Ford Scorecard IATF 16949 Pocket Guide

Background

For all IATF 16949 audits, there are three key steps to ensure a robust audit plan accounting for performance:

Rules 5.7.1 c) “customer and internal performance data since the previous audit”
Rules 5.7.2 Audit plan “certification body shall undertake an analysis of the required information (see section 5.7.1)”
Rules 5.7.2 a) “Each audit plan shall identify a minimum of one (1) hour on site ... for verification of data ...”

1. Ford Scorecard – what performance data to use for audit pre-planning? (Rules 5.7.1 c)

The client should provide the following customer performance data for Ford product (images are shown below):

- **Q1 Scoring Detail SIM screen** confirming supplier name, manufacturing GSDB site code, city and state;
  - Screen includes: Q1 status; Q1 score dashboard; Q1 scores for: Capable Systems, Quality, Delivery and Warranty Performance; Production and Service;
- **Performance Metric Summary screen** showing details of Production and Service PPM; 13 months of performance trends; Delivery ratings; Warranty; BSAQ concern report counts;

  Note 1: It is not acceptable for the client to provide SIM report cards more than two weeks old at the time of submission to the CB (SIM is updated weekly).
  Note 2: Overall site performance is for the Primary site code, not for any linked Alternate site code.
  Note 3: A recommended Q1 status is not to be used, only use the “Present Q1 status” on Q1 Score Details.
  Note 4: Multiple site codes may exist at a single location, but should all be linked to the Primary site code.

2. How does an auditor analyze the Ford scorecard data? (Rules 5.7.2)

   - **a)** Confirm the Manufacturing GSDB site code, site name, city and state match the certificate and audit profile (refer to the note above regarding “Multiple site codes”).
   - **b)** Review Q1 Scoring Detail (Q1 Score Dashboard) for red scores – should be included in the audit plan. Orange scores are to be considered for the audit plan and yellow items offer continuous improvement opportunities. Review each category (Capable Systems; Quality, Delivery and Warranty Performance) for details of the scoring.
   - **c)** Confirm the “Present Q1 status” to determine the applicability of IATF Special Status (Q1 Revoked)
   - **d)** Review Performance Metric Summary to determine performance trends and months of activity.

3. What does an auditor focus on in the verification of the data? (Rules 5.7.2 a)

During the 1 hour pre-meeting, the CB auditor confirms online with the client reviewing the Ford SIM screens:

   - **a)** The client site GSDB code, site name, city and state on any SIM screen, paying close attention to identify any Alternate site codes shown – the Primary GSDB site code is the one recorded in the audit report.
   - **b)** Review the current Q1 status and Q1 Score Dashboard, noting any change of metric color codes since the pre-planning submission to adjust the audit plan if necessary.
   - **c)** Review detail links from Performance Metrics Summary page to get part numbers and other specifics.
   - **d)** Ask if any Engineering Alerts have been issued, temporarily modifying part specifications and ask about associated controls and part identification.
   - **e)** Review the Performance Metrics Summary page or any recent Field Service Actions or Stop Shipments.

Note: verified GSDB site codes for associated extended sites should also be recorded in the audit report.
4. Images of Ford SIM screens, for each report identified above

- SIM Homepage on Ford Supplier Portal in Covisint

**SIM Homepage**

- SIM Homepage is available through Ford Supplier Portal, Covisint
- Supplier selects the “Supplier Site” viewpoint from drop down list
- They are required to enter their 5 character alphanumeric supplier manufacturing site code into the field which is located below the viewpoint list and then click “Search” *
  - The site code can be found on the Purchase Order and will either be the primary site code or an alternate site code (see slide 7)

Select the appropriate GSDB site code

**SIM Search Results**

- This screen shows the code entered on the previous search screen
- The supplier confirms the correct location through the name, location and parent code
- The supplier would then click on the correct site code to go to their site page
Verify the 3 key points listed:

1. Verify the address matches the current manufacturing audit site.
2. Q1 Status is not “Z,” “2,” or blank.
3. No yellow highlight in gray site information banner (see “Alternate Site Codes”, slide 7).

Note that alternate site codes may be added to the IATF database, but always after the primary code. The site’s performance is associated with the primary code.

Alternate Site Codes

If you see this message, STOP and go to the linked Primary Site Code to view manufacturing site performance.

Sites with YELLOW HIGHLIGHTS indicate this information is linked from the primary site code indicated above.

Alternate site codes at the same address should also be recorded in the IATF database after the Primary site code.
# FORD OEM Quick Reference Guide, showing CSR and supplier code applicability

<table>
<thead>
<tr>
<th></th>
<th>FORD*</th>
<th>Lincoln*</th>
<th>Auto Alliance Thailand (AAT) (Rayong, Thailand)</th>
<th>Jiangling Motor Co (JMC) (China)</th>
<th>Sollers (Russia)</th>
<th>Otosan (Turkey)</th>
<th>ChangAn Ford (CAF) (China)</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Numbering Scheme / Structure of Supplier Codes (if applicable)</strong></td>
<td>Ford GSDB codes</td>
<td>Ford GSDB codes</td>
<td>Ford GSDB codes</td>
<td>Ford GSDB codes</td>
<td>Ford GSDB codes</td>
<td>Ford GSDB codes</td>
<td>Ford GSDB codes</td>
</tr>
<tr>
<td><strong>Can more than 1 supplier code exist for the same supplier (e.g. based on commodity, currency, etc.)?</strong></td>
<td>YES</td>
<td>YES</td>
<td>YES (Only for Ford production parts)</td>
<td>YES (Only for Ford production parts)</td>
<td>YES</td>
<td>YES</td>
<td>YES</td>
</tr>
<tr>
<td><strong>Is a supplier code required to be entered in the IATF Database as a Ford vendor?</strong></td>
<td>YES</td>
<td>YES</td>
<td>YES (Only for Ford production parts)</td>
<td>YES (Only for Ford production parts)</td>
<td>YES</td>
<td>YES</td>
<td>YES</td>
</tr>
<tr>
<td><strong>Which supplier code should be entered into the IATF Database if more than 1 supplier code exists for the same site?</strong></td>
<td>The Primary site code(s)* used to track the site performance should be entered in the IATF database. A Primary site has a Q1 Status code other than blank, “2” or “2”, and has a Q1 score calculated. A Primary site code will not have a yellow caution warning sign or yellow highlights in the SIM banner. Alternate site codes display a yellow warning sign, a redirect message to the primary site code, and the Q1 score and status from the primary code.</td>
<td>YES</td>
<td>YES (Only for Ford production parts)</td>
<td>YES (JMC QMS system for those suppliers not in Ford system)</td>
<td>YES</td>
<td>YES</td>
<td>YES</td>
</tr>
<tr>
<td><strong>Is the IATF OEM scorecard used for suppliers to these organizations? If not, what is used?</strong></td>
<td>YES</td>
<td>YES</td>
<td>YES (Only for Ford production parts)</td>
<td>YES (For common Ford programs)</td>
<td>YES</td>
<td>YES</td>
<td>YES</td>
</tr>
<tr>
<td><strong>Are the suppliers required to meet the FORD OEM CSR(s)?</strong></td>
<td>YES</td>
<td>YES</td>
<td>YES (Only for Ford production parts)</td>
<td>YES (For common Ford programs)</td>
<td>YES</td>
<td>YES</td>
<td>YES</td>
</tr>
<tr>
<td><strong>If not, are there own CSR(s) that have to be met?</strong></td>
<td>***</td>
<td>***</td>
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*Includes Production, including Detroit Chassis Plant (DCP), and Service (FCSD – Ford Customer Service Division and FCS – Ford Component Sales)
12 months of activity does not require activity in every month. However, 12 months ago or more there need to be receipts recorded.

**Verify 12 Months of Receipt Activity**

To verify the supplier has had at least 12 months of business activity, utilize the “Performance Metrics Summary” View at top right of Views List. *Note: This must be done for both Production and Service if there is activity indicated.*

In the event that it is unclear if the supplier has had at least 12 months of business activity, utilize the “Performance Metrics Summary” View at top right of Views List and the “PPM Summary” link for additional details. (Continue to next page)
Verify 12 Months of Receipt Activity

From the “PPM Summary”, click the “Export Table Options”, and select the “Export Table to Excel (PPM 48 Months Reports)”. An Excel sheet will open with receipts for the past 48 months. Verify there are receipts in any month older than the threshold month (12 months).

Detail of confirming 12 months of activity

Image from Excel File – PPM 48 Months

In Excel file, scroll right to find the most recent months in the “Receipts” Section (around column DF)

Scroll left to see previous 48 months of receipts, specifically 11 or more months prior to most recent month

Receipts in months 13 and 14
No Receipts in months 11 and 12

This supplier can be verified to have at least 12 months of activity based on receipts in any month from month 12 to month 48 in the Excel file

It is acceptable to have months with zero receipt activity for both production and service as long as the oldest receipt month is 12 months or older.
Q1 scoring and status are available through the Q1 Scoring Detail page.

SIM View for Supplier Site

This screen provides several options of data that can be viewed by the supplier for the selected site. The key view of interest is Q1 Scoring Detail.

The Q1 Score Dashboard provides recommendations for performance driven audit trails.

Q1 Scoring Detail

This section is the top of the scoring detail page and provides the present Q1 status, the total Q1 score, and the major contributing metric scores for the supplier site.

Colors are red flags for poor performance areas.

- **Red**: Include in audit plan
- **Orange**: Consider for audit plan
- **Yellow**: Continuous Improvement Opportunity
- **White**: Acceptable performance

Scrolling down on this webpage will provide a further breakdown of the scores.
It is important to know the difference between Present Q1 Status and Recommended Q1 status.

**Q1 Revoked Status = IATF Special Status**

1. IATF certified suppliers with an “R” Present Q1 Status should have notified the Certification Body of special status within five days of receipt of revocation letter.
2. “Q1 at Risk” and “Recommended Status” do not trigger a special status reporting requirement per Ford Customer Specific Requirements.
Suppliers are required to record their certifications into GSDB, these details should be validated.

**Q1 Scoring Detail – Capable Systems**

- Maximum points available in that metric vs Applied Metric Points
- Verify Correct IATF Certificate Number
- Key Points:
  - Verify correct IATF Certificate Number and status
  - Any point loss in Q1 MSA or APQP Launch can be an area of focus for audit plan

- The supplier is required to record its current and valid IATF 16949 certification in the Ford Global Supplier Database (GSDB) available through the Ford Supplier Portal
- Certifications and second party Ford assessment (Q1 MSA) of the supplier must be current and acceptable to have no impact on Q1 score

Further details for each metric are available through links on each page

**Q1 Scoring Detail – Quality Performance**

- Key Points:
  - Commodity PPM for WORST PERFORMING commodity is displayed, other commodities are available under the production and service links which may also be considered

- Blue, underlined links will take the user to a detail page (i.e. Production, Service, Stop Shipments)
Delivery score details are available through SUPER-G logistics reporting system, linked from SIM.

Q1 Scoring Detail – Delivery and Warranty Performance

Key Points:
- Orange delivery ratings in the Q1 Score Dashboard requires deeper analysis using detail links before inclusion in the audit plan
  - Individual demerits for delivery ratings can be found in SUPER-G (see slide 21)
  - Production and service delivery scoring identifies the worst-performing delivery rating for this supplier.

Blue, underlined links will take the user to a detail page (i.e. Production, Service, Field Service Actions)

Key thresholds drive delivery metric scoring in Q1

Delivery Performance Detail

- Clicking the “Production” and “Service” links in delivery type will bring you from the Q1 Scoring Detail view to Q1 Delivery Details
- Delivery should be included in the audit plan if a supplier has at least one of the following in either production or service:
  1) 6M Weighted Average < 81
  2) Non zero “# of Consecutive Ratings < 81”
- Any rating marked as “Not Considered For Q1” in the notes should be disregarded
The Performance Metric summary page provides performance trends over 13 months and access to details.

**Performance Metric Summary**

The “Performance Metric Summary” view provides an overview of the following metrics:

- PPM Summary, Production, and Service
- Delivery Ratings for production and service
- Field Service Actions (FSA) and Stop Shipments (SS)
- Warranty Performance

This view is located on the top right corner of the “Views List”.

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**Performance Metrics Summary - PPM**

Specific part numbers contracted by Ford are available through the export table reports.
It is important to identify the correct region of shipment and ship points (ship sites) to identify specific customer plants and remote sites.

**Key Points**

1. Grouping Options – able to group metrics by several key elements
2. Metrics – able to select a specific metric or component of PPM to allow sorting of results
3. Actions – allow you to add filters and view 13 month activity by part number
4. Export Table Options – provides option to download 48 months of part detail data
Field Service Actions (recalls) and stop shipments (customer production interruptions) are significant events.

Performance Metrics Summary – FSA / SS

Key Points:
1. Stop Shipments and Field Service Actions links will show all incidences reported in the years indicated.
2. There is an indicator in the detail for incidents which impact Q1.

Performance Metrics Summary – Warranty

Key Points:
- Warranty data is fed from Ford systems SWR / AWS (Analytical Warranty System) / GSAR (Global Systems for Analytics and Research).
- The Supplier Warranty Reporting (SWR) Link can provide additional data on warranty claims, but does not directly align with Q1 metrics.
- Q1 scoring is based on comparison of the 3 month, 6 month, and 12 month R/1000 average.
- Warranty is shared responsibility between the supplier and Ford, not fault based.
Although QR Rate and APQP Launch Performance scoring appear on the Q1 Scoring Detail page, the details are only available through the On Demand Reports page.

**QR Rate and APQP Launch Performance**

Key Points:
1. QR Rate metric and APQP Launch Performance details are only available on the “On Demand Reports” view, mid right column in the “Views” list.
2. “QR Rate Metric report” shows detail of the QR rate calculation used in Q1 scoring.
3. “APQP Launch Performance” shows the launch rating and the STA Engineer comments for the supplier.

The Getrag / Ford Joint Venture for transmissions are not managed by Ford Supplier Quality, but still may be a customer to the supplier site, although the customer is the Getrag JV.

**Getrag Ford Transmission Suppliers**

**How to Identify Getrag Unique Suppliers:**

1. **No Service Activity (Service STA Inactive)**
2. **Production Activity ONLY to Getrag Plants**

Refer to “PPM Summary Tool” and group by “Plant” and “Receipts” metric.

May also include parts shipped through trading companies to other regions.

3. **Production STA Org “FEPGF” or “XAGFT”**

These suppliers are excluded from Q1 and are governed by the Getrag commercial contracts.