



**COMMITTEE D02 on PETROLEUM PRODUCTS, LIQUID FUELS, AND LUBRICANTS**

**CHAIRMAN** – Andrew Stevens, Lubrizol

## Handbook Surveillance Panel

*Date – 4 April 2024*

### ATTENDANCE

<b>AFTON</b>	Amanda Stone, Bob Campbell, Don Bell
<b>ASTM TMC</b>	Dylan Beck
<b>BG PRODUCTS</b>	Maddie Dellinger
<b>CHEVRON</b>	Shawn Whitacre, Josephine Martinez, Ricardo Affinito
<b>EXXON</b>	Denny Gaal
<b>FORD</b>	Mike Deegan
<b>INERTEK</b>	Al Lopez, Joe Franklin
<b>INFINIUM</b>	David Brass
<b>LUBRIZOL</b>	Andrew Stevens, Robert Slocum
<b>OHT</b>	Jason Bowden
<b>SWRI</b>	Khaled Rais, Travis Kostan, Yong-Li McFarland, Mike Birkie, Pat Lang
<b>VALVOLINE</b>	Amy Ross



## 1. Attendance: See table above

## 2. New Business

### 2.1 Review of Surveillance Panel Handbook Revision 1

#### 2.1.1 David Brass - Comments

- David Brass says PCEOCP needs its own definition. It's currently listed as a sub bullet which doesn't make much sense. No one had any objections to making this change.
- Yong-Li asked if the wording was sufficient as far as the definition goes.
- David Brass says the acronym needs to be spelled out.
- Shawn Whitacre says that it can be like HDEOCP, but PCEOCP needs to be spelled out.
- David Brass says there are companies listed as a part of ILSAC, some of them are there but not all. For example, Stellantis.
- Bob Campbell says they shouldn't all be included because things change.
- Andrew Stevens suggested removing the examples.
- The group agreed that this was best.
- Yong-Li McFarland asked if we defined OEM somewhere. We did not. She suggested adding OEM to the terminology section.
- David Brass says that if the terminology is in alphabetical order, then PCOECF needs to drop down.
- David Brass says that the image in 5.1 (history and organization chart) isn't readable at its current size.
- Bob Campbell says that putting it sideways in the appendix might be best so it's readable.
- David Brass had another comment under 5.18.3 saying that once the independent labs have test unavailability then the industry needs to act. The dependent labs can still run but the test wouldn't be considered available.
- Jason Bowden asked if independent/dependent labs need to be defined.
- Andrew Stevens agrees that for someone brand new it could be helpful to define.
- Yong-Li asked if we needed to add more wording to 5.18.3 or if it was covered somewhere else. She asked about context as far as steps around making a test available/unavailable.
- Pat Lang says it should be covered later in the document. It is in 5.18.1.
- David Brass asked if there is an example template letter for notifying the industry about unavailable tests.
- Jason Bowden says there is a link in 5.18.5.1
- Pat Lang says that the link is an email list. The link was misspelled and has been corrected.
- Andrew Stevens made a note to find an example or a link to include in the handbook.
- Pat Lang says he has an example he can share.

#### 2.1.2 Denny Gaal - Comments

- Denny Gaal wondered if we are going to keep this task force active or if we're just going to hand the document over to Section 8 .
- Pat Lang says that the intent was to dissolve the task force after the completion of the document and let it rest in Section 8's hands until it needs updated.
- Andrew Stevens adjusted the wording in the Scope to clarify.
- Denny Gaal stated that he doesn't think SAE is a member of AOAP and that the definition should be adjusted
- The group worked to adjust the definition.
- Denny Gaal pointed out that the ILSAC acronym is now International Standardization and Approval Committee.
- Another comment from Denny states that some of the bench tests in the flow chart graphic are incorrect. There's no CBT Surveillance Panel and there aren't 2 TEOST panels.

- Jason Bowden says that the graphic is missing some surveillance panels on the engine side as well.
- Dylan Beck states that the graphic is active on their website.
- Bob Campbell suggests making the chart less specific.
- Dylan Beck thinks that the TMC would want to be specific.
- Andrew Stevens says we could make a new chart that's vertical and fits better in the document.
- Pat Lang told Dylan Beck that the 2 cycle tests don't have an active surveillance panel anymore and that he's happy to answer questions as he updates it.
- Yong-Li McFarland suggests linking the chart instead of pasting a picture. She says it's part of a 5-page document.
- Robert Slocum says there should be a link in line 287. He asked if the link in that line is supposed to be a link to an engineer's list. He believes that the link to the chart is misplaced.
- Yong-Li suggests moving the chart document link into a relevant section.
- Denny's next comment was about having descriptions for each subsection. Andrew asked if the descriptions are in the TMC organizational document.
- Jason Bowden says that the descriptions in the TMC document are vague and that we should elaborate in the Handbook.
- Andrew Stevens asked if Denny Gaal and Yong-Li McFarland want to come up with basic descriptions needed for Section 5. Yong-Li says that her and Denny can handle definitions for Section 7 but is unable to give definitions for D02.B03 and D02.B04.
- Amy Ross says she has a grease representative at Valvoline she can talk to for D02.04.
- Jason Bowden says that he can pull from old meeting minutes to find a scope for the sub sections. He says he can copy that and send it to Andrew.
- Denny Gaal had a comment about test availability but the change has already been made previously in the meeting.
- Another comment from Denny in section 6.2.2 stating that there is some information that isn't publicly available, for example supplier information. He says for reference oils we don't know who the suppliers are. He states he miss read the section initially but thinks it's good as it is now.

### **2.1.3 Additional Comments**

- Jason Bowden states that in 11.1.1 there is a small editorial change that needs to be made.
- Pat Lang says that in section 8.9 there is a small editorial change needed on line 488.
- Shawn Whitacre says that the EMA name changed to Truck and Engine Manufacturers Association.
- Al Lopez says that a section should be added for the O&H group. There are 2 groups working now. What does it handle and what does it do, both of those things should be included in the document.

### **3. Any Additional Business**

- None

### **4. Meeting Outcomes**

1. *Make a new flow chart for this document. Dylan Beck to take chart back to TMC to get updated.*
2. *Yong-Li McFarland and Denny Gaal to come up with a description for Section 7.*
3. *Jason Bowden to get Andrew a definition for D02.B03*
4. *Amy Ross to talk to her people at Valvoline for a Definition for D02.B04.*
5. *Al Lopez to put together some wording to send to Andrew for O&H section.*
6. *Andrew to make changes that in made in the document during the meeting, marked in red.*

### **5. Next meeting TBD, in a month or so**