



COMMITTEE D02 on PETROLEUM PRODUCTS, LIQUID FUELS, AND LUBRICANTS

CHAIRMAN – Andrew Stevens, Lubrizol

Handbook Surveillance Panel

Date – 13 September 2023

ATTENDANCE

AFTON	Amanda Stone, Bob Campbell, Don Bell
ASTM TMC	John Loop
BG PRODUCTS	Maddie Dellinger
CHEVRON	Josephine Martinez, Ricardo Affinito, Robert Stockwell
INERTEK	Al Lopez, Bill Buscher
INFINIUM	Todd Dvorak
LUBRIZOL	Andrew Stevens
OHT	Jason Bowden
SWRI	Khaled Rais, Travis Kostan, Yong-Li McFarland, Pat Lang
VALVOLINE	Amy Ross

1. Attendance: See table above**2. Old Business**

- None

3. New business**3.1 Review Current Progress**

- Andrew Stevens reviewed the topics on the excel sheet that are labeled “To Be Completed.”



Handbook TF
Updated Responsib



Agenda
SP_Handbook_TF_1:

Section 1 History & Organization Review

- Under the History & Organization section the remaining subtopics are organization chart of D02.B, brief history of the surveillance panels, objectives for each section/group of “B”, organization chart for committees, and purpose of different subcommittee groups and who is a member.
- Pat Lang asked if anyone has started any of these topics.
- Andrew Stevens said that no work has been done on these items.
- Joe Franklin was traveling and dealing with a delayed flight so he couldn’t make the call
- Bill Buscher stated that he can reach out to Joe and ask about a plan. As far as Bill knows, nothing has started.
- Bill Buscher said he can reach out to some retired industry professionals who have been a part of the industry for a long time to obtain some history.
- Jason Bowden said he feels like he’s seen an org chart floating around somewhere.
- Pat Lang said that a chart would be very useful.
- Yong-Li McFarland linked the D02 organization chart in the Microsoft Teams chat. She said that she can upload it to the collaborative website.
 - [Microsoft Word - ASTMOrganizationChart.docx \(astmtmc.org\)](#)
- Andrew Stevens stated that some of the committee’s definitions are missing from the document.
- Yong-Li McFarland asked if Bill Buscher could review the document with the people he listed and fill in the gaps.
- Bill Buscher agreed and stated that it needs to include things like NCDT.

Section 2 Semi-Annual Reports Review

- Andrew Stevens asked Maddie Dellinger if Section 2 (Semi-Annual Reports) was complete. She stated yes it was complete and the information has been uploaded to the share site.

Section 3 Panel House Keeping Review

- The next section is Section 3 (Pannel Housekeeping) which has been mostly completed. The only section left is the introduction of calibration oil reblends and new calibration oils.
- Amy Ross brought up how this topic is complicated and needs more discussion with the Section 3 group. She stated that the bench section can be cut and dry but is unsure how things operate outside of bench testing.
- Bill Buscher mentioned that one thing that has happened this past summer is a reference oil existed in the system for so long that the original supplier analyzed what was left of the oil and stated that it was at the end of its life. Bill wondered how we address something like this.
- Amy Ross says that her panel has voted to discard NOACK reference oils before and it could be as simple as voting. She also mentioned that they have voted to discard lingering quantities of left over oils after new oils have been approved.
- Bill Buscher stated that multiple tests rely on this oil manufacturer so there needs to be some kind of protocol. He says this is a good opportunity for guidelines.
- Yong-Li McFarland states that the oil should be able to be reblended so it can be dealt with like an old batch.
- Bill Buscher stated that the oil cannot be reblended because the raw materials don’t exist anymore. This test only has one oil. So, does the industry keep using that one oil to keep the test viable? If the oil degrades and stands

cannot calibrate because the supplier says it's no good, then does the industry eliminate the oil? In some cases, there is no way to get a replacement test oil, as it can take a long time. The test cannot stay around if there is no reference oil for it.

- Amy Ross stated that there are tests to monitor the stability of fluids and setting thresholds for alarms on reference oils.
- Bill Buscher stated that with bench testing it's easier to do a reference test and more difficult with engine tests because it costs so much to run the test, which is likely why it's not done.
- Amy Ross said that he should go to the manufacturer and ask how they're determining a reference oil is at the end of its life, which chemical and physical properties specifically.
- Pat Lang said that the note from TMC was vague and might've been because the oil is 20+ years old.
- Bob Campbell stated that the measurements are likely proprietary so we will not know them.
- Pat Lang stated that maybe it could be a box for the panel to check. For example, after so many years testing needs to be performed on the reference oil to make sure it's still within spec. He says that TMC does FTIR and ICP which could be a starting place.
- John Loop stated that he could get with Brittany Pfleeger
- Bill Buscher said that the email was sent out by Jeff Clark and was generic stating that they, "conducted analysis on that oil and it had reached the end of its life and should no longer be used for referencing purposes."
- Jason Bowden suggested treating it like running out of any other reference oil.
- Bob Campbell suggested getting an eye on the reference oil before things go bad. Stating that once the manufacturer gets involved, it takes a lot of time and money to solve test problems like wear or corrosion. He says that being on the cusp of PC12, now is a good time to get some protocol in the books.
- Amy Ross suggested having a meeting regarding reference oils with Group 3 because there is a lot of information to go over.
- Bob Campbell suggested getting as much information on the reference oil prior to use, taking a proactive approach to data collection on oils.
- Andrew Stevens said that the only other in progress item for Section 3 is to review and update the scope and objectives (S&O) and create a guide for S&O development.
- Amy Ross said there is an example from Yong-Li McFarland on the collaboration site from her Surveillance Panel – EOFT/EOWT.

Section 4/5 Running Meetings and Information Letter Process Review

- Andrew states that Group 4 and 5 got combined into small groups. He couldn't remember if someone wrote a blurb about using ASTM to review Ballots. He states that members need to vote on all ballots to maintain an active membership so that they're able to vote on items that do pertain to them as a chair. He asks if this still needs to be done or if the commentary is already out there?
- Jason Bowden asked Andrew to specify exactly what he was talking about.
- Robert Stockwell stated that members should be getting reminder emails.
- Andrew says that when he first joined ASTM, he didn't know he needed to vote on ballots, so he didn't until he was told he needed to.
- Yong-Li asked if Andrew was going to write these guidelines.
- Andrew states that yes, he should be able to.

Section 6 Statistics Review

- Andrew Stevens stated that the next section is the statistics group. The remaining topics include yearly training and links to materials. He asks where the group is at with these topics and what kind of material do we want to deliver for these points?

- Travis Kostan said that he had a note on his to do list to get the group back together but that couldn't happen over the summer. He stated that that he can get the group back together to work on marking some of these items off the list. He feels like the larger group hits a headwind every time we try to discuss this topic.
- Pat Lang said some of the subject material is not one size fits all. We've discussed this multiple times and the consensus feels like we do want some kind of yearly training. He said we could have subtopics be a part of the presentation and wonders what the forum for the presentations would be. He said that overall, we've agreed on some sort of yearly training.
- Travis Kostan said that there are still logistical problems. We've been talking in circles and have been for a while.
- Pat Lang stated that we could rotate who is responsible for it year after year.
- Travis Kostan asks if anyone in the stats group had any opinions on that. No one offered up any opinions.
- Andrew Stevens asks if the group will still do a write up regarding things that should be considered, and lessons learned.
- Travis Kostan said yes, the stats group can work through things like the references from Pittsburg.
- Pat Lang says that in the handbook we should reference "potential annual training" and include subjects and links that we have in the handbook.
- Andrew Stevens states that we could do training in person some years and WebEx other years. The handbook can be updated with links to training.
- Pat Lang stated that the handbook can be like a road map for people to get help.
- Andrew Stevens asks Travis if he has enough information now to get to work with the statistics group.
- Travis Kostan says yes that he's good to work through the items knowing that the annual training will be occasional.

Section 8: Chair Change Management and Section 9: Legal Review

- Andrew Stevens states that the last 2 items on the list are the process for becoming a chair and legal knowledge/information. He asked if we want to come up with an actual process for becoming a chair.
- Pat Lang asked if anyone knew how we were doing it now.
- Bill Buscher said that Joe Franklin told him that it's the section chair's responsibility to select the chair. He also stated that in his 29 years in the industry, it hasn't happened that way on the engine oil side. Typically, the old chair solicits a new chair. He said it's a case by case basis and that OEMs play a role on the engine side.
- Bob Campbell said that it also comes down to whether the current company wants to retain ownership.
- Andrew Stevens asked if we are okay with the status quo or if we want to set guidelines.
- Bill Buscher suggests wording it as "selecting a chair" instead of "becoming a chair." He said there are unwritten rules that we go by to a certain degree. He stated that the industry doesn't want one company to hold too many chair positions.
- Pat Lang said yes that we want it spread among various groups.
- Bill Buscher stated that another unwritten rule is that the person running the panel needs to know something about that test. He asks if we want to write the unwritten.
- Yong-Li brings up an example of something that recently happened on the bench test side: there was a chair who stepped down and the panel was left without a chair. Denny Gaal, as section chair, was then considered acting chair of that panel and was responsible for selecting a new chair for that panel based on nominations.
- Bill Buscher said that typically multiple people are interested.
- Maddie Dellinger brought up that in the case of ROBO, no one else was interested but herself. So, Justin Mills nominated her as chair. There were no objections from the panel, and a vote was taken.
- Andrew asked if we wanted to write it out.
- Pat Lang suggested not defining the entire process but writing out some guidelines and rules.
- Yong-Li McFarland emphasized that the wording needs to be changed as far as the title goes.
- Andrew Stevens changed the title to "Guidelines for Selecting a New Chair (Replacement or New Panel) and Tips for Training a New Chair."
- Pat Lang said Joe Franklin will have input on this topic.

- Andrew Stevens asks Maddie Dellinger if she wants to take a stab at the topic and then they can review it sometime soon and send it out to the group.
- Maddie Dellinger agreed to do a write up.
- Yong-Li McFarland stated that she uploaded the documents to the shared site that were part of the original excel sheet under "content."
- Andrew Stevens stated that as far as the legal section goes, the anti-trust statement is really all that we need for that section. Other than that, he says there isn't much left.
- Maddie Dellinger asked Andrew to send out the Excel spreadsheet that he has been editing to the group.
- Pat Lang asked what we need to do next to keep moving.
- Andrew Stevens stated that there is a meeting in October that we can push back to November before the holidays.
- Andrew says he will send out a poll for a mid-November date for the next meeting. People were in verbal agreement.

4. Any Additional Business

- None

5. Meeting Outcomes

- Amy Ross to put together a Section/Group 3 Meeting.
- Maddie Dellinger to do write up for "Chair Change Management" in collaboration with Andrew Stevens.
- Andrew Stevens to send out a poll for mid-November meeting.

6. Next meeting TBD Mid-November

**D02.B Surveillance Panel Chair's Handbook Task Force:
Call Meeting Agenda
September 13, 2023 @ 2:00-3:30 PM EDT**

1. Roll Call (start 2:05 EST)

1.1. SP Membership changes and additions

2. Old Business

2.1	N/A	Panel
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3. New Business

3.1	Review Current Progress Create Plan to Address Remaining Items	Andrew Stevens Task Force
3.2	Any Additional Discussion	Task Force

4. Next Meeting

4.1. SP Meeting: TBD

5. Meeting Adjourned

Section Description	Responsibilities/Expectations	Tools/Resources	Members	Progress			
1. History & Organization	Background Industry Knowledge	Org Chart of D02.B	Denny Gaal Rich Grundza Jeff Clark Joe Franklin* Bill Buscher Andy Ritchie Robert Stockwell Al Lopez Maddie Dellinger Andrew Smith Shawn Whitacre Jason Bowden	To Be Completed			
		Brief history of the evolution of creation of surveillance panels		To Be Completed			
		Objectives for each Section/Group of B		To Be Completed			
		Org Chart of Associated Committees and their purpose/interaction with each other (ex. NCDT, AOAP, CLOG, etc.)		To Be Completed			
2. Semi-Annual Reports			Maddie Dellinger* Denny Gaal Andrew Stevens YongLi McFarland Bill Buscher John Loop				
	Prepare & Circulate Semi-Annual Reports for ASTM Meetings	Guidelines for Semi-Annual Reports Template for Bench Test SP Reports		Content Complete Content Complete			
3. Panel Housekeeping	Continuous Panel Management		Denny Gaal Bob Campbell Bill Buscher Andy Ritchie Rich Grundza Jason Bowden Amy Ross Khaled Rais Pat Lang				
	Maintain a Current Active Membership List			Content Complete			
	Continual communications with industry stakeholders on test changes, problems, needs. This can include hardware, reference oil, and other topics.			Content Complete			
	Liaison with other SP Chairs through TGC			Content Complete			
	Respond to Test Procedure Questions			Content Complete			
	Liaison with the TMC to monitor the performance of calibration oil and fuel inventories	TMC Contacts Link Fuel Supplier Contacts Link		Content Complete Content Complete			
	Stewarding with the TMC the introduction of calibration oil reblends and new calibration oils	Guidance for Intro Process		Can Some Guidelines Be Created?			
	Liaison with OEM/CPD to monitor parts supply			Content Complete Can Some Guidelines Be Created?			
	Review and Update Scope & Objectives	Guide for S&O Development		Content Complete			
4. Running Meetings	Running Meetings as Issues Arise	Meeting Frequency	Maddie Dellinger Andrew Stevens* YongLi McFarland Rich Grundza Andrew Smith Joe Franklin Pat Lang Jason Bowden Khaled Rais	Content Complete			
		Guidelines for Running SP Meetings (Minutes captured and posted in timely manner, Robert's Rules of Order etc)?		Content Complete			
		ASTM/SP Voting Guidelines (Information Letter v Editorial, etc. TGC Task Force to address this)		Content Complete			
		ASTM Voting Guidelines for Negative Ballots (How to coordinate SP response, etc.)		Content Complete			
5. Information Letter Process	Reviewing Information Letter Ballots	Guidelines for Drafting Ballots and Information Letters	Rich Grundza Jeff Clark Joe Franklin Bill Buscher	Content Complete			
		Information Letter Process Including Responsibilities of Different Bodies (ASTM/Panel/Sub B)		Content Complete			
		Guide for Utilizing ASTM to Review Ballots (How to respond to ballots, join correct Subcommittee)		Content Complete?			
		Statement that Chair is technical contact for Information Letters with associated responsibilities		Content Complete			
6. Statistics	Constant Monitoring of Industry Control Charts	Doc to explain creation and interpretation of control charts (Deeper explanations of CUSUM, etc.) Link to LTMS doc. Explanation of use? List of industry statisticians that support each method? (maybe out of scope of method but should exist somewhere???) Links to D6300 / D6299? Guidelines for taking actions resulting from control chart activity Close monitoring coming out of Precision Matrix	Denny Gaal Travis Kostan* Martin Chadwick Elisa Santos Jo Martinez Rich Grundza Jeff Clark Amanda Stone Ricardo Affinito Todd Dvorak Amy Ross	Links to Training Material? Decision on Yearly Training Seminar?			
		Guidelines for updating r/R or targets (i.e. old 10/20/30 reference tests rule or whatever that will look like in the future)					
		Guidelines for developing correction factors					
	7. Developing New Procedures	Lead Development/Incorporation of New Test Into New Spec			Guidelines for developing control charts Guidelines for developing severity adjustments Guidelines for Developing Precision Matrix Flow chart of development/incorporation process Checklist of development tasks Guidelines for Creating an ASTM standard Explanation / Guidelines for BOI/VGRA Matrix	Rich Grundza Jeff Clark Travis Kostan Martin Chadwick Amanda Stone Todd Dvorak Elisa Santos Jo Martinez Jason Bowden David Brass Mike Lopez Mike Birke Al Lopez Bill Buscher	
					Incorporate language to consider "proper" substests for bench/engine tests (i.e. an actual ASTM method with r/R)		
					Mention contacting D02.96 for support when incorporating substests		
		Write Research Report			Guidelines for Creating a Research Report		
		8. Becoming a Chair					
Definition of Process for Becoming a Chair							
9. Legal		Legal Knowledge/Information	Anti-Competitive, Single Source (cartel), State laws on weights and measurements, Access to legal reviews	*Use the ASTM anti-trust statement*	To Be Completed?		