



Board and Members' Meeting
Tuesday, April 17, 2012
at
The Ohio Manufacturers' Association Offices
33 N. High St.
Columbus, Ohio 43215

Agenda

Time	Activity	Person
Noon	Lunch	
12:30 p.m.	Chairman's Report	Sal Miraglia Chairman and President
	<ul style="list-style-type: none">• Welcome• Introductions• Safety instructions• Antitrust statement• Appointment of directors• Preview of agenda	
1:00 p.m.	Treasurer's Report: 2011 Fiscal Year-End & 2012 YTD Report	Brenda Schulz Treasurer
1:15 p.m.	Operations Report	Emily Petrovich Secretary
1:30 p.m.	Committee Reports	Sal Miraglia
	<ul style="list-style-type: none">• Activities of the Government Affairs Committee<ul style="list-style-type: none">○ Policy updates○ 2012 Legislative Reception• Activities of the Communications Committee<ul style="list-style-type: none">○ Cleveland State University Industry Impact Study○ Web site• Membership/nominations updates	Bob Lapp Chairman, Government Affairs Committee Mike Wallner Chairman, Communications Committee Chris Masciantonio
2:30 p.m.	Guest speaker	Kristi Tanner Assistant Director & Chief Operating Officer, Ohio Department of Development
3:00 p.m.	Adjourn to pre-event briefing for legislative reception	

Ohio Steel Council
Statement of Financial Position
At March 31, 2012

	Current Year	Previous Year
Assets:		
Current Assets:		
Cash		
Demand Deposits	75,652	\$0
Money Management	<u>0</u>	<u>0</u>
Total Cash	75,652	0
Accounts Receivable		
Membership Dues	3,000	0
Allowance for Uncollectables	<u>0</u>	<u>0</u>
Net Membership Dues	3,000	0
Receivable Other	<u>0</u>	<u>0</u>
Total Accounts Receivable	3,000	0
Prepaid Expenses	<u>50</u>	<u>0</u>
Total Current Assets	78,702	0
Equipment		
Accumulated Depreciation	<u>0</u>	<u>0</u>
Depreciated Cost	<u>0</u>	<u>0</u>
Total Assets	<u><u>78,702</u></u>	<u><u>\$0</u></u>
Liabilities:		
Current Liabilities:		
Accounts Payable		
Trade	<u>0</u>	<u>\$0</u>
Total Accounts Payable	0	0
Accrued Expenses	<u>6,500</u>	<u>0</u>
Total Current Liabilities	<u>6,500</u>	<u>0</u>
Equity:		
Fund Balance/Retained Earnings	8,712	0
Excess Revenues over Expenses	<u>63,490</u>	<u>0</u>
Total Equity	<u>72,202</u>	<u>0</u>
Total Liabilities and Equity	<u><u>78,702</u></u>	<u><u>\$0</u></u>

Ohio Steel Council
Statement of Activities
For the Three Months Ending March 31, 2012

	Year-To-Date Actual	Annual Budget	Variance
Revenues:			
Net Membership Dues	\$108,000	\$105,000	\$3,000
Other Revenue	<u>0</u>	<u>0</u>	<u>0</u>
Total Revenues	<u>\$108,000</u>	<u>\$105,000</u>	<u>\$3,000</u>
Expenses:			
Professional and Consulting - OMA Management Fee	9,000	36,000	27,000
Professional and Consulting - Bricker & Eckler LLP	0	2,500	2,500
Professional and Consulting - GBQ Partners	0	6,500	6,500
Professional and Consulting - Cleveland State University	31,239	62,500	31,261
Meetings	975	6,400	5,425
Marketing and Communication	2,217	4,500	2,283
Insurance	1,072	1,200	128
Miscellaneous	<u>7</u>	<u>0</u>	<u>(7)</u>
Total Expenses	<u>\$44,510</u>	<u>\$119,600</u>	<u>\$75,090</u>
Excess Revenues over Expenses	<u><u>\$63,490</u></u>	<u><u>(\$14,600)</u></u>	<u><u>\$78,090</u></u>

Ohio Steel Council
Statement of Financial Position
At December 31, 2011

	Current Year	Previous Year
Assets:		
Current Assets:		
Cash		
Demand Deposits	\$9,637	\$0
Money Management	<u>0</u>	<u>0</u>
Total Cash	9,637	0
Accounts Receivable		
Membership Dues	6,500	0
Allowance for Uncollectables	<u>0</u>	<u>0</u>
Net Membership Dues	6,500	0
Receivable Other	<u>0</u>	<u>0</u>
Total Accounts Receivable	6,500	0
Prepaid Expenses	<u>0</u>	<u>0</u>
Total Current Assets	16,137	0
Equipment		
Accumulated Depreciation	<u>0</u>	<u>0</u>
Depreciated Cost	<u>0</u>	<u>0</u>
Total Assets	<u><u>\$16,137</u></u>	<u><u>\$0</u></u>
Liabilities:		
Current Liabilities:		
Accounts Payable		
Trade	<u>\$925</u>	<u>\$0</u>
Total Accounts Payable	925	0
Accrued Expenses	<u>6,500</u>	<u>0</u>
Total Current Liabilities	<u>7,425</u>	<u>0</u>
Equity:		
Fund Balance/Retained Earnings	0	0
Excess Revenues over Expenses	<u>8,712</u>	<u>0</u>
Total Equity	<u>8,712</u>	<u>0</u>
Total Liabilities and Equity	<u><u>\$16,137</u></u>	<u><u>\$0</u></u>

Ohio Steel Council
Statement of Activities
For the Twelve Months Ending December 31, 2011

	Year-To-Date Actual	Annual Budget	Variance
Revenues:			
Net Membership Dues	\$52,500	\$52,500	\$0
Other Revenue	<u>0</u>	<u>0</u>	<u>0</u>
Total Revenues	<u>\$52,500</u>	<u>\$52,500</u>	<u>\$0</u>
Expenses:			
Professional and Consulting - OMA Management Fee	27,000	27,000	0
Professional and Consulting - Bricker & Eckler LLP	7,242	7,500	258
Professional and Consulting - GBQ Partners	6,500	6,500	0
Meetings	1,114	1,000	(114)
Marketing and Communication	1,932	4,500	2,568
Insurance	0	1,178	1,178
Miscellaneous	<u>0</u>	<u>0</u>	<u>0</u>
Total Expenses	<u>\$43,788</u>	<u>\$47,678</u>	<u>\$3,890</u>
Excess Revenues over Expenses	<u>\$8,712</u>	<u>\$4,822</u>	<u>\$3,890</u>

MINUTES OF THE OHIO STEEL COUNCIL BOARD MEETING

December 20, 2011

The Ohio Manufacturers' Association Offices

33 N. High Street

Columbus, Ohio 43215

Board Directors in Attendance:

Mark Burtschi, ArcelorMittal
Scott Ertl, Charter Manufacturing
Jean Gaetano, V&M Star
Eric Hauge, ArcelorMittal
Jim Leonard, Tube City IMS
Greg Levy, Wheeling & Lake Erie Railroad
Chris Masciantonio, U. S. Steel
Alan McCoy, AK Steel
Sal Miraglia, The Timken Company
Brenda Schulz, Nucor Steel Marion
Ted Thielens, Republic Engineered Products
John Willoughby, Eramet Marietta, Inc.
Denny Wist, Thomas Steel Strip

Members in Attendance:

Bob Lapp, The Timken Company
Chuck Hesse, Charles Hesse Associate
Drew Nelson, Wheeling & Lake Erie Railroad
Mike Wallner, AK Steel

OMA Staff in Attendance:

Erik Burkland, President
Ryan Augsburger, Public Policy Services
Kevin Schmidt, Public Policy Services
Lisa Schaaf, Marketing Services

Chairman and President Sal Miraglia brought the meeting order at 10:00 am. Sal offered welcoming/introductory remarks, reviewed the location's safety instructions, read the antitrust statement and previewed the agenda.

A resolution passed that resigning board director, Mark Burtschi of ArcelorMittal is replaced by Eric Hauge, VP & GM, of ArcelorMittal. Sal welcomed Eric to the board.

A resolution passed that the board adopt charters as presented for the Council's two standing committees: the Government Affairs Committee and the Communication Committee.

Brenda Schulz, Treasurer, presented a financial report in which she referenced: outstanding 2011 dues payments, the draft 2012 budget which was distributed, the fact that 2012 dues invoices will be mailed shortly, and that she had prorated refund checks available for members who had paid 2011 dues into the former Ohio Steel Industry Advisory Council (OSIAC). Brenda stressed that it is important for check recipients to cash them and clear out the OSIAC bank account and conclude OSIAC business.

Sal called on Government Affairs Committee Chairman, Bob Lapp, to discuss the work of the committee to date. Bob described the basic provisions of the committee's charter and described the tier one and tier two priority policy issues the council will undertake work on in 2012. Bob described the preliminary plans for the council's first legislative reception to be held on April 17 at the Capital Club in Columbus from 5:00 to 7:30 p.m. Sal noted that the first quarter board meeting will be held also on April 17 in lieu of March 6. Lapp also referenced to the OMA white paper proposal to Governor Kasich, contained in the briefing materials, that outlines considerations for energy policy.

Sal called on Communications Committee Chairman, Mike Wallner, to present a report of his committee's work to date. Mike reviewed his committee charter briefly and referred to boilerplate language that describes the Council's purpose and mission and a brand identity package created by the committee. Motions were offered and passed to: adopt the boilerplate language as well as the elements of the identity package as presented. Mike also described that key message platforms are in development that will support various communication initiatives and that a refresh of the web site is planned to bring it current.

The council entertained discussion about the steel industry economic impact study proposal from Cleveland State University (CSU). The council decided to engage CSU for the initiative as proposed and discussed its funding as the 2012 budget indicates that there will be insufficient operating capital to cover the entire expense. The council decided that it would fully fund the study and create an equitable sharing of the organization's deficit at year-end, should there be one. Eric Burkland and Lisa Schaaf will contact CSU to initiate the project.

Sal called on member, Chris Masciantonio of U. S. Steel for an update on membership outreach. Chris had offered to consider options to recruit additional members. The council determined that Chris would contact members to compile a list of potential companies that the council could consider for nominating to its membership.

The council heard a guest presentation from Rebecca Heimlich, Terry Fleming and Sean Bennett about the work the Ohio Energy Resource Alliance is doing to educate various audiences about the opportunities associated with shale gas in Ohio.

Speaker of the Ohio House Bill Batchelder spoke to the council about his perspectives on legislative issues worked on in 2011 and issues of priority going forward.

The meeting was adjourned by Chairman Miraglia at approximately 1:30 pm.

Respectfully submitted,

A handwritten signature in black ink, appearing to read "Lisa Schaaf". The signature is fluid and cursive, with a long horizontal stroke extending to the right.

Lisa Schaaf on behalf of
Emily Petrovich
Secretary
Ohio Steel Council



Cleveland State University

Maxine Goodman Levin College of Urban Affairs
Center for Economic Development

March 8, 2012

Eric Burkland
President
Ohio Manufacturers' Association
33 North High Street
Columbus, OH 43215

Dear Mr. Burkland,

This Addendum to the Agreement dated June November 4, 2011 is executed by and between Ohio Manufacturers' Association, on behalf of the Ohio Steel Council, located at 33 North High Street, Columbus, Ohio 43215, and Cleveland State University, a state-supported university and instrumentality of the State of Ohio established pursuant to Ohio Revised Code Section 3344 acting by and through its Board of Trustees with a principal business address at 2121 Euclid Ave., Cleveland, Ohio 44115 (hereinafter referred to as "CSU") on behalf of Iryna Lendel, Ph.D. in the Levin College of Urban Affairs.

Scope of Work

This addendum is for three focus groups and six to 10 phone interviews, which will be in addition to the scope of work outlined in the proposal originally submitted to the sponsor and agreed upon in the November 4, 2011 document. Specifically, the scope of work will be expanded beyond the original agreement as discussed with members of the Steel Study Advisory Group on February 15, 2012:

1. Six to 10 industry top executives will be interviewed by phone to obtain their views on the current state of the industry, future challenges and opportunities, and strengths and weakness of Ohio as a business location.
2. The number of focus groups will be expanded from three to six total and will consist of participants other than the C-level executives agreed upon in the November 4, 2011 document.
 - a. The CSU team will conduct two days of focus groups in locations of concentrated steel activities around the state. Each location will include a morning session with plant-level managers, who will be asked to discuss the challenges and advantages of

running a steel business in Ohio, particularly in terms of the state's regulatory and operating environment. The research team may supplement this information-gathering with a written survey of participants. An afternoon session will consist of mid-level managers in purchasing and sales and marketing roles who can speak specifically to supply chain and customer chain issues.

- b. A third day of focus groups will be held in Columbus: One session will be with steel-industry human resource managers, who will be asked to address workforce needs and challenges. The second session will invite steel users to discuss their relationship with the industry, their future needs and anticipated changes in technology and demand. The research team also may choose to convene a meeting of the Steel Advisory Council to address and supplement focus group findings, specifically regarding government relations and regulatory concerns.

Period of Performance

The effective period of this Addendum to the Agreement shall be from March 1, 2012 through May 31, 2012, unless otherwise provided for by written modification to this agreement.

Deliverable(s) and Deliverable Schedule

The results of the additional focus groups and phone interviews will be included in a study report. A draft report will be shared with Ohio Manufacturers' Association, on behalf of the Ohio Steel Council, prior to finalizing it.

Roles and Responsibilities

CSU (as described in the Agreement) will serve as the quantitative and qualitative researcher for the project. The Ohio Steel Council, through a designated Steel Study Advisory Group, will provide guidance and counsel throughout the research project, specifically assisting in identifying and soliciting participants for the six total focus groups and executive-level phone interviews.

Termination

Either CSU or OMA can terminate this Addendum to Agreement with cause upon 30 (thirty) days written notice by certified or registered mail, return receipt requested, if during which time the identified cause is not remedied to the satisfaction of the party giving notice. OMA may terminate this Addendum to Agreement without cause upon 30 (thirty) days written notice by certified or registered mail, return receipt requested. OMA will remain liable for and will pay to CSU all payments then due that relate to creation of the work product as of the date of termination according to the payment schedule, which will be prorated to the date of termination.

Cost:

The total cost for the additional focus groups and interviews is \$9,000 (nine thousand dollars). This total cost includes personnel and University indirect cost (20% of direct costs). One

hundred percent of the payment will be due upon final delivery of the report. CSU shall submit an invoice to OMA within 30 (thirty) days of execution and final product delivery. OMA shall remit payment to CSU within 30 (thirty) days of receipt.

Sincerely,

Iryna Lendel, Ph.D.
Assistant Director

Please sign two originals of this letter and return one to Craig M. Zullig, Grants Manager, Office of Sponsored Programs and Research, Cleveland State University, 2121 Euclid Avenue, PH 300, Cleveland, OH 44115-2214.

CLEVELAND STATE UNIVERSITY

**OHIO MANUFACTURERS' ASSOCIATION
(on behalf of the OHIO STEEL COUNCIL)**

Jerzy T. Sawicki, Ph.D.
Interim Associate Vice President for
Research

Eric Burkland
President

Date

Date



Research Participation Signup Form Ohio Steel Council Economic Impact Study

Instructions: Please identify the appropriate members from your company (or as otherwise requested) to participate in as many focus groups as possible below.

Please email your completed form to **Lisa Schaaf** at **LSchaaf@ohiomfg.com** by **Friday, April 13, 2012**. We will contact the recommended participants with final confirmation and logistics. **Thank you.**

Note: In order to better accommodate schedules, there are two focus groups for plant level managers and two for employees from your purchasing, sales and marketing areas.

Focus Group 1: Plant level managers (or the generally equivalent job title in your company):

Date: Thursday May 3, 2012

Time: 9:30 a.m. - Noon

Place: 1717 Euclid Avenue, Cleveland, OH (at the Cleveland State University Levin College of Urban Affairs)

Please enter the name, title, phone number and e-mail address of your company's participant(s).

Name	Title	Phone	Email

Focus Group 2: Purchasing, sales and marketing managers (or the generally equivalent job title in your company):

Date: Thursday, May 3, 2012

Time: 1:30 p.m. – 4:00 p.m.

Place: 1717 Euclid Avenue, Cleveland, OH (at the Cleveland State University Levin College of Urban Affairs)

Please enter the name, title, phone number and e-mail address of your company's participant(s).

Name	Title	Phone	Email

Focus Group 3: Plant level managers (or the generally equivalent job title in your company):

Date: Wednesday, May 9, 2012

Time: 9:30 a.m. - Noon

Place: The Timken Company, 1835 Dueber Avenue, S.W, Canton, OH

Please enter the name, title, phone number and e-mail address of your company's participant(s).

Name	Title	Phone	Email

Focus Group 4: Purchasing, sales and marketing managers (or the generally equivalent job title in your company):

Date: Wednesday, May 9, 2012

Time: 1:30 p.m. – 4:00 p.m.

Place: The Timken Company, 1835 Dueber Avenue, S.W, Canton, OH

Please enter the name, title, phone number and e-mail address of your company's participant(s).

Name	Title	Phone	Email

Focus Group 5: Human resources managers (or the generally equivalent job title in your company); these managers will be asked to examine workforce development issues, among others:

Date: Thursday, May 10, 2012

Time: 9:30 a.m. - Noon

Place: The Ohio Manufacturers' Association, 33 N High St., Columbus Ohio

Please enter the name, title, phone number and e-mail address of your company's participant(s).

Name	Title	Phone	Email

Focus Group 6: Steel customers. Here, please recommend (by name) people to whom you sell your product. It is important to hear the perspectives of those who purchase steel products.

Date: Thursday, May 10, 2012

Time: 1:30 p.m. – 4:00 p.m.

Place: The Ohio Manufacturers' Association, 33 N High St., Columbus Ohio

Please enter the name, title, phone number and e-mail address of your recommended participant(s).

Name	Title	Phone	Email

Executive Phone Interviews: The research project anticipates 6-10 phone interviews with top level executives.

What is the name and title of the most senior executive at your company?

Name	Title

What is the name and contact information of the person who schedules for this executive?

Name	Phone	Email

Thank you! Please return form to Lisa Schaaf at LSchaaf@ohiomfg.com by Friday, April 13.

Questions? Please call (614) 629-6806

Ohio Steel Industry

Preliminary Findings

- Ohio is an important steel-producing state. In 2010, 9.257 million net tons of steel was produced here, representing 10.4% of all steel produced in the United States (Table 1). Measured in net tons of production, Ohio is the nation's No. 2 steel producer, second only to Indiana. Ohio increased its volume of raw steel production by over 40% from 2009 to 2010, surpassing the U.S. growth rate of 36%.
- 6 Ohio companies are on the Worldsteel's list of 2010 world top producers: ArcelorMittal (ranked #1), Tata Steel (#7), U.S. Steel (#8), Gerdau (#10), Nucor (#11), and Severstal (#12).
- Ohio is important state not only as a steel producer, but also as a metal fabricator. Measured in terms of 2010 Gross Domestic Product, Ohio ranks No. 3 in raw steel production, behind only Indiana and Pennsylvania. In terms of total raw steel products and fabrication, Ohio is ranked No. 2 in (behind Texas), producing 8.2% of total U.S. GDP for the industry. Ohio's steel industry was hit harder than the national average over the two business cycles between 2001 and 2010 (Table 2).
 - *In 2010, Ohio was still 9.4% behind its historical 10-year average for Total Raw Steel Products and Fabrication, while the nation as a whole almost reached its historical 10-year average (-0.1%).*
 - *In 2010, Ohio's Raw Steel Production recovered only about two-thirds of its historical 10-year average, while the nation as a whole was only 4% away from that target.*
- Ohio is recovering from the recent recession faster than the U.S. average for *Total Raw Steel Products and Fabrication*: In 2009-2010, the Ohio industry added 9% in GSP, while the U.S. industry as a whole added 7.9%. For the same period of time, Ohio's Raw Steel Production recovered by 15%, compared to 12.7% for the nation as a whole.
- The 2011 projected GSP growth of 11.7% for Ohio's *Total Raw Steel Products and Fabrication* surpasses the expected growth in GDP of 9.1% for the industry in the nation overall. The Raw Steel Production industry in Ohio is expected to grow at 16.1%, compared to a projected U.S. increase of 12%.
- Ohio's steel industry is also recovering its employment (Table 3). Since 2009, the trough of the latest economic recession, Ohio employment in Raw Steel Production recovered 8.5%*. Although the Fabricated Metal industry was still losing employees in 2010, by the first two quarters of 2011, it had recovered 4.1% of employment, placing the overall steel cluster on an upward trend in employment.

Notes:

For this analysis we used the American Iron and Steel Institute's data on raw steel production. We used Moody's Economy.com data estimates on gross state product (GSP) and Census of Quarterly Employment and Wages data on employment.

The last year of real data in Moody's Economy.com is 2010; data for 2011 are projections. The latest employment data include 2 first quarters of 2011.

The *Raw Steel industry* includes the *Iron and Steel Mills and Ferroalloy Manufacturing* (NAICS 3311) and the *Steel Product Manufacturing from Purchased Steel* (NAISC 3312) industries.

*This 2009-2011 employment data includes 2 first quarters of 2011.

The *Total Raw Steel Products and Fabrication* (also called *Total Steel* in figures) includes the *Raw Steel industry* (NAICS 3311 and 3312) and *Fabricated Metal Product Manufacturing* (NAICS 332). In total, the discussed steel cluster includes NAICS 3311, 3312, and 322.

Table 1. Raw Steel Production by States

(Thousands of net tons)

States	2010	2009	2008	2007	2006
Indiana	22,050	18,414	25,731	25,857	26,252
AL, TN, KY, MS, AR	19,420	13,274	19,478	20,445	20,465
VA, WV, GA, FL, NC, SC, LA	9,486	6,534	9,864	11,386	10,825
Ohio	9,257	6,590	14,778	16,146	15,856
Pennsylvania	6,299	5,705	6,395	6,790	6,817
Michigan	6,124	2,858	5,251	5,867	6,662
Illinois	4,332	2,105	3,968	4,239	4,398
CO, UT, WA, OR, CA, AZ, HI	3,540	2,747	3,899	3,992	3,860
Texas	3,081	2,244	3,710	4,592	4,162
MN, WI, MO, OK, NE, IA	2,747	2,226	3,529	3,990	3,869
RI, CN, NJ, NY, DE, MD	2,395	2,762	4,693	4,834	5,067
Total	88,731	65,460	101,297	108,138	108,234

Source: American Iron and Steel Institute

Table 2. Gross Domestic Product (000s in 2012 \$)

	2010		Compared to 5 Yr. Avg.		Compared to 10 Yr. Avg.		Compared to 2009 (last business cycle trough)		2011 (projections)		Projected Growth 2010-2011	
	USA	Ohio	USA	Ohio	USA	Ohio	USA	Ohio	USA	Ohio	USA	Ohio
Raw Steel	22,029,550	1,943,353	-10.9%	-34.0%	-3.6%	-34.2%	12.7%	15.0%	24,676,534	2,256,859	12.0%	16.1%
Iron and Steel Mills and Ferroalloy Mfg.	14,993,319	1,198,129	-11.6%	-36.8%	-4.2%	-37.4%	12.6%	16.8%	16,565,489	1,355,502	10.5%	13.1%
Steel Product Mfg. from Purchased Steel	7,036,231	745,224	-9.4%	-28.8%	-2.3%	-28.2%	12.9%	12.4%	8,111,044	901,357	15.3%	21.0%
Fabricated Metal Product Mfg.	138,062,148	10,785,965	-1.0%	-7.5%	0.5%	-6.7%	7.2%	9.8%	149,984,258	12,340,958	8.6%	14.4%
Total Raw Steel Products and Fabrication	160,091,698	13,155,182	-2.5%	-9.9%	-0.1%	-9.4%	7.9%	9.0%	174,660,792	14,692,503	9.1%	11.7%

Source: Moody's Economy.com

Table 3. Employment in Ohio Steel Industry

	2008	2009	2010	2011
Raw Steel	21,288	16,253	16,960	17,630
Iron and Steel Mills and Ferroalloy Mfg.	12,563	9,010	9,528	9,889
Steel Products Mfg. from Purchased Steel	8,725	7,243	7,432	7,742
Fabricated Metal Product Mfg.	114,144	95,336	94,100	97,976
Total Raw Steel Products and Fabrication	135,432	111,589	111,060	115,606

Source: Quarterly Census of Employment and Wages



TO: Ohio Steel Council Board of Directors and Officers
FROM: Mike Wallner, Chair, Communications Committee
DATE: April 9, 2012
RE: Communications Committee Report

Regarding the Communications Committee of the Ohio Steel Council, the following summary reflects the actions taken by the Committee since the Board's last meeting on December 20, 2011.

Project	Status
1Q, 2012 Committee Meeting	Complete. Our quarterly meeting took place via conference call on February 24, 2012. Topics included: Planning for the legislative reception, the updated OSC website and the economic impact study with Cleveland State University.
Legislative Reception Communication Materials <i>April 17, 2012</i>	Complete. Two drops of invitations were distributed by OMA. In addition, and with input from Bob Lapp and Ryan Augsburger, room signage and an event handout were created. Samples attached. A looped video was also produced for display on flat panel TVs at the event. Special thanks to Kari Groh and her team at Timken for editing the video. Also, special thanks to Timken, AK Steel, ArcelorMittal and Vallourec for submitting footage. And, very special thanks to Lisa Schaaf and all at OMA for their efforts on these projects.
OSC Website Refresh	Complete. The updated website was launched on March 5. The site features enhanced navigation, updated content and new contact information. Special thanks to Kari Groh and Lisa Schaaf.
OSC Stationery Package	Complete. A small inventory of OSC letterhead and envelopes was ordered for the OMA office.
Cleveland State University Ohio Steel Industry Economic Impact Study	In Progress. The research project has two main components: an economic impact study being prepared by Cleveland State University economist, Iryna Lendel, and a primary focus-group/interview research component. An early findings document can be found in your meeting briefing materials. The focus groups of steel industry employees and users of steel products will take place: May 3 at Cleveland State University May 9 at Timken headquarters in Canton

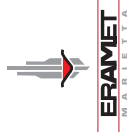
	<p>May 10 at the OMA offices in Columbus</p> <p>All OSC member companies are asked to identify research participants. Highest level executives will be interviewed by phone. If you have not considered participants from your company, a sign up form is elsewhere in your meeting briefing materials.</p>
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If there are any questions about this report, please feel free to contact me anytime.

Thank you,

Mike Wallner
General Manager
Communications and Public Relations
AK Steel Corporation
Phone: 513-425-2688
Fax: 513-425-5613
Cell: 513-594-3850
mike.wallner@aksteel.com

Ohio Steel Council Member Companies



The Ohio Steel Council Board of Directors, Officers and Members welcome you to the 2012 Legislative Reception.

Tuesday, April 17, 2012

About the Ohio Steel Council

Comprised of steel producers, processors and suppliers, the Ohio Steel Council serves as the voice of the steel industry in Ohio. By promoting the benefits of a healthy steel sector, the Council strives to educate key constituents about the industry's overall importance and significant economic impact. A participant in the legislative process, the Ohio Steel Council provides insight on policy issues, including their potential effects on Ohio's steel industry and the state's economy.

www.ohiosteelcouncil.org

The Strength of Ohio Steel

Ohio is the **second largest steel producing state in America**, behind only Indiana. In 2010, 9.257 million net tons of steel was manufactured in Ohio, which represented about 10 percent of all steel produced in the United States. While the industry has a long way to go to get back to pre-recession capacity utilization levels, raw steel production in Ohio increased by more than 40 percent from 2009 to 2010, **surpassing the U.S. growth rate** of 36 percent.

The domestic steel industry was hit hard during the Great Recession, and its recovery continues to be a long, slow process. While Ohio's steel sector is recovering faster than the U.S. average, **the recovery remains fragile**. For a robust economy in Ohio, and throughout America, we need a healthy and financially-viable steel industry. To achieve this, our elected officials and industry leaders must continue to work together in support of a pro-growth, pro-manufacturing agenda.

Today, **more than 115,000 Ohioans are employed** in the steel industry.

Employment in Ohio Steel Industry

	2008	2009	2010	2011
Raw Steel	21,288	16,253	16,960	17,630
Iron and Steel Mills and Ferroalloy Mfg.	12,563	9,010	9,528	9,889
Steel Products Mfg. from Purchased Steel	8,725	7,243	7,432	7,742
Fabricated Metal Product Mfg.	114,144	95,336	94,100	97,976
Total Raw Steel Products and Fabrication	135,432	111,589	111,060	115,606

Source: Quarterly Census of Employment and Wages

Keeping Ohio's Steel Industry Competitive

Steelmaking is an energy-intensive process that requires reliable and economical energy supplies. Although the domestic steel industry has **reduced its energy intensity by 30 percent** over the past two decades, energy still constitutes up to 15 percent of the cost of steelmaking. All energy costs, principally for natural gas and electricity, have a huge impact on our competitiveness in regional, national and global markets. Therefore, it is critical that energy policy supports **reliable, affordable, stable and predictable pricing and supply**.

Similarly, as stewards of the environment and the communities in which we operate, environmental policy is critical to the steel industry. According to the U.S. EPA, not only does the U.S. steel industry lead the global steel sector in energy efficiency, it **generates the second lowest amount of CO₂ emissions** per ton of steel produced anywhere on the planet, second only to South Korea. And, **steel is the most recycled material** on Earth.

We support clarity, predictability and consistency in environmental regulations and in environmental policies that reflect **scientific consensus, commonsense enforcement and careful cost-benefit analysis**.



WELCOME

Ohio Steel Council

LEGISLATIVE RECEPTION

Le Bistro Room at the
The Capital Club of Columbus

OHIOsteel
COUNCIL

REGISTRATION

Ohio Steel Council

LEGISLATIVE RECEPTION

Le Bistro Room at the
The Capital Club of Columbus



ENERGY EFFICIENCY

THE U.S. STEEL INDUSTRY

- **Leads** global steel sector in energy efficiency
- **Exceeds** energy reduction targets under Kyoto Protocol
- **33% reduction** in energy since 1999

ECONOMIC IMPACT

STEEL INDUSTRY

- **\$7.2 billion:** Total Ohio economic impact
- **\$600 million** in Ohio taxes
- **\$315 million** in Ohio capital expenditures annually
- **\$1 billion** in new steel capital spending underway in Ohio
- **100,000 Ohio jobs:** Direct and indirect employment
- **>1 million U.S. Jobs:** Direct and indirect employment

SUSTAINABILITY

- Steel is **most recycled material** on Earth
- **83%** of all steel recycled
- U.S. steel industry generates **second lowest CO₂** in global steel sector, behind only South Korea
- Co-generation, **advanced energy technologies**

HIGH-TECH INDUSTRY



The latest technology helps Ohio steel companies remain among the most productive in the world.

OHIOsteel
COUNCIL

STEEL PRODUCTS BENEFIT SOCIETY

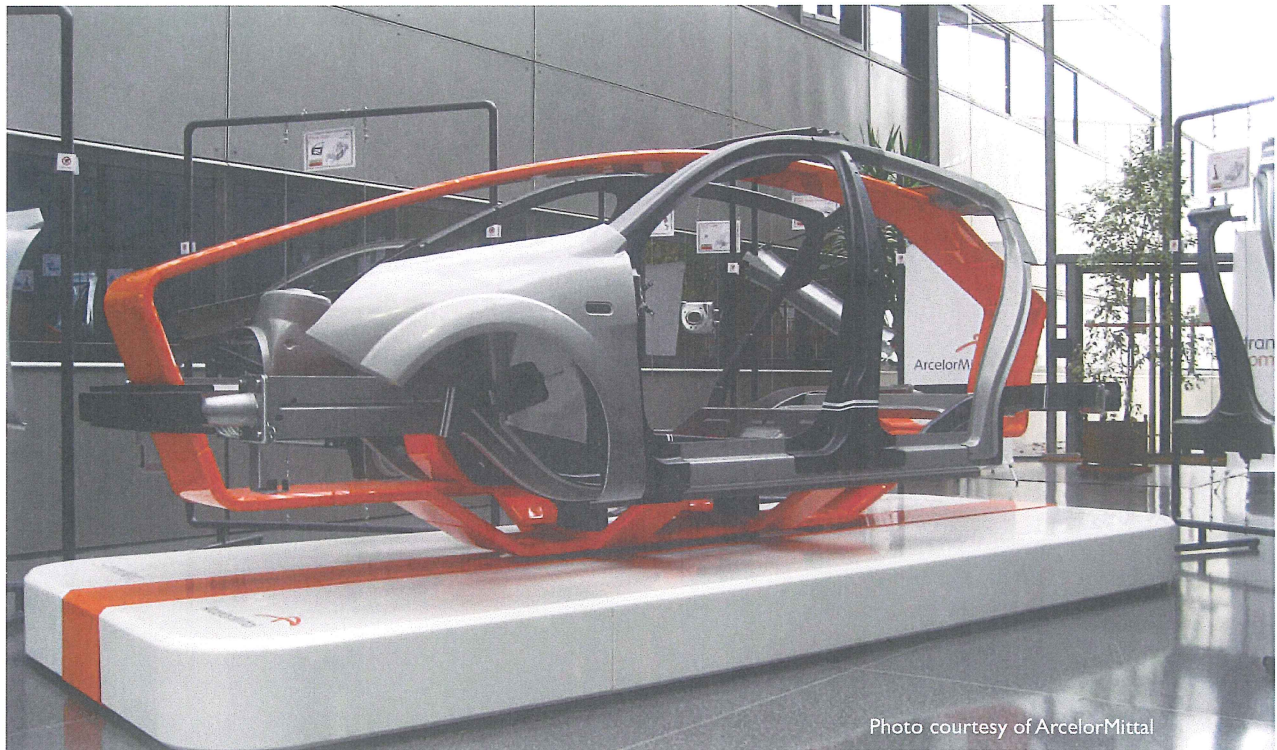


Photo courtesy of ArcelorMittal

Advanced high strength steels help automakers design **more fuel efficient vehicles** without sacrificing occupant safety.

CORPORATE CITIZENSHIP



Ohio's steel industry contributes more than
\$5.3 million annually to help support local nonprofits
throughout our communities.

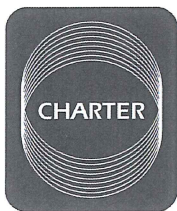
OHIOsteel
COUNCIL

OHIO steel COUNCIL

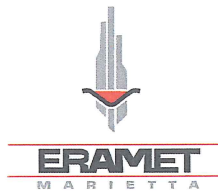
 **AK Steel**

 **AMG Vanadium**


ArcelorMittal



 **CLIFFS**



 **Republicsteel**



TATA STEEL

TIMKEN
Where You Turn


Tube City IMS
We Create Value



 **United States Steel**

**Wheeling & Lake Erie
Railway**

RSVP to date 147

Maybe 4

Declined 17



YES 147

YES + MAYBE 151

OSC Legislative Reception
RSVP to date 4/11/2012

YES	Maybe	NO	Prefix	First	Last	Title	Company
1			The Honorable	John	Adams	Majority Whip	Ohio House of Representatives
1			The Honorable	Richard	Adams	Representative	Ohio House of Representatives
1			The Honorable	Ron	Amstutz	Representative	Ohio House of Representatives
1			The Honorable	Marlene	Anielski	Representative	Ohio House of Representatives
1			The Honorable	Nickie	Antonio	Representative	Ohio House of Representatives
1			The Honorable	Michael	Ashford	Representative	Ohio House of Representatives
1			Mr.	Ryan	Augsburger	Managing Director, Public	The Ohio Manufacturers' Association
1			The Honorable	Kevin	Bacon	Senator	Ohio Senate
1			The Honorable	Nan	Baker	Representative	Ohio House of Representatives
			The Honorable	Troy	Balderson	Senator	Ohio Senate
1			The Honorable	John	Barnes, Jr.	Representative	Ohio House of Representatives
1			The Honorable	William	Batchelder	Speaker of the House	Ohio House of Representatives
1			The Honorable	Bill	Beagle	Senator	Ohio Senate
1			The Honorable	Peter	Beck	Representative	Ohio House of Representatives
1			Mr.	Trevor	Beers	Environmental Manager	Nucor Steel Marion Inc.
1			The Honorable	Terry	Blair	Representative	Ohio House of Representatives
			The Honorable	Lou	Blessing	Speaker Pro Tempore	Ohio House of Representatives
1			Mr.	Patrick	Bloom	Government Relations	Cliffs Natural Resources, Inc.
1			Mr.	George	Boes	Deputy Chief of Staff	Ohio State House
			The Honorable	Terry	Boose	Representative	Ohio House of Representatives
1			The Honorable	Barbara	Boyd	Representative	Ohio House of Representatives
1			Ms.	Eileen	Bradner	Sr. Director & Counsel, Fed	Nucor Public Affairs, Inc.
			The Honorable	Andrew	Brenner	Representative	Ohio House of Representatives
			The Honorable	Edna	Brown	Assistant Minority Whip	Ohio Senate
			The Honorable	Danny	Bubp	Representative	Ohio House of Representatives
			The Honorable	Jim	Buchy	Representative	Ohio House of Representatives
			The Honorable	Armond	Budish	Minority Leader	Ohio House of Representatives
			Administrator	Steve	Buehrer	Administrator/CEO	Ohio Bureau of Workers' Compensation
			The Honorable	Dave	Burke	Senator	Ohio Senate
1			Mr.	Eric	Burkland	President	The Ohio Manufacturers' Association

OSC Legislative Reception
RSVP to date 4/11/2012

YES	Maybe	NO	Prefix	First	Last	Title	Company
1			Mr.	Mark	Burtschi	Relations	ArcelorMittal
			The Honorable	James	Butler, Jr.	Representative	Ohio House of Representatives
			The Honorable	Capri	Cafaro	Senator	Ohio Senate
		1	Mr.	Matt	Carle	Director of Legislative Affairs	Governor's Office
			The Honorable	John	Carney	Representative	Ohio House of Representatives
			The Honorable	Nicholas	Celebrezze	Representative	Ohio House of Representatives
1			The Honorable	Ted	Celeste	Representative	Ohio House of Representatives
1			The Honorable	Jack	Cera	Representative	Ohio House of Representatives
			Mr.	Jai	Chabria	Senior Advisor to the Governor	Governor's Office
1			Ms.	Peggy	Claytor	Manager, State Government	The Timken Company
1			The Honorable	Kathleen	Clyde	Representative	Ohio House of Representatives
1			The Honorable	William	Coley	Senator	Ohio Senate
			The Honorable	Courtney	Combs	Representative	Ohio House of Representatives
			The Honorable	Margaret	Conditt	Representative	Ohio House of Representatives
			Mr.	Jim	Conlon	VP & General Counsel	Stein, Inc.
		1	Ms.	Liz	Connolly	Senate Majority Caucus	Ohio Senate Majority Caucus
			Mr.	Joseph	Curtin	CEO	Tube City IMS
			The Honorable	Rex	Damschroder	Representative	Ohio House of Representatives
1			The Honorable	Timothy	Derickson	Representative	Ohio House of Representatives
			The Honorable	Anthony	DeVitis	Representative	Ohio House of Representatives
			Attorney General	Mike	DeWine	Attorney General	State of Ohio
1			Ms.	Jennifer	Diggins	Director of Public Affairs	Nucor Corporation
1			Mr.	Francesco	DiGiannantonio	Chief Financial Officer	Republic Steel
			Mr.	Andy	DiPalma	Minority Legislative Director	House Minority Caucus
1			Mr.	Dean	Douglass	Operations Manager	Eramet Marietta
			Mr.	Jack	Dover	Senior Advisor	U.S. Senate - Office of Sherrod Brown
			The Honorable	Mike	Dovilla	Representative	Ohio House of Representatives
1			The Honorable	Denise	Driehaus	Representative	Ohio House of Representatives
1			Ms.	Kelsey	Woolard	Legislative Aide to Denise	Ohio House of Representatives
		1	The Honorable	Mike	Duffey	Representative	Ohio House of Representatives

OSC Legislative Reception
RSVP to date 4/11/2012

YES	Maybe	NO	Prefix	First	Last	Title	Company
1			Ms.	Stacia	Edwards	Deputy Chancellor Ohio Board of Regents	Ohio Board of Regents
1			Ms.	Anna	Ehrich	Deputy Director, Federal Char	Nucor Public Affairs, Inc.
			The Honorable	John	Eklund	Senator	Ohio Senate
				Raga	Elim	Government Relations	Cliffs Natural Resources, Inc.
			Mr.	Scott	Ertl	Management Office	Charter Steel
1			The Honorable	Keith	Faber	President Pro Tempore	Ohio Senate
			OEPA Ms.	Laura	Factor	Assistant Director	Ohio Environmental Protection Agency (EPA)
			Mr.	Ben	Famous	Regional Representative	U.S. Senate - Office of Sherrrod Brown
1			The Honorable	Teresa	Fedor	Representative	Ohio House of Representatives
1			The Honorable	Lorraine	Fende	Representative	Ohio House of Representatives
1			The Honorable	Mike	Foley	Representative	Ohio House of Representatives
1			Mr.	Ed	Forshey	Plant Manager	AMG Vanadium, Inc.
			Ms.	Joy	Frank-Collins	Consultant	Frank-Collins Group LLC
			Mr.	Rich	Frederick		Governor's Office
1			Ms.	Jean	Gaetano	Executive Administrator	V & M Star
			The Honorable	Randy	Gardner	Representative	Ohio House of Representatives
			The Honorable	Nancy	Garland	Representative	Ohio House of Representatives
1			Ms.	Kristina	Sutton	Legislative Aide to Nancy G	Ohio House of Representatives
1			The Honorable	Lou	Gentile	Senator	Ohio Senate
1			The Honorable	Ron	Gerberry	Representative	Ohio House of Representatives
1			Mr.	Marc	Glasgow	Vice President	Stein, Inc.
1			The Honorable	Anne	Gonzales	Representative	Ohio House of Representatives
1			Mr.	Micah	Derry	Legislative Aide to Anne G	Ohio House of Representatives
			The Honorable	Bruce	Goodwin	Representative	Ohio House of Representatives
			The Honorable	Jay	Goyal	Representative	Ohio House of Representatives
			Mr.	Nate	Green	Project Manager	JobsOhio
1			Ms.	Kari	Groh	Public Relations	The Timken Company
1			The Honorable	Cheryl	Grossman	Assistant Majority Whip	Ohio House of Representatives
1			The Honorable	Robert	Hackett	Representative	Ohio House of Representatives
1			The Honorable	Christina	Hagan	Representative	Ohio House of Representatives

OSC Legislative Reception
RSVP to date 4/11/2012

YES	Maybe	NO	Prefix	First	Last	Title	Company
1			The Honorable	Robert	Hagan	Representative	Ohio House of Representatives
1			The Honorable	Dave	Hall	Representative	Ohio House of Representatives
1			Mr.	Michael	McGuire	Legislative Aide to Michael	Ohio House of Representatives
			Ms.	Beth	Hansen	Chief of Staff	Governor's Office
		1	Mr.	Eric	Hauge	Manager	ArcelorMittal Cleveland
			Mr.	Chad	Hawley	Policy Director	House Majority Caucus Staff
			The Honorable	Bill	Hayes	Representative	Ohio House of Representatives
1			The Honorable	Tracy	Heard	Minority Whip	Ohio House of Representatives
1			The Honorable	Michael	Henne	Representative	Ohio House of Representatives
1			Ms.	Alyssa	Sarko	Legislative Aide to Michael	Ohio House of Representatives
			Charles	Hesse	Dir., Gov't Affairs	V & M Star	7777 Bainbridge Road
			The Honorable	Brian	Hill	Representative	Ohio House of Representatives
			Mr.	Abe	Jacob	Legislative Aide to Brian H	Ohio House of Representatives
		1	Ms.	Mary Beth	Holdford	Communications	ArcelorMittal
			The Honorable	Jay	Hottinger	Representative	Ohio House of Representatives
1			The Honorable	Matt	Huffman	Majority Floor Leader	Ohio House of Representatives
1			Mr.	Averel	Meden	Sr. Legislative Aide to Mat	Ohio House of Representatives
			The Honorable	Jim	Hughes	Senator	Ohio Senate
1			Mr.	Bob	Huseman	Vice President, Operations	Tube City IMS, LLC
1			Secretary of Stat	Jon	Husted	Secretary of State	State of Ohio
1			Mrs.	Tracy	Intihar	Cabinet Secretary	Governor's Office
1			Mr.	Ken	Johnson	General Manager FQM	V&M Star
1			The Honorable	Terry	Johnson	Representative	Ohio House of Representatives
1			The Honorable	Shannon	Jones	Majority Whip	Ohio Senate
			The Honorable	Kris	Jordan	Senator	Ohio Senate
1			Mr.	Troy	Judy	Chief of Staff	House Majority Caucus Staff
			Mr.	Ben	Kanzeg	Deputy Director for Policy	Governor's Office
1			Mr.	Matt	Kaput	Project Engineer	Tube City IMS, LLC
1			Governor	John	Kasich	Governor, State of Ohio	State of Ohio
			The Honorable	Eric	Kearney	Minority Leader	Ohio Senate

OSC Legislative Reception
RSVP to date 4/11/2012

YES	Maybe	NO	Prefix	First	Last	Title	Company
			Mr.	Damien	Hardy	Legislative Aide to Eric Keefe	Ohio Senate
			Mr.	Leo	Almeida	Legislative Aide to Eric Keefe	Ohio Senate
			Ms.	Jennifer	Moore	Legislative Aide to Eric Keefe	Ohio Senate
1			Mr.	Anthony	Klapac	Environmental	ArcelorMittal Columbus
		1	Mr.	Charlie	Knight	Roll Mill Manager	Nucor Steel Marion Inc.
1			The Honorable	Casey	Kozlowski	Representative	Ohio House of Representatives
			Mr.	Mark	Kvamme	CIO	JobsOhio
1			Mr.	Chris	Lait	Vice President of Operations	Tube City IMS
			The Honorable	Al	Landis	Representative	Ohio House of Representatives
1			Mr.	Robert	Lapp	and Community Relations	The Timken Company
1			The Honorable	Frank	LaRose	Senator	Ohio Senate
1			Ms.	Denise	Larr	Principal	Larr Policy Consulting, LLC
1			Mr.	John	Laughman	Services	The Ohio Manufacturers' Association
1			Mr.	Mike	LaWell	Govt. Affairs Consultant	ArcelorMittal
			The Honorable	Peggy	Lehner	Senator	Ohio Senate
1			Mr.	William	O'Gorman	Legislative Aide to Peggy L	Ohio Senate
			Ms.	Elizabeth	Wallace	Legislative Aide to Peggy L	Ohio Senate
1			Mr.	Gerry	Lehrke	Sales Manager	Nucor Steel Marion Inc.
			Mr.	James	Leonard	Relations	Tube City IMS
			The Honorable	Tom	Letson	Representative	Ohio House of Representatives
1			Mr.	Greg	Levy	Sales	Wheeling & Lake Erie Railway
1			Mrs.	Denise	Locke	Project Services	The Ohio Manufacturers' Association
1			The Honorable	Clayton	Luckie II	Representative	Ohio House of Representatives
1			The Honorable	Matt	Lundy	Representative	Ohio House of Representatives
1			The Honorable	Ron	Maag	Representative	Ohio House of Representatives
1			The Honorable	Dale	Mallory	Representative	Ohio House of Representatives
		1	Treasurer of Stat	Josh	Mandel	Treasurer of State	State of Ohio
1			Mr.	Brad	Young	Staff of John Mandel	State of Ohio
1			Ms.	Ali	Graves	Staff of John Mandel	State of Ohio
			The Honorable	Gayle	Manning	Senator	Ohio Senate

OSC Legislative Reception
RSVP to date 4/11/2012

YES	Maybe	NO	Prefix	First	Last	Title	Company
1			The Honorable	Jarrod	Martin	Representative	Ohio House of Representatives
1			Mr.	Roger	Marynak	Sr. VP of Marketing	Tube City IMS, LLC
1			Mr.	Chris	Masciantonio	Governmental Affairs	U S Steel Corporation
1			Mr.	Joel	Mastervich	President	V&M Star
			Mr.	Joel	Mastervich	President & CEO	V & M Star
			The Honorable	Mary	Matheney	Representative	Ohio House of Representatives
1			Ms.	Jason	Mauk	Chief of Staff	Senate Majority Caucus
			The Honorable	Jeffrey	McClain	Representative	Ohio House of Representatives
1		1	Ms.	Rose	McGlothlin	Executive Assistant	The Timken Company
1			Mr.	Pat	McFadden	Affairs	Nucor Corporation
			The Honorable	Ross	McGregor	Representative	Ohio House of Representatives
			Mr.	Charles	Mellows	Business Development	Charter Steel
			Mr.	Scott	Milburn	Director of Communication	Governor's Office
1			The Honorable	Zack	Milkovich	Representative	Ohio House of Representatives
1			Ms.	Carolyn	Thompson	Legislative Aide to Zack Miller	Ohio House of Representatives
1			Ms.	Katherine	Miller	Communications Manager	Nucor Corporation
1			Mr.	Sal	Miraglia	Business	The Timken Company
1			Mr.	Eric	Mitchell	Melt Shop Manager	Nucor Steel Marion Inc.
			The Honorable	Dennis	Murray	Representative	Ohio House of Representatives
1			Mr.	Ryan	Kelsey	Legislative Aide to Dennis	Ohio House of Representatives
1			Mr.	David	Mustine	General Manager	JobsOhio
1			Director	Scott	Nally	Director	Ohio Environmental Protection Agency (EPA)
1			Ms.	Tracy	Freeman	Legislative Liason	Ohio Environmental Protection Agency (EPA)
1			Ms.	Annie	VanBlarico	Legislative Liason	Ohio Environmental Protection Agency (EPA)
1			Mr.	Todd	Nein	Interim Executive Director	Ohio Air Quality Development Authority
			Mr.	Drew	Nelson	SVP, Marketing & Sales	Wheeling & Lake Erie Railway
1			The Honorable	Craig	Newbold	Representative	Ohio House of Representatives
1			The Honorable	Tom	Niehaus	President	Ohio Senate
1			The Honorable	Larry	Obhof	Senator	Ohio Senate
			The Honorable	Sean	O'Brien	Representative	Ohio House of Representatives

OSC Legislative Reception
RSVP to date 4/11/2012

YES	Maybe	NO	Prefix	First	Last	Title	Company
			The Honorable	Scott	Oelslager	Senator	Ohio Senate
			The Honorable	Mark	Okey	Representative	Ohio House of Representatives
		1	Ms.	Summer	Paris	Communications Representative	ArcelorMittal
			The Honorable	Bill	Patmon	Representative	Ohio House of Representatives
1			The Honorable	Tom	Patton	Majority Floor Leader	Ohio Senate
1		1	The Honorable	Dorothy	Pelanda	Representative	Ohio House of Representatives
			Ms.	Brian	Perera	Finance Director, Senate	Senate Majority Caucus Staff
			The Honorable	Bob	Peterson	Representative	Ohio House of Representatives
		1	Chancellor	Jim	Petro	Chancellor	Ohio Board of Regents
1			Ms.	Emily	Petrovich	Representative	U S Steel Corporation
		1	The Honorable	Debbie	Phillips	Assistant Minority Whip	Ohio House of Representatives
1			Ms.	Kathy	McDermott	Legislative Aide to Debbie	Ohio House of Representatives
			The Honorable	Connie	Pillich	Representative	Ohio House of Representatives
1			Mr.	Doug	Polk	Affairs	V&M USA
		1	The Honorable	Rob	Portman	Congressman	U.S. Senate - Office of Rob Portman
1			Mr.	Steve	White	Congressional Staff	U.S. Senate - Office of Rob Portman
			Mr.	Barry	Racey	Public Relations	A K Steel Corporation
			The Honorable	Dan	Ramos	Representative	Ohio House of Representatives
1			Ms.	Trina	Rauscher-Cooper	HR Director	V&M Star
	1		The Honorable	Alicia	Reece	Representative	Ohio House of Representatives
			Mr.	Ed	Roberts	Congressional Staff	Office of Senator Sherrod Brown
	1		The Honorable	Kristina	Roegner	Representative	Ohio House of Representatives
			The Honorable	Philip	Rose	Representative	Ohio House of Representatives
			The Honorable	Cliff	Rosenberger	Representative	Ohio House of Representatives
1			Mr.	Bill	Ross	Logistics Manager	Eramet Marietta
			The Honorable	Margaret	Ruhl	Representative	Ohio House of Representatives
1			Mr.	John	Ryan	State Director	U.S. Senate - Office of Sherrod Brown
		1	Mr.	Jeff	Sammons	Energy	ArcelorMittal Columbus
	1		The Honorable	Tom	Sawyer	Senator	Ohio Senate
1			The Honorable	Timothy	Schaffer	Senator	Ohio Senate

OSC Legislative Reception
RSVP to date 4/11/2012

YES	Maybe	NO	Prefix	First	Last	Title	Company
1			The Honorable	Joel	Schiavoni	Assistant Minority Leader	Ohio Senate
			Director	Chris	Schmenk	Director	Ohio Department of Development
1			Mr.	Kevin	Schmidt	Director, Public Policy Services	The Ohio Manufacturers' Association
			Ms.	Kathy	Schooley	Executive Assistant	The Timken Company
1			Mr.	Mike	Schueller		Charter Steel
1			Ms.	Brenda	Schulz	Controller	Nucor Steel Marion Inc.
			The Honorable	Kirk	Schuring	Representative	Ohio House of Representatives
1			The Honorable	Barbara	Sears	Assistant Majority Floor Leader	Ohio House of Representatives
			The Honorable	Bill	Seitz	Senator	Ohio Senate
1			Mr.	Eric	Shuster	General Manager MPM	V&M Star
1			Mr.	Fred	Schuster	Plant Manager Marion	ArcelorMittal Marion
1			The Honorable	Michael	Skindell	Senator	Ohio Senate
1			The Honorable	Lynn	Slaby	Representative	Ohio House of Representatives
1			The Honorable	Stephen	Slesnick	Representative	Ohio House of Representatives
1			Mr.	Dane	Smith	General Operations Manager	ArcelorMittal Shelby
1			The Honorable	Shirley	Smith	Assistant Minority Leader	Ohio Senate
1			Mr.	Alan	Ohman	Administrative Assistant to	Ohio Senate
			Chairman	Todd	Snitchler	Chairman	Public Utilities Commission of Ohio
1			The Honorable	Robert	Sprague	Representative	Ohio House of Representatives
1			Mr.	Brian	Stack	General Manager	ArcelorMittal Columbus
			The Honorable	Peter	Stautberg	Representative	Ohio House of Representatives
1			The Honorable	Gerald	Stebelton	Representative	Ohio House of Representatives
			The Honorable	Michael	Stinziano	Representative	Ohio House of Representatives
1			Mr.	Jerry	Strader	Vice President, Marketing	Tube City IMS, LLC
1			Mr.	Wayne	Struble	Director of Policy	Governor's Office
		1	Mr.	Dave	Sumoski	GM & VP	Nucor Steel Marion Inc.
			The Honorable	Vernon	Sykes	Representative	Ohio House of Representatives
			The Honorable	Matt	Szollosi	Assistant Minority Leader	Ohio House of Representatives
			Ms.	Kristi	Tanner	COO	JobsOhio
			The Honorable	Charlieta	Tavares	Senator	Ohio Senate

OSC Legislative Reception
RSVP to date 4/11/2012

YES	Maybe	NO	Prefix	First	Last	Title	Company
-		1	Lieutenant Governor	Mary	Taylor	Lieutenant Governor	State of Ohio
-		1	The Honorable	Louis	Terhar	Representative	Ohio House of Representatives
1			Mr.	Cory	Fleming	Legislative Aide to Louis Terhar	Ohio House of Representatives
		1	Mr.	Ted	Thielens	Executive Vice President	Republic Steel
1			The Honorable	Andrew	Thompson	Representative	Ohio House of Representatives
1			Mr.	Michael	Sabo	Legislative Aide to Andrew Thompson	Ohio House of Representatives
			Mr.	Jerry	Tipton	Purchasing	V & M Star
			The Honorable	Nina	Turner	Minority Whip	Ohio Senate
1			The Honorable	Joseph	Uecker	Representative	Ohio House of Representatives
			The Honorable	Lynn	Wachtmann	Representative	Ohio House of Representatives
			The Honorable	Mark	Wagoner	Senator	Ohio Senate
			Mr.	Mike	Wallner	Communications & Public	A K Steel Corporation
			The Honorable	Carlton	Weddington	Representative	Ohio House of Representatives
1			Mr.	Eric	Weldele	Chief of Staff	Public Utilities Commission of Ohio
			Ms.	Nan	Welker	Kari Groh	The Timken Company
			Ms.	Matt	Whatley	Senate Majority Caucus Staff	Senate Majority Caucus Staff
1			The Honorable	Christopher	Widener	Senator	Ohio Senate
1			Mr.	Daniel	Hurley	Legislative Aide to Christopher Widener	Ohio Senate
1			Mr.	Steve	Ewing	Legislative Aide to Christopher Widener	Ohio Senate
1			Ms.	Stephanie	Baker	Legislative Aide to Christopher Widener	Ohio Senate
			Mr.	Stephen	Wilkes	Governmental &	Tata Steel
			The Honorable	Sandra	Williams	Representative	Ohio House of Representatives
			Mr.	John	Willoughby	Chief Executive Officer	Eramet Marietta, Inc.
			The Honorable	Roland	Winburn	Representative	Ohio House of Representatives
1			Mr.	Mike	Wise	Member	McDonald Hopkins, LPA
			Director	Larry	Wolpert	Executive Director	Joint Committee on Agency Rule Review(JCARR)
1			Auditor of State	Dave	Yost	Auditor of State	State of Ohio
			The Honorable	Ron	Young	Representative	Ohio House of Representatives
1			The Honorable	Kenny	Yuko	Representative	Ohio House of Representatives
1			Mr.	Ben	Schaefer	Legislative Aide to Kenny Yuko	Ohio House of Representatives

OSC Legislative Reception
 RSVP to date 4/11/2012

YES	Maybe	NO	Prefix	First	Last	Title	Company
			Director	Jim	Zehringer	Director	Ohio Department of Natural Resources - Agriculture
147	4	17					

Ohio Steel Council Government Affairs Committee
Meeting Minutes

March 14, 2012

Present: Bob Lapp (Chair), Mark Burtschi, Alan McCoy, Brenda Schultz, John Willoughby, Emily Petrovich, Chris Masciantonio, Scott Ertel, Seth Conrad, Stephen Wilkes, Mike Wise, Denny Larr, R. Augsburger, K. Schmidt, Cathy Lyttle of Worthington (Guest)

Next meeting: To be called for May preceding June OSC Board meeting. Members were apprised on Legislative Reception prep session hosted by OSC government affairs chairman Lapp on April 17 at 3PM at the OMA offices.

I. Announcements

Reviewed and approved meeting minutes (Feb 14 meeting). Moved by M. Burtschi, Second by S. Schultz

Highlighted April 17 OSC Legislative Reception and plans and encouraged members to use tools to promote attendance to public officials and state legislators with constituent relationships.

II. Discussion

See agenda (attached). Energy, tax and environmental issues were reviewed and discussed.

J. Willoughby asked for letter of support on ferroalloy issue. Chair Lapp advised that the request was in order but that the government affairs committee lacks authority to authorize letters of support and agreed the specific need for letter of support and the protocol of evaluating and authorizing letters of support is appropriate for discussion by OSC Board on April 17.

Media reports of a two-stage steel manufacturing economic development project in southern Ohio were reviewed.

Guest presentation by Dr. Iryna Lendel of Cleveland State University regarding a recent shale gas economic impact study. A written copy of the study was provided to committee members.

Guest presentation by Kristi Tanner, General Manager of JobsOhio. Mrs. Tanner presented on the creation of JobsOhio, state efforts to spur economic investment in manufacturing and steel. Mrs. Tanner also responded to questions and concerns about state efforts to provide incentives to a prospective steel company in Southern Ohio.

Committee discussed possible guest speaker recommendations for April 17 OSC Board meeting. EPA Director Scott Nally's name was advanced. The Committee also recommended extending invite to Kristi Tanner of JobsOhio to present at April 17 OSC Board.

Ohio Steel Council Government Affairs Committee
Meeting Minutes

February 14, 2012 (PHONE)

Present: Robert Lapp, Chair, Emily Petrovich (USS), Chris Masciantonio (USS), Brenda Schultz (Nucor), Stephen Wilkes (Tata), Barry Racey (AK), Alan McCoy (AK), John Willoughby (Eramet), Mike Wise (Eramet), Carles Hesse (V&M Starr), Denny Larr (Timken & Nucor), Mark Burtschi (ArcelorMittal), Ryan Augsburger and Kevin Schmidt (OMA Staff)

Next meeting: March 14, 1:30pm, 33 N. High Street, Columbus

I. Announcements

- April 17 OSC legislative reception plan was reviewed by Bob Lapp and committee was notified of need to reinforce invitations to legislators to promote attendance.
- March 14 meeting was announced in-person with join by phone option
- Chair Lapp announced Committee invited possible policymaker speaker options for April 17 Board meeting.

II. Discussion

A “protocol” for evaluating policy letter requests / engagements was discussed and consensus approach developed: Members agreed such opportunities are ideally issues having broad steel industry impact rather than company specific. Government Affairs Committee should discuss opportunities case by case. If time does not permit, committee chair in consultation with OSC board chair empowered to take action. Requests for engagement should be routed to OSC government affairs chairman. Chairman Lapp was going to inform OSC Board Chair and President Sal Miraglia of proposed “protocol” for determining policy engagements. Board ratification by OSC Board would be required and could occur in April.

Above policy engagement “protocol” was used to evaluate request for letter of support on ferroalloy emissions. Questions were raised about the need for OSC letter of support due to EPA timeframe for comment having passed. No action taken.

Public policy reports were offered and discussion followed. Barry Racey and Alan McCoy led off a description of pending legislation to designate electricity generated by blast furnace waste gas as “renewable.” Chuck Hesse and Mike Wise also described the project and responded to members questions. Discussion followed concerning the timeliness of the proposal. C. Masciantonio questioned the reason for limiting language for only facilities in place before 1985. R. Lapp suggested a more broad review of renewable mandates should be considered. Proponents of SB 289 requested OSC support for legislation. Chair Lapp announced that could be discussed March 14.

Chair Lapp asked Ryan Augsburger and Kevin Schmidt to review public policy highlights including great lakes compact, shale gas policy developments, federal truck transportation legislation, and electricity rate developments in AEP service territory.

US EPA Forces US Ferroalloy Production Overseas

March 2012

Eramet Marietta Inc. (Marietta, OH) and Felman Productions, LLC. (Letart, WV) are the only two domestic producers of ferromanganese and silicomanganese, strategic military defense materials used in steelmaking. Both companies could be forced to close if a US EPA proposal to amend air emissions standards for the industry is finalized.

REQUEST

The proposed rulemaking should be reconsidered. The best available scientific data demonstrate that the industry's existing emission standards are sufficiently stringent to protect public health and the environment, and there is no justification for additional unproven and costly controls. The proposed requirements would close a strategically important domestic industry.

BACKGROUND

On November 23, 2011, the US EPA proposed to amend the "National Emissions Standards for Hazardous Air Pollutants: Ferroalloys Production" a standard promulgated under the Clean Air Act to control the emissions of hazardous air pollutants from the manufacture of ferromanganese and silicomanganese. The proposal arises from a "risk and technology review" of the current standard which was promulgated in 2001 and which sets technology-based emission limits for the industry based on the maximum achievable control technology (MACT) standard.

KEY POINTS

- Focused solely on meeting an arbitrary court-ordered deadline to conduct risk and technology review for a number of MACT standards, EPA did not take time to understand the ferroalloy production industry, its processes, or to objectively evaluate the perceived health and environmental risks. As a result, EPA has erroneously prescribed unnecessary, unproven, and costly process controls.
- As currently written, the proposed rule would force both companies to discontinue production in the United States. Lost would be over 450 employee jobs plus at least twice that number of external jobs that support the two facilities.
- The loss of payroll and property tax revenues and community support and involvement would have a negative economic impact in this depressed region of West Virginia and Ohio of over \$150 million.
- Loss of production would leave the U.S. steel industry fully dependent on foreign sources for an essential, strategic raw material: primarily Asia, South Africa and South America.
- EPA attempts to justify the costly controls on the basis that ferroalloy production poses significant health risks to surrounding neighborhoods from "high" manganese levels. But the best available scientific evidence shows that EPA is wrong.
- Eramet Marietta and Felman Production take very seriously their responsibilities to protect human health and the environment. Driving this production offshore where environmental and health regulations are minimal is a lose-lose-lose: for public health, the environment, and the people of West Virginia and Ohio.

The Honorable Lisa Jackson, Administrator
U.S. Environmental Protection Agency
1200 Pennsylvania Avenue, N.W.
Washington, DC 20460

Dear Administrator Jackson:

Re: Proposed National Emissions Standards for Hazardous Pollutants (NESHAP) rule: Ferroalloys Production (issued November 23, 2011)

It has come to our attention that one of our members, Eramet Marietta, Marietta, Ohio (EMI), and Felman Production, Letart, West Virginia, the two remaining United States smelters of Manganese ferroalloys, will be severely impacted by the above-referenced rule. We understand EPA's rule may be finalized despite objections from the two companies, as well as the Manganese Interest Group (MIG). MIG is an ad hoc coalition of trade associations and companies interested in the scientifically sound evaluation and regulation of manganese compounds (other members include: AISI, SMA, Steel Slag Association, Specialty Steel Industry of North America, the International Manganese Institute, Afton Chemical Corporation, and US Steel).

We are writing to encourage you to use the best available, peer-reviewed science in the amendments proposed (76 FR 72508.) This proposed rule would supplement existing regulations and require ferroalloys production facilities to install additional costly emissions control equipment. The President has directed federal agencies in Executive Order 13563 to base regulations on the best available science, and to employ the least burdensome tools for achieving regulatory ends.

Manganese ferroalloys are a critical ingredient of steelmaking and are important to national interests. A Department of Commerce investigation found that ferroalloy production is critical to national defense. Final promulgation of the NESHAP standards proposed last November could result in the closure of the last two manganese ferroalloy plants in the United States with no commensurate public health benefit. Plant closures will impact over 450 high wage manufacturing jobs, mostly among members of the United Steel Workers Union, with significant impacts on the communities of Marietta, Ohio and Letart, West Virginia.

It is our understanding that the scientific justification for the proposed rule is outdated and may not be supported by real world data, and that the standards may not be achievable in practice by real-world facilities. In establishing the proposed standards, EPA relies upon a science assessment issued in 1993, neglecting recent peer-reviewed scientific information. To achieve the proposed standards, EPA's proposal assumes that the affected facilities would install technologies that may not be appropriate or effective as applied to ferroalloys production facilities.

Given the importance of relying upon the best available science to protect the public health, jobs and the economy, we strongly urge the EPA to take the following steps before promulgating a final rule:

1. Ensure that any determinations or standards developed by EPA to address residual risk are based on the best available scientific and technical information.
2. Work with stakeholders, including the two remaining domestic manganese ferroalloy producers, to identify feasible technologies to achieve protections in a way that also protects jobs and the economy.
3. We encourage you to consider seeking an extension of the court-imposed deadline for issuing the final rule, in order to give adequate attention to our requests.

Sincerely,