

# Technical Guidance Committee Report

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December 5, 2016

Lake Buena Vista, FL

# TGC Meetings Conducted This Reporting Period

- The TGC conducted a meeting on August 11, 2016 in Dearborn, MI.
- The fuels task force held a conference call on October 24<sup>th</sup>.

# Declaring a Test Unavailable

- Extensive discussion on the topic of a clear definition of when a test is considered unavailable.
  - Reviewed TMC document entitled “Out of Control Document”
    - Document is geared towards dealing with action that is taken when industry EWMA precision and severity alarms are triggered.
    - Document currently does not address what is done when a test is unavailable due to critical component interruptions.
- Panel members agreed that the TMC should not restrict a dependent lab from calibrating regardless of test hardware availability at the independent labs.
- Panel members agreed that it is not justifiable for a test to be deemed unavailable by ASTM if only a dependent lab can run the test.
  - A notification process should be implemented so that the critical parties are advised as laboratories run out of critical components causing them to not be able to run the test.
- Panel members agreed that API should make the decision on allowing registrations if independent labs can't conduct tests.
- Action:
  - Frank Farber volunteered to draft a document which would contain the wording on test availability guidelines and a notification process for when a test is at risk of becoming unavailable.

# ASTM Sub Committee B Test Availability Guidelines

## BACKGROUND

The ASTM Technical Guidance Committee has approved the following guidelines to assist surveillance panels in the notification of when a specific test may be available or unavailable for testing purposes. The intent is that all stake holders are informed in a timely manner of any possible continuation/disruption in test availability.

## GUIDELINES

Each surveillance panel is responsible for ensuring adequate supplies of acceptable test components, fuel, or any other item necessary to conduct a test. If a condition arises that would prevent a laboratory from procuring a previously available resource to conduct a test the surveillance panel chairman should be notified immediately. The surveillance panel is to then meet and discuss possible redistribution of the resource, alternative suppliers, etc. to help resolve the procurement issue. If no resolution is found the surveillance panel chairman is to inform at a minimum the stake holders shown below under the heading notification list. It is hoped in situations when a test is facing a shortage of a resource that immediate notification can focus industry expertise on finding suitable replacements and or develop/initiate protocol to handle approval of oils. The intention is restore the availability of the test as quickly as possible. In contrast, if conditions allow a resource to become available that was previously deemed unavailable the surveillance panel chairman is to also immediately notify stake holders.

For ASTM Test Monitoring System purposes a test is deemed available as long as one calibrated laboratory is able to run tests. The calibrated laboratory can be a dependent or independent laboratory. In the event that the only laboratory that can run tests is a dependent laboratory, registration and licensing organizations will need to determine appropriate responses.

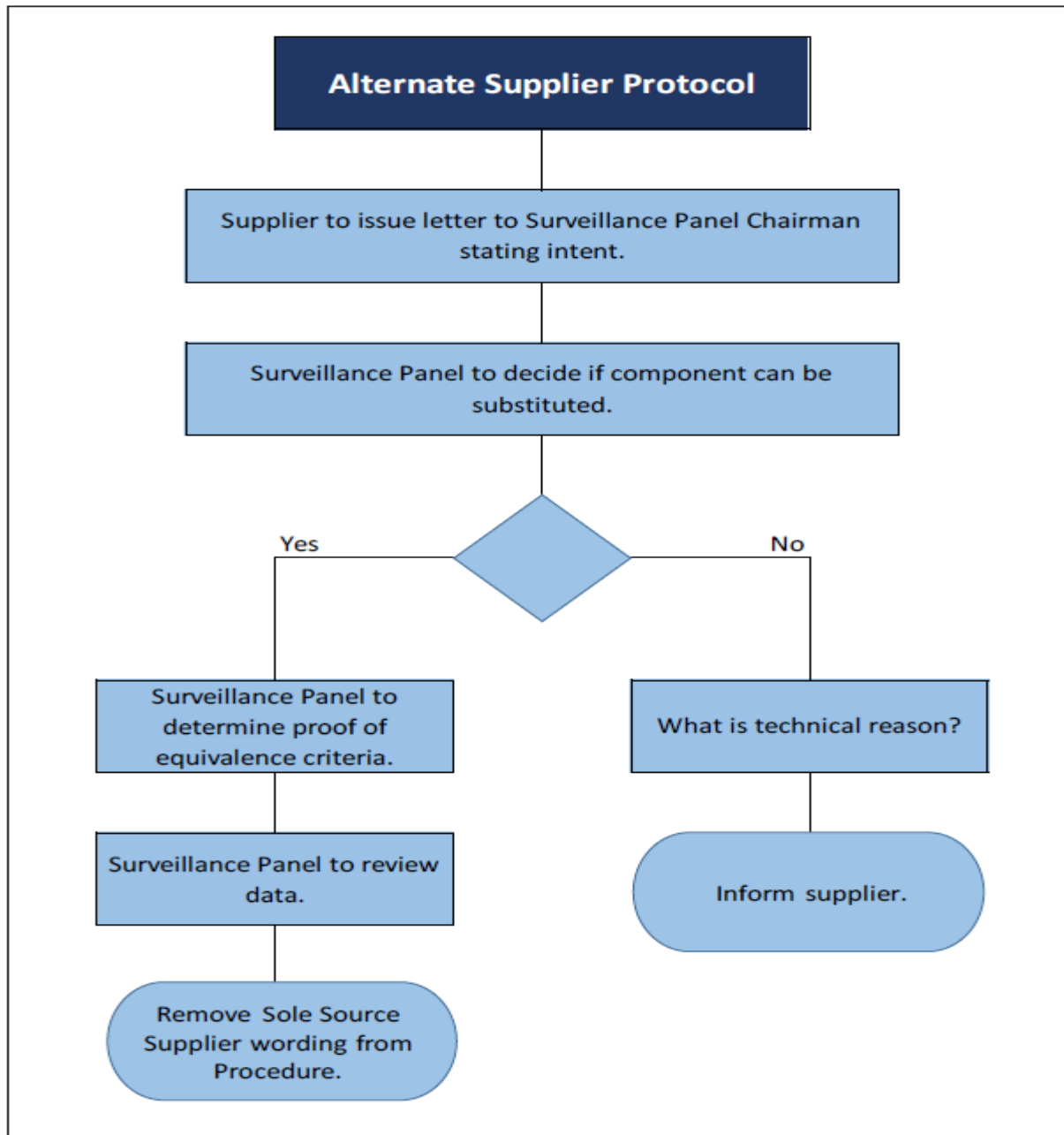
Notification List

Organization	Position	Current Representative
ASTM	D02.B0 Chairman	Joe Franklin
	Test Monitoring System Executive Committee Chairman	Steve Kennedy
	Test Monitoring Center Director	Frank Farber
	PCEOCP Chairman	Thom Smith
	HDEOCP Chairman	Shawn Whitacre
	D02.B0.01 Chairman	Bill Buscher
	D02.B0.02 Chairman	Heather DeBaun
	Membership of Effected Surveillance Panel	
ACC	Product Approval Protocol Task Group Manager	Doug Anderson
	MAAG Chairman	Mike Hoey
API	EOLCS Manager	Kevin Ferrick
	EOLCS Chairman	Scott Rajala
Auto Alliance		Ron Romano
JAMA		Takumaru Sagawa
EMA	EMA Staff	Roger Gault
AOAP	Chairman	Scott Lindholm
DEOAP	Chairman	Steve Kennedy
ACC-MA	Manager	Don Lind

# Material Substitution/Alternate Supplier Protocol

- Extensive discussion on the topic of the guidelines of allowing material substitutions within ASTM test procedures.
- A panel member advised that there is a document that dates back to 1989 that does attempt to define the process.
- ASTM representative Alyson Fick advised that the “Facts for Members” document dated December 2014 supersedes this document.
- Action:
  - TGC to review these documents further to see if they provide the proper direction.

Table 1



# Engineering Review/ACC Conformance Page

- Jim Moritz provided a presentation on how engineering review should be considered in certain test cases. As an example:
  - Miss a IIIG blowby reading that is required but does not have a test spec. Procedure states that you need to take the readings but it is recognized that missing a reading is not going to affect the test.
- TGC asked to consider the possibility of adding a new field to the ACC conformance statement that would flag the reader of the report that engineering review (judgement) has been applied to the test.
- **Action**: Jim Moritz to draft a modified conformance statement with the additional field/wording. The TGC will pass that on to ACC for consideration.



# Multiple Bid Process within ASTM

- Currently no process within ASTM to handle the possibility of a multiple bid process for a test component.
- ASTM is not willing to manage the bidding process.
- Comment made that this should not be discussed at an ASTM meeting since it has financial implications.
  - Note that the HDEOCP has facilitated a bidding process in the past for fuel
- Labs would have to handle any contractual issues directly with the vendor directly.
- Still need to work out the mechanism for selecting a vendor and if only one supplier can be used at a time.

# Fuel Task Force

- Jim Matasic of Lubrizol has agreed to chair the Fuel Task Force
- A conference call was held on October 24<sup>th</sup>
- This was the initial call to get the task force active again:
  - Reviewed membership
  - Reviewed previous list of action items
- Looking forward to future direction from this group to help address our fuel handling/storing and procuring challenges.

# Scope and Objectives

The Technical Guidance Committee is a standing committee under the ASTM Test Monitoring System Executive Committee. The TGC shall consist of the chairmen of the surveillance panels of monitored tests, a representative of each of the test developers/sponsor who are responsible for the test procedures and the Director. The Technical Guidance Committee will advise the Director in technical matters concerning test procedures.

This will involve working with the surveillance panels, test developers, critical parts suppliers, fuel suppliers and testing laboratories across all testing types to improve the repeatability and reproducibility of the test procedures. The TGC will provide guidance for future test developments. Additionally, the TGC chairman will liaise with the ACC PAPTG Chair.

## **Objectives:**

- 1) Develop guidelines for issues that are potentially common to all HD/PC engine, gear and bench testing.
- 2) Work with the Rating Committee to provide guidance for issues related to visual deposit ratings.
- 3) Provide guidance on best practices for critical component identification within test procedures.
- 4) Continue to refine the “Guide for Test Development” document as new categories are developed.

# What's Next

- Next meeting scheduled for December 7<sup>th</sup> from 1:00 to 3:00 PM here at Lake Buena Vista, FL.