards to guide companies in measuring, reporting and managing GHG intensity on a company-wide basis or on a product specific basis. While broad GHG or carbon intensity supply chain accounting at a product or corporate level has not been generally mandated, other internal or external motivations can exist for conducting such accounting. Companies that seek to adhere to these standards must not only account for their own direct or indirect emissions associated with manufacturing a product or providing a service, but also must account for their supply chain's emissions.

It is becoming increasingly commonplace to find in supply chain agreements clauses that obligate a seller to cooperate with its buyer relative to environmental initiatives which could be inclusive of accounting for the GHG footprint of the product or service being supplied. These clauses do not typically identify any specific standard or protocol that might be employed for this accounting or afford other meaningful detail as to the nature or quality of the information that might be required. Suppliers would be well advised to familiarize themselves with GHG accounting standards like those finalized by the Greenhouse Gas Protocol to understand what information they may be required to develop and provide up the supply chain under these clauses. While data collection is clearly a key to conducting any GHG accounting under any standard, suppliers should recognize the potential that within some supply chains there may be a requirement for third party verification of a GHG accounting. This could impose additional costs within the supply chain.

In the end, suppliers subject to clauses that could trigger an obligation to conduct a GHG accounting need to be sensitive to the GHG accounting and reporting policies buyers up the supply chain are adopting on a corporate or product basis. This will serve to inform suppliers what may be expected of them in the business relationship and identify the data, and the systems necessary to collect the data.

Kohl is a partner in Warner Norcross & Judd's Southfield, Mich., office and a member of the firm's Environmental and Sustainability and Climate Change practice groups.

OESA ed. note: AIAG member OEMs and suppliers have collaboratively developed an AIAG GHG guideline for estimating, collecting and reporting manufacturing facility-based GHG emission data. This document will assist suppliers to develop an emissions inventory. This guideline is based on the World Resources Institute (WRI) GHG Corporate Reporting Standard. The AIAG GHG Guideline will supplement the WRI materials. Information is available on the AIAG website: <http://www.aiag.org>.

The OESA Legal Corner is a monthly feature in OESA News. OESA affiliate law firm members contribute short legal updates to keep members informed on critical issues affecting their businesses. OESA enforces a strict policy of no legalese for these briefs. For more information or to request or suggest a topic, contact Margaret Baxter at 248.952.6401 ext. 223 or mbaxter@oesa.org.

EVENTS

IRN Survey Reveals Greater Business Opportunities; Stable Balance of Power

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Korth will provide suppliers with data for internal strategy sessions as well as productive discussions with customers. Areas covered by the survey include how much customers are requesting, what kind of reductions suppliers are agreeing to, and how behaviors vary by customer group (Chrysler, Ford, General Motors, Honda, Nissan, Toyota and Tier 1s). The event also will cover:

- What concessions suppliers are providing, and in what form
- What suppliers are including in “up front” payments for new business
- How takeover work is impacting supplier business
- How the relative power between suppliers and their customers has shifted
- If and how suppliers are getting price increases

Supporting Partner:



Dan Sharkey, partner, Brooks Wilkins Sharkey & Turco PLLC, will discuss best practices for maximum leverage in pricing negotiations with customers including written communications, “tough” meetings and occasional disputes. He will discuss the dos and don’ts for attempting to obtain price increases, pushing back on requests for price decreases and countering common purchasing techniques.

Event pricing includes a copy of the IRN survey report.

OESA members and industry guests may register in the events section of <http://www.oesa.org>. For registration assistance, contact Felece Hickman at 248.952.6401 ext. 237 or fhickman@oesa.org. For program information, contact Margaret Baxter at 248.952.6401 ext. 223 or mbaxter@oesa.org.

Ford Purchasing Panel Set for December Town Hall

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More than 300 executives attended the 2010 OESA Ford Town Hall. The ability to access senior purchasing executives, hear Ford’s purchasing direction and communicate major issues affecting the entire value chain are key value propositions of the town hall. As one of the 2010 meeting supplier participants noted, “Ford is an important player in the market. Their way of sharing information and rolling out their strategy is very helpful for suppliers and at the end, reduces cost and effort.” These forums are an important form of two-way communication to assist customer-supplier relations.

Ford has invited additional purchasing executives to attend the session and be available before and after the town hall. Registration and networking begins at 2 p.m. with Ford purchasing executives available during this time. The town hall program runs from 3 p.m. to 4:30 p.m. and includes prepared remarks by **Brown** with a majority of the time allocated for the question and answer session. With all the purchasing areas represented, Ford is supporting this meeting to assure supplier questions are answered.

OESA members may register in the events section of <http://www.oesa.org>. For registration assistance, contact Felece Hickman at 248.952.6401 ext. 237 or fhickman@oesa.org. For program information, contact Dave Andrea at 248.952.6401 ext. 228 or dandrea@oesa.org.

EVENTS

Crisis and Recovery Management and the Spirit of *Monozukuri*

Margaret Baxter, OESA

JETRO, JAPIA, JBSD and OESA will host “Japan’s Automotive Industry: Achieving Recovery and Growth Through *Monozukuri*” on Dec. 8, 2011, at the Suburban Collection Showplace, Novi, Mich.

The Great East Japan Earthquake spurred an unprecedented recovery effort from the Japanese automotive and manufacturing communities. Through intensive collaboration and the shared mindset of *monozukuri* – the spirit and quest for manufacturing excellence – Japanese automotive suppliers and OEMs managed to quickly recover production in the face of crisis.

In this seminar, suppliers will hear perspectives from Japanese OEMs and parts suppliers on how they were affected by the March disaster, how crisis and recovery management played out both in Japan and the United States and on future prospects for growth and opportunity.

Speakers include:

- **Hon. Kuninori Matsuda**, Consul-General of Japan in Detroit
- **Hidehiro Yokoo**, President, JETRO Tokyo
- **Nampachi Hayashi**, Senior Technical Executive, Toyota Motor Corporation, Japan
- **Nobuhiro Ozawa**, General Manager, Nissan Iwaki Factory, Nissan Motor Co., Japan
- **Dave Thomas**, Plant Manager, Keihin IPT Mfg.
- **Hiromi Ikehata**, President, Toyoda Gosei North America Corporation
- **Tatsuhiko Shindo**, Chief Executive Director, JETRO Chicago

In addition, **Neil De Koker**, president and CEO, OESA, will share impressions of his recent JETRO-sponsored visit to Japan to tour the region devastated by the March 2011 earthquake and tsunami. He will comment on visits to local Japanese OE suppliers, OEMs, transportation hubs and government agencies.

The theme of *monozukuri* will be presented as a catalyst to foster innovation in manufacturing technologies, sustain a talented workforce and encourage collaboration, interaction and cooperation between American and Japanese manufacturers.

Online registration is available through OESA in the event section of <http://www.oesa.org>.



EVENTS

Record Attendance at OESA GM Town Hall

Kathy Reiss, OESA

OESA hosted a General Motors Town Hall meeting on Nov. 16, 2011, with a record attendance of 363, including 24 GM purchasing and engineering executives. As **Neil De Koker**, president and CEO, OESA, stated in his welcoming remarks, "This shows the importance of GM to our members and the industry."

The meeting agenda varied slightly from past GM Town Hall meetings. GM had several presenters from purchasing and engineering, using a recent OESA member survey as the platform for discussion topics and presentation content. Presentations were followed by breakout sessions with the 24 GM executives that offered one-on-one Q&A networking for attendees.

GM purchasing and engineering executives making presentations included:

- **Bob Socia**, Vice President, Global Purchasing and Supply Chain
- **John Calabrese**, Vice President, Global Vehicle Engineering
- **Sam Winegarden**, Executive Director and Group Global Functional Leader, Global Engine Engineering
- **Paris Pavlou**, Executive Director, Global Purchasing – Powertrain
- **Randy Pappal**, Executive Director, Global Purchasing – Global Body/Exterior
- **Kathy Worthen**, Executive Director, Global Purchasing – Chassis Systems
- **Dave McKean**, Executive Director, Global Purchasing – Interior and Safety
- **Tom McMillen**, Executive Director, Global Purchasing – Supplier Quality/Program Purchasing Management

Socia welcomed members, stating, "I want to thank the supply base for supporting GM through trying issues we have faced this year. These [supplier meetings] are beneficial for us to continue to address supply base concerns." He noted that the OESA survey results send a clear message that purchasing and engineering at high executive levels were in-sync, but that consistent corporate messages are not permeating down through the organization.

Given this, the joint purchasing and engineering teams presentations focused on:

- Communicating to enhance understanding and perspectives
- Taking steps to improve working relationships
- Helping suppliers understand GM's evolving culture and approach

Calabrese targeted his discussion on new technologies and intellectual property processes. His roadmap highlighted industry and GM activities in electrification, fuel economy, infotainment and active safety. His request from the supply base was to:

- Tell us (GM) how to be a better customer
- Develop technologies with laser sharp focus
- Develop cutting edge operations focused on simplified processes
- Use DFSS and FMEA techniques daily to drive evidence-based decisions

Other GM executives discussed sourcing alignment activities between purchasing and engineering, process changes within GM, raw material cost volatility and strategic sourcing processes.

Socia closed the meeting highlighting General Motors' 2012 key priorities including:

- Producing the world's best vehicles
- Achieving best in segment quality
- Implementing the Strategic Sourcing Process
- Pursuing total enterprise cost optimization
- Assuring required capacities are in place and confirmed
- Developing required, advanced technologies
- Increasing collaboration with partners

OESA welcomes member feedback. Members should address comments and suggestions to Dave Andrea at 248.952.6401 ext. 228 or dandrea@oesa.org.

EVENTS

Best-in-Class Tooling Management

Margaret Baxter, OESA

Supporting Partner:

On Jan. 19, 2012, **Laurie Harbour**, president, Harbour Results, Inc., will discuss current tooling practices that drive cost, complexity and extended product development. At the half-day meeting, OESA and Harbour Results, Inc. will take an in-depth look at the state of tooling.



Harbour will be joined by **Jack Kirby**, chief manufacturing engineer, interiors product line, Inteva Products. **Kirby** will discuss the role and responsibility of the tier one in driving cost and complexity out of the tooling process, and share thoughts on ways that the tier one can provide value to the customer, drive operational efficiencies at the tier one, and work with tool makers to provide information and support needed to optimize the tooling process. He will also address the operational impact of an optimized tool procurement process.

Joining **Harbour** and **Kirby** will be **Dan King**, COO, Riviera Tool, **Erin Hoffmann**, president, ArtiFlex, and **Brendan Wenzlik**, president, Prospect Mold. Speakers will provide case studies highlighting innovations in the tool making process, the drive toward a lean organization, behaviors that the OEM, the tier one and the toolmaker can adopt to drive cost out of the tooling process, and best practices in low cost country sourcing.

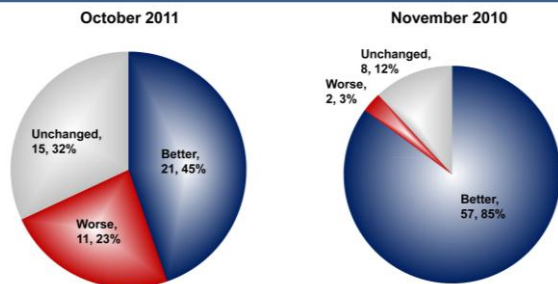
The meeting will take place at the MSU Management Education Center in Troy, Mich. Full meeting details will be sent to OESA members in early December. For more information, contact Margaret Baxter at 248.952.6401 ext. 223 or mbaxter@oesa.org.

Supplier China Operations Survey Results Available

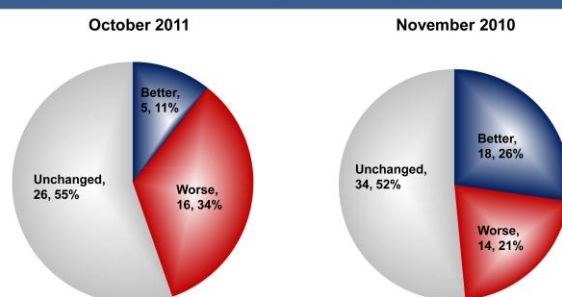
Margaret Baxter, OESA

OESA's annual 2011-2012 China Operations Survey results revealed that there is still significant confidence in the China market; however, supplier optimism has waned somewhat from previous years' results. In addition, suppliers indicate that their China automotive sales growth, while still strong, has slowed.

Assess the strength in domestic sales and production of the Chinese auto industry over the past 9 months.



Assess the strength in global cost competitiveness of the Chinese auto industry over the past 9 months.



Significant challenges that suppliers face in China have remained constant. Companies indicate that cost increases in raw materials and labor are significant, but that employee turnover has slowed slightly. The most commonly noted challenge remains selling to the OEMs in China and finding qualified suppliers.

An overview of the survey results is available upon request. All survey participants received a copy of the full report. OESA will host a webinar on Jan. 10, 2012, featuring **Steve Kueffner**, practice leader international consulting, Towers Watson, who will share information on the Towers Watson China Compensation Survey. For more information, contact Margaret Baxter at 248.952.6401 ext. 223 or mbaxter@oesa.org.

PUBLICATIONS

Updated OEM Warranty Comparative Analysis Unveiled

Greg Janicki, OESA

On Nov. 1, 2011, the OESA Warranty Management Council hosted the “OESA Comparative Analysis of OEM Warranty Programs” at MSU Management Education Center, Troy, Mich. Attendees heard presentations that identified tools meant to provide suppliers with knowledge to drive best practices in warranty management.

Also presented at the meeting was the updated version of the “OESA Comparative Analysis of OEM Warranty Programs” publication. The document provides an overview of each North American OEM warranty program and details:

- Customer process
 - Process flow
 - Parts handling
 - Warranty data management
 - Data accessibility
- Commercial implications
 - Pay points
 - Cost structure breakdown
- No Trouble Found liability

OEM customers included in the “Analysis” include: BMW, Chrysler, Ford, General Motors, Honda, Hyundai, Kia, Mercedes, Nissan, Toyota and Volkswagen.

The meeting featured commentary by **Michael Hirt**, manager, warranty and service quality, ADAC Automotive, and **Dave Sakata**, vice president, technology, Freudenberg-NOK, who provided an overview of the analysis and how to leverage the information. In addition, **William Kohler**, member, Clark Hill PLC, shared an update on industry issues related to warranty.

The publication is \$50 for members, \$100 for non-members. To order, visit the publications section of <http://www.oesa.org>. For further information, contact Greg Janicki at 248.952.6401 ext. 245 or gjanicki@oesa.org.

2012 OESA OEM PO Terms & Conditions Comparative Analysis Available

Margaret Baxter, OESA

Companies doing business with, or contemplating business with any North American OEM should not be without a copy of the “2012 OESA N.A. OEM Production P.O. Terms and Conditions Comparative Analysis.” This “Comparative Analysis” provides OE suppliers with a reference to clarify documents within contractual relationships with their customers, and highlights areas most critical to today’s industry environment.

OESA and Butzel Long partnered to develop the “Comparative Analysis,” which compares the terms and conditions of BMW, Chrysler, Mercedes, Ford, General Motors, Honda, Hyundai, Kia, Nissan, Toyota and Volkswagen. The 2012 edition incorporates the new GM Terms and Conditions issued in March 2011 and updates to the BMW Terms and Conditions and the newly-refreshed “OESA Model Terms and Conditions.”

The “Comparative Analysis” covers 33 major topics, including:

- Contract formation and termination
- Invoices and payment
- Setoff
- Warranty and recall
- Intellectual property
- OEM-owned tooling and other property
- Service parts
- Supplier quality
- Dispute resolution

Order forms are available at <http://www.oesa.org/publications>. An electronic version may be purchased by member companies along with a company-wide license. OESA extends a special thanks to the Butzel Long law firm for providing the necessary expertise to develop this document.

Supporting Partner:

BUTZEL LONG
ATTORNEYS AND COUNSELORS

PUBLICATIONS

OESA Issues Updated OESA Model Terms and Conditions

Margaret Baxter, OESA

Due to the changing commercial landscape in the industry, a committee met in August 2011 to develop and update the OESA Model Terms. It was agreed that overall the “OESA Model Terms and Conditions” had withstood the test of time, however a few areas needed a refresh, including:

- Warranty term and remedy
- Quantity
- Term
- Force majeure (or excusable non-performance)
- The “commentary” that accompanies the various provisions in the document

The updates have been made and the document is now final. It will continue to be a “living document” and OESA will continue to look for ways to improve and/or update the documents based on member feedback. The Microsoft Word version of the “OESA Model Terms and Conditions” and a .pdf file with commentary are available for download from the OESA website at no cost.

Committee members:

- **Lisa Boulton**, General Counsel, AGS Automotive Systems
- **Dawn Reamer**, Attorney, AISIN World Corp. of America
- **Jason Surber**, President, ATF, Inc.
- **Carl Jensen**, Vice President, Sales & Marketing, HUSCO International, Inc.
- **Paul Donovan**, Group Technology Counsel, ITW
- **Sara Friedmann**, Business Manager, NSK Corporation
- **Raimi Blackerby**, Corporate Counsel and IP Director, TI Automotive
- **Sheldon Klein**, Shareholder, Butzel Long
- **Dan Rustmann**, Shareholder, Butzel Long

The “OESA Model Terms and Conditions” was originally developed by a team of 48 individuals from 30 OESA member companies in order to offer a set of fair and balanced terms and conditions for the industry. The team worked for 18 months to develop the language. The litmus test for each provision was “could I live with this as a buyer, AND as a seller?”

The document was simplified into “plain English,” and published in 2004 along with UCC-style commentary, that attempted to explain the spirit of each provision. A recent survey of OESA members indicated that 70 percent of respondents have been active users of the document for customer and supplier negotiations. Some have revised their own terms and conditions and a few companies have elected to adopt the “OESA Model Terms and Conditions” with varying degrees of modifications as their own.

For more information, contact Margaret Baxter at 248.952.6401 ext. 223 or mbaxter@oesa.org.

Canada-U.S. Automotive Dinner Announced

OESA and APMA announce the 24th annual Canada-U.S. Automotive Dinner on Feb. 16, 2012, at the Centerpoint Parkway Marriott, Pontiac, Mich. OESA and APMA will partner with the Canadian Consulate General Detroit, to organize the event.

The keynote address will be given by **Mark Reuss**, president, General Motors North America. **Reuss** will discuss plans for General Motors in North America and around the globe. He will also share thoughts on the importance of North America in the global automotive market and the importance of Canada and the U.S. as an automotive powerhouse.

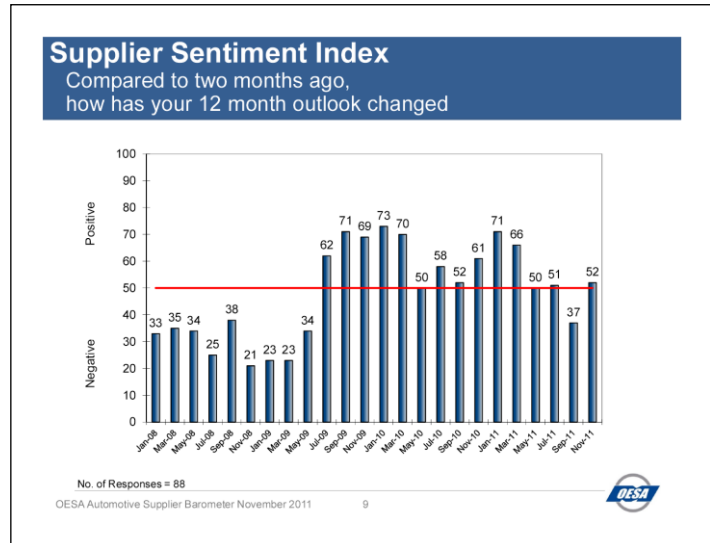
Individual tickets and tables of eight are available for purchase. Registration will be available in early December on the OESA website. For registration assistance, contact Felece Hickman at 248.952.6401 ext. 237 or fhickman@oesa.org. Select partnership opportunities are still available. For partnership and event information, contact Margaret Baxter at 248.952.6401 ext. 223 or mbaxter@oesa.org.

SURVEYS

Sentiment Returns to Neutral with Mixed Influences

Kathy Reiss, OESA

The November 2011 OESA Automotive Supplier Barometer Supplier Sentiment Index bounced back above neutral to 52 from 37 in September. The shift was influenced by attitudes of “somewhat more optimistic” increasing from 16 to 25 percent and the “somewhat more pessimistic” sentiment decreasing from 55 to 16 percent. Optimism increased across most revenue groups with the exception of companies having \$50 to \$150 million in annual revenue. The European economic and Thailand flooding concerns are constraining the somewhat increasing optimism. However, to a greater extent, production volume increases are driving sentiment optimism.



A positive sign is that most respondent companies will be hiring for corporate engineering and technical, hourly production and skilled trades workers over the next six months. For companies that are planning to add staff, finding qualified available candidates is proving most difficult in the areas of engineering/technical and skilled trades. Investment plans for 2012 continue to remain positive with increasing spend rates planned for plant and equipment, R&D and talent acquisition and training programs.

Responding to concerns over supply chain risks, the interest in North American manufacturing localization is strong with 84 percent of respondent companies seeing some increase in localization activity from their customers and 58 percent are pursuing manufacturing localization with their own supply base. These same factors are also moving suppliers to consider dual sourcing of critical components. However, that is the minority with 43 percent planning to do so. Specified components and materials include steel, resins and electronics.

While suppliers work to meet increasing production requirements, as an alternative to adding in-house manufacturing capacity 41 percent of respondents indicated their company would consider out-sourcing or subcontracting work when necessary volumes are reached. For 59 percent of respondents, out-sourcing is either not anticipated, unlikely or not a strategic fit.

About the OESA Automotive Supplier Barometer:

The OESA Automotive Supplier Barometer takes the pulse of OESA regular members and provides a snapshot of the business environment, commercial issues and supplier strategies. OESA appreciates the support of Deloitte LLP with the OESA Automotive Supplier Barometer. As used in this document, “Deloitte” means Deloitte & Touche LLP, Deloitte Consulting LLP, Deloitte Tax LLP, and Deloitte Financial Advisory Services LLP, which are separate subsidiaries of Deloitte LLP. Please see <http://www.deloitte.com/us/about> for a detailed description.

For more on the OESA Automotive Supplier Barometer:

www.oesa.org/Industry-Info-Analysis/Automotive-Supplier-Barometer

LEGISLATIVE

OESA Members: What You Need to Know About Rare Earth Materials

Ann Wilson, MEMA

The growth of the global economy has provided both opportunities and challenges to American businesses, including motor vehicle parts manufacturers. Materials and inputs that go into manufactured goods may be sourced thousands of miles away from the place of production. Difficulties in securing needed materials in today's complex global supply chain can be numerous and varied. Of increasing concern to parts suppliers and other key industries is the supply of rare earth elements (REEs).

China currently controls 97 percent of the world's REE mine production and 50 percent of reserves. The United States, at one time self-reliant on sourcing its REE needs, now imports 100 percent of rare earths materials, primarily from China. China is the world's second largest economy after the United States and many observers see China using its REE dominance to help steer its strategic economic plans. China's efforts in recent years to restrict its rare earth exports and mining production can be seen as part of this economic strategy and not an action taken out of concern for the environment or natural resources as it has stated.

In 2009, the United States filed a case against China at the World Trade Organization (WTO) for its export restrictions on a number of raw materials that are important to many American industries. This summer, the WTO panel ruled in favor of the United States and a final appeal decision expected early next year upholding the U.S. position could be helpful in persuading China to ease its rare earth export restrictions given the similarities of the two export policies.

Responding to concerns from OESA members, MEMA/OESA sent a letter to U.S. Trade Representative (USTR) **Ron Kirk** on Nov. 4, 2011, urging him to take a strong position against China's rare earth policies at last month's U.S.-China Joint Commission on Commerce & Trade annual meeting. "While fully aware that there are many pressing issues relating to U.S.-China trade, MEMA joins other key sectors in the belief that rare earth elements should be a priority in the U.S.-China dialogue," the letter stated. In the coming weeks, OESA will be conducting a member survey to determine to what extent China's REE policies are disrupting the supply of rare earths.

In addition, MEMA is taking stock of congressional legislation that seeks to reestablish a domestic rare earth industry while forming alliances with foreign allies in seeking out new sources of rare earths. MEMA Washington office staff continues to seek input from OESA members on the impact of the availability of REEs on supplier companies. If you have any questions, or would like more information, please contact Dan Houton at dhouton@mema.org or 202.312.9250.

Ann Wilson may be contacted at 202.312.9246 or awilson@mema.org.

OESA Member Dues

OESA will be sending 2012 dues invoices to the main member representative of each member company starting Nov. 30, 2011. Payment is due by Jan. 31, 2012. **Regular members renewing before Jan. 31, 2012, may apply without charge for membership in a council that is new to that member company.**

Contact Brenna McCann with any questions regarding dues billing or complimentary council membership, 248.952.6401 ext. 226 or bmccann@oesa.org.

GUEST COLUMN

Year in Review: Still Waiting for that "Quiet Year"

Aaron Bragman, IHS Automotive

After the gas price spikes of 2008, 2009 was supposed to be the "quiet year of recovery." Then after the collapse of the global auto market and bankruptcies swept the industry in 2009, 2010 was supposed to be the "quiet year of recovery." That plan was thwarted by the unintended acceleration issues and recall at Toyota, and everyone looked to 2011 as the "quiet year of recovery." That obviously did not happen either, with the tragic earthquake and tsunami that devastated northern Japan and sent many of the world's automakers scrambling to fill lost component supplies, shuttering assembly plants and seeing inventory plummet. And just when the hardest hit Japanese automakers were about to get back on their feet, a second natural disaster in Thailand again slowed production around the world.

It has not been just one year of extraordinary events, but several now. Many have wondered when the industry is likely to be allowed to catch its breath, when will things calm down and return to a point of normalcy, but it may be that the balance of things has changed significantly enough to warrant an examination of conditions. The troubles experienced by the Japanese manufacturers in the past year have been significant in that they have reshaped the way the North American market in particular looks. The competitors to the Japanese OEMs could not have imagined a situation that could have worked more to their favor, despite the tragedy that sadly had to accompany the scenario's arrival. Just as the American domestic automakers have newfound profitability thanks to restructuring and bankruptcy, their main competitors suffer from insufficient inventory to maintain their market share. Part of the gains made by the Americans in 2011 can be attributed to this competitive stumble, but not all – it must be noted that the products themselves are significantly better than just about any time in the history of the American automakers, and the public is taking notice.

This has also been the year of dramatic ascendancy for South Korean and German automakers. Lexus has lost the luxury sales crown that it has worn for a decade to German automakers, and buyers who otherwise would have bought a Toyota or Honda have started looking at Hyundais and Kias in significant numbers. While some Japanese automakers have found themselves with more capacity than demand, Hyundai has found that it cannot build vehicles fast enough to satisfy demand, bumping up against capacity constraints at its U.S. plant.

While this balance of power has shifted in the United States over the past year, one should not expect it to last. The brands that have suffered from the natural disasters of 2011 have been hurt, but also enjoy some of the highest owner loyalty rates in the industry. Once the restoration of supply streams has been reestablished and production returns to normal rates, expect to see those Japanese brands mount a significant challenge to the resurgent Americans and the upstart Koreans. That challenge however, will be a harder fight for the Japanese brands than it has ever been. As such, it looks like we still will not see a "quiet year" for the industry in 2012, as the battle for share in the U.S. market and abroad only looks to heat up.

Aaron Bragman can be contacted at Aaron.Bragman@ihs.com.

“JUST-IN-TIME” NEWS

OESA Executives Offered Tours at the 2012 North American International Auto Show

Glenn Stevens, OESA

OESA offers an exclusive opportunity for senior executives of OESA member companies to participate in guided tours of the North American International Auto Show with partner IHS Automotive on Jan. 10, 11 and 12, 2012. Executives will learn about future production vehicles and design concepts impacting the supply base from a technology, procurement and global ER&D perspective.

Forecast, component, powertrain and advisory service experts from IHS Automotive will lead small groups in a 90-minute tour that identifies strengths and weaknesses of OEM product strategies and platforms. These private tours offer a unique opportunity for candid discussions on vehicles launched at the show and the business impact on the industry. The tours enable OESA members to better focus on OEM product goals and objectives. Headphones are provided to ensure presenters are easily heard throughout the tour.

This is an OESA members-only event and reservations are on a limited, first-come registration basis. For more information, contact Michelle Maki 248.952.6401 ext. 229 or mmaki@oesa.org or Glenn Stevens at 284.952.6401 ext. 225 or gstevens@oesa.org.

Upcoming OESA Activities

Dec. 1, 2011

Is Your Sales Team ready for 2012?
Executive Sales Management Training
Gerry Weinberg & Associates
Southfield, Mich.

Dec. 1, 2011

OESA Small & Medium Enterprise Presidents Council*
The Somerset Inn
Troy, Mich.

Dec. 5, 2011

OESA Environment, Health and Safety Council*
The Baronette Renaissance Detroit-Novı Hotel
Novı, Mich.

Dec. 7, 2011

OE Sales and Marketing Council Meeting*
Troy Marriott
Troy, Mich.

Dec. 7, 2011

OESA Automotive Public Relations Council*
Federal-Mogul
Southfield, Mich.

Dec. 7, 2011

OESA Executive Breakfast Briefing: IRN Pricing
Survey Results
Troy Marriott
Troy, Mich.

Dec. 8, 2011

OESA Warranty Management Council*
MSU Management Education Center
Troy, Mich.

Dec. 8, 2011

OESA Product Development Council*
MSU Management Education Center
Troy, Mich.

Dec. 8, 2011

Japan's Automotive Industry: Achieving Recovery and
Growth Through Monozukuri
The Suburban Collection Showplace
Novı, Mich.

Dec. 9, 2011

OESA Automotive Supplier Technology Forum*
USCAR
Southfield, Mich.

Dec. 13, 2011

OESA Members-Only Ford Town Hall Meeting
The Dearborn Inn
Dearborn, Mich.

**Open to council members and invited guests only.*