

## ASTM TEST MONITORING BOARD MEETING

June 25, 2015

Hilton Hotel  
San Francisco, CA

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### **Call to Order**

ASTM D02.B0.08, the Test Monitoring Board, met on Monday, June 25, 2012 at 5:00 p.m. in the Hilton Hotel in San Francisco, CA. There were eight voting members, four non-voting members, and four visitors present in person. One voting member, Ron Romano participated via conference call. The attendance list is shown as Attachment A. The minutes from the December 5, 2011 meeting were approved. The agenda is shown as Attachment B.

The chairman requested that the meeting be focused toward addressing a New Business item of the Test Monitoring Center's involvement with the GM IIIH test. The group agreed that the standard meeting agenda would be tabled in lieu of the IIIH discussion.

Prior to the New Business item the AGC chairman gave a short update on the financials of the TMC. The full report is shown as attachment C.

### **New Business**

The GM IIIH test is planned to replace the current ASTM Sequence IIIG test for the next passenger car category (GF-6) planned for model year 2017

Frank Farber presented attachment D, which is a letter to the ILSAC chairman Ron Romano from Matt Snider (GM) explaining GM's stance on the IIIH test. In short, GM does not plan to bring the test within the ASTM system and will retain final decision making authority on all aspects of the test. During a short presentation of this document at the API meeting the week before by Don Smolenski (GM), Don noted that GM would like to have the Test Monitoring Center provide monitoring services for the IIIH test if they were permitted. To initiate the discussion of whether the TMC could work with GM on the IIIH, Frank Farber presented attachment E.

During the presentation it was noted that ASTM headquarters was consulted with by the TMC Administrator on this issue. ASTM headquarters responded that TMB and Sub Committee B approval would be required for the TMC to work with GM and that they were not totally opposed to the idea. After much discussion the board felt they needed more information from GM on the monitoring services desired from the TMC. They also acknowledged that allowing the TMC to work with GM on the IIIH test was better for the industry since the TMC has an experienced staff, understands and utilizes industry accepted processes. Frank Farber was tasked with developing a more detailed understanding of the services requested by GM. The board also felt that a revision to the ASTM test Monitoring System Rules

& Regulations was reasonable first step forward to addressing some of the issues with the IIIH test. In addition, the board felt that TMB and Sub Committee B would have to approve the TMC working with GM once more details were available on the services.

To address a change to the Rules & Regulations Jason Bowden made the following motion with a second from Chris Castanien:

2.1 The purpose of the System is to establish, maintain and operate an independent calibration system to ensure that all tests performed using test procedures published and ~~which are under the jurisdiction of ASTM Committee D02~~ **or monitored by ASTM** are conducted in a valid manner so they can be interpreted properly.

The System shall be restricted to monitoring only tests ~~assigned to it by ASTM Subcommittee D02.B0~~ **approved by the TMB and Subcommittee B.**

The board unanimously approved the following motion to Article 2 of the ASTM Test Monitoring System Rules & Regulations (9 approve, 0 abstain, 0 negative).

The next step was to have Sub B authorize a letter ballot on the revision.

#### **OLD BUSINESS**

There was no old business.

#### **NEW BUSINESS**

GM IIIH discussion.

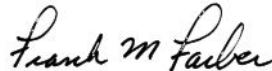
#### **NEXT MEETING**

The next meeting is scheduled for December 3, 2012 in Norfolk, VA.

#### **ADJOURNMENT**

The meeting was adjourned at approximately 6:30 p.m.

Respectfully submitted,



Frank M. Farber, Secretary  
ASTM Test Monitoring Board

FMF/fmf  
Attachments

## ASTM TEST MONITORING BOARD MEETING

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Voting Members

NAME	COMPANY AND ADDRESS	PHONE NUMBER E-MAIL ADDRESS FAX NUMBER	PRESENT
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## ASTM TEST MONITORING BOARD MEETING

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ASTM TEST MONITORING BOARD MEETING

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*Larry Goldblatt*

*Irwin.Goldblatt@bp.com*

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NAME	COMPANY AND ADDRESS	PHONE NUMBER E-MAIL ADDRESS FAX NUMBER	PRESENT
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Attachment A

Page 5 of 5

Visitors

NAME	COMPANY AND ADDRESS	PHONE NUMBER E-MAIL ADDRESS FAX NUMBER	PRESENT
NORB NAAN	Naan Consultant Inc	845-297-4333	✓
MIKE M. MILLAN	MLM CONSULTING	586-677-9198	✓
Jim Linden	LINDEN CONSULTING	248-321-5343 LINDENJIM@HOTMAIL.COM	✓

**ASTM TEST MONITORING BOARD MEETING**  
**Monday – June 25, 2015**  
**5:00 - 6:30 PM**  
**Hilton**  
**San Francisco, CA**

**AGENDA**

- 1. Call to Order**
- 2. Approval of December 5, 2011 Minutes**
- 3. Membership**
- 4. Receive, Accept and Take Action on Reports**
  - Administrative Guidance Committee – Chris Castanien**
  - Technical Guidance Committee – Bill Buscher III**
  - Test Monitoring Center – Frank Farber**
  - Data Communications Committee – Frank Farber**
- 5. Old Business**
- 6. New Business-Sequence IIIH**
- 8. Next Meeting**
  - Monday December 3, 2012 Norfolk, VA**
- 9. Adjournment**



AGC Semi-Annual Report to the  
Test Monitoring Board

January 2012

To

June 2012

June 25, 2012

AGC Membership

- Chris Castanien      Lubrizol (Chair)
- John Glaser          Intertek Automotive Research
- Dewey Szemenyei    Afton Chemical
- Dave Bradley        ASTM
- Ben Weber            Southwest Research Institute
- Frank Farber         TMC (Non-Voting)

Membership Changes?

- None

## AGC Responsibilities

- Advise the TMC Administrator on general business activity
- Advise the TMC Administrator in finalizing the annual budget, manpower requests and contract recommendations
- Prepare an annual evaluation and salary recommendations of the TMC Administrator and Staff for presentation to the Board

## TMC Fiscal Performance

■ Fiscal Year 2004	-\$205,293
■ Fiscal Year 2005	\$125,648
■ Fiscal Year 2006	\$124,141
■ Fiscal Year 2007	\$177,815
■ Fiscal Year 2008	\$ 70,864
■ Fiscal Year 2009	\$469,773
■ Fiscal Year 2010	\$415,224
■ Fiscal Year 2011	\$483,558
■ Fiscal Year 2012	-\$140,000 *

\* Projected

## FY 2012 TMC Projected Performance

- Projected expenses are below budget
- Projected income is above budget
- Projecting a deficit of \$140,000

## FY 2012 TMC Projected Performance

<u>Line Item</u>	<u>2011 EOY<sup>1</sup></u>	<u>2012 Budget</u>	<u>2012 Projected</u>
Total Expenses	\$2,137,291	\$2,424,700	\$2,350,000
Revenues	\$2,587,559	\$1,982,656	\$2,175,000 <sup>2</sup>
Revenue - Expense	\$450,268	-\$442,004	-\$175,000
Interest	\$33,290	\$37,000	\$36,500
Net	\$483,558	-\$405,044	-\$138,500
Reserves	\$4,355,718 <sup>3</sup>	\$3,950,674 <sup>4</sup>	\$3,844,652
Months Reserve	24	19	21
Fee Adjustments	None	None	None
New Tests	None	None	None
Reg. FT Headcount	13	14	15

<sup>1</sup> Values from audit report

<sup>2</sup> Based on Jan-May monthly average (corrected for lump sum fees)

<sup>3</sup> Net Assets-UnRestricted and Undesignated

<sup>4</sup> Derived from 2011 EOY audit reserve and Net from budget

## [ TMC Forecast – FY 2012 Assumptions ]

Salary increases, 3.2% (2012, 2013, 2014)

- Benefits (fringe)
  - 30.3% (2012)
  - 30.1% (2013)
  - 30.6% (2014)
  
- Continued participation in new development

## [ TMC – Budget Items ]

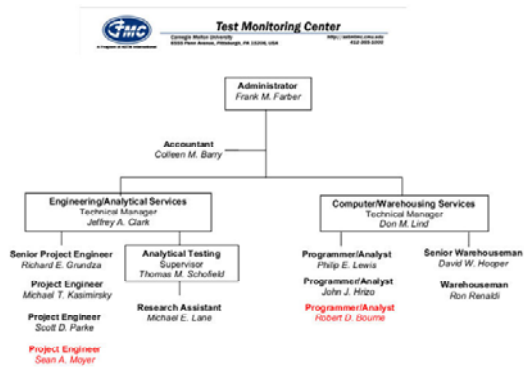
- Two staff members were hired to replace the two retirements in 2011.

## TMC 2012 - 2014 Budget

Income and Expenses	2012 Budget	2013 Budget	2014 Budget
Salaries	1,052,000	1,137,000	1,173,000
Temporary Help	5,400	5,500	5,500
Benefits (30.3%)	320,000	344,000	361,000
<b>Total Salaries &amp; Benefits</b>	<b>1,377,400</b>	<b>1,486,500</b>	<b>1,539,500</b>
<b>Overhead</b>	<b>699,000</b>	<b>753,000</b>	<b>783,000</b>
<b>Capital</b>	<b>19,000 *</b>	<b>19,500</b>	<b>20,000</b>
Travel	62,500	57,500	62,500
Telephone	16,200	16,500	16,600
Office Supplies	17,600	17,800	18,000
Contract Services	16,000	16,000	17,000
Lab Supplies	40,000	41,000	42,000
Training & Education	5,000	5,200	5,400
Procedure Rewrites	7,000	8,000	9,000
Rating Workshops	23,000	24,000	25,000
Audit	17,000	17,500	18,000
Reference Cdis	40,000	40,000	60,000
<b>Other Operating Expenses</b>	<b>233,300</b>	<b>243,400</b>	<b>273,500</b>
<b>Depreciation</b>	<b>5,000</b>	<b>5,000</b>	<b>4,500</b>
<b>Cost of Oil Sold</b>	<b>110,000</b>	<b>90,000</b>	<b>80,000</b>
<b>Total Operating Expenses</b>	<b>\$2,424,700</b>	<b>\$2,578,000</b>	<b>\$2,680,800</b>
Total Revenue	1,982,656	2,540,000	2,641,800
Interest	37,000	38,000	39,000
<b>Total Operating Revenue</b>	<b>\$2,019,656</b>	<b>\$2,578,000</b>	<b>\$2,680,800</b>
<b>Net Income (Loss) from Operations</b>	<b>(\$405,044)</b>	<b>\$0</b>	<b>\$0</b>
Total Fund - Liquid Assets	\$3,777,607	\$3,777,607	\$3,777,607
Months Operating Assets	18.7	17.6	16.9
Fee Adjustments (+/-)	As Needed	As Needed	As Needed
New Tests	Not Expected	Not Expected	Not Expected
Reg. FT Headcount	14	15	15

\* Includes ACCIATC IT Upgrades

## TMC Organizational Chart



30-3600 - Administration\orgchart\TMC Org Chart.doc

[ Action Items ]

Approval of this report



GM Powertrain

Matthew J. Snider  
General Motors Corporation  
Global Powertrain Engineering  
Mail Code: 483-730-472  
823 Joslyn, Ave.  
Pontiac, Michigan 48340-2920  
USA

June 12, 2012

Ron Romano  
Ford Motor Company  
1800 Fairlane Drive,  
Allen Park, MI 48101  
Phone: (313) 845-4068  
- As ILSAC Chair-

Dear Mr. Romano,

This letter is in response to the questions you, in your capacity as ILSAC chair, forwarded to GM regarding GM's planned Sequence IIIH test. For your reference, the questions are provided below. We understand that the API wishes to incorporate the IIIH test into its planned GF-6 specification and that, as part of that effort, drafted these questions in an attempt to better understand the Sequence IIIH test. GM has attempted to answer all of the questions as best as possible. Obviously, we are in an early stage of test development and the answers provided below are subject to change as test development progresses.

Thank you,

Matthew J. Snider  
General Motors Powertrain.

cc: Dennis Bacheldor - API  
Luc Girard - Auto-Oil Advisory Panel Co-Chair  
Teri Kowalski - Auto-Oil Advisory Panel Co-Chair

**1 - GM-IIIH – Test Stand Acceptance and Calibration**

1. Who will make the decision to certify a GM-IIIH Test Stand? (e.g. GM, Stakeholders, etc) –
  - *GM plans to work with a third party test monitoring agency to handle test stand certification. GM contemplates that the third party test monitoring agency will follow documented procedures, and stand set-up checks.*
2. Will both Dependent and Independent Labs be allowed to have GM-IIIH Test Stands?
  - *Yes, assuming all such labs can demonstrate calibration capability.*
3. What process will be followed for initial calibration of GM-IIIH Test Stands?
  - *GM contemplates using processes similar to what have been used in the past for similar engine tests.*
4. Who will decide if a GM-IIIH Test Stand is calibrated (e.g. GM, Industry, etc)
  - *GM plans to work with a third party test monitoring agency to handle test stand calibration. GM contemplates that the third party test monitoring agency will follow documented procedures including a test monitoring system, and test stand checks.*
5. What process will be used to monitor GM-IIIH Test Stand Calibration?
  - *GM plans to work with a third party test monitoring agency to handle test stand calibration. GM contemplates that the third party test monitoring agency will follow documented procedures including a test monitoring system, and test stand checks.*
6. Will labs running the GM-IIIH be allowed to participate in decisions on changes to the GM-IIIH Test?
  - *Absolutely. Test lab input on changes to any engine test is invaluable. It is contemplated, however, that GM will retain final decision making authority.*

**2 - Data Exchange and Decision Process for GM-IIIH Test**

1. Will there be regular public stakeholder meetings to discuss GM-IIIH Test Monitoring?
  - *GM contemplates that regular stakeholder meetings will be held.*
2. Will the GM-IIIH Test Data be shared with the industry stakeholders?
  - *GM contemplates that reference oil (calibration) data will be shared; candidate data will not be shared; and development data will likely be made available to some extent in the form of a Research Report.*
3. Will public, industry stakeholder meetings be held on a regular cycle (e.g. Bi-Weekly, Monthly, Quarterly, Annually, other)
  - *GM does not understand the difference between “stakeholder” in question 1 of this section, and “industry stakeholder” in this question. Please clarify.*
4. Is the decision process expected to be a private, GM process?
  - *GM anticipates a process that includes input from all stakeholders, but with*





*final decision making authority retained by GM.*

5. Will industry stakeholders have a vote in the decision making process for the GM-IIIH
  - *GM anticipates a process that includes input from all stakeholders, but with final decision making authority retained by GM.*
6. Will there be equitable voting?
  - *GM anticipates a process that includes input from all stakeholders, but with final decision making authority retained by GM.*
7. Will there be a dispute resolution process?
  - *GM anticipates a process that includes input from all stakeholders, but with final decision making authority retained by GM.*

### **3 - GM-IIIH Test Part and Hardware Management**

1. How long (in years) does GM plan to provide parts for the IIIH Engine?
  - *As long as possible, but targeting at least beyond 2020CY.*
2. How will estimates of GM-IIIH parts requirements be made?
  - *Like every other test that has ever been developed, we rely on past usage as an indicator of future requirements.*
3. Will GM agree to supply new GM-IIIH parts during this time?
  - *Please clarify this question.*
4. Will the GM-IIIH Parts Inventory be managed by GM or a Third Party
  - *GM contemplates that some parts will be managed by GM and others will be managed by third parties.*
5. If changes in the GM-IIIH hardware are required how will the decision to approve the new hardware are made?
  - *GM anticipates a process similar to what has been used in the past to introduce new parts. We anticipate that input would be sought from all stakeholders, but final decision making authority would be retained by GM.*
6. Will the decision be solely GM's responsibility or will industry stakeholders participate in the process?
  - *GM anticipates a process that includes input from all stakeholders, but with final decision making authority retained by GM.*
7. Will the processes for changes in GM-IIIH test hardware be similar to the ASTM Surveillance Panel process?
  - *GM anticipates a process that includes input from all stakeholders, but with final decision making authority retained by GM.*

### **4 - Process to Establish Reference Oils and Collect Calibration Data**

1. Will current reference oils be tested in the GM-IIIH test?



- *Yes, GM plans to evaluate the performance of current IIIG reference oils in the IIH test.*
- 2. How will new reference oils be developed for the GM-IIH test?
  - *GM plans to ask the interested industry members for new reference oils.*
- 3. Will reference and calibration data from the GM-IIH testing be released to industry stakeholders at the same time?
  - *Please explain the difference between “reference data” and “calibration data.” Please clarify this question.*
- 4. Will reference and calibration data from the GM-IIH testing be released to industry stakeholders on an as generated basis?
  - *GM anticipates that reference oil data will be released in a timely manner after it is generated.*

**5- Process to Identify and Procure Reference Fuel for the GM-IIH Test**

1. What type reference fuel will be used in GM-IIH Test?
  - *GM plans to use standard PCMO test fuel.*
2. Will GM-IIH reference fuel be identified by GM by type and batch?
  - *Yes. GM plans to keep track of fuel information in a manner similar to the current IIIG test.*
3. Who will procure the GM-IIH Reference fuel for use in the GM-IIH testing?
  - *As with all engine tests, GM anticipates that test labs will order the fuel that they need on an as needed basis.*
4. What process will be used to make changes to the GM-IIH Reference Fuel?
  - *GM anticipates a process that includes input from all stakeholders, but with final decision making authority retained by GM.*
5. Is the process to change reference fuel similar to the ASTM Surveillance Panel Process?
  - *Yes. GM anticipates a process that includes input from all stakeholders, but with final decision making authority retained by GM.*

**6 - Precision/BOI/VGRA Matrix Testing**

1. How will the GM-IIH Precision/BOI/VGRA Matrix Testing be designed?
  - *GM has included anticipated precision matrix costs in its IIH budget. GM contemplates working with interested industry statisticians to develop the precision matrix. GM would be open to reasonable BOI and VGRA testing as well. GM anticipates that additional BOI and VGRA testing would have to be conducted by other parties.*
2. Will stakeholders be asked to participate in the design of the Precision/BOI/VGRA Matrix?



- *GM contemplates working with interested industry statisticians/parties to design the precision matrix.*
- 3. Will stakeholders be asked to participate in the formulation and selection of the matrix Oils?
  - *GM contemplates working with interested industry parties to select formulations for the precision matrix.*
- 4. How will the GM-IIIH Precision/BOI/VGRA Matrix be evaluated?
  - *GM contemplates using statistics and seeking the advice of those statisticians and parties that helped to design the matrix.*
- 5. Will stakeholders be asked to participate in the evaluation process?
  - *GM contemplates seeking the advice of those statisticians and parties that helped to design the matrix.*



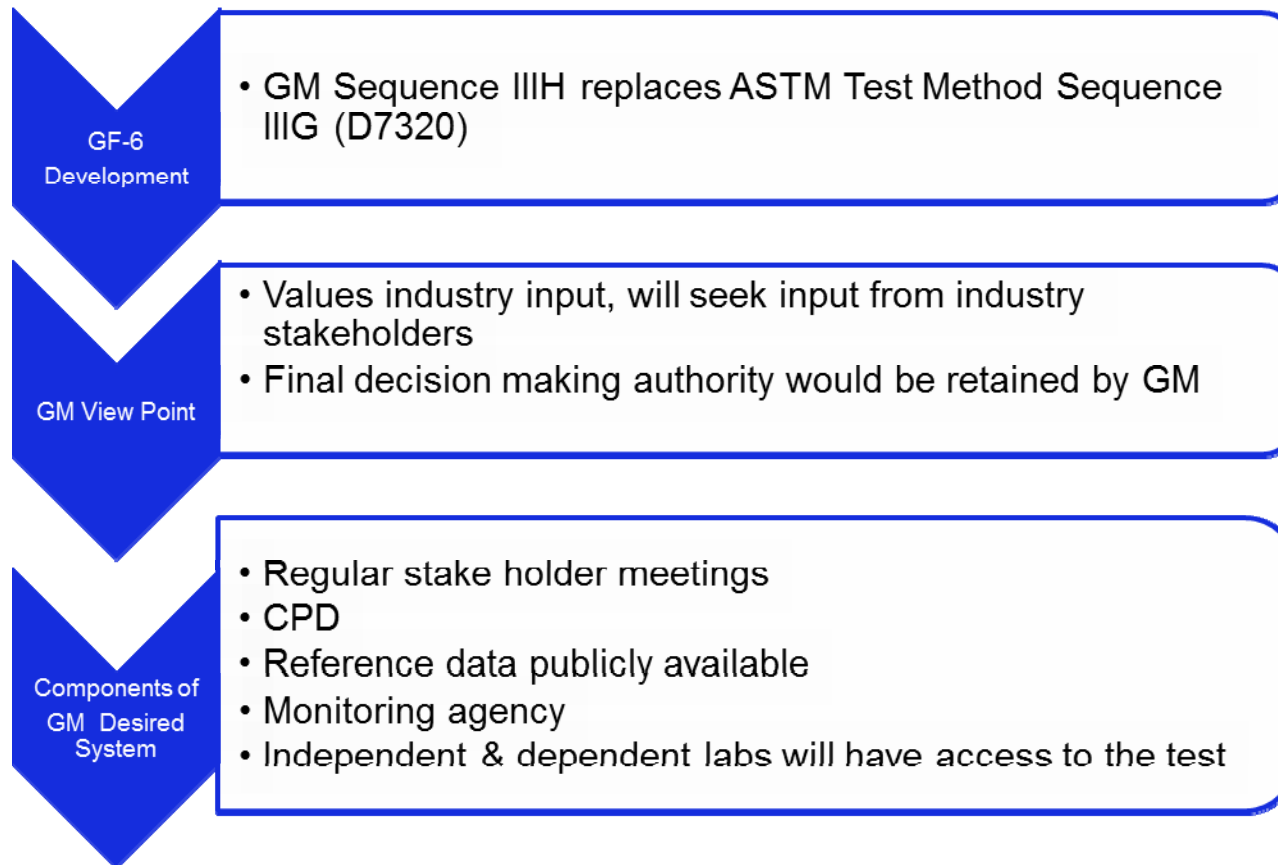
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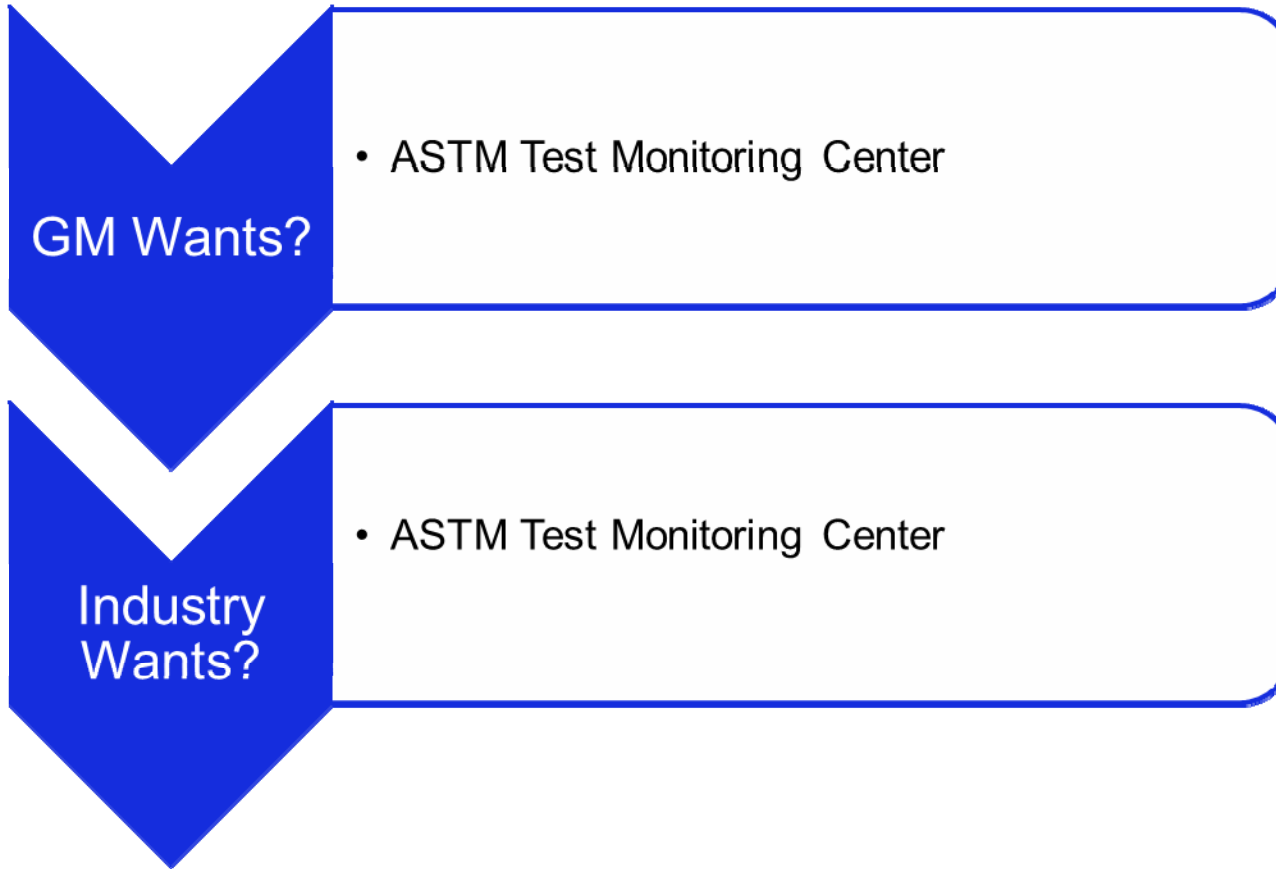
***<http://astmtmc.cmu.edu>***

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- Sequence IIIH Test Monitoring Board Presentation 6/2012

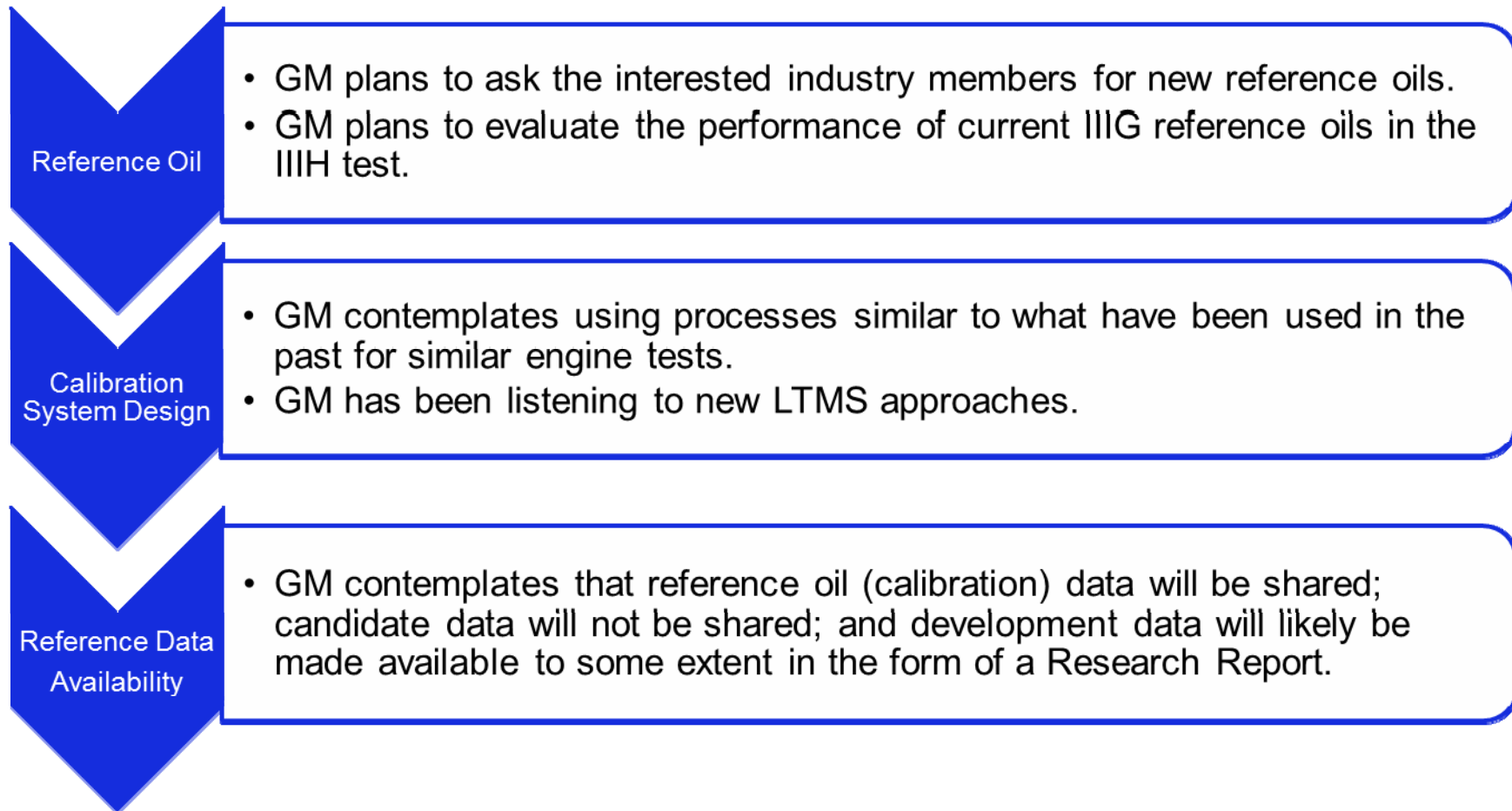
# Sequence IIIH Overview



# Sequence IIIH Desires



# Identify the TMC Issues



# Identify the TMC Issues (continued)

## Test Procedure Maintenance

- Test lab input on changes to any engine test is invaluable. It is contemplated, however, that GM will retain final decision making authority on test procedure changes.

## Lab Visits

- GM plans to work with the monitoring agency to handle test stand checks.

## Meetings

- GM contemplates that regular stakeholder meetings will be held.
- Final decision making authority retained by GM.



# Identify the TMC Issues (continued)

## GM Sponsorship

- One of the original sponsors of the Test Monitoring System and founding fathers of the TMC (1976 IIC and IIIC)

## Maintain the Community

- Industry is best served by keeping GM-ASTM dialogue going

## Maintain Current Services

- TMB to address GM requests in context with current rules & regulations

# Test Monitoring System Rules & Regulations

## Article 2

- ARTICLE 2 - PURPOSE
- 2.1 The purpose of the System is to establish, maintain and operate an independent calibration system to ensure that all tests performed using test procedures published by ASTM and which are under the jurisdiction of ASTM Committee D02 are conducted in a valid manner so that they can be interpreted properly.
- The System shall be restricted to monitoring only tests assigned to it by ASTM Subcommittee D02.B0.

# Rules & Regulation Revision Process



Revision  
Process

- ARTICLE 11 - AMENDMENTS
- 11.1 Amendments or revisions of these Regulations may be proposed in writing by a member at any regular meeting of Subcommittee B. A letter ballot shall be authorized by approval of two-thirds of members in attendance at the Division meeting.
- 11.2 Amendments or revisions of these Regulations shall be adopted by letter ballot on affirmative vote of at least two-thirds of the Division members voting, provided the proposed change(s) does not conflict with the *ASTM Bylaws, Bylaws Governing ASTM Committee D02, or the Regulations Governing ASTM Technical Committees.*

# Next Steps

1

- TMB considers request from GM for TMC to work as monitoring agency using current structure for the IIIH test under development.

2

- If approved by TMB, a motion will be made to draft a Sub B ballot to revise the rules & regulations to allow monitoring of non-ASTM tests under certain conditions.

# Next Steps

3

- ARTICLE 2 - **REVISION**
- 2.1 The purpose of the System is to establish, maintain and operate an independent calibration system to ensure that all tests performed using test procedures published ***and/or monitored by ASTM are conducted in a valid manner so they can be interpreted properly.***
- The System shall be restricted to monitoring only tests ***approved by the TMB.***



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