



CHAIRMAN – Andrew Stevens, Lubrizol, andrew.stevens@lubrizol.com , Yong-Li McFarland, SwRI, yongli.mcfarland@swri.org

SECRETARY – Maddie Dellinger, BG Products, mdellinger@bgprod.com

Handbook Surveillance Panel

Date – 20 April 2023

ATTENDANCE

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| AFTON | Amanda Stone, Bob Campbell, Don Bell |
| ASTM TMC | Dylan Beck, Rich Grundza, John Loop |
| BG PRODUCTS | Maddie Dellinger |
| CHEVRON | Josephine Martinez |
| EXXON | Dennis Gaal |
| INERTEK | Al Lopez, Anthony Lange, Andrew Smith, Joe Franklin, Bill Buscher |
| INFINIUM | Andy Ritchie, David Brass, Todd Dvorak |
| LUBRIZOL | Andrew Stevens, Robert Slocum |
| OHT | Jason Bowden |
| ORONITE | Robert Stockwell |
| SWRI | Khaled Rais, Travis Kostan, Yong-Li McFarland, Mike Birkie, Pat Lang |
| VALVOLINE | Amy Ross |

1. Attendance. See table above.

2. Agenda

1. Updates from Groups 6/7: Statistics & Developing New Procedures
2. Updates from Groups 4/5: Running Meetings & Information Letter Process
3. Updates from Groups 2/3: Semi-Annual Reports & Panel Housekeeping
4. Updates from Groups 1/8: History & Organization & Becoming a Chair

3. Attachments

- Current Handbook Outline and Section Responsibilities:



ASTM D02 SP
Handbook 3-6-23.xl

4. Minutes:

Introduction

- Overview of the Agenda given by Andrew

Updates from Group 6/7: Statistics & Developing New Procedures: Travis Kostan

- Travis Kostan gave an update about group 6 and 7 stating that they have held 2 meetings as a subgroup.
- During the 1st meeting, Travis's group went through their topics line by line and had people volunteer to take the items on. Once that was complete, those people got together and worked on things prior to their second meeting.
- Travis stated there was a general feeling amongst the group that they weren't going to be able to put some items in the handbook due to them not always being relevant to the situation at hand. He questioned if some of the statistical specifics would stand the test of time.
- He provided an example saying that writing and including guidelines for "developing a precision matrix" might not be in the purview of every surveillance panel chair as it is not their job to know these things. Again, stating that a lot of these statistics are very situation dependent.
- Travis offers the idea of a statistical presentation yearly for industry training. He states that there is an obvious desire for people to understand these things more.
- Travis states that they can put together something that involves and understanding of the different statistics but can't necessarily work up guidelines for developing them.
- Travis stated: "what does the surveillance panel chair need to know?" and stressed that they don't need to know how to develop the statistics, but they do need to understand them.
- Andrew Richie agrees.
- Todd Dvorak says these things are panel specific and agrees with Travis Kostan.
- Andrew Stevens suggests including important considerations or lessons learned, things that a panel or chair may just want to think about and consider while they go through these types of processes.
- Travis states he is unsure if chair handbook is the place for that. He suggests that surveillance panel chairs should be involved in TGC can learn from them.
- Josephine Martinez states that these are things that you learn as you do it. She says this topic should be in the handbook, but it should be very brief, claiming it's helpful for the chairs to know whose responsibility the statistics are.

- Travis states it is the chair's responsibility to contact statistics groups on case by case basis.
- Bob Campbell states that the handbook is going to be used by people who are less familiar with these processes than us. He says that how the statistics team analyses the data doesn't necessarily need to be included.
- Pat Lang says it might be useful to have an example of how certain statistics are calculated. He questioned how we were going to maintain a statistics course yearly. He wonders if we could put some of the statistical information on the TMC website.
- Travis Kostan states that giving examples isn't necessarily a good idea because people might think that's how they need to calculate statistics when it is really a case by case basis.
- Joe Franklin said that if we put severity adjustments example in the handbook and chairs don't need to do that people might get confused.
- Travis Kostan says that his group is going in a lighter direction with more guidance on where to go. He says that the group can review it when they're done.
- Andrew says he's thinking of the big picture and wonders how we are going to get the final product together. The subgroups eventually need to come up with a final draft for the panel to review.
- Yong-Li McFarland states that ASTM collaboration site with documents, comments, and questions is up and working. She wants to make sure everyone on the task force has the link.

Updates from Group 4/5: Running Meetings & Information Letter Process: Andrew Stevens

- Andrew Stevens stated he did a similar thing to Travis Kostan and divided the line items amongst people. He says that those smaller subgroups then divided and met on a regular basis to produce content.
- No one had any comments on the Group 4 and 5 updates.
- Yong-Li McFarland asked if we were still going to meet up in person at surveillance panel week at ASTM D02.
- Pat Lang stated there is a TCG meeting at ASTM D02 that is an hour and a half long. He says he's going to try and have a Microsoft Teams option for those of us who won't be at ASTM D02.

Updates from Group 2/3: Semi-Annual Reports & Panel Housekeeping: Maddie Dellinger & Amy Ross

- Maddie Dellinger stated that Group 3 hasn't met but there is a plan to combine group 2 and group 3.
- Maddie presented an example of a bench test template that was used at a previous ASTM D02 Meeting.
- Maddie stated she tried to create a PowerPoint that covered everyone but is unsure how accurate the template is due to her limited scope.
- She wondered if the PowerPoint should be condensed into a more general one.
- Denny Gaal says yes. Something similar across the board would be good because in general all the information is the same.
- Joe Franklin states that the expected life of the test for heavy duty and light duty tests needs to be included.
- Pat Lang stated that everyone typically has a different spin on their Semi-Annual Reports. He wondered if we should just make recommendations on what information the chair needs to have.
- Maddie Dellinger suggested she could make a more general template or even a list of strongly recommended information.
- Pat Lang stated yes, a list with minimum information for the Semi-Annual Report is a good idea.
- Bill Buscher stated that an engine test chair is totally different than a bench test chair. He thinks that the handbook should include a standardized format and minimal requirement for information.
- Maddie Dellinger states she can do a combination: minimum requirements, bench template, and engine template.
- No further comments.

Updates from Group 1/8: History & Organization & Becoming a Chair: Joe Franklin

- No updates

Any Additional Discussion

- Andrew Stevens and Yong-Li McFarland mention that a link to the ASTM share space will be sent out soon. When people have documents that need review, the task force will be alerted, and a meeting can be scheduled. Uploading documents gives people time to review it and prepare.
- Amy Ross asked for guidance regarding reblends of reference oils. Where does that fit into the overall document. She thinks it might be better suited in the statistics category.
- Rich Grundza states that reblends have only occurred when a test has run out of current blends.
- Anthony Lange (who works with gear oil) states that some of the oils they use are 20 years old. He says they are starting to do reblends of those oils. He thinks we should consider criteria for shelf life.
- Rich Grundza states he's seen passenger car oil go for 20 years.
- Anthony Lange states that generally, the shelf life recommendation for a fluid 5 years. Do we consider that?
- Andrew Lange states it would be worthwhile to talk about and consider these things.
- Rich Grundza states that there isn't a one size fits all rule so how do we go about doing this?
- Andy Ritchie says he has always wondered about an oil that's been in existence for 20 years, is it really, okay?
- Joe Franklin asked if TMC still posted a master list of the reference oils. He says it might be worthwhile to look at.
- Rich Grundza states that it's not fully updated but is on the TMC website.
- Yong-Li McFarland refers to Amy's original question, that this might not fit with the statistics group. The surveillance panel chair needs to know how to initiate reblends.
- Andrew Stevens states that people need to know where to find the information.
- Yong-Li McFarland asks Amy Ross if her question has been answered.
- Amy Ross states that she thinks so, but might send an email about it after the meeting.
- Yong-Li McFarland says emails are going out about collaboration site and that people should email her if they don't receive it.

4. Next meeting

June 15th 2-3:30 PM EST