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Committee D02 on PETROLEUM PRODUCTS AND LUBRICANTS

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Unapproved Minutes of the February 18, 2009 Sequence VID Surveillance Panel conference call.

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The meeting was called to order at 10:00am by Chairman Charlie Leverett.

Agenda

The Agenda is **Attachment 1**.

1.0 Roll Call

The attendance list is **Attachment 2**.

2.0 Approval of Minutes

The minutes from the 11.13.2008 meeting were posted but it was noted the presentation on proposals for the precision matrix was not included. That change was made and the minutes posted again. The minutes for the 12.16.2008 conference call were approved without change.

3.0 Action Item Review

3.1.) The Surveillance Panel will recommend the reference oils to be used for VID tests. (09/10/08) Open pending completion of Phase I and discussion from this meeting.

3.2) The Statistical Group will review BL Shift (BLB vs. BLA) after the Precision Matrix Phase II is completed. (10/06/08) Open pending Phase II of Precision Matrix

3.3) The Statistical Group will review outlier criteria after the Precision Matrix Phase II is completed. (01/06/08) Open pending Phase II of Precision Matrix

3.4) Determine requirements for the next batch of BL by the next Surveillance Panel meeting. Open pending completion of Phase II is currently in Scope & Objectives.

3.5) Survey labs for participation on Phase II (11/13/08) - I have done a survey and as-of today we will have 5 labs and 8 stands running in Phase II. Completed

3.6) Dan to send minutes from 11/13/08 meeting to TMC for posting.
Completed

ACTION: Dan will update the minutes with the statistical presentation for the precision matrix phase 2 run order and have them posted on the TMC web site.

3.7) OHT will notify SP when the new engine supply arrived. (12/16/08). **The build is expected to take place in March, 2009. This would include the VID modification package and pistons with rings.**

3.8) Rich will notify Charlie when the modified data dictionary forms are available. (12/16/08) **A newer version is being testing and would be release on 03.16.2009 as approved.**

3.9) Charlie to send out E-ballot on table 6 (12/16/08). Completed also included table 7.

4.0 Old Business

4.1) The following action item was made 09/10/08 and closed 10/21/08:

Labs should start creating a list of acceptable engine reconditioning practices. The SP will review the list and make final recommendations on parts and actions required.

I have been asked if oil pumps can be changed and what the actions are for the engine, i.e. if participating in the Phase II of the Precision Matrix do they need to run two more prove-out tests?

ACTION: Labs will generate a list of acceptable parts to replace on the VID engine.

MOTION: Labs would be allowed to change the oil pump. If oil pressure returns to the previous level, this engine would be allowed to be used in the precision matrix.

Mark Mosher / Guy Stubbs / This motion was tabled.

ACTION: Labs will provide oil pressure data. Charlie will work with Rich Grundza on a data sheet.

5.0 New Business

5.1) Precision Matrix Update – Estimated completion of Phase I is March 10th.

5.2) Discussion on selection of Reference Oils.

I have received the following statement from John Zalar and Thom Smith:

The selection of reference oils has always been the responsibility of ASTM surveillance panels. While oil characteristics such as vis grade, additive technology, and base oils are often important considerations, we cannot recall an instance when review of test data was not a part of the reference oil selection process. Industry stakeholders have ample opportunity to participate in the ASTM surveillance panels and to provide relevant technical input to the selection of reference oils. Additionally, while it is true that some guidelines were issued to assist in selection of the reference oils, even these may need to be re-considered should the Phase 1 data provide some unexpected insight.

Regards,
John Zalar & Thom Smith

5.2.1) Oronite Proposal –

Oronite would like to request a VID Surveillance Panel hold a teleconference before the end of February. This would be to finalize the 3 reference oils for step 2.

There are no data analysis required to reach this decision. According to the original Matrix Design and Funding Task Force recommendation which was approved and accepted by both ILSAC/Oil and PCEOCP, the original five reference oils are as follows:

	Technology 1	Technology 2	Technology 3
0W20			X
0W30	B		
5W20	A		
5W30			C
10W30		D	

It was required that the final three reference oils be a 0Wxx, 5Wxx and 10W30. After the BOI/VGRA group mapped the additive technology suppliers to the matrix oils, it was also required that the final 3 reference oils be from different technology suppliers to maximize the diversity of the technologies. With that, there were only two options:

D, A and X or D, B and C

ILSAC members have expressed specifically the need to include Oil A (technology 1, 5W20 Group II base oil) to provide linkage to GF-4 FE performance because that is most similar to an OEM FF oil and has the most VIB data, the only choice left is D, A, X. The PCEOCP has authorized Seq VI SP to make the final reference oil selection and therefore the decision by SP is final and sufficient to initiate step 2.

According to the Matrix Design and Funding Task Force and PCEOCP the analysis after step 1 will be used for the following reasons:

1. to decide if there is discrimination for 5 viscosity grades
2. to provide BOI/VGRA data to API to establish read across rules
3. to provide a preliminary read of the test precision and engine age effect (but the conclusion can only come after step 2 completion)

None of the above is required to start step 2. The final 3 oil selection is the only decision needed to begin step 2.

An early SP meeting would provide two benefits to the industry:

1. It enables step 2 to start immediately after step 1 and save roughly 2 weeks from the GF-5 timeline which was under renewed effort to get back on track
2. It enables dependent labs to start testing almost immediately after step 1 is complete. This potentially could lead to additional timeline improvement

In yesterday's ILSAC/Oil meeting all the groups agreed to review the GF-5 timeline and propose ways to move it back on track.

5.2.2 Lubrizol Proposal –

All labs could run oil “D” (only 10W 30) in the first tests and this would give the Statistical Group ~ a week to review the Phase I data as to not delay the start of Phase II. TMC will have all possible reference oils at the labs prior to the second of three test/stand/engine so we do not have any delay.

Below is an estimated timeline showing both Proposals

Using oils A, D & X		
Phase I	32 tests	3/9/2009
Start of Phase II		3/9/2009
Completion of Phase II		3/30/2009
Issue Research Report		4/13/2009
Phase I	32 tests	3/10/2009
Stat Phase II Oil D (Test #1)		3/10/2009
Data review & Recommendations to SP		3/13/2009
SP to review recommendations from SG		3/17/2009

Completion of Phase II 4/1/2009

Issue Research Report 4/15/2009

MOTION: Wait for data on oil “C” running on both stands at both labs. Have a conference call on 02.26.2009 at 10:00am to review that data. Review the Phase 2 run order and change that order so all of the first tests to run at each participating lab would be on the same selected reference oil.

Ron Romano / Jim Linden / This motion was approved with one waive.

ACTION: Charlie will prepare a detailed time line.

5.3) Review of data from labs wanting to participate in Phase II of the Precision Matrix. The data will be available coded and in a separate file called “Prove Out”.

5.4) Due to requests on ideas to shorten the completion of Phase II and the issuance of the Research Report we need to discuss how to handle any invalid tests which may occur in Phase II?

5.4.1) Options we may need to consider

- a. Rerun these tests and hold the Precision Statement until valid results is reported?
- b. Only use valid results setting a specific date data needs to be reported to TMC?
- c. Any other ideas?

ACTION: The invalid test requirements will be revisited.

6.0 Next Meeting

6.1) The next meeting will be a conference call on 02.26.2009 at 10:00am.

6.2) There will be weekly conference calls

The meeting was adjourned at 10:05am.

ATTACHMENT

ONE

Sequence VI Surveillance Panel Conference Call

Wednesday February 18, 2009

@ 9:00 AM CST

Call-in Number is: 866-298-0814

Conference Code: 2709134

Agenda

1.0) Roll Call

2.0) Approval of minutes

2.1) Approve the minutes from 11/13/08 and 12/16/08.

3.0) Action Item Review

3.1.) The Surveillance Panel will recommend the reference oils to be used for VID tests. (09/10/08) Open pending completion of Phase I and discussion from this meeting.

3.2) The Statistical Group will review BL Shift (BLB vs. BLA) after the Precision Matrix Phase II is completed. (10/06/08) Open pending Phase II of Precision Matrix

3.3) The Statistical Group will review outlier criteria after the Precision Matrix Phase II is completed. (01/06/08) Open pending Phase II of Precision Matrix

3.4) Determine requirements for the next batch of BL by the next Surveillance Panel meeting. Open pending completion of Phase II is currently in Scope & Objectives.

3.5) Survey labs for participation on Phase II (11/13/08) - I have done a survey and as-of today we will have 5 labs and 8 stands running in Phase II. Completed

3.6) Dan to send minutes from 11/13/08 meeting to TMC for posting. Completed

3.7) OHT will notify SP when the new engine supply arrived. (12/16/08). Open

3.8) Rich will notify Charlie when the modified data dictionary forms are available. (12/16/08) Completed, a newer version is out for beta currently.

3.9) Charlie to send out E-ballot on table 6 (12/16/08). **Completed also included table 7.**

4.) Old Business

4.1) The following action item was made 09/10/08 and closed 10/21/08:

Labs should start creating a list of acceptable engine reconditioning practices. The SP will review the list and make final recommendations on parts and actions required.

I have been asked if oil pumps and be changed and what the actions are for the engine, i.e. if participating in the Phase II of the Precision Matrix do they need to run two more prove-out tests?

5.) New Business

5.1) Precision Matrix Update – Estimated completion of Phase I is March 10th, we will have further discussions in items below.

5.2) Discussion on selection of Reference Oils.

I have received the following statement from John Zalar and Thom Smith:

The selection of reference oils has always been the responsibility of ASTM surveillance panels. While oil characteristics such as vis grade, additive technology, and base oils are often important considerations, we cannot recall an instance when review of test data was not a part of the reference oil selection process. Industry stakeholders have ample opportunity to participate in the ASTM surveillance panels and to provide relevant technical input to the selection of reference oils. Additionally, while it is true that some guidelines were issued to assist in selection of the reference oils, even these may need to be re-considered should the Phase 1 data provide some unexpected insight.

*Regards,
John Zalar & Thom Smith*

5.2.1) Oronite Proposal – Please reference the Email below from Mark sent out last Friday.

Charlie,
Oronite would like to request a VID Surveillance Panel hold a teleconference before the end of February. This would be to finalize the 3 reference oils for step 2.

There are no data analysis required to reach this decision. According to the original Matrix Design and Funding Task Force recommendation which was approved and accepted by both ILSAC/Oil and PCEOCP, the original five reference oils are as follows:

	Technology 1	Technology 2	Technology 3
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It was required that the final three reference oils be a 0Wxx, 5Wxx and 10W30. After the BOI/VGRA group mapped the additive technology suppliers to the matrix oils, it was also required that the final 3 reference oils be from different technology suppliers to maximize the diversity of the technologies. With that, there were only two options:

D, A and X or D, B and C

ILSAC members have expressed specifically the need to include Oil A (technology 1, 5W20 Group II base oil) to provide linkage to GF-4 FE performance because that is most similar to an OEM FF oil and has the most VIB data, the only choice left is D, A, X. The PCEOCP has authorized Seq VI SP to make the final reference oil selection and therefore the decision by SP is final and sufficient to initiate step 2.

According to the Matrix Design and Funding Task Force and PCEOCP the analysis after step 1 will be used for the following reasons:

1. to decide if there is discrimination for 5 viscosity grades
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3. to provide a preliminary read of the test precision and engine age effect (but the conclusion can only come after step 2 completion)

None of the above is required to start step 2. The final 3 oil selection is the only decision needed to begin step 2.

An early SP meeting would provide two benefits to the industry:

1. It enables step 2 to start immediately after step 1 and save roughly 2 weeks from the GF-5 timeline which was under renewed effort to get back on track
2. It enables dependent labs to start testing almost immediately after step 1 is complete. This potentially could lead to additional timeline improvement

In yesterday's ILSAC/Oil meeting all the groups agreed to review the GF-5 timeline and propose ways to move it back on track.

Please hold a VID Surveillance panel teleconference ASAP to officially select the final 3 oils.

Thanks,

Mark R. Sutherland, P.E.

5.2.2 Lubrizol Proposal – All labs could run oil “D” (only 10W 30) in the first tests and this would give the Statistical Group ~ a week to review the Phase I data as to not delay the start of Phase II. TMC will have all possible reference oils at the labs prior to the second of three test/stand/engine so we do not have any delay.

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Phase I	32 tests	3/10/2009
Stat Phase II Oil D (Test #1)		3/10/2009
Data review & Recommendations to SP		3/13/2009
SP to review recommendations from SG		3/17/2009
Completion of Phase II		4/1/2009

5.3) Review of data from labs wanting to participate in Phase II of the Precision Matrix.

I will be sending this information in a separate Email.

5.4) Due to requests on ideas to shorten the completion of Phase II and the issuance of the Research Report we need to discuss how to handle any invalid tests which may occur in Phase II?

5.4.1) Options we may need to consider

- a. Rerun these tests and hold the Precision Statement until valid results is reported?
- b. Only use valid results setting a specific date data needs to be reported to TMC?
- c. Any other ideas?

6.) Next Meeting

6.1) Weekly Conference calls – if this group deems it necessary we can hold weekly or bi-weekly conference calls for formal discussions on anything between now and the completion of the Precision Matrix Phase II.

7.) Meeting Adjourned

ATTACHMENT

TWO

ASTM SEQUENCE VI SURVEILLANCE PANEL
Conference Call 02/18/09

Name	Address	Phone/Fax/Email	Attendance
Bowden, Dwight Voting Member	OH Technologies, Inc. P.O. Box 5039 Mentor, OH 44061-5039	Phone: 440-354-7007 Fax: 440-354-7080 dhbowden@ohtech.com	Jason has Dwight's vote
Jim Linden Voting Member	General Motors Research & Development 30500 Mound Rd./MC 480-106-160 Warren, MI 48090-9055	Phone: 586-986-1888 james.l.linden@gm.com	Present
Andy Ritchie Voting Member	Infineum 1900 East Linden Ave. Linden, NJ 07036-0735	Phone: 908-474- Fax: 908-474-3637	Present
Ron Romano Voting Member	Ford Motor Company 21500 Oakwood Blvd POEE Bldg Rm DR 167 MD 44 Dearborn, MI 48121-2053	Phone: 313-845-4068 rromano@ford.com	Present
Lai, Patrick Voting Member	Imperial Oil Ltd. of Canada 453 Christina Street South Sarnia, N7T T8T8,	Phone: 519-336-5611 Fax: 519-339-5866 patrick.k.lai@esso.com	
Leverett, Charlie Voting Member	Intertek Automotive Research 5404 Bandera Road San Antonio, TX 78238	Phone: 210-647-9422 Fax: 210-523-4607 charlie.leverett@intertek.com	Present
Grunza, Rich Voting Member	ASTM TMC 6555 Penn Ave. Pittsburgh, PA 15206-4489	Phone: 412-365-1034 Fax: 412-365-1047 Dml@tmc.astm.cmri.cmu.edu	Present
Miranda, Timothy Voting Member	BP Castrol Lubricants USA 1500 Valley Road Wayne, NJ 07470	Phone: 973-305-3334 Timothy.Miranda@bp.com	Present
Mosher, Mark Voting Member	ExxonMobil 600 Billingsport Road Paulsboro, NJ 08066	Phone: 856-224-2132 Fax: 856-224-3628 mark_r_mosher@exxonmobil.com	Present
Caudill, Timothy Voting Member	Ashland, Inc. 21st and Front Streets Ashland, KY 41101	Phone: 606-329-5708 Fax: 606-329-3009 Tlcaudill@ashland.com	Present
Stubbs, Guy Voting Member	Southwest Research Institute (SwRI) 6220 Culebra Road San Antonio, TX 78228	Phone: 522-5913 Fax: gstubbs@swri.edu	Present
Szappanos, George Voting Member	Lubrizol 29400 Lakeland Blvd. Wickliffe, OH 44092	Phone: 440-347- Fax: 440-347-4096 George.Szappanos@lubrizol.com	Present
Glaenzer, David Voting Member	Afton Research Center 500 Spring Street Richmond, VA 23218	Phone: 804-788-5214 Fax: 804-788-6358 Dave_Glaenzer@ethyl.com	Present
Tracey King Voting Member	Chrysler	Phone: Fax: tek1@chrysler.com	Present
Sutherland, Mark Voting Member	Chevron Oronite Company LLC 4502 Centerview Ste. 210 San Antonio, TX 78228	Phone: 731-5605 Fax: 731-5621 msut@chevrontexaco.com	Present
Robert Stockwell	ConocoPhillips Lubricants R&D Passenger Car Engine Oil	office 580-767-6894 Robert.T.Stockwell@conocophillips.com	Present

**ASTM SEQUENCE VI SURVEILLANCE PANEL
Conference Call 02/18/09**

Name	Address	Phone/Fax/Email	Attendance
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