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100 Barr Harbor Drive
PO Box C700
West Conshohocken, PA
19428-2959 USA

tel +1.610.832.9500
fax +1.610.832.9666
www.astm.org

COMMITTEE D02 on PETROLEUM PRODUCTS, LIQUID FUELS, AND LUBRICANTS

CHAIRMAN: Randy F Jennings, Tennessee Dept Of Agric, P O Box 40627, Nashville, TN 37204, United States (615) 837-5150, Fax: (615) 837-5327, e-mail: randy.jennings@tn.gov

FIRST VICE CHAIRMAN: James J Simnick, Bp America, 150 Warrenville Rd, Naperville, IL 60563, United States (630) 420-5936, Fax: (630) 420-4831, e-mail: simnicjj@bp.com

SECOND VICE CHAIRMAN: Michael A Collier, Petroleum Analyzer Co Lp, 21114 Hwy 113, Custer Park, IL 60481, United States (815) 458-0216, Fax: (815) 458-0217, e-mail: michael.collier@paclp.com

SECOND SECRETARY: Hind M Abi-Akar, Caterpillar Inc, Building H2000, Old Galena Road, Mossville, IL 61552, United States (309) 578-9553, e-mail: abi-akar_hind@cat.com

SECRETARY: Scott Fenwick, National Biodiesel Board, PO Box 104848, Jefferson City, MO 65110-4898, United States (800) 841-5849, Fax: (537) 635-7913, e-mail: sfenwick@biodiesel.org

STAFF MANAGER: Alyson Fick, (610) 832-9710, e-mail: afick@astm.org

Unapproved Meeting Minutes of the Technical Guidance Committee Virtual Meeting

Hyatt Regency, Seattle, WA

June 27, 202

2:30 – 4:00 PM PST

Reply to: Patrick Lang

Southwest Research Institute, 6220 Culebra Road San Antonio, TX 78228

Phone: 210-522-2820, patrick.lang@swri.org

The meeting was called to order at 2:30 PM Pacific time by Pat Lang.

Agenda:

The meeting agenda can be found as Attachment # 1.

Membership Review:

The attendance list can be found as Attachment #2. Pat commented that a thorough review of the attendance list was done prior to this meeting. He encouraged the audience to review the list as it is passed around to ensure accuracy. Pat also reminded the group that the membership list for the TGC is comprised of the surveillance panel chairs of the TMC monitored tests and test developers/sponsors.

Review and Acceptance of Minutes:

Pat Lang requested approval of the December 6, 2021 meeting minutes. Receiving no comments or changes the chairman moved for approval; there were no objections.

Action Item List:

The action item list was reviewed and can be found as Attachment #3. The status of each action item is listed.

Fuels Task Force Update:

Pat advised that all of the action items on the fuels task force list are complete. As a result, there was no formal report provided. If there are any new requests for the fuels task force to handle, the group will reconvene.

Rating Task Force:

Bob Campbell provided the rating taskforce update. The report can be found as Attachment #4. A summary is as follows:

- 1) TMC manuals 20 and 21 are now available for purchase; ordering information can be found in the report.
- 2) Combined rating workshop was conducted the week of February 14, 2022 in San Antonio.
 - Data indicates that raters are in a good spot
 - LED lights, JMP software for real-time evaluations and a new web-based system utilized during this workshop.
- 3) The rater calibration extensions have now been terminated since there was an in-person workshop was held.
- 4) A Heavy Duty (HD) workshop is planned on September 18th in San Antonio.

Old Business:

DACA II Review Task Force:

Pat Lang reported that the task force that is reviewing the DACA II document has continued to be active during this period with three virtual meetings held. A summary report can be found as Attachment # 5. The current goal is to have the review completed by the December 2022 TGC meeting during ASTM week.

Part numbers in ASTM Procedures:

A quick refresher on the background for this item is that there has been a request to consider relocating the parts lists that currently reside in the ASTM test procedures to a document that resides on the TMC website. The thought behind this is that it will afford the ability of making changes or updates to part numbers without having to make changes to the test procedure. Making changes to the test procedure can be a very lengthy process and this would eliminate the burden that is put on the information letter approval process, which requires balloting through Subcommittee B. The procedure would reference the document and where it is located for an interested party to access.

The new information on this topic, as discussed during this meeting, is that the Sequence VI Surveillance Panel has been working on reviewing the part numbers in the test procedures. They have thoroughly reviewed the part numbers to make the lists/tables more concise and accurate. They were also contemplating moving the parts list out of the procedure and having a separate document reside on the TMC website. During the Sequence VI Surveillance Panel vote on what to do with their lists, their panel agreed that they would not remove the list from the procedure. The voting members echoed the same concerns voiced earlier at the previous TGC meeting about ensuring that any changes get the proper review outside of just the surveillance panel. Additionally, there are concerns about having too many alternate documents that the TMC will have to ensure get maintained/updated appropriately.

As a result of this, Pat Lang advised that he would like for this item to be removed from the TGC action item list. It is clear through the vote taken at the Sequence VI Panel that the overall consensus is the need to keep the part lists in the test procedures. Surveillance Panels are at liberty to move part lists to an annex in the ASTM test procedures or rearrange the lists as they see appropriate, but the list will remain in the procedure. There were no objections from the panel on calling this TGC action item done.

New Business:

Method Used to Determine Test Weighting during Precision Matrix:

Andy Ritchie prepared a presentation which can be found as Attachment #6. In this presentation, he shares some of the recent learnings associated with VH rocker cover sludge (RAC) relative to the targets that were set during the precision matrix. It appears that the targets may have been set too severe from the start, which could partially explain why reference oil results on RAC are very mild. He further explained that during the precision Matrix in 2017, there were four labs that participated in the matrix. An equal weighting approach was used despite the fact that there were a different number of tests provided by each lab. In the current LTMS system, the EWMA's are actually weighted by test lab frequency. Additionally, the VH RAC issue may have been mitigated if the targets were updated at 10, 20, and 30 tests like we typically did in the past as outlined in Appendix F of the LTMS document.

As a result of this, Andy is advising that the issues raised with the VH target setting and target updating are relevant to all of the sequence tests. He is recommending that the TGC take the action item of convening the group in the fall of 2022 and discussing the following items:

- Future Precision Matrix (PM) designs and analysis approaches, including the use of ‘equal weighting’ of data from each lab participating in a PM.
- Review of LTMS Appendix F recommendation to reset targets after 10, 20, and 30 tests.

Mike Deegan commented that the OEM’s are not as familiar with the LTMS system and the target setting process as the others involved in the surveillance panels. As an example, when a Cusum plot is at 45 degrees, what is it actually telling us?

Frank Farber stated that we need more data to set targets than just the precision matrix data. The process of updating targets at 10/20/30 data points addresses this need.

Bob Campbell cautioned that with three reference oils, we would need 90 tests to review and reset the targets for the final time. This could take a long time to acquire the data. Jeff Clark agreed that it would take a long time to get 30 engine tests.

Andy Ritchie commented that more data provides a better chance of getting the targets correct.

Yong-Li McFarland called up the LTMS Appendix F document during the meeting. The wording in Appendix F is such that updating the targets at 10/20/30 is not mandatory.

Travis Kostan commented that each surveillance panel needs to consider the number of tests required to set the stake in the ground after the precision matrix.

Mike Deegan feels that there may be situations where specific parameters may need target resets as opposed to all of them.

Mike Lochte commented that we need to come up with a frame work on setting targets and document it so that future stewards of the test have guidelines.

Robert Stockwell stated that there was a lot going on with the VH test and we did the best that we could at the time when we set the targets. Now that we look back, we could have benefitted from a target reset for RAC in the VH which supports the 10/20/30 test target updates.

Bob advised that the surveillance panels need to keep their eye on the ball and watch the tests closer. There were some warning signs in the charts that something wasn’t on track.

Frank Farber advised the group that in the VH precision matrix were tests that were invalid but the results were extrapolated based on that labs’ performance with the other oils.

Action Item:

The TGC is to initiate a meeting in the fall of 2022 that will consist of the surveillance panel chairs and OEMS. The purpose of the meeting will be to discuss precision matrix target setting, the target update frequencies as outlined in the LTMS document Appendix F and best practices for control chart monitoring. The bench test and gear test SP chairs will also be invited to this meeting.

TGC Objectives:

Frank Farber prepared a document that outlines the objective of the TGC; refer to Attachment #7. This will be posted to the TMC website as a document to define the mission of the committee as well as the membership. This is an important item that, in order to get things accomplished, the core group needs to be the decision makers. Andy Ritchie emphasized that it is imperative that the core group, i.e. SP chars and OEM participate in the meetings.

Next Meeting:

The next meeting is planned to be in the fall of 2022; location and date to be determined.

The meeting adjourned at 3:40 PST.

Attachment #1

Agenda

June 27, 2022

AGENDA

ASTM Technical Guidance Committee Meeting Seattle Washington

Patrick Lang – Chairman

Monday June 27, 2022–2:30 PM to 4:00 PM (PDT)

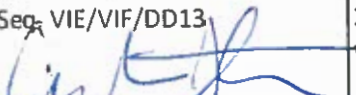
1. Attendance
2. Chairman's Comments
3. Review & Acceptance of Minutes
 - 3.1. Acceptance of the December 6, 2021 meeting minutes (Anaheim, CA).
4. Review Action Item List (Pat Lang)
5. Fuel Task Force
 - 5.1. Update on fuels task force activities (Mike Lochte)
6. Rating Task Force
 - 6.1. Update on status of rating task force activities (Bob Campbell)
7. Old Business
 - 7.1 DACA II Review Task Force Update (Pat Lang)
 - 7.2 Relocating parts lists from test procedures to TMC website
8. New Business
 - 8.1. Laboratory weighting used during initial test target setting (Andy Ritchie)
 - 8.2. Review proposed document on the TGC's charter (Frank Farber)
9. Next Meeting: During December 2022 ASTM Meetings
10. Adjournment

Attachment #2

Attendance List

June 27, 2022

Technical Guidance Committee----Voting Membership List

NAME	COMPANY AND ADDRESS	PHONE NUMBER E-MAIL ADDRESS
Matt Schlaff HT Foam, Scanning Brookfield, Sulfated Ash	Intertek Automotive Research 5404 Bandera Road San Antonio, TX 78238-1933	Phone: e-mail: matt.schlaff@intertek.com
Jacob Goodale Caterpillar SP Chair	Infineum USA, L.P. 1900 East Linden Ave. Linden, NJ 07036-0735	Phone: (512) 695-8026 e-mail: Jacob.Goodale@infineum.com
Robert Slocum L-37/L-37-1	The Lubrizol Corporation 29400 Lakeland Blvd. Wickliffe, OH 44092-2298	Phone: e-mail: robert.slocum@lubrizol.com
Andrew Smith Cummins SP Chair 	Intertek Automotive Research 5404 Bandera Road San Antonio, TX 78238-1933	Phone: 210-823-8501 e-mail: andrew.smith@intertek.com <i>andrew.c.smith@intertek.com</i>
Patrick Lang Sequence VIII	Southwest Research Institute 6220 Culebra Road San Antonio, TX 78228-0510	Phone: (210) 522-2820 e-mail: plang@swri.org
Teri Kowalski Test Developer	Toyota Motor North America 1555 Woodridge Ave. Ann Arbor, MI 48105	Phone: (734)995-4032 e-mail: teri.kowalski@toyota.com
Yon-Li McFarland EOFT/EOWT 	Southwest Research Institute 6220 Culebra Road San Antonio, TX 78228-0510	Phone: (210) 522-2715 e-mail: yonli.mcfarland@swri.org
Andrew Stevens Sec. VIE/VIF/DD13 	The Lubrizol Corporation 29400 Lakeland Blvd. Wickliffe, OH 44092-2298	Phone: (440) 347-4020 e-mail: andrew.stevens@lubrizol.com
Mike Lopez CBT, HTCBT	Intertek Automotive Research 5404 Bandera Road San Antonio, TX 78238-1933	Phone: (210) 523-4674 e-mail: mike.lopez@intertek.com
Andy Ritchie Sequence VG, SP Chair 	Infineum USA, L.P. 1900 East Linden Ave. Linden, NJ 07036-0735	Phone: (908) 474-2097 e-mail: andrew.ritchie@infineum.com
Mike Deegan Test Developer 	FCSD/SEO Lubricant Technical Specialist 1800 Fairlane Drive Allen Park, MI 48101	Phone: (313) 805-8942 e-mail: mdeegan@ford.com
Robert Slocum L-60-1 	The Lubrizol Corporation 29400 Lakeland Blvd. Wickliffe, OH 44092-2298	Phone: e-mail: robert.slocum@lubrizol.com

Technical Guidance Committee----Voting Membership List

NAME	COMPANY AND ADDRESS	PHONE NUMBER E-MAIL ADDRESS
Hind Abi-Akar Test Developer	Caterpillar, Inc. Old Galeena Road Building H3000 Mossville, IL 61552-3000	Phone: (309) 578-9553 e-mail: abi-akar_hind@car.com
Suzanne Neal Test Developer <i>SMN</i>	Detroit Diesel/Daimler Trucks NA 2400 E. 10th 13400 Outer Drive West Detroit MI 48239	Phone: (313)592-7130 e-mail: suzanne.neal@daimlertruck.com <i>suzanne.neal@daimlertruck.com</i>
Don Bell OSCT	Afton Chemical Corporation 500 Spring Street PO Box 2158 Richmond, VA 23218-2158	Phone: (804)-788-6332 e-mail: don.bell@aftonchemical.com
Mike Birke Elastomer Compatability (EOEC)	Southwest Research Institute 6220 Culebra Road San Antonio, TX 78228-0510	Phone: (210) 522-5310 e-mail: mike.birke@swri.org
William Buscher, III Sequence IVA/IVB	Intertek Automotive Research 5404 Bandera Road San Antonio, TX 78238-1933	Phone: e-mail: william.buscher@intertek.com
David Brass Mack/Volvo SP Chair	Infineum USA, L.P. 1900 East Linden Ave. Linden, NJ 07036-0735	Phone: e-mail: dbrass@infineum.com
Tim Cushing Test Developer	GM Powertrain 823 Joslyn Road, Mail Code 483-730-312 Engine Engineering Building Pontiac, MI 48340-2920	Phone: (248) 881-3518 e-mail: timothy.cushing@gm.com
Bridget Brassell TEOST 33C, MHT SP Chair <i>B2</i>	The Lubrizol Corporation 29400 Lakeland Blvd. Wickliffe, OH 44092-2298	Phone: e-mail: bridget.brassell@lubrizol.com
Frank Farber TMC Administrator <i>Frank</i>	ASTM Test Monitoring Center 6555 Penn Avenue 203 ARMSTRONG Pittsburgh, PA 15206-4489 <i>FREEPORT, PA 16229</i>	Phone: (412) 365-1005 <i>30</i> e-mail: fmf@astmtmc.edu <i>fmf@astmtmc.org</i>
Justin Mills ROBO SP Chair	Evonik	Phone: (215) 706-5816 e-mail: justin.mills@evonik.com
Amy Ross Volatility, D5800/D6417	Valvoline	Phone: 859-357-3523 e-mail: amy.ross@valvoline.com

Technical Guidance Committee---Voting Membership List

NAME	COMPANY AND ADDRESS	PHONE NUMBER E-MAIL ADDRESS
Anthony Lange L-33-1	Intertek 5404 Bandera Road San Antonio, TX 78238-1933	Phone: e-mail: anthony.lange@intertek.com
Robert Stockwell RFWT/ IIIF/IIIG/IIIH Chairman <i>RS</i>	Chevron Oronite Company, LLC 4502 Centerview Drive, Suite 210 San Antonio, TX 78228	Phone: (210) 232-3188 e-mail: robert.stockwell@chevron.com
Haiying Tang Test Developer/OEM <i>Tang Haiying</i>	Stellantis , MI	Phone: (248) 512-0593 e-mail: haiying.tang@stellantis.com
Jessica Hawkins BRT	Intertek Automotive Research 5404 Bandera Road San Antonio, TX 78238-1933	Phone: 210-523-4683 e-mail: jessica.villareal@intertek.com
Shawn Whitacre HDEOCP Chair <i>SDW</i>	Chevron Lubricants 100Chevron Way Richmond, CA 94802	Phone: <i>510-242-3557</i> e-mail: ShawnWhitacre@chevron.com
Matt Sangpeal L-42	Afton Chemical Corporation 500 Spring Street PO Box 2158 Richmond, VA 23218-2158	

Technical Guidance Committee----Frequent Guests

NAME	COMPANY AND ADDRESS	PHONE NUMBER E-MAIL ADDRESS
Matthew Bowden	OH Technologies PO Box 5039 Mentor, OH 44061-5039	Phone: (440) 354-7007 x101 e-mail: mjbowden@ohotech.com
Jason Bowden	OH Technologies PO Box 5039 Mentor, OH 44061-5039	Phone: (440) 354-7007 x101 e-mail: jhbowden@ohotech.com
Bob Campbell 	Afton ,	Phone: e-mail: bob.campbell@afton.com 
Ryan Denton	Cummins, Inc. ,	Phone: e-mail: ryan.denton@cummins.com
Dave Duncan	The Lubrizol Corporation 29400 Lakeland Blvd. Wickliffe, OH 44092-2298	Phone: (440) 347-2018 e-mail: David.Duncan@Lubrizol.com
Joe Franklin 	Intertek Automotive Research 5404 Bandera Road San Antonio, TX 78238-1933	Phone: (210) 523-4671 e-mail: joe.franklin@intertek.com
Autumnylnn Glass	Cummins, Inc. ,	Phone: e-mail: autumnylnn.glass@cummins.com
Pat Holmes	Volvo/Mack ,	Phone: (717) 658-8007 e-mail: patrick.holmes@volvo.com
Michael Lochte 	Southwest Research Institute 6220 Culebra Road San Antonio, TX 78228-0510	Phone: (210) 522-5430 e-mail: mlochte@swri.org
Steve Marty	Southwest Research Institute 6220 Culebra Road San Antonio, TX 78228-0510	Phone: (210) 522-5929 e-mail: smarty@swri.org
Dan Pridemore	Afton ,	Phone: e-mail: dan.pridemore@aftonchemical.com
Chris Taylor	PSL Services P.O. Box 281 Sutherland Springs, TX 78161	Phone: e-mail: pslservicesinc@gmail.com@vpracingfuels.com

Technical Guidance Committee----Frequent Guests

NAME	COMPANY AND ADDRESS	PHONE NUMBER E-MAIL ADDRESS
Prasad Tumati <i>Prasad Tumati</i>	Haltermann	Phone: (313) 300-8300 e-mail: ptumati@jhaltermann.com
Jim Matasic	Lubrizol	Phone: e-mail:
Juan Vega <i>Juan Vega</i>	Intertek Automotive Research	Phone: e-mail: <i>Juan.Vega@intertek.com</i>
Jeff Clark	TMC	Phone: <i>412-365-1032</i> e-mail: <i>jclark@astmtmc.org</i>
DENNIS GAAL	EM	Phone: <i>856-693-3989</i> e-mail: <i>dennis.gaal@exxonmobil.com</i>
Brittany Pfleeger	TMC	Phone: <i>412-365-1013</i> e-mail: <i>bjp@astmtmc.org</i>
Bill O'Ryan	API	Phone: <i>440-376-3459</i> e-mail: <i>oryanw@API.ORG</i>
Sachin Ladkar	North American Subtech	Phone: e-mail: <i>sladkar@subtech.com</i>
ROBERT LEGG	SOUTHWEST RESEARCH	Phone: <i>210-522-2071</i> e-mail: <i>robert.legg@swr.org</i>
John Loop	Lubrizol	Phone: <i>(440) 463-9087</i> e-mail: <i>john.loop@lubrizol.com</i>
Jeff Hsu	Shell	Phone: <i>281-544-8619</i> e-mail: <i>J.Hsu@Shell.com</i>
Laura Birnbaumer	Oronite	Phone: <i>510-242-5942</i> e-mail: <i>labi@chevron.com</i>

Technical Guidance Committee----Frequent Guests

NAME	COMPANY AND ADDRESS	PHONE NUMBER E-MAIL ADDRESS
Travis Kostan	Southwest Research Inst. 6220 Culebra Rd San Antonio, TX 78228-0510	Phone: (210) 522-2407 e-mail: travis.kostan@swri.org
		Phone: e-mail:
		Phone: e-mail:
		Phone: e-mail:
		Phone: e-mail:
		Phone: e-mail:
		Phone: e-mail:
		Phone: e-mail:
		Phone: e-mail:

Attachment #3

Action Items List

June 27, 2022

Technical Guidance Committee (TGC)

Action Items List Status as of 6-27-22:

1. Action Item – TGC to review the current “DACA II” document.
 - *Task force actively working on this.*

2. Action Item – Create task force to review surveillance panel voting rules.
 - *In Process: Chair chosen and meeting to be scheduled*

3. Action Item – TGC to review the current document for “out of control” tests.
 - *Open*

4. Action Item – TGC to work on generating test procedure wording that would address the handling of testing anomalies.
 - *Open*

Attachment #4

Rater Task Force Report

June 27, 2022



Rater Task Force Update to TGC

6/27/2022

Passion for Solutions®

Manual 20 Update

Issued

Contact Information for TMC Manuals 20 & 21 and other rating scales and aids :

Yvonne Reese

ASTM International

100 Barr Harbor Drive

West Conshohocken, PA 19428

phone: (610) 832-9570

fax: (610) 834-7078

email: yreese@astm.org

Workshop Status – Happy Valentine’s Day

Combined workshop help week of 2/14 in San Antonio

- ▲ Test labs only
- ▲ Data indicated raters in a good spot
- ▲ Three new tools in play
 - LED lights
 - JMP for real-time evaluations and visuals
 - New web-based data input system
 - Very well received and managed

See report on TMC website for details

- ▲ https://www.astmtmc.org/ftp/refdata/gas/rating_workshop_data/2022_Combined/Combined%20LD-HD%20Rater%20Workshop%20Final%20Report.pdf

Ultimate COVID Impact

- ▲ 4 consecutive workshops ultimately cancelled
 - 2 LD, 2 HD

Rater extensions

 **TMS Issue Resolution Summary (Ref. # 2020-05, 2020-10)
extending currently calibrated LD/HD raters until next
workshop issued by TMC**

▲ This resolution has expired since a workshop was held

Next Workshop

 **Tentatively planned for week of Sept 18 in San Antonio**

▲ HD only

Attachment #5
DACA II Review Task Force Report
June 27, 2022

DACA II Review Task Force

SOUTHWEST RESEARCH INSTITUTE®

Prepared By: Patrick Lang
June 27, 2022



DACA III Review Task Force Activities

- Task force formed with Pat Lang as the chairman
- Group agreed that the final document will be called DACA III.
- Eight virtual meetings held to date with three taking place during this period.
- Topics covered thus far:
 - Filtering
 - System Time Response
 - Quality Index
- Final topic is measurement uncertainty.

Membership List

Attendance List for DACA II Review Task Force	
Name	Company
Amol Savant	Valvoline
Al Lopez Bill Buscher	Intertek
Andrew Stevens George Szappanos David Doerr Jim Matasic	Lubrizol
Randy Harmon John White Ron Barthold Khaled Rais Bob Warden Mike Lochte Ankit Chaudhry Tom Wirries Chris DesRuieeeau	Southwest Research
Bob Campbell	Afton
Tim Cushing	General Motors
Jim Gutzwiller Andy Ritchie	Infineum
Michael Tucker Rohit Rao Jason Griffin	Exxon Mobil
Mike Deegan	Ford
Robert Stockwell	Oronite
Jeff Clark Rich Grundza Sean Moyer	Test Monitoring Center

Questions?



Attachment #6
Precision Matrix Target Setting
June 27, 2022

Presentation by Sequence VH Surveillance Panel Chair to the TGC

Andrew Ritchie

TGC, Seattle June 27th 2022

Connections Between Recent VH RAC Issues and Future TGC Actions

- **Sequence VH Surveillance Panel and Severity Task Force has worked to identify concerns about the integrity of the VH test.**
 - EWMA and CUSUM charts suggest some of the problems were present from the start of the test.
 - Periodic requirement to introduce a new VH test fuel introduces a further source of variability over a period of time.
 - The VH calibration bad sludge oil 940 RAC targets from the results and analysis of the 2017 VH Precision Matrix (PM) appear to have been set too severe.
- **Precision Matrix (PM) and the analysis from the statisticians' report in June 2017.**
 - 4 labs (A,G,D and E) and 3 oils (940,1009,1011)
 - 'Equal weighting' approach was used, as it was for all of the recent Light Duty PM test analyses
 - Principle of fairness to all labs creates a disconnect with how a test is determined as on target since EWMA's are weighted by lab test frequency
- **Since 2017 approximately 140 VH calibration test oil results have been reported.**
 - A majority of the data comes from the 2 San Antonio labs – Lab E has only reported 8 valid calibration test results

Technical Guidance Committee (TGC) is requested to convene to address issues common to the different panels.

- Issues raised with the VH in recent months are probably relevant to all of the Sequence tests.
- Propose face to face TGC meeting involving the SP Chairs, OEM test sponsors and key Industry stakeholders.
 - TGC used to meet a day before the 'Surveillance Panel Week' of meetings started
- Assess the range of tasks which could improve the repeatability and reproducibility of all the monitored test procedures
- Meeting should include discussion of future Precision Matrix (PM) designs and analysis approaches, including the use of 'equal weighting' of data from each lab participating in a PM.
- Review of LTMS Appendix F requirement to reset targets after 10, 20 and 30 tests.

Technical Guidance Committee (TGC)

Objectives: Discuss and implement items which are common to groups of ASTM Surveillance Panels monitored by the TMC.

- Standing Committee under the ASTM Test Monitoring Executive Committee (EC)
- Membership consists of current TMC monitored test Surveillance Panel Chairs and representatives of test developers/sponsors of tests approved by the EC
- The Chairman of the EC shall appoint a Chair of the Technical Guidance Committee from the membership of this committee. (Cannot be the TMC Director).
- Meet annually at a minimum and report to the EC semiannually
- Assist the TMC Director, Surveillance Panels, test developers/sponsors and individual testing laboratories to
 - Improve and standardize the operating procedures
 - Improve rating methods
 - Steward a range of tasks that improve the repeatability and reproducibility of monitored test procedures which relate to more than one test procedure

Attachment #7
Technical Guidance Committee Objectives
June 27, 2022

Technical Guidance Committee (TGC)

Objectives: Discuss and implement items which are common to groups of ASTM Surveillance Panels monitored by the TMC.

- Standing Committee under the ASTM Test Monitoring Executive Committee (EC)
- Membership consists of current TMC monitored test Surveillance Panel Chairs and representatives of test developers/sponsors of tests approved by the EC
- The Chairman of the EC shall appoint a Chair of the Technical Guidance Committee from the membership of this committee. (Cannot be the TMC Director).
- Meet annually at a minimum and report to the EC semiannually
- Assist the TMC Director, Surveillance Panels, test developers/sponsors and individual testing laboratories to
 - Improve and standardize the operating procedures
 - Improve rating methods
 - Steward a range of tasks that improve the repeatability and reproducibility of monitored test procedures which relate to more than one test procedure