### ASTM TEST MONITORING BOARD MEETING December 6, 2004

Tampa Marriott Waterside Tampa, FL

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### CALL TO ORDER

ASTM D02.B0.08, the Test Monitoring Board, met on Monday, December 6, 2004 at 5:00 p.m. in Grand Salon A of the Tampa Marriott Waterside in Tampa, Florida. There were seven voting members, three non-voting members and four visitors present. The attendance roster is shown in Attachment A. Minutes from the June 22, 2004 meeting were approved.

### **MEMBERSHIP**

In the annual TMB elections, Tom Cousineau, Hannah Murray, Robert Stockwell, Matt Urbanak, and Norbert Nann were elected to two-year terms beginning January 1, 2005.

### ADMINISTRATIVE GUIDANCE COMMITTEE

Walter Groff presented the AGC report (see Attachment B). Regarding AGC membership, Walter reported that Tom Cousineau will replace Tom Boschert. The AGC is also seeking a replacement for Cliff Venier (retired). It is planned that Tom Cousineau will replace Walter Groff as AGC chairman sometime in mid-2005.

The TMC fiscal 2004 net income through October was \$57,396. It is currently projected that the TMC will end its fiscal year at approximately break-even. The TMC three-year budget plan was developed by the AGC and approved by the ASTM Board of Directors in October 2004. This plan includes the 2005 TMC budget as well as projected budgets for 2006 and 2007. The 2005 TMC budget projects break-even financial performance. The TMB approved the AGC report, including the 2005 TMC budget.

#### TECHNICAL GUIDANCE COMMITTEE

Gordon Farnsworth reported that the Technical Guidance Committee had not met since the last TMB meeting. The TGC is currently circulating draft guidelines for development of LTMS reference oil targets and severity adjustment standard deviations. If approved by the TGC members, these guidelines will be added to the LTMS manual as an appendix.

### DATA COMMUNICATIONS COMMITTEE

John Zalar presented the DCC report for Frank Farber (see Attachment C). The DCC has not met during the past six months. The only current activity of the DCC is beta testing of report packet revisions.

#### TEST MONITORING CENTER

The TMC report is shown in Attachment D. John Zalar reported on the status of a re-blend of Sequence VIB calibration oils, BC-6 and BCFHD-6. The BC-6 blend has been completed and the oil has been approved based on the analytical results. Blending of BCFHD-6 is scheduled for the week of December 6, 2004. Both products should be ready to ship to all purchasers by year end. Engine test verification of BC-6 should begin shortly thereafter.

The TMC has upgraded its web site in order to improve navigation and functionality. The web site now features an improved look with cascading menus and convenient direct links.

TMB Chairman Gordon Farnsworth coordinated a survey of four test laboratories to provide feedback on TMC performance. Based on the results of the survey, the TMC has established goals to 1) improve internal communications regarding best engineering practices, 2) improve consistency in proactive control chart review and interpretation, 3) increase emphasis on providing assistance to labs, and 4) increase practical knowledge of test lab operations. A follow-up survey is planned for early 2006 to provide a measure of success in achieving these goals and to provide additional feedback on TMC performance.

The latest version of the ASTM Reference Oils booklet is available on the TMC web site.

### **BALLOTS**

John Zalar reported that fifteen TMC information letters had been balloted within Subcommittee B. No disapprove votes or comments were received. A ballot summary is shown in Attachment E.

### **OLD BUSINESS**

There was no old business.

### **NEW BUSINESS**

There was no new business.

### **NEXT MEETING**

The next meeting is scheduled for June 20, 2005 in Pittsburgh, Pennsylvania.

### **ADJOURNMENT**

The meeting was adjourned at 5:40 p.m. for an Executive Session.

Respectfully submitted,

John L. Zalar, Secretary ASTM Test Monitoring Board

JLZ/jlz

Attachments

## **Attachment A**

### ASTM TEST MONITORING BOARD MEETING

### December 6, 2004 Tampa Marriott Waterside Tampa, FL

### **Voting Members**

NAME	COMPANY AND ADDRESS	PHONE NUMBER E-MAIL ADDRESS FAX NUMBER	PRESENT
Abdul Cassim	Caterpillar Inc. Building H2000 Old Galena Road P. O. Box 610 Mossville, IL 61552-0610	Phone: (309) 578-9096 e-mail: <u>cassim abdul h@cat.com</u> FAX: (309) 578-3563	d/Com
Thomas Cousineau	Afton Chemical Corporation 500 Spring Street P.O. Box 2158 Richmond, VA 23218-2158	Phone: (804) 788-6282 e-mail: tom.cousineau@aftonchemical.com FAX: (804) 788-6244	TAC
Gordon Farnsworth	Infineum USA L.P. 1900 East Linden Avenue Linden, NJ 07036-0536	Phone: (570) 934-2776 e-mail: gordon.farnsworth@infineum.com FAX: (908) 474-3637	SPF
Hannah Murray	Toyota Technical Center USA 1588 Woodridge Avenue Ann Arbor, MI 48105-9773	Phone: (734) 995-3762 e-mail: <u>hmurray@ttc-usa.com</u> FAX: (734) 995-5971	
Norbert Nann	Nann Consultants, Inc. 59 Edgehill Drive Wappingers Falls, NY 12590	Phone: (845) 297-4333 e-mail: norbnann1@aol.com FAX: (845) 297-4334	var
Greg Shank	Mack Trucks 13302 Pennsylvania Avenue Hagerstown, MD 21742	Phone: (301) 790-5817 e-mail: <u>gregshank@volvo.com</u> FAX: (301) 790-5815	J.S.S
Robert Stockwell	GM Power Train Engineering Ctr. GM Corporation Mail Code 480-734-801 30003 Van Dyke Warren, MI 48105-9773	Phone: (810) 492-2268 e-mail: <u>robert.stockwell@gm.com</u> FAX: (810) 575-2732	RS
Robert Sutherland	Pennzoil Products Company 1520 Lakefront Circle The Woodlands, TX 77380	Phone: (281) 363-8029 e-mail: robertsutherland@pzlqs.com FAX: (281) 363-8002	
Lew Williams	The Lubrizol Corporation 29400 Lakeland Boulevard Wickliffe, OH 44092	Phone: (440) 347-1111 e-mail: lawm@lubrizol.com FAX: (440) 944-8112	LAWY

### Non-Voting Members

		DUONE NUMBER	T
NAME	COMPANY AND ADDRESS	PHONE NUMBER	DDEOENT
IVAIVIE	COMITANT AND ADDRESS	E-MAIL ADDRESS	PRESENT
Don Bartlett	The Lubrized Corporation	FAX NUMBER	
Don Bartiett	The Lubrizol Corporation 29400 Lakeland Boulevard	Phone: (440) 347-2388	
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william buscher, m	Southwest Research Institute	Phone: (210) 522-6802	i
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Tom Franklin	PerkinElmer Automotive Research	FAX: (210) 681-8300	
On Tankin		Phone: (210) 647-9446	$\triangle$ $\triangle$
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L	Richmond, VA 23218-2158		
John Zalar	ASTM Test Monitoring Center	Phone: (412) 365-1005	1 /1
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		DUONE NUMBER	
NAME	COMPANY AND ADDRESS	PHONE NUMBER E-MAIL ADDRESS FAX NUMBER	PRESENT
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IRWIN GOLDBLATT	BP/Castrol 240 Centennial Ave PISCATAWAY NITOBS	722-980-3606	<u>_</u>
JIM WELLS	SWRT 6220 QUEBRA PD	JWELLS Q SWEI.OFG Z10-522-5918	
Bill Buscher	Buscher Consulting Servi PC Box 112- Hopewell Jet, NY125	res 845/894-9658 Buschwa@acl.com1 3 845/8917-8069	V
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# AGC REPORT TO THE TEST MONITORING BOARD

June, 2004 To December, 2004

**December 6, 2004** 

# AGC Semi-annual Report Membership Changes

- **■** Walter Groff SwRI (Chair)
- **Tom Cousineau replacing Tom Boschert** 
  - Afton Chemical Co.
- John Glaser Perkin Elmer
- Ken Pearson ASTM
- Cliff Venier (Retired) Shell Global Solutions
  - No replacement at this time
- **Lew Williams** Lubrizol
- John Zalar TMC

# AGC Semi-annual Report Responsibilities

- Advise the Administrator in general business activity
- Advise the Administrator in finalizing the annual budget, manpower request and contract recommendations
- Prepare an annual evaluation and salary recommendations of the administration for presentation to the board.

# AGC Semi-annual Report TMC Financial - History

	1999	2000	2001	2002	2003
Revenues					
Test fees	\$1,868,069	\$1,785,950	\$1,861,653	\$1,297,297	\$1,533,477
Reference oil sales	\$418,274	\$504,629	\$498,542	\$309,600	\$363,139
Interest income	\$71,428	\$115,943	\$96,333	\$36,685	\$18,340
Donated oils	\$43,943	\$82,073	\$10,620	\$31,403	\$12,466
Total	\$2,401,714	\$2,488,595	\$2,467,148	\$1,674,985	\$1,927,422
Expenses					
Salaries	\$787,220	\$805,000	\$802,572	\$832,970	\$870,428
Fringe benefits	\$193,813	\$215,836	\$215,389	\$216,060	\$234,705
Rental and overhead charges	\$511,918	\$548,816	\$555,894	\$584,240	\$576,192
Operating expenses	\$322,615	\$251,438	\$224,866	\$215,696	\$208,177
Depreciation	\$62,494	\$59,945	\$24,870	\$23,376	\$24,103
Professional and outside services	\$32,010	\$27,022	\$32,933	\$34,122	\$42,695
Cost of oil sold	\$85,912	\$70,317	\$80,861	\$50,168	\$58,853
Obsolete oil inventory expense	\$0	\$19,700	\$19,700	\$0	\$94,909
Total	\$1,995,982	\$1,998,074	\$1,957,085	\$1,956,632	\$2,110,062
Revenues - Expenses	\$405,732	\$490,521	\$510,063	(\$281,647)	(\$182,640)
Reserves	\$2,130,499	\$2,612,126	\$3,169,290	\$2,759,186	\$2,717,158
Months Reserve	12.8	15.7	19.4	16.9	15.5

## AGC Semi-Annual Report TMC Fiscal Performance - FY 2004

Line Item	2004 Budget	2004 Projected
Salaries	\$888,000	\$890,000
Temporary Help	\$10,000	\$7,000
Benefits	\$254,000	\$253,000
Overhead	\$599,000	\$595,000
Travel	\$75,000	\$75,000
Telephone	\$22,000	\$22,000
Office Supplies	\$22,000	\$12,000
Reference Oils	\$50,000	\$50,000
Capital	\$20,000	\$20,000
Contract Services	\$42,000	\$36,000
Lab Supplies	\$25,000	\$25,000
Training & Education	\$15,000	\$10,000
Procedure Rewrites	\$15,000	\$15,000
Audit	\$19,000	\$22,000
Total Expenses	\$2,056,000	\$2,032,000
Revenues	\$2,017,000	\$2,117,000
Revenue-Expense	(\$39,000)	\$85,000
Interest	\$20,000	\$17,000
Reserves	\$2,703,000	\$2,819,000
Months Reserve	15.8	16.6
Fee Increases	None	None
Reg. FT Headcount	17	17

# AGC Semi-annual Report TMC Fiscal Performance - FY 2004

**■ Fiscal 2003 actual performance -\$182,640** 

**■** Forecast for FY 2004 <u>-\$ 39,000</u>

Fiscal 2004 performance to date

- Through October, 2004

+\$ 57,396

Revised Fiscal 2004 projections Breakeven

# AGC Semi-annual Report TMC Forecast - FY 2005 - Assumptions

- Inflation 2.0%
- Salary increases 3.0% (2005, 2006, 2007)
- Benefits (fringe)
  - **28.28% (2005)**
  - **28.92% (2006)**
  - **29.22% (2007)**
- Continued participation in new tests
- **■** Minimum 6 months reserve at all times
- PC-10
- **GF-5**

- 2005
- 2008

## AGC Semi-Annual Report TMC Forecast - FY 2005 - 2007

Line Item	2005	2006	2007
Salaries	\$916,000	\$943,000	\$971,000
Temporary Help	\$8,000	\$8,200	\$8,400
Benefits (28.62%)	\$264,000	\$275,000	\$286,000
Overhead	\$611,000	\$631,000	\$651,000
Travel	\$70,000	\$75,000	\$76,500
Telephone	\$20,000	\$20,400	\$20,800
Office Supplies	\$13,000	\$13,300	\$13,600
Reference Oils	\$50,000	\$51,000	\$52,000
Capital	\$20,000	\$20,000	\$20,000
Contract Services	\$30,000	\$30,600	\$31,200
Lab Supplies	\$25,000	\$25,500	\$26,000
Training & Education	\$10,000	\$10,200	\$10,400
Procedure Rewrites	\$15,000	\$15,300	\$15,600
Audit	\$22,000	\$22,400	\$22,800
Total Expenses	\$2,074,000	\$2,140,900	\$2,205,300
Revenues	\$2,078,000	\$2,150,000	\$2,220,000
Revenue-Expense	\$4,000	\$9,100	\$14,700
Interest	\$20,000	\$20,000	\$20,000
Reserves	\$2,843,000	\$2,872,000	\$2,907,000
Months Reserve	16.4	16.1	15.8
Fee Increases	None	None	None
New Tests	PC-10		
Reg. FT Headcount	17	17	17

## AGC Semi-annual Report TMC Forecast - FY 2005 – Expected Revenue

Test Area	No.	Test Fees	Oil Sales	Totals
Sequence IIIF	20	\$49,200	\$4,640	\$53,840
Sequence IIIG	40	\$114,400	\$9,280	\$123,680
Sequence IVA	26	\$63,960	\$6,032	\$69,992
Sequence VG	28	\$68,880	\$4,872	\$73,752
Sequence VIB	175	\$430,500	\$50,750	\$481,250
Sequence VIII	21	\$51,660	\$2,436	\$54,096
1M-PC	22	\$54,120	\$19,140	\$73,260
1K/1N	14	\$34,440	\$12,180	\$46,620
1P	12	\$29,520	\$10,440	\$39,960
1R	6	\$14,760	\$5,220	\$19,980
C-13*	20	\$49,200	\$34,800	\$84,000
T-8/T-8E	4	\$9,840	\$8,120	\$17,960
T-10	8	\$19,680	\$18,560	\$38,240
T-11	15	\$36,900	\$24,360	\$61,260
T-12*	22	\$54,120	\$38,280	\$92,400
M11 EGR	2	\$4,920	\$2,320	\$7,240
ISB*	20	\$49,200	\$23,200	\$72,400
ISM	10	\$24,600	\$14,500	\$39,100
6V92TA	1	\$2,460	\$2,436	\$4,896
RFWT	4	\$9,840	\$1,624	\$11,464
EOAT	2	\$4,920	\$1,392	\$6,312
Two-Stroke	8	\$19,680	\$1,856	\$21,536
Bench Tests	1850	\$205,000	\$49,000	\$254,000
Gears	460	\$280,000	\$23,000	\$303,000
ELAS/DFLUB	O	\$0	\$20,000	\$20,000
Rater Cal./Wrkshp	О	\$8,000	\$O	\$8,000
Totals	2790	\$1,689,800	\$388,438	\$2,078,238

# AGC Semi-annual Report Additional Revenue Streams

■ No active initiatives at this time.

# AGC Semi-annual Report Action Items

- Approval of this report
- Approval of the TMC Budget for FY 2005

### **Attachment C**

MEMORANDUM: 04-100

DATE: November 9, 2004

TO: Mr. Gordon Farnsworth, ASTM Test Monitoring Board Chairman

FROM: Frank M. Farber

SUBJECT: Data Communications Committee Report

The Data Communications Committee (DCC) has not met since the June 2004 ASTM meetings.

- At the present time, the only DCC objective is to beta test all report packet revisions.
- Action Items: None at this time.

Future meeting schedule: None planned (Chairman will determine need to meet)

### FMF/fmf

c: J. L. Zalar

ftp://ftp.astmtmc.cmu.edu/docs/Data Communications Committee/tmb reports/astm 200410.pdf

### **Attachment D**



MEMORANDUM: 04-096

DATE: November 10, 2004

TO: Gordon Farnsworth, Chairman, ASTM Test Monitoring Board

FROM: John L. Zalar

SUBJECT: ASTM TMC Semiannual Report

### ADMINISTRATIVE/FINANCIAL

The ASTM Board of Directors approved the 2005 Test Monitoring Center budget and three-year financial plan on October 19, 2004. Details of the budget and three-year plan will be included in the Administrative Guidance Committee Report. There have been no changes in TMC personnel during the past six months and staffing remains at 17 full-time employees. The current TMC organizational chart is shown in Attachment A.

### INFORMATION LETTERS

The following 15 information letters have been issued by the TMC since my last report.

Date Issued
06/15/04
06/24/04
07/19/04
05/26/04
07/01/04
08/02/04
10/01/04
06/17/04
05/19/04
09/17/04
09/20/04
09/20/04
09/17/04
09/27/04
07/19/04

All of these letters are on the regular Fall Subcommittee B information letter ballot. There were no pre-balloted information letters during the past six months.

### REFERENCE OILS RECEIVED / SHIPPED

The following reference oils were received and processed by the TMC during the period from May 1, 2004 to October 31, 2004.

<u>Test Type</u>	Oil Code	Quantity (gallons)
D6078, D6079	DFA4*	55
D6078, D6079	DFB4*	55
Sequence VIB	GF4CAT**	55
Sequence VIB	GF4CT2**	55
L-37	152-1	165
L-37	153-1	156

<sup>\*</sup> Lubricity reference fluids

During this same time period, the TMC made 216 shipments of reference oils containing a total of 1,770 individual oil samples.

#### REFERENCE OIL BOOKLET

An updated version of the booklet entitled *ASTM Reference Oils* is now available on the TMC web site at ftp://astmtmc.cmu.edu/docs/ASTM\_Reference\_Oils\_2004.pdf.

### **CALIBRATION TEST REPORTING**

During the period from May 1, 2004 to October 31, 2004, 1555 calibration tests were reported to the TMC. Also, during this same period, 98% of all tests reported to the TMC were transmitted electronically.

### SEQUENCE VIB CALIBRATION OILS - BATCH 6 BLEND STATUS

The re-blends of the Sequence VIB baseline calibration oil, BC-6, and the high detergent flush oil, BCFHD-6 are progressing on schedule. The test labs have placed their orders for quantities needed to support an additional two years of testing. All payments have been collected and a purchase order has been issued to the blender. The total volumes ordered were 12,100 gallons of BC-6 and 4,800 gallons of BCFHD-6. The blending of the oils is expected to commence before the end of November. It is anticipated that both products will be blended, analytically verified, containerized, and shipped to the purchasers by year end. Once the oils have been received by the test labs, the engine test verification program will be scheduled. This program, designed by the Sequence VIB Surveillance Panel, will consist of 16 back-to-back engine test comparisons of BC-6 versus BC-2. The results of the engine test verification program will be analyzed by the TMC and presented to the surveillance panel. These results will form the basis for approval of the new blend for use in Sequence VIB testing.

<sup>\*\*</sup> Evaluated for use as reference oils for the Sequence VIB

### TMC WEB SITE ENHANCEMENTS

Work is underway to enhance the functionality of the TMC web site. In addition to an improved look, the site will have cascading menus for easier navigation and direct links to frequently accessed documents, such as the LTMS manual. The new web site should be available by January, 2005.

### SURVEY OF TMC PERFORMANCE

TMB Chairman Gordon Farnsworth coordinated an anonymous survey of four test labs to provide feedback on the performance of the TMC. This survey included evaluations of each TMC engineer as well as observations on the overall performance of the TMC. The comments were organized into three groupings: 1) rated items exceeding industry expectations, 2) rated items meeting industry expectations, and 3) rated items falling below industry expectations.

The information received from this survey was found to be very useful for identifying areas needing improvement, both for individuals and for the organization as a whole. Comments received about specific individuals will be used in the TMC performance review process to target areas needing improvement, in addition to those already targeted internally. The goal is to provide guidance for improving individual performance with emphasis on raising areas rated as 'below expectation' to 'meets or exceeds expectation'. With regard to comments received about the organization as a whole, the TMC has initiated efforts to achieve the following goals:

- 1. Improve internal communications among the engineering staff regarding best practices in each monitored test area.
- 2. Develop a more consistent practice of proactive control chart review and interpretation.
- 3. Increase emphasis on providing assistance to labs and industry and thereby improve the balance between 'compliance' and 'assistance'.
  - Anticipate questions and need for assistance
  - Improve team work with industry
  - Increase awareness of how TMC can add value
- 4. Increase practical knowledge about the operations of a testing laboratory.

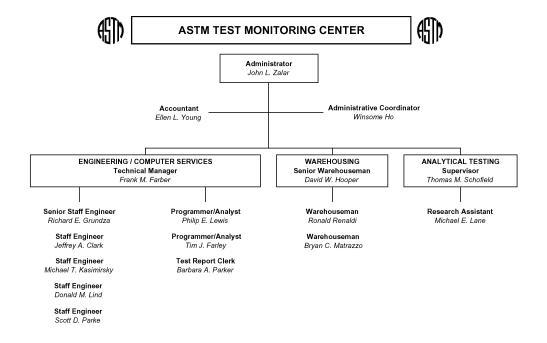
The TMC wishes to thank all the participants in the survey for providing very constructive comments. It would seem appropriate to conduct another survey in the future to measure TMC success in achieving the goals stated above and to provide additional feedback on ways that the TMC can be a more effective resource to the industry.

JLZ/jlz/mem04-096.jlz.doc

Attachment

c: ASTM Test Monitoring Board ftp://astmtmc.cmu.edu/docs/test monitoring board/TMC-12-2004.pdf

### Attachment A



### D02.B BALLOT RESULTS (Ballot 04-07)

# TMC Information Letters TMB Elections Closing Date: November 19, 2004

### **Ballot Responses**

### Return (Voting Members Only) = 36/49 (73%)

		Approve	Disapprove	Abstain
TN	AC Information Letters			
1.	Sequence IIIF Letter No. 04-2	44	0	34
2.	Sequence IIIG Letter No. 04-2	44	0	34
3.	Sequence IVA Letter No. 04-1	44	0	34
4.	Sequence VG Letter No. 04-2	44	0	34
5.	Sequence VG Letter No. 04-3	44	0	34
6.	Sequence VIB Letter No. 04-2	45	0	33
7.	Sequence VIB Letter No. 04-3	45	0	33
8.	1K/1N Letter No. 04-2	45	0	33
9.	T-10 Letter No. 04-1	45	0	33
10.	T-10 Letter No. 04-2	45	0	33
11.	T-10 Letter No. 04-3	45	0	33
12.	T-10 Letter No. 04-4	45	0	33
13.	L-37 Letter No. 04-1	44	0	34
14.	L-37 Letter No. 04-2	44	0	34
15.	L-60-1 Letter No. 04-2	43	0	35
<u>TM</u>	<b>B</b> Elections			
16.	Tom Cousineau, Producer	49	0	29
17.	Matthew Urbanak, Producer	48	0	30
18.	Hannah Murray, User	48	0	30
19.	Robert Stockwell, User	48	0	30
20.	Norbert Nann, General Interest	46	0	32

### **Comments**

None