ASTM Test Monitoring System Executive Committee Meeting
June 27, 2016

Hyatt Regency
Bellevue, WA

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**Call to Order**

ASTM D02.B0.08, the Test Monitoring System Executive Committee, met on Monday, June 27, 2016 at 5:00 p.m. at the Hyatt Regency Hotel in Bellevue, WA. Nine voting members and 28 other attendees were present. The attendance list is shown as Attachment A.

Committee Voting Members
Steve Kennedy, Present
Jason Anderson, Present
Ron Romano, Present
Eric Johnson, Present
Ron Loomis, Present
Doyle Boese, Present
Jason Bowden, Present
Suzanne Neal, Present
Bob Campbell, Present

The agenda is shown as Attachment B.

**Meeting Minutes**
The March 15, 2016 meeting minutes were approved as posted.

**Membership**
The membership was reviewed. It was noted that Ron Romano will be terming out from the USER side and a replacement will be needed starting in 2017. The chairman also noted that at the of end of December he would not be seeking re-election.

The current members and their terms are shown on the next page.

| | 2009 | 2010 | 2011 | 2012 | 2013 | 2014 | 2015 | 2016 | 2017 | 2018 | 2019 | 2020 | 2021 | 2022 | 2023 |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| Steve Kennedy | | | P | P | P | P | P | P | | | | | | | |
| Jason Anderson | | | | | | | U | U | | | | | | | |
| Ron Romano | U | U | U | U | U | U | U | U | | | | | | | |
| Suzanne Neal | | | | | | | | U | U | | | | | | |
| Eric Johnson | | | | | | U | U | U | U | | | | | | |
| Bob Campbell | | | | | | | P | P | | | | | | | |
| Ron Loomis | | | | | | | | P | P | | | | | | |
| Doyle Boese | | | | | | P | P | P | P | | | | | | |
| Jason Bowden | | | | G | G | G | G | G | G | | | | | | |

Eligibility; P=Producer, U=User, G=General Interest

**Technical Guidance Committee (TGC) Report – Pat Lang**

Pat's report is shown as Attachment C.

**Test Monitoring Center (TMC) Report – Frank Farber**

Frank's report is shown as Attachment D. One action item that was addressed by the committee on the report was to form a committee under TGC named 'Rating Committee' to address items concerning rater workshop format, rating manual updates, rating fluorescent light replacement, etc. The TGC chairman will look for a representative to head this committee.

**ACC Request for ASTM Subcommittee B Organizational Chart – Frank Farber**

Per a request from ACC the following org chart was developed. Bench test surveillance panels are included in the attached chart which were previously missing from the presented version (Attachment E).

**ACC PAPTG Presentation – James Booth**

Attachment F shows James's report. There were several questions concerning material substitution and the bidding process from the audience. Some members voiced support for continuing the discussion on both items. The chairman felt that these discussions would dovetail into some of the technical guidance committee action items already noted in the TGC report. The TGC chairman agreed to work these items at the next meeting of the TGC.

**Revised Bench Test Fee Review – Frank Farber**

Frank reported that the executive committee met on March 15 and reviewed the bench test fees implemented at the start of 2015. The committee agreed to an additional review once the mid-year income and expenses were reported. The committee would meet once the information was available.

The meeting ended at 6:35 pm.

Respectfully submitted,

Frank M Farber

Frank M. Farber, Secretary
ASTM Test Monitoring System Executive Committee

Attachments
FMF/fmf

# ASTM Test Monitoring System Executive Committee Meeting
June 27, 2016
Hyatt Regency Bellevue; Bellevue, WA

Voting Members

| NAME | COMPANY AND ADDRESS | PHONE NUMBER<br>E-MAIL ADDRESS<br>FAX NUMBER | PRESENT |
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| Bob Campbell | Afton Chemical Corporation<br>500 Spring Street<br>P.O. Box 2158<br>Richmond, VA 23218-2158 | Phone: (804) 788-5236<br>e-mail:<br>bob.campbell@aftonchemical.com<br>FAX: (804) 788-5340 | RC |
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| NAME | COMPANY AND ADDRESS | PHONE NUMBER<br>E-MAIL ADDRESS<br>FAX NUMBER | PRESENT |
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Hyatt Regency Bellevue; Bellevue, WA



Visitors

| NAME | COMPANY AND ADDRESS | PHONE NUMBER<br>E-MAIL ADDRESS<br>FAX NUMBER | PRESENT |
|---|---|---|---|
| MATTHEW BOWDEN | OH TECHNOLOGIES | MJBOWDEN @ OHTECH.COM | ✓ |
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★ More on back side ★

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— Noh Park. Stony Brook Scientific Ltd
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# ASTM Test Monitoring System
# Executive Committee Meeting
# Monday – June 27, 2016
# 5:00 - 6:30 PM

Hyatt Regency Bellevue; Bellevue, WA

# AGENDA

1. **Call to Order**

2. **Approval of Minutes - March 15, 2016**

3. **Membership**

4. **Receive, Accept and Take Action on Reports**
   - **Technical Guidance Committee – Pat Lang**
   - **Test Monitoring Center – Frank Farber**

5. **New Business**

   - **ACC Request for ASTM Structure – Frank Farber**

   - **ACC PAPTG Presentation – James Booth**
     - **Clarification of ASTM bidding process for fuels and critical parts**
     - **ASTM supplier agreements**
     - **Substituted materials approval**

6. **Old Business**
   - **Revised Bench Test Fee Review**

7. **Next Meeting – Monday, December 5, 2016**
   **Lake Buena Vista, FL**

8. **Adjournment**

# Technical Guidance Committee Report

Prepared by: Patrick Lang

June 27, 2016

Bellevue, WA

# April 29th Meeting

- The TGC conducted a meeting on April 29, 2016 in Paulsboro, NJ.
  - This was the first meeting in several years
  - Previous chairs provided their perspectives on the historical activities of the TGC and provided insight on the purpose of the TGC.
  - Recognized the need to get the TGC active again since there are several technical issues that need attention.
  - Minutes from meeting have been posted to TMC website

# Draft of TGC Scope

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.

The TGC chairman will liaise with The ACC PAPTG Chair.

# Discussion and Action Items

- For further understanding of what has been done in the past, some of the older non-electronic TGC meeting minutes will be scanned and posted on the TMC website for review by those interested.
- Group agrees that there needs to be some consistency on how test procedures define key test components (parts). Some examples:
  - Critical vs. non-critical
  - First-in-first-out (FIFO)
  - Minimum quantity of parts inventory at CPD and OEM

  **Action**: TGC to work on creating a document to outline best practices for handling test hardware.

# Discussion & Action Items (cont'd)

- In HD testing, raters go through the calibration process but do not take action based on their rankings as is done with the PCMO raters.

  **Action**: TGC Chairman to ask HD Surveillance Panel Members to consider adopting the methods used by the PCMO group.

- A Test Fuel Task Force was formed previously and has not met since 2011. This group will be asked to reconvene to review the many issues that have arose regarding fuel supply, fuel specifications in the procedure and further defining the fuel approval process for specific test types.
  - Example: VG has a defined protocol for the sludge fuel approval process but it is not spelled out in the procedure. This procedure will be added to the ASTM standard for the VG and should be considered for others.

# Discussion and Action Items (cont'd)

- The LCTWG initiated a discussion on how to properly handle material substitutions within the guidelines of ASTM. It is not well defined and being done differently amongst test procedures. Some items to consider:
  - Performance specification vs. supplier name (sole source supplier)
  - Component blueprint vs. supplier part number

  **Action**: Work towards creating some standard wording documenting how to handle substitutions.

# Discussion & Action Items (cont'd)

- There is a lot of uncertainty around the definition of a test being unavailable and the proper protocol for declaration . This is an area that needs further clarification.

  **Action**: The TGC to review any existing documentation regarding test unavailability and make recommendations on how to clearly define and document the protocol.

# Summary

- Several new action items have been identified as a result of the recent meeting.
- TGC Chairman to assign tasks as appropriate to get the action items addressed.
- Next meeting planned to be called later this summer.

# Test Monitoring Center Report

- June 27, 2016
  - Bellevue, WA

Test Monitoring Center
http://astmtmc.cmu.edu
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# 2016 Matrix Programs

- IIIH – Completed
- IVB – 2016 Start
- VH – 2016 Start
- VIE – Completed
- VIF – Completed
- Chain Wear – Completed
- LSPI – Completed
- GMOD – Completed
- PC11 VGRA – Completed
- Anticipate several GF-6 VGRA Matrices

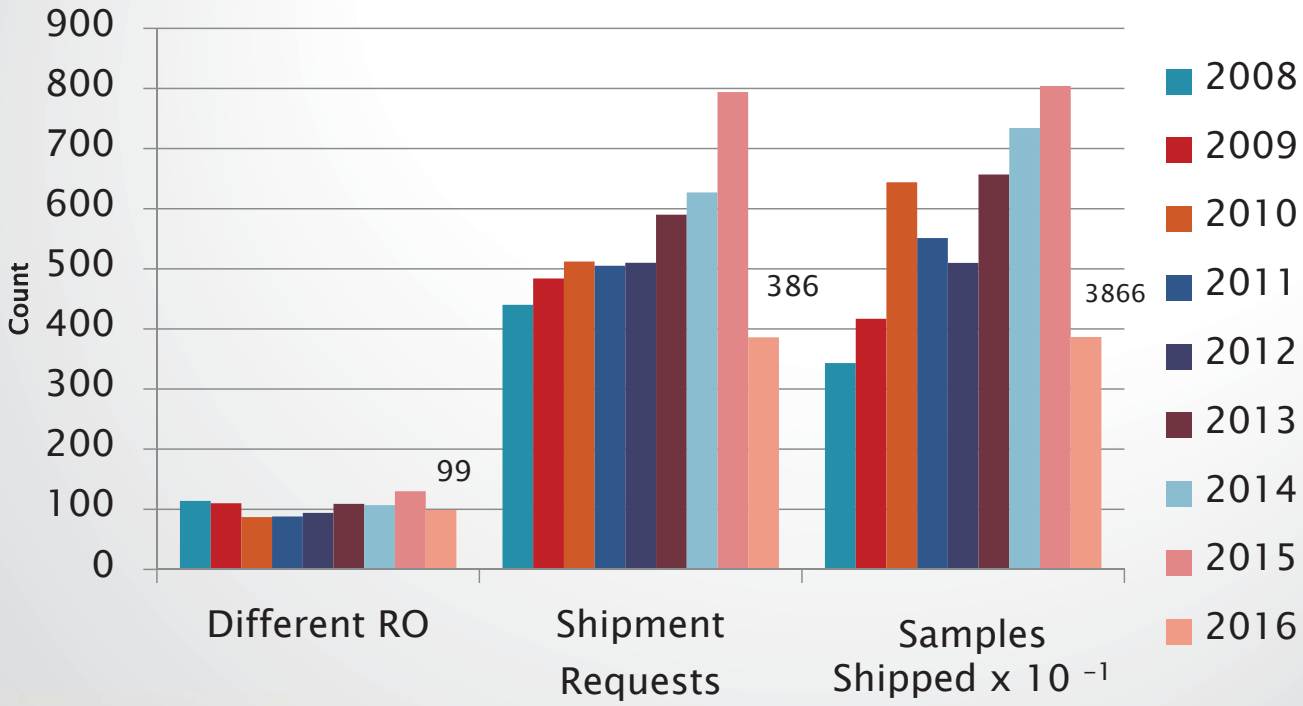
# 12 Information Letters Passed Sub B Ballot

| Test Area | No. | Issued | Subject |
|---|---|---|---|
| VG | 15-2 | 20151104 | Cam Bearing Change |
| 1N | 15-3 | 20151228 | Change in TGF Reporting |
| IIIG | 16-1 | 20160201 | Additional Cleaning to Allow Reuse of Fuel Injectors |
| IIIF | 16-1 | 20160203 | Additional Cleaning to Allow Reuse of Fuel Injectors |
| IIIF | 16-2 | 20160208 | Correction to Spark Plug Number in Table A5.1 |
| ROBO | 16-1 | 20160311 | Numerous Revisions |
| T-12 | 16-1 | 20160314 | Updated VUYP Hardware Correction Factors and New Delta Lead Correction Factors |
| ISM | 16-1 | 20160324 | Test Number Correction |
| L-37 | 16-1 | 20160331 | Requirements for using lab-assembled axle units |
| ISB | 16-1 | 20160407 | Changes to ISB Wear Parameter Reporting |
| ISM | 16-2 | 20160407 | Changes to ISM Wear Parameter Reporting |
| T-13 | 16-1 | 20160422 | Viscosity Increase @ 40 °C Final Minimum Value |

# Reference Oil Procurement

| Type | Oil Code | Quantity (gallons) |
|---|---|---|
| Jet Fuel Lubricity | JFA4/JFB4 | 100 |
| DD13 | 866 / Oil C | 340 |
| | 864 / Oil X | 1710 |
| VIE | VIEBL5 | 10000 |
| | VIEFO5 | 3245 |
| GMAER | GMAERBL | 530 |
| | GMAER02 | 330 |
| GMVFE | GMVFEHR01 | 1080 |

# Reference Oil Shipment Overview

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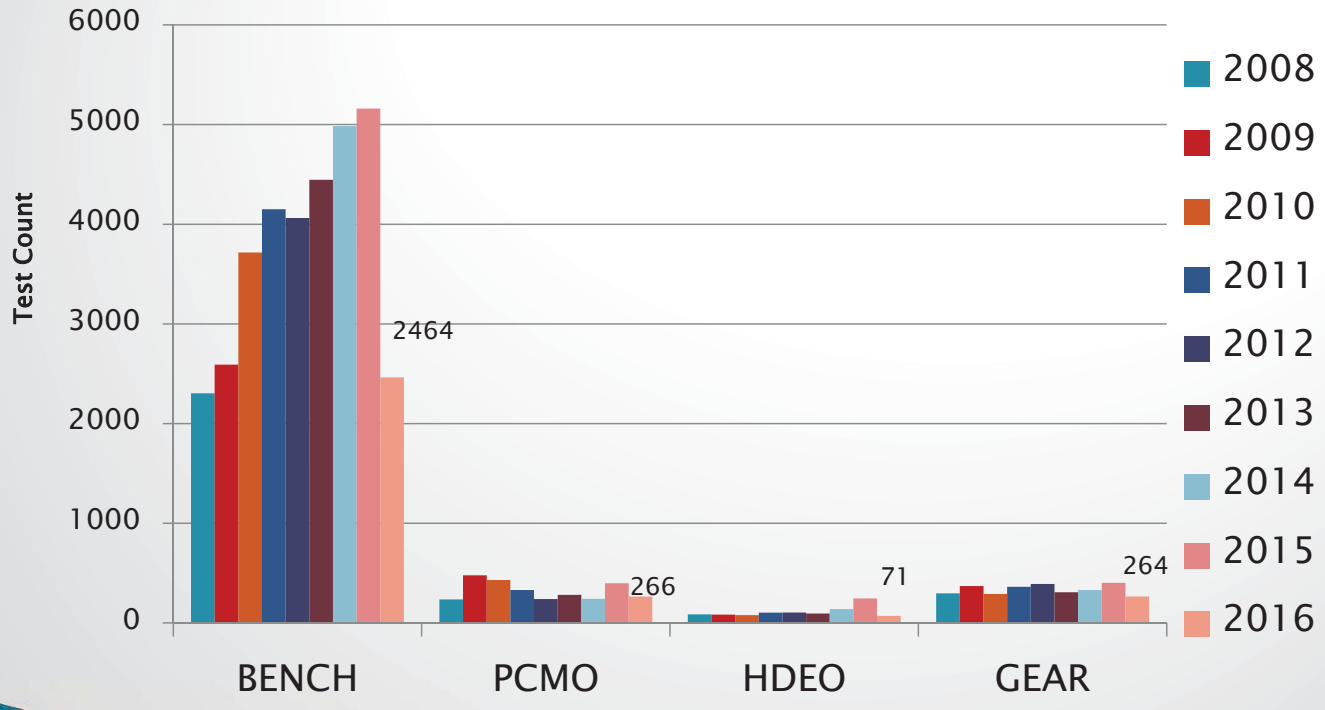
# Reference Test Activity

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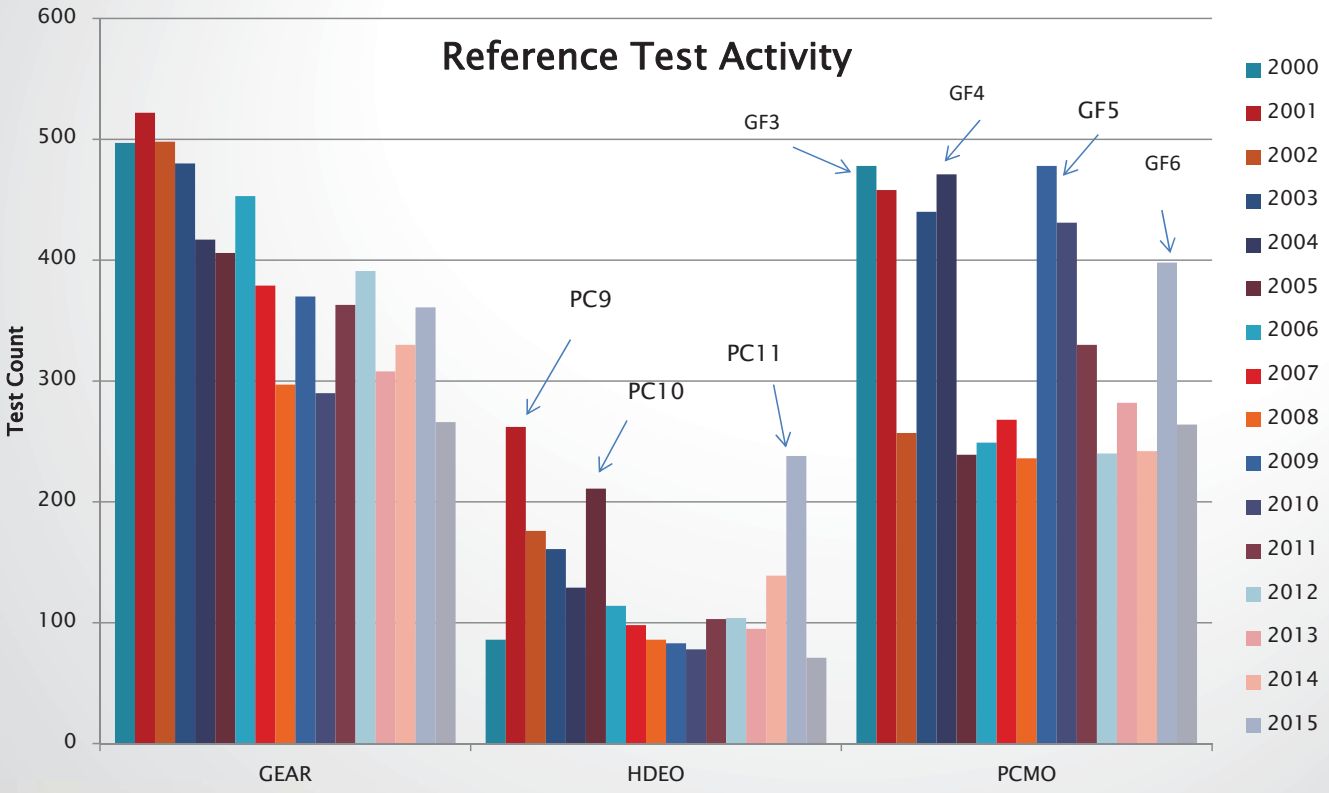


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# 1006-2 Status

- TMC Inventory of 1006-2 is at 2475 gallons
  - It can not be re-blended
- 1.5-year usage
  - SF105 465 gallons
    - Specified in ASTM D471 & GM Standards
  - EOEC/LDEOC 645 gallons
  - IVA/VG/VIII 549 gallons
  - Total 1659 gallons
  - BRT uses 1006 blend (plenty in house)
- Estimated Life ~18 months

# Deposit Rater Workshop Meeting

- TMC held a Deposit Rater Workshop Meeting on June 14 in Pittsburgh
  - Attended by 10 companies
    - Engineering, lab and field raters in attendance
  - Discussed workshop format
    - Semi-annual vs. annual
    - Lab, field and untrained rater participation
    - Rater training component
    - Target setting process

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# Workshop Open Discussion

- Proposed format
  - A single, combined annual LD & HD workshop.
  - ASTM TMC calibrated (RWB in last 12 months) lab raters attend 1st session
    - One calibration piston is used to bring raters together before official rating starts
    - Generate target means and standard deviations on all parts through discussion
    - Parts are divided into groups and rated by session 1 raters to enable all parts being rated

# Proposed format continued

- Session 1 ratings are screened with one pass of E178
- Means and standard deviations are then locked

- One rater from each lab stays and provides training for second group of non-lab raters.
- Session 2 raters rate and discuss same calibration piston before official rating starts.
- Session 2 raters are shown session 1 calibration piston results after their rating of part.
- After training session non-lab raters rate same parts to fill workshop database

# Fluorescent Lighting Issues

- Currently, the industry uses these fluorescent lamps for rating:
- – FC8T9-CW (“round” fixture)
- – F15T8-CQ (“two-bulb” fixture)
- Due to Federal regulations, fluorescent lamps are going off the market.
- For some labs, breaking a fluorescent lamp is a significant problem, due to the mercury content, requiring a full “Haz-Mat” response.

# European use of LED lighting

- The European CEC Rating Method specifies the use of LED light fixtures.
- At least two of the fixtures allowable for use in the CEC method are manufactured by Waldmann Lighting.
- – Tevisio (round fixture)
- – Taneo (“two bulb” fixture)

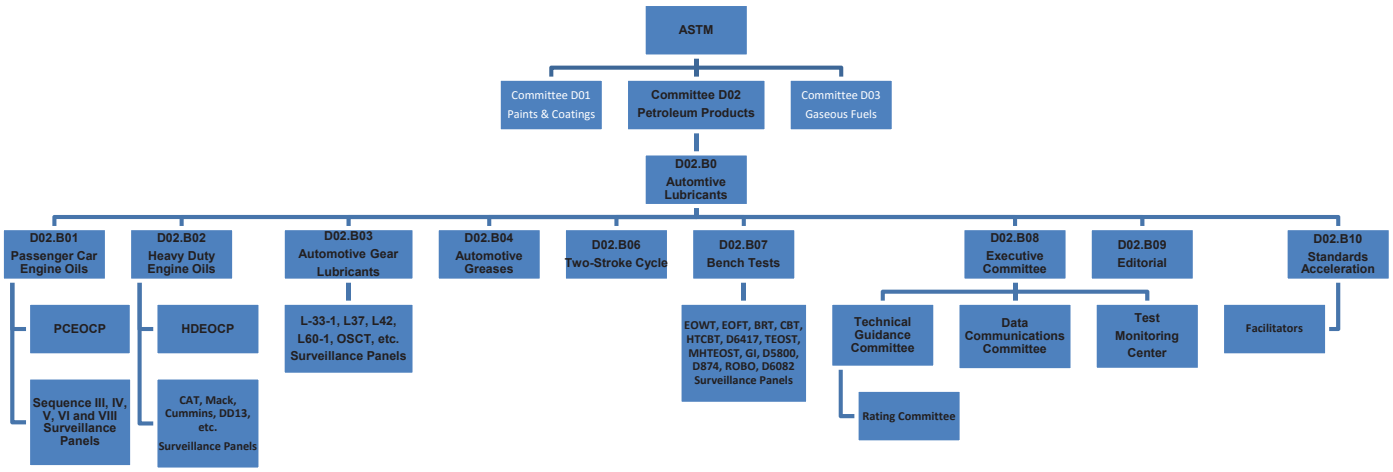
# Lighting Task Force

- The group felt a lighting task force needed to be formed to evaluate LED light source to replace the current lights.
  - Jack Kobrinetz (Afton) volunteered to lead a task force to evaluate LED lighting replacements

# Workshop Group Formation

- Attendees felt a group needed to be formed to provide oversight of rater workshops and rating aids (manuals, sludge depth gauges, lighting, etc.)
  - Propose a permanent group be formed under the Technical Guidance Committee

# ASTM Committee Hierarchy within D02.B0 Automotive Lubricants



# Scopes/Descriptions

Sub Committee B

Promotes the knowledge, specifications, methods of test, and nomenclature for automotive lubricating oils. This will include those lubricants used in the power train and chassis components of self-propelled wheeled vehicles including passenger cars, trucks, buses, industrial power plants, high-speed diesels, and tractors.

Sections: D02.B01, D02.B02, D02.B03, D02.B04, D02.B06, D02.B07, D02.B08, D02.B09 and D02.B10

Some of these sections receive reports from panels under their oversight and are responsible for the promotion of knowledge of, and specifications, test methods and terminology for automotive lubricants and fluids. Some committees provide updates to Sub Committee B.

Typical Objectives

–Keep existing performance tests operational, at historic severity and precision levels.

–Ensure that performance test parts and reference oils are available in adequate supply and of a consistent quality.

–Develop and maintain performance tests for lubricant categories.

–Maintain surveillance of test procedures under section jurisdiction.

–Work to improve test precision and correlation with field service.

–Maintain active liaison with related organizations (CEC, SAE, API, etc.)

Class Panels: PCEOCP & HDEOCP (Passenger Car and Heavy Duty Engine Oil Class Panels)

Each panel is responsible for maintaining existing API Passenger Car Engine/Heavy Duty Oil Performance categories and for developing new ones as needed. Definition and documentation of performance limits for these categories, in ASTM D4485 is also the responsibility of the panels. Consistent with proper maintenance of categories the panels interprets Surveillance Panel recommendations regarding severity shifts, procedure changes, test usefulness, precision issues, test availability, and any other matters having a bearing on performance limits and specifications.

For definition of new engine oil performance specifications, the panels approve the suitability of tests for inclusion and the designs of test matrices intended to establish precision and other measures of test usefulness. To facilitate accomplishment of this responsibility, class panels may form special task forces to develop and interpret data from new tests, recommend test matrix designs, appoint matrix managers, and recommend limits as appropriate. The panels recommend appropriate action regarding revisions to D4485 through Sub Committee B for balloting, and are governed by a set of operating guidelines established by PCEOCP & HDEOCP members.

PCEOCP liaisons with API, ACC, ILSAC, AOAP: These bodies make the final decisions on the specifications for Passenger Car engine oil. In addition the PCEOCP and the HDEOCP must work together to share resources and in some cases share tests between categories.

HDEOCP liaisons with API, ACC, EMA, DEOAP /NCDT/NCET to coordinate category development with critical industry stake holders.

Surveillance Panels: Sequence V, Sequence III, Sequence IV, Sequence VI, Sequence VIII, CAT, Mack, Cummins, Detroit Diesel, etc.

The XXX Surveillance Panel is responsible for the surveillance and continued improvement of the XXX test documented in ASTM Standard DXXXX as updated by the Information Letter System.

Improvements in rating technique, test operation, test monitoring and test validation will be accomplished through continual communication with the Test Sponsor, ASTM Test Monitoring Center, ASTM BO.0X, Passenger Car or Heavy Duty (whichever is appropriate) Engine Oil Classification Panel, ASTM Rating Task Force, ASTM Committee B0.0X, ACC Monitoring Agency. Actions to improve the process will be recommended when deemed appropriate based on input from the preceding. Industry transition to new engine hardware batches will be monitored and redistribution of existing hardware facilitated to accomplish uniform industry implementation.

Development and correlation of updated test procedures with previous test procedures will be reviewed by the panel. This process will provide the best possible test procedure for evaluating automotive lubricant performance with respect to the lubricant's ability to prevent *(insert test areas pass/fail parameters).*

B08 – ASTM Test Monitoring System Executive Committee

The committee has the responsibility for setting the technical direction policies, procedures and for providing guidance for carrying out the purpose of the Test Monitoring System and all of its regulations. The committee has oversight of a surveillance panel's developed system that uses reference material tests to calibrate test stands and testing laboratories.

The committee also provides guidance on the annual budget and general operations of the ASTM Test Monitoring Center as well as the hiring of staff.

B09 – Editorial

The sections primary responsibility is to resolve any Form and Style/editorial matters that exist or arise in Subcommittee D02.B0's standards and update the D4485 Specification as necessary.
Specific tasks may include the following:
Correct Form and Style/editorial errors
Ensure that SI units are appropriately used

B10 – Standards Acceleration

The section on Standards Acceleration maintains a staff of facilitators to expedite the establishment of standards relating to automotive lubricants. Facilitators' activities include upgrading test procedures to ASTM test methods, and revising standards as needed once they are adopted; the *Form and Style for ASTM Standards* to be followed in all cases.

Test Monitoring Center (TMC)

Operates an independent calibration system to ensure that all tests performed using test procedures published by ASTM and /or monitored by the Center are conducted in a valid manner so that they can be interpreted properly. Additional services provided by the TMC include reference material distribution and test registration.

Technical Guidance Committee (TGC)

The Technical Guidance Committee 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.

The TGC chairman will liaise with the ACC PAPTG Chair.

Data Communication Committee (DCC)

The purpose of the Data Communications Committee is to provide a forum for discussion and development of technical solutions for standardizing industry wide data communications systems and other computer applications relating to these systems.

6-27-2016

# Fuels and Critical Parts for ASTM Procedures

## (PAPTG presentation to ASTM Test Monitoring System Executive Committee)

American Chemistry Council | Petroleum Additives Panel

# Discussion Topics

- Clarification of ASTM Bidding Process for Fuels and Critical Parts
- ASTM Supplier Agreements
- Substituted Materials Approval

# ASTM Bidding Process For Fuels and Critical Parts

ACC PAPTG believes the industry would benefit from greater awareness of the bidding process for materials supporting ASTM tests.

ACC PAPTG recommends developing written general guidelines and illustrate (through a flow chart) the bidding process for fuels and critical parts.

- ASTM to create guidelines for the circumstances under which a bidding process should be considered.

- Clarify roles and responsibilities of industry members (Task Force, Surveillance Panel, Class Panel) and ASTM Staff through the bidding process.

# ASTM Supplier Agreements

**ACC PAPTG believes it is important to create supplier agreements to maintain ASTM tests.**

**ACC PAPTG recommends developing written general guidelines and illustrate (through a flow chart) the process for creating supplier agreements.**

- **ASTM to create guidelines for the circumstances under which a supplier agreement should be considered.**
  - PAPTG proposal:
    - Consumables (e.g. fuel, critical parts) should be considered by ASTM for supplier agreement.
    - Non-consumables (e.g. heat exchanger) may not be suitable for supplier agreements.
    - Bidding process should completed with the ratification of an agreement.

- **Clarify roles and responsibilities of industry members (Task Force, Surveillance Panel, Class Panel) and ASTM Staff through the agreement ratification process.**

# Materials Substitution

**Currently, substitution language and the use of vendor-specific names across all passenger car and heavy-duty ASTM engine test procedures is inconsistent.**

- **ACC PAPTG are pleased work has started to look into this**

- **ACC PAPTG proposes the following for consideration:**
  - Not making test procedures vendor specific
  - Establishing the following best practice hierarchy through guidelines: specification, critical part, critical part sole source.
  - Making ASTM procedures free of intellectual property.

**The current process for substituting materials isn't fully understood by industry stakeholders or potential vendors.**

- **ACC PAPTG recommends developing written general guidelines (via stakeholder input) and illustrate (through a flow chart) the process for substituted materials to be approved for use in ASTM engine oil test procedures.**

# Appendix

# A Case Study: PC-10 Bidding Process

ASTM D02.B0.02 Heavy Duty Engine Oil Classification Panel (HDEOCP) set up a supplier selection task force [date?] to:

- Establish a specification [verify this was done by the task force]
- Devise a selection criteria
- Conduct the bidding process

The fuel supplier selection task force comprised of: Mesfin Belay, Pat Fetterman, Tom Franklin, Jim Wells.

PC-10 fuel was put out to bid on [date]

The selection task force selected a fuel supplier #2 based on the ability to meet the specification, fuel batch certified volume, and the lowest price.

On November 11, 2004 the fuel supplier selection task force's recommendation was accepted.

No further work was conducted by ASTM to create an agreement with the selected fuel supplier.