

## ASTM TEST MONITORING BOARD MEETING

June 22, 2004

Grand America Hotel  
Salt Lake City, UT

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### CALL TO ORDER

ASTM D02.B0.08, the Test Monitoring Board, met on Tuesday, June 22, 2004 at 5:10 p.m. in the Belvedere room of the Grand America Hotel in Salt Lake City, Utah. There were eight voting members (Bob Olree represented Robert Stockwell), three non-voting members and four visitors present. The attendance roster is shown in Attachment A. Minutes from the December 8, 2003 meeting were approved.

### MEMBERSHIP

There were no changes in TMB voting membership.

### ADMINISTRATIVE GUIDANCE COMMITTEE

Walter Groff presented the AGC report (see Attachment B). TMC fiscal 2003 net income was -\$183,000 versus a forecast of -\$195,000. Fiscal 2004 net income through the first four months is +\$87,000. The overall TMC financial status remains good for the short term. TMC reserve funds are currently equal to 16 months of operating expenses.

At the request of the AGC, the TMB discussed recent actions by surveillance panels where the TMC was asked to remove or refuse laboratory calibration based on issues outside the calibration process, such as a lab failing to run a donated reference oil test by a certain deadline. The TMB recommended that the chairman of Subcommittee B be asked to issue guidance to surveillance panel chairs that the *Regulations Governing the ASTM Test Monitoring System* cannot support these types of requests.

Walter Groff reported that a review of test methods monitored by the TMC revealed inconsistent wording regarding the authority of the TMC to shorten or extend calibration periods for issues directly relating to the calibration process. Walter proposed a draft of consistent wording (see last three pages of Attachment B) to be included in test methods monitored by the TMC, both present and future. The draft was revised to eliminate the last sentence of section X.1.

The TMB recommended that this revised draft be forwarded to Section 9 for final editing and presentation to Subcommittee B for approval. This consistent language could then be added to each test method via the information letter process.

#### **TECHNICAL GUIDANCE COMMITTEE**

Gordon Farnsworth reported that the TGC had not met since the last TMB meeting.

#### **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 that TMC staffing remains at 17 regular full-time employees. No changes to this headcount are forecast through 2006. The TMC is currently coordinating a re-blend of Sequence VIB calibration oils (BC and BCFHD). Work continues to implement full monitoring of the CI-4 elastomer compatibility bench test. The TMC discarded the remaining supply of oil 5000, a standard crankcase oil used in the L-10 Injector Deposit Test. The discarded volume of 6015 gallons enabled the TMC to eliminate one off-site warehouse space and its corresponding annual lease cost of \$13,000.

#### **BALLOTS**

John Zalar reported that sixteen TMC information letters had been balloted within Subcommittee B. No disapprove votes were received. There was one abstain vote with comment. A ballot summary is shown in Attachment E.

#### **OLD BUSINESS**

There was no old business.

#### **NEW BUSINESS**

There was no new business.

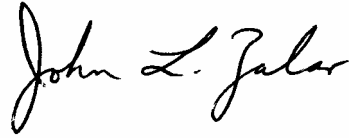
#### **NEXT MEETING**

The next meeting is scheduled for December 6, 2004 in Tampa, Florida.

**ADJOURNMENT**

The meeting was adjourned at 6:15 p.m.

Respectfully submitted,

A handwritten signature in black ink that reads "John L. Zalar". The signature is written in a cursive style with a large, looped initial "J".

John L. Zalar, Secretary  
ASTM Test Monitoring Board

JLZ/jlz

Attachments

## ASTM TEST MONITORING BOARD MEETING

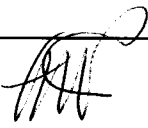
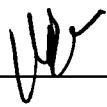
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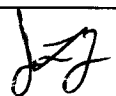
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944-8112

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# **AGC Report To The Test Monitoring Board**

**December 2003**

**To**

**June, 2004**

**June 22, 2004**



# **AGC Semi-annual Report**

## **Membership**

- **Walter Groff** SwRI (Chair)
- **Tom Boschert** Ethyl
- **John Glaser** Perkin Elmer
- **Ken Pearson** ASTM
- **Cliff Venier** Shell Global Solutions
- **Lew Williams** Lubrizol
- **John Zalar** TMC

**No changes in membership since our last meeting.**

# **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 Fiscal Performance - FY 2003**

- **Earnst and Young - traditional auditor**
- **Deloitte and Touche LLP - new auditor**
  - **E&Y dropped many small firms last year including the TMC. D&E is same firm used by CMU**
- **Audit accomplished in May of this year.**
  - **Audit recommended dropping some old inventory of reference oils totaling \$94,909**
    - **529-1, 531, 531-1, 534, 534-2, 536, 536-1 (Seq. VIA oils)**
- **FY2003 statement was changed to show a loss of \$182,640 rather than the \$88,682**
- **Real change was to total assets and total liabilities and capital.**

# AGC Semi-annual Report

## TMC Fiscal Performance - FY 2003

- Fiscal Year 2003 ended January 31, 2003
- Forecast for 2003 -\$195,000
- Fiscal 2003 actual performance
  - Before Audit -\$ 88,662
- Fiscal 2003 Actual Performance
  - After Audit  -\$182,640

# AGC Semi-annual Report

## TMC Fiscal Forecast

Temporary Help	\$10,000	\$10,000	\$10,000
Benefits (28.28%)	\$254,000	\$262,000	\$269,000
Overhead	\$599,000	\$616,000	\$633,000
Travel	\$75,000	\$75,000	\$75,000
Telephone	\$22,000	\$22,000	\$23,000
Office Supplies	\$22,000	\$22,000	\$23,000
Reference Oils	\$50,000	\$50,000	\$50,000
Capital	\$20,000	\$20,000	\$20,000
Contract Services	\$42,000	\$43,000	\$43,000
Lab Supplies	\$25,000	\$26,000	\$26,000
Training & Education	\$15,000	\$15,000	\$15,000
Procedure Rewrites	\$15,000	\$15,000	\$15,000
Audit	\$19,000	\$20,000	\$20,000
<b>Total Expenses</b>	<b>\$2,056,000</b>	<b>\$2,111,000</b>	<b>\$2,164,000</b>
Revenues	\$2,017,000	\$2,115,000	\$2,170,000
Revenue-Expense	<b>(\$39,000)</b>	<b>\$4,000</b>	<b>\$6,000</b>
Interest	\$20,000	\$20,000	\$20,000
Reserves	\$2,703,000	\$2,727,000	\$2,753,000
Months Reserve	15.8	15.5	15.3
Fee Increases	None	None	None
New Tests	CI-4+	PC-10	PC-10
Reg. FT Headcount	17	17	17

# **AGC Semi-annual Report**

## **TMC Fiscal Performance - FY 2004**

- **Fiscal 2004 Net Forecast - \$ 39,000**
- **Performance to date (4 months)**
  - Revenue **\$742,892**
  - Costs **\$655,948**
  - Net to date **\$ 86,944**
- **CMU has indicated that a possible change in Employee benefits may occur in July. 28.28% to 28.6%. Impact to the budget would be approx. \$2,500.**

# **AGC Semi-annual Report**

## **TMC Fiscal Performance - FY 2004**

- **Year starting off traditionally. No change in forecast is anticipated at this time.**
- **Overall TMC financial status for the short term remains good**
- **Reserve at 16 months**

# **AGC Semi-annual Report**

## **Additional Revenue Streams**

- **Waiting chance to bid on ACC registration.**
  - **Understand that this opportunity may be slipping away.**
- **ASTM has noted no showstoppers to bid on this based on initial understanding.**



# **AGC Semi-annual Report**

## **Issue for Guidance**

- **Recent Surveillance Panel Actions have involved asking the TMC to remove or refuse laboratory calibration based on issues outside the calibration process.**
- **Examples**
  - **Sequence VIII Surveillance Panel (November 19, 2002 surveillance panel minutes)**
    - **“The SP decided to direct the TMC to withhold reference oil requests from any laboratory that hasn’t completed their 1009 donated run.”**

# **AGC Semi-annual Report**

## **Issue for Guidance**

- **Examples (Cont.)**
  - **L-60 Surveillance Panel (August 27, 2003 surveillance panel minutes)**
    - **“All labs must complete the three (donated) tests using insulation and 1 (donated) test without insulation by October 10, 2003. The Surveillance Panel instructs the TMC to remove stand calibration qualification if the matrix is not completed by the required date.”**

# **AGC Semi-annual Report**

## **Issue for Guidance**

- **Examples (Cont.)**
  - **SCOTE Surveillance Panel (February 17, 2004 Surveillance Panel minutes)**
    - **“All Cat 1N calibrations will terminate 4-5-2004 unless labs complete a reference run on the new liner.”**

# **AGC Semi-annual Report**

## **Issue for Guidance**

- **After discussions the TMB Chair requested review of TMC charter and test procedures that may specifically address the issues of lengthening/reducing calibration periods or refusing/pulling lab calibration.**
  - **TMC Charter**
    - **No specific wording addressing this issue or the extension or shortening of reference periods. However it does address the TMC responsibility for maintaining an adequate system for supplying test parts and collecting and analyzing volunteered/purchased reference oil test data.**

# **AGC Semi-annual Report**

## **Issue for Guidance**

- **TMB Chair request (cont.)**
  - **D6709 (VIII)**
    - **10.1.3.2 When circumstances develop which are beyond the laboratory's control, such as fuel or parts shortages, calibration periods and the number of test starts between calibrations may be adjusted. Adjustments to calibration periods and the number of test starts between calibrations shall be approved by the TMC and the Sequence VIII Surveillance Panel before additional test starts are conducted. Make a note on the form shown in Fig. in the final test report, stating that the test was conducted on a power section/test stand in which calibration requirements were adjusted and, also, the reason for the adjustment.**

# **AGC Semi-annual Report**

## **Issue for Guidance**

- **TMB Chair request (cont.)**
  - **D5704 (L-60-1)**
    - **9.2.2 For a previously referenced test stand, reference tests giving results within the established limits for those oils shall be conducted at the frequency specified by the TMC (currently every ten tests or three months, whichever occurs first). Test oils for this purpose are distributed as blind coded samples by the TMC when request for calibration is received. All test starts and test data using reference oils shall be reported to the TMC. Calibration frequency is subject to change as required. Current calibration information is available from the TMC.**

# **AGC Semi-annual Report**

## **Issue for Guidance**

- **TMB Chair request (cont.)**
  - **D6750 (1K/1N)**
    - **10.1.2.2 To enhance reference oil test program design and test severity monitoring, the TMC may move up or extend reference oil tests.**
  - **D6628 (1M-PC) D6681 (1P) D6923 (1R)**
    - **The TMC is permitted to move up or extend calibration tests to enhance calibration test program design and test severity monitoring.**

# **AGC Semi-annual Report**

## **Issue for Guidance**

- **TMB Chair request (cont.)**
  - The following test procedures also have wording that address moving calibration periods.
    - D6838 (M11) D6975 (M11 EGR) D5967 (T8/T8E) D6483 (T-9) D6987 (T-10/T10A) D5862 (6V92TA) D5966 (RFWT) D6894 (EOAT) D6984 (IIIF) D6593 (VG) D6837 (VIB) D7038 (L-33-1) D6121 (L-37)
  - The following test procedures do not have wording addressing moving calibration periods.
    - D6891 (IVA) STP 512A (L-42) D5579 (HTCT) D4857 (Ring Sticking) D4863 (Lubricity) D4858 (Preignition)



# **AGC Semi-annual Report**

## **Issue for Guidance**

- **Conclusion**
  - **The TMC charter**
    - Does not specifically provide authority to the TMC to lengthen or shorten calibration time periods or to pull calibrations.
  - **ASTM standards monitored by the TMC**
    - Most procedures provide guidance to TMC for shortening or lengthening calibration periods but do not address pulling or refusing calibration.
    - Standards have ASTM consensus
    - Wording addressing issue is not consistent

# **AGC Semi-annual Report**

## **Issue for Guidance**

- 1. The authority of the TMC to actually “withhold” calibration based on issues outside the calibration system.**
- 2. Consistency of wording in ASTM standards allowing TMC to lengthen or shorten referencing periods affecting laboratory calibration.**

# **AGC Semi-annual Report**

## **Action Items**

- **Approval of this report**
- **Two Action items**

# **AGC Semi-annual Report**

## **Action Item No. 1**

- **Surveillance Panels requesting the TMC to remove or withhold calibration on issues outside of the calibration process.**
  - **AGC Recommendation**
    - **TMB to request the chairman of subcommittee “B” issue guidance to surveillance panel chair that charter of the TMC cannot support these types of requests.**

# **AGC Semi-annual Report**

## **Action Item No. 2**

- **Surveillance Panel requests for changing referencing frequency relating to calibration.**
  - **AGC Recommendation**
    - **TMB to request consistency of wording in ASTM Standards monitored by the TMC and providing suggested wording. Suggested wording attached. Note, Lyle Bowman has reviewed for ASTM content and wording.**

*X.1 Donated Reference Oil Test Programs* - The surveillance panel is charged with maintaining effective reference oil test severity and precision monitoring. During times of new parts introductions, new or re-blended reference oil additions, and procedural revisions, it may be necessary to evaluate the possible effects on severity and precision levels. The surveillance panel may choose to conduct a program of donated reference oil tests in those laboratories participating in the monitoring system, in order to quantify the effect of a particular change on severity and precision. Typically, the surveillance panel requests its panel members to volunteer enough reference oil tests to create a robust data set. Broad laboratory participation is needed to provide a representative sampling of the industry. To ensure the quality of the data obtained, donated tests are conducted on calibrated test stands. The surveillance panel shall arrange an appropriate number of donated tests and ensure completion of the test program in a timely manner. The conduct of donated tests has no effect on established reference oil calibration periods, except that each donated test counts as a test start.

## Y.1 Adjustments to Reference Oil Calibration Periods

- Y.1.1 Procedural Deviations* – On occasions when a laboratory becomes aware of a significant deviation from the test method, such as might arise during an in-house review or a TMC inspection, the laboratory and the TMC shall agree on an appropriate course of action to remedy the deviation. This action may include the shortening of existing reference oil calibration periods.
- Y.1.2 Parts and Fuel Shortages* - Under special circumstances, such as industry-wide parts or fuel shortages, the surveillance panel may direct the TMC to extend the time intervals between reference oil tests. These extensions shall not exceed one regular calibration period.
- Y.1.3 Reference Oil Test Data Flow* - To ensure continuous severity and precision monitoring, calibration tests are conducted periodically throughout the year. There may be occasions when laboratories conduct a large portion of calibration tests in a short period of time. This could result in an unacceptably large time frame when very few calibration tests are conducted. The TMC can shorten or extend calibration periods as needed to provide a consistent flow of reference oil test data. Adjustments to calibration periods are made such that laboratories incur no net loss (or gain) in calibration status.

## Y.1.1 Adjustments to Reference Oil Calibration Periods (cont.)

*Y.1.4 Special Use of the Reference Oil Calibration System* - The surveillance panel has the option to use the reference oil system to evaluate changes that have potential impact on test severity and precision. This option is only taken when a program of donated tests is not feasible. The surveillance panel and the TMC shall develop a detailed plan for the test program. This plan requires all reference oil tests in the program to be completed as close to the same time as possible, so that no laboratory/stand calibration is left in an excessively long pending status. In order to maintain the integrity of the reference oil monitoring system, each reference oil test is conducted so as to be interpretable for stand calibration. To facilitate the required test scheduling, the surveillance panel may direct the TMC to lengthen and shorten reference oil calibration periods within laboratories such that the laboratories incur no net loss (or gain) in calibration status.





## Test Monitoring Center

6555 Penn Avenue  
Pittsburgh, PA 15206-4489  
(412) 365-1000

MEMORANDUM: 04-048

DATE: May 21, 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 December 2003 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\\_200404.pdf](ftp://ftp.astmtmc.cmu.edu/docs/Data_Communications_Committee/tmb_reports/astm_200404.pdf)



# Test Monitoring Center

6555 Penn Avenue  
Pittsburgh, PA 15206-4489  
(412) 365-1000

## Attachment D

MEMORANDUM: 04-047

DATE: May 21, 2004

TO: ASTM Test Monitoring Board

FROM: John L. Zalar

SUBJECT: ASTM TMC Semiannual Report

### ADMINISTRATIVE/FINANCIAL

For many years, Ernst & Young has performed the independent financial audits of the Test Monitoring Center. This was (is) the same auditing firm used by ASTM International. In December 2003, Ernst & Young informed the TMC that, being one of their smaller accounts, we were being dropped as a client. ASTM International recommended that the TMC begin using Carnegie Mellon University's auditor, Deloitte & Touche. Consequently, the TMC audit for the period February 1, 2003 through January 31, 2004 was completed in April by Deloitte & Touche. The outcome of the audit was favorable. A copy of the audit report has been electronically distributed to the Test Monitoring Board mailing list.

There have been no personnel changes during the past six months. The TMC staff count remains at 17 full-time employees. The current organizational chart is shown as Attachment A.

### INFORMATION LETTERS

Information letter activity has been moderately high. The following 16 information letters have been issued by the TMC since my last report.

<u>Information Letter</u>	<u>Date Issued</u>
Sequence IIIF No. 03-3	11/7/03
Sequence IIIF No. 04-1	4/13/04
Sequence IIIG No. 03-4	11/13/03
Sequence IIIG No. 04-1	4/2/04
Sequence VIG No. 04-1	3/10/04
Sequence VIB No. 04-1	1/30/04
Sequence VIII No. 03-1	11/17/03
1K/1N No. 04-1	2/23/04
1M-PC No. 03-1	11/21/03
1P No. 03-1	11/21/03
T-8 No. 03-1	10/24/03
T-9 No. 03-1	10/24/03
T-10 No. 03-3	10/28/03
L-42 No. 03-4	11/14/03

<u>Information Letter</u>	<u>Date Issued</u>
L-60-1 No. 04-1	3/1/04
HTCBT No. 03-2	12/4/03

All of these letters are on the Spring Subcommittee B information letter ballot. The results of the ballot will be reported at the TMB meeting on June 22, 2004.

## **SEQUENCE VIB CALIBRATION OIL RE-BLEND**

At the request of the Sequence VIB Surveillance Panel, the TMC has begun the process of coordinating another re-blend of Sequence VIB calibration oils. There are two products, the baseline calibration oil (BC) and the high detergent flush oil (BCFHD). This blend, which will be the sixth re-blend of these oils, is intended to satisfy industry needs through April 2007. The target is to have approved and usable product by the end of the first quarter of 2005. The major steps in the re-blend process are summarized below.

1. A survey of participating laboratories is used to calculate blend volumes of BC and BCFHD. (This step was completed on April 30, 2004 resulting in blend volumes of 12,100 gallons of BC-6 and 4800 gallons of BCFHD-6.)
2. A request for quotation is submitted to the blender to determine the total blender costs. (As of the date of this report, the request for quotation has been submitted and the blender is working on the quotation.)
3. The cost per gallon of oil is established. The cost per gallon includes blender costs, analytical verification costs (two independent laboratories are used), and engine test verification costs (2 to 4 engine test laboratories are used), adjusted for any credit/debit from the previous blend.
4. Invoices are sent to all purchasers and monies are collected and deposited in a special account at Carnegie Mellon University. The TMC is not charged overhead on purchases made from this account.
5. TMC issues a purchase order for blending the two products. All monies must be collected prior to issuing this purchase order.
6. Once blended, both oils are analytically verified prior to containerization and shipment to the labs. The TMC receives a small inventory of each product to accommodate new labs and minor lab shortages.
7. After the labs receive the oils, the engine test performance of BC is evaluated in a verification testing program designed by the Sequence VIB Surveillance Panel. The new blend is compared to a baseline blend of BC via a series of back-to-back engine tests. Data collection and analysis is performed by the TMC.
8. The Sequence VIB Surveillance Panel reviews the results of the engine test verification program and determines if the blend is approved for use. A correction factor could be necessary in the case where the new BC blend performs differently than the baseline blend.

### **TMC MONITORING OF CI-4 ELASTOMER TEST**

On December 9, 2003 the Heavy Duty Engine Oil Classification Panel approved a request for TMC monitoring of the CI-4 Elastomer Compatibility Test. This action was reported to Subcommittee B on December 10, 2003. The TMC already had a limited involvement with the test, including distribution of the reference oil and maintenance of a data set with statistics on the TMC web site. As a result of this limited involvement, it was agreed that the facilitator for the test method could be funded by the TMC. Based on the HDEOCP request, the TMC began working with the surveillance panel to expand services and implement a formal monitoring process. As this work progressed, concerns were raised about the cost effectiveness of formal TMC monitoring of this test. On May 18, 2004, the HDEOCP reconsidered the need for and value of TMC monitoring of the elastomer test. A motion to reverse the original request for TMC monitoring was defeated. The TMC will continue working with the surveillance panel to complete the implementation of a monitoring system.

### **NEW REFERENCE OILS**

The following reference oils were received and processed by the TMC during the period from November 1, 2003 to April 30, 2004.

<u>Test Type</u>	<u>Oil Code</u>	<u>Quantity (gallons)</u>
ISM	ISMA	575
L-37	LT1-1	110
L-37	LT2-1	110
HTCBT	NO3	1
HTCBT	NO4	1
HTCBT	NO5	1

During this same time period, the TMC made 246 shipments of reference oils containing a total of 2,070 individual oil samples.

### **REFERENCE OIL DISCARDS**

The TMC recently discarded most of the remaining supply of oil 5000, a standard crankcase oil used in the L-10 Injector Deposit Test. The discarded volume of 6105 gallons enabled us to eliminate one off-site warehouse space and its corresponding annual lease cost of nearly \$13,000.

The remaining supplies of Sequence VIA reference oils have been declared obsolete and will be scheduled for discard. The list of oils includes 529-1, 531, 531-1, 534, 535-2, 536, and 536-1. The total oil volume is slightly in excess of 9000 gallons. This is a major discard but will free up space for new oils that are expected to be procured in support of PC-10.

## **CALIBRATION TEST REPORTING**

During the period from November 1, 2003 to April 30, 2004, 1270 calibration tests were reported to the TMC. Also, during this same period, 96% of all tests reported to the TMC were transmitted electronically.

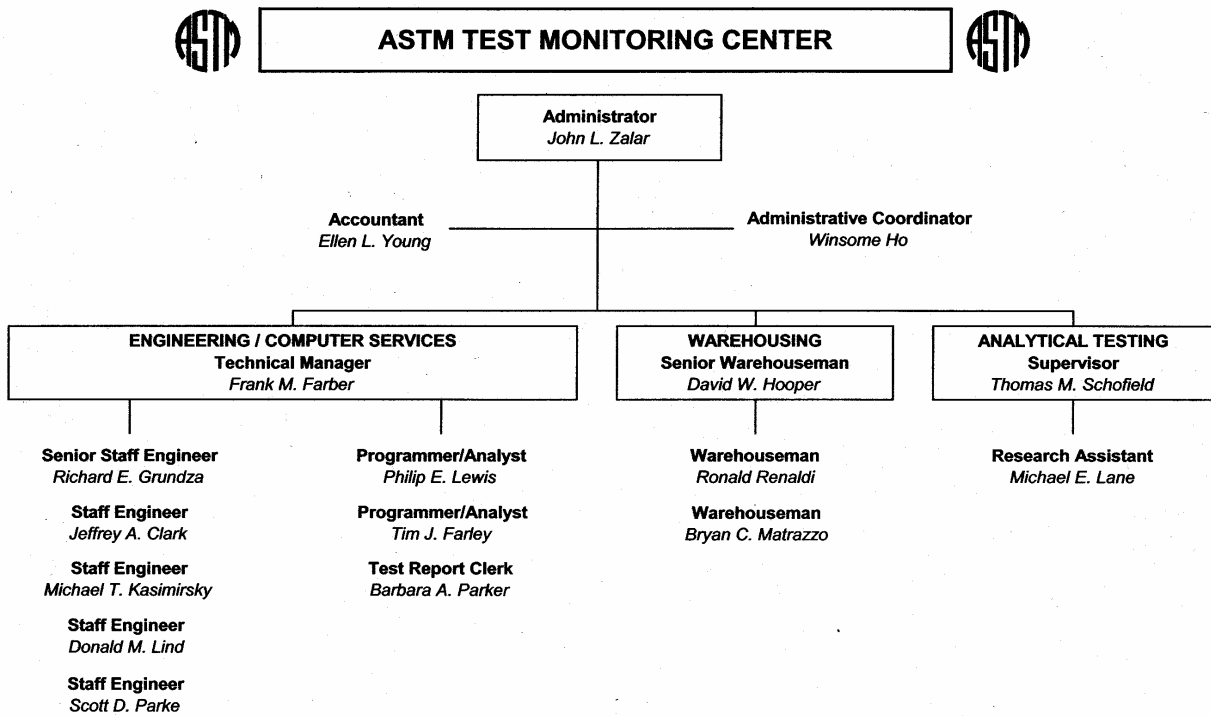
JLZ/jlz

Attachment

c: [ftp://ftp.astmtmc.cmu.edu/docs/test\\_monitoring\\_board/TMC-6-2004.pdf](ftp://ftp.astmtmc.cmu.edu/docs/test_monitoring_board/TMC-6-2004.pdf)

Distribution: Email

Attachment A



**D02.B BALLOT RESULTS  
(Ballot 04-03)**

**TMC Information Letters  
Closing Date: May 27, 2004**

**Ballot Responses**

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

	Approve	Disapprove	Abstain
<b><u>TMC Information Letters</u></b>			
1. Sequence IIIF Letter No. 03-3	40	0	40
2. Sequence IIIF Letter No. 04-1	40	0	40
3. Sequence IIIG Letter No. 03-4	40	0	40
4. Sequence IIIG Letter No. 04-1	40	0	40
5. Sequence VG Letter No. 04-1	40	0	40
6. Sequence VIB Letter No. 04-1	41	0	39
7. Sequence VIII Letter No. 03-1	39	0	41
8. 1K/1N Letter No. 04-1	41	0	39
9. 1M-PC Letter No. 03-1	41	0	39
10. 1P Letter No. 03-1	41	0	39
11. T-8 Letter No. 03-1	41	0	39
12. T-9 Letter No. 03-1	41	0	39
13. T-10 Letter No. 03-3	40	0	40
14. L-42 Letter No. 03-4	43	0	37
15. L-60-1 Letter No. 04-1	42	0	38
16. HTCBT Letter No. 03-2	43	0	37

**Comments**

**Michael Duffy, OI Analytical – Could not open ballot attachments.**