



**Address** 100 Barr Harbor Drive  
PO Box C700  
W. Conshohocken, PA  
19428-2959 | USA

**Phone** 610.832.9500  
**Fax** 610.832.9666  
**Web** [www.astm.org](http://www.astm.org)

---

## **Committee D02 on PETROLEUM PRODUCTS AND LUBRICANTS**

*Chairman:* KENNETH O. HENDERSON, Cannon Instrument Co., 2139 High Tech Road, State College, PA 16803, (814) 353-8000, Fax: (814) 353-8007, e-mail: [kenohenderson@worldnet.att.net](mailto:kenohenderson@worldnet.att.net)  
*First Vice-Chairman:* BEN R. BONAZZA, TI Group Automotive Systems, Caro Research Center, 326 Green Street, Caro, MI, 48723 (989) 673-8181 ext. 227, Fax: (989) 673-3241, e-mail: [bbonazza@us.tiauto.com](mailto:bbonazza@us.tiauto.com)  
*Second Vice-Chairman:* JANET L. LANE, ExxonMobil Research & Engrg., 600 Billingsport Rd, Paulsboro, NJ 08066-0480 (856) 224-3302, Fax: (856) 224-3616, e-mail: [janet.l.lane@exxonmobil.com](mailto:janet.l.lane@exxonmobil.com)  
*First Secretary:* RALPH A. CHERRILLO, Shell Global Solutions (US) Inc., Westhollow Tech Ctr., 3333 Highway 6 South, Houston, TX 77082 (281) 544-8789, Fax: (281) 544-8150, e-mail: [ralph.cherrillo@shell.com](mailto:ralph.cherrillo@shell.com)  
*Second Secretary:* MICHAEL A. COLLIER, Petroleum Analyzer Co. LP, PO Box 206, Wilmington, IL 60481, (815) 458-0216, Fax: (815) 458-0217, e-mail: [macvarlen@aol.com](mailto:macvarlen@aol.com)  
*Staff Manager:* DAVID R. BRADLEY, (610) 832-9681, Fax: (610) 832-9668, e-mail: [dbradley@astm.org](mailto:dbradley@astm.org)

Issued: March 24, 2009  
Reply to: Dan Worcester  
Southwest Research Institute  
528 Tom Slick Ave  
San Antonio, TX 78228  
Phone: 210.522.2405  
Fax: 210.684.7523  
Email: [dan.worcester@swri.org](mailto:dan.worcester@swri.org)

The unapproved minutes of the March 12, 2009 Sequence VI Surveillance Panel conference call.

This document is not an ASTM standard; it is under consideration within an ASTM technical committee but has not received all approvals required to become an ASTM standard. It shall not be reproduced or circulated or quoted, in whole or in part, outside of ASTM committee activities except with the approval of the chairman of the committee having jurisdiction and the president of the society. Copyright ASTM, 100 Barr Harbor Drive, West Conshohocken, PA 19428-2959.

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 03.05.2009 meeting were not posted.

## 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.
- 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) The SP is to 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) OHT will notify SP when the new engine supply arrived. (12/16/08). **The engine build is estimated to start 04.2009 at the GM plant.**
- 3.6) The Surveillance Panel will hold weekly conference calls until all issues relating to oil selection are resolved for Phase II. (02/18/09) This will take place through the completion of Phase II.
- 3.7) This was an earlier action item which was dropped and now back into place, 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. (02/18/09) OPEN
- 3.8) TMC will ship oils A, B, C, D & X to participating labs so they may start the first Phase II run on oils D once the lab is ready. (02/26/09) This is completed.
- 3.9) The SP decide to monitor oil pressure and have the Statistical Group review the complete data set (Phase I & II) to see if oil pressure correlates to performance. (02/26/09) Open until Phase II is completed
- 3.10) It has been recommended that stage weighting be reviewed as part of the Phase I & II analysis. (02/26/09) Open until Phase II is completed
- 3.11) SwRI to supply additional information on orifice blockage in their engine 11B. Done
- 3.12) SwRI will supply BL data on engine 11B prior to and after the re-assembly of the engine. They should also re-install the original tensioner on this engine prior to final assembly. (03/05/09)
- 3.13) Labs should review the Oberg filters and determine if we need to modify to determine to detect them in a by-pass mode. (03/05/09) We will have additional discussions today in the Old Business Section (4.2) below.
- 3.14) Rich and Charlie will pull the VIB engine survey from 2007 and determine how many labs requested engines. (03/05/09) Rich has supplied this information and I will send it to each lab as a reminder.

3.15) Charlie will contact AER to see how much reimbursement they want for the special order cams not used. (03/05/09) Completed, AER has valued these cams at \$675 per set I will be contacting the labs concerning the engines they requested on the 2007 survey.

3.16) Charlie will send out a schedule of upcoming meeting. (03/05/09) Completed but may be changed.

3.17) Bill Busher will arrange room rate at the Sea World Marriott for April 14 & 15 SP meeting to be hosted by SwRI. (03/05/09)

3.18) ExxonMobil will supply BL data on engine 11B prior to and after the re-assembly of the engine. (03/05/09)

4.0 Old Business

4.1) Timeline Update (as-of 02/26/09) shown below:

Estimated Timeline for Completion of VID PM and Issuance of Research Report **as-of 2/26/09**

Phase I Completion 3/10/2009	Start Phase II Oil 1 3/10/2009	Data review completed by SG 3/16/2008	SP Conference Call to discuss SG data review & oils 2 & 3 selection 3/17/2008	Start Phase II Oil 2 3/17/2008	Start of Phase II Oil 3 3/24/2009	* All Data in for review by SG 4/7/2009	SG Reports data review to VI SP 4/14/2009	Issue Research Report 4/21/2009
------------------------------------	---	---	--	---	--	--	--	--

\* Allows 7 days for supplemental data as noted on page 7 of the MOA

4.2) Oil pressure by-pass at the external Oberg filters - I believe we could drill & tap the plug that holds the spring in place to detect if the filter is in by-pass (seeing a pressure reading), OHT is looking into obtaining additional plugs if we decide to pursue this option. The other option is the tail-tail light, Guy mentioned due to it being brass it may not be wise to have it in contact with the oil, but it would only be in contact if in the by-pass mode. The question is does the SP want to pursue either option and if we do we need to establish guidelines on what we do if by-pass was to occur during a test. **It was decided the gasket material was lodged in the engine, and there will be no further action on this item.**

## 5.) New Business

5.1) The VID Precision Matrix Test on Oil D at SwRI was invalid because of a torque system failure. The torque was offset 8.5 NM at EOT with a corresponding shift in MAP. This resulted in a 4.64% BLS. The load cell/load amp are being investigated. Afton has also noted dyno problems on this test, and asked that other labs watch for possible issues.

They were going to run oil "D" as the first run in Phase II so after a discussion with Rich and Charlie it was decided that they continue with this oil.

The SP needs to determine how to handle this, due to them getting compensated for tests run in Phase I this test can not be omitted, some options are:

- a. Run oil D at the completion of the rerun of the invalid test from Phase I to stay on the original schedule.
- b. Repeat oil D at the completion of Phase II.
- c. Use one of the three runs in Phase II to obtain an additional data on one of the other two reference oils selected.

The contract is worded that Phase II can begin at the completion of the last Phase I test, so SwRI will repeat the last run as Phase I.

5.3) For, reference Oil Selection (oils 2 & 3), are there any comments at this time? We will hold a call on Tuesday of next week (03/17/09 @ 10:00 CDT) to get the recommendation from the Statistical Group.

MOTION: The timeline will be moved back one week to allow analysis time for the STAT Group.

Charlie Leverett/George Szappanos 11 for, none against, and one waive.

ACTION: Charlie Leverett will confirm Tracey King's vote.

5.4) Based on the above motion, the face to face meeting will move to the STAT Group on 04.21 and the Surveillance Panel on 04.21 in the afternoon, and the morning of the 22<sup>nd</sup>. All would be held in Detroit.

ACTION: Bill Buscher will work with Ben Weber on meeting rooms for ILSAC and PCEOCP as those group meeting will now move to the following week. ILSAC would need the released Research Report for their meeting. Jim Linden has agreed to supply a meeting room at GM.

The meeting adjourned at 10:58am.

ATTACHMENT

ONE

## Sequence VI Surveillance Panel Conference Call

Thursday March 12, 2009

@ 10:00 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 03/05/09 conference call.

#### 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

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) The SP is to 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) OHT will notify SP when the new engine supply arrived. (12/16/08). Open - as of 03/05/09 the build will occur April 09.

3.6) The Surveillance Panel will hold weekly conference calls until all issues relater to oil selection are resolved for Phase II. (02/18/09) Open until Phase II is completed

3.7) This was an earlier action item which was dropped and now back into place, 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. (02/18/09) OPEN

3.8) TMC will ship oils A, B, C, D & X to participating labs so they may start the first Phase II run on oils D once the lab is ready. (02/26/09)  
**Completed**

3.9) The SP decide to monitor oil pressure and have the Statistical Group review the complete data set (Phase I & II) to see if oil pressure correlates to performance. (02/26/09) **Open until Phase II is completed**

3.10) It has been recommended that stage weighting be reviewed as part of the Phase I & II analysis. (02/26/09) **Open until Phase II is completed**

3.11) SwRI to supply additional information on orifice blockage in their engine 11B. **Done**

3.12) SwRI will supply BL data on engine 11B prior to and after the re-assembly of the engine. They should also re-install the original tensioner on this engine prior to final assembly. (03/05/09)

3.13) Labs should review the Oberg filters and determine if we need to modify to determine to detect them in a by-pass mode. (03/05/09) **We will have additional discussions today in the Old Business Section (4.2) below.**

3.14) Rich and Charlie will pull the VIB engine survey from 2007 and determine how many labs requested engines. (03/05/09) **Rich has supplied this information and I will send it to each lab as a reminder.**

3.15) Charlie will contact AER to see how much reimbursement they want for the special order cams not used. (03/05/09) **Completed, AER has valued these cams at \$675 per set I will be contacting the labs concerning the engines they requested on the 2007 survey.**

3.16) Charlie will send out a schedule of upcoming meeting. (03/05/09) **Completed but may be changed.**

3.17) Bill Buser will arrange room rate at the Sea World Marriott for April 14 & 15 SP meeting to be hosted by SwRI. (03/05/09)

3.18) ExxonMobil will supply BL data on engine 11B prior to and after the re-assembly of the engine. (03/05/09)

#### **4.) Old Business**

4.1) Timeline Update (as-of 02/26/09) shown below:

Estimated Timeline for Completion of VID PM and Issuance of Research Report **as-of 2/26/09**

Phase I Completion	Start Phase II Oil 1 (VID-D)	Data review completed by SG	SP Conference Call to discuss SG data review & oils 2 & 3 selection	Start Phase II Oil 2	Start of Phase II Oil 3	* All Data in for review by SG	SG Reports data review to VI SP	Issue Research Report
3/10/2009	3/10/2009	3/16/2008	3/17/2008	3/17/2008	3/24/2009	4/7/2009	4/14/2009	4/21/2009

\* Allows 7 days for supplemental data as noted on page 7 of the MOA

4.2) Oil pressure by-pass at the external Oberg filters - I believe we could drill & tap the plug that holds the spring in place to detect if the filter is in by-pass (seeing a pressure reading), OHT is looking into obtaining additional plugs if we decide to pursue this option. The other option is the tail-tail light, Guy mentioned due to it being brass it may not be wise to have it in contact with the oil, but it would only be in contact if in the by-pass mode. The question is does the SP want to pursue either option and if we do we need to establish guidelines on what we do if by-pass was to occur during a test.

## **5.) New Business**

5.1) The VID Precision Matrix Test on Oil D at SwRI was invalid because of a torque system failure. The torque was offset 8.5 NM at EOT with a corresponding shift in MAP. This resulted in a 4.64% BLS. The load cell/load amp are being investigated.

They were going to run oil "D" as the first run in Phase II so after a discussion with Rich and Charlie it was decided that they continue with this oil.

The SP needs to determine how to handle this, due to them getting compensated for tests run in Phase I this test can not be omitted, some options are:

- a. Run oil D at the completion of the rerun of the invalid test from Phase I to stay on the original schedule.
- b. Repeat oil D at the completion of Phase II.



- c. Use one of the three runs in Phase II to obtain an additional data on one of the other two reference oils selected.

5.2) From the decision above how does this change the timeline?

5.3) Reference Oil Selection (oils 2 & 3), any comments at this time? We will hold a call on Tuesday of next week (03/17/09 @ 10:00 CDT) to get the recommendation from the Statistical Group.

## **6.) Next Meeting**

6.1 We will hold a conference call March 17 @ 10:00 CDT.

## **7.) Meeting Adjourned**

ATTACHMENT

TWO

**ASTM SEQUENCE VI SURVEILLANCE PANEL**  
**Conference Call 03/12/09**

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@ohotech.com	Jason voting for DB
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	Gordon voting for AR
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
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	
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	Bill voting for GS
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 <a href="mailto:msut@chevrontexaco.com">msut@chevrontexaco.com</a>	Present
Robert Stockwell	ConocoPhillips Lubricants R&D Passenger Car Engine Oil	office 580-767-6894 Robert.T.Stockwell@conocophillips.com	Present

