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Meeting Minutes of the Technical Guidance Committee In-Person Meeting

Sheraton, New Orleans

December 4, 2023

Scheduled Meeting Time 4:00 – 5:30 PM

**Reply to:** Patrick Lang

Southwest Research Institute, 6220 Culebra Road San Antonio, TX 78228

Phone: 210-522-2820, [patrick.lang@swri.org](mailto:patrick.lang@swri.org)

The meeting was called to order at 4:00 PM by Chairman Pat Lang.

**Agenda:**

The meeting agenda can be found as attachment #1.

**Membership Review:**

The attendance list can be found as attachment #2.

### **Review and Acceptance of Minutes:**

Pat Lang requested approval of the June 26, 2023, meeting minutes (held during June ASTM). A motion for approval was made by Pat Lang and seconded by Jeff Clark. No objections were voiced; the minutes were approved as written.

### **Action Item List:**

The action item list was reviewed; see Attachment #3 for more details.

### **Fuels Task Force:**

Pat Lang reported that there has been no activity in the fuels task force this period. All of the action items have been completed. If there are any new items to be added, please contact Mike Lochte at SwRI or the TGC chairman.

### **Rating Task Force:**

Bob Campbell provided the rating task force update; the full report can be found as Attachment #4.

- Workshop Formats have changed to better support standardized testing. The format will be as follows:
  - Spring Workshop will be “Standardized Testing Deposit Workshop” for HD and PCMO with testing lab personnel as the attendees.
  - Fall Workshop will cover the field-testing activities. Anyone interested can attend.
- A fall workshop was held in San Antonio October 17 - 19, 2023. There were 13 raters in attendance.
- Then next Standardized Deposit Rating Workshop will be held March 10-15, 2024 in San Antonio

Phil Scinto commented that he would like to see some efforts around digital rating. Mike Kunselman advised that there are some ongoing efforts in “auto-rating” for the D130 test method. Perhaps there is something that can be leveraged from this effort.

### **Stats Topics:**

Chairman advised that there will now be a standing agenda item for stats topics.

### **Old Business:**

Andrew Stevens provided an update on the status of the Surveillance Panel Handbook. See attachment #5 for a summary. Good progress has been made and the goal is to have it completed by June ASTM.

### **New Business:**

#### **Test Out-of-Control Document**

Pat Lang reported that the next action item that will be addressed is the review of the “Out-of-Control” document. One item that will need to be updated is the changes associated with the new LTMS system that have been implemented since the document was created.

Phil Scinto commented that he doesn’t like the term “out-of-control”. He cautioned that there are scenarios where a test could be deemed as such but is still a usable test under certain circumstances.

Jeff Clark also suggested that we consider reviewing what should be done when a test is unavailable. Pat reminded the panel that there is a procedure on the TMC website outlining what to do when a test is unavailable.

Brent Calcot advised that both “out-of-control” and “unavailable” are terms used in API-1509 so we need to coordinate with API if there are any changes to the terminology due the review process.

#### **TGC Files on TMC Website**

Pat Lang reported that he will work with the TMC to refine access to the various TGC files on the TMC website. Consider some direct links from the home page.

The meeting adjourned at 16:50

### **Next Meeting:**

The next meeting will be at the call of the chairman.

# **Attachment #1**

## **Agenda**

**December 4, 2023**

## **AGENDA**

### **ASTM Technical Guidance Committee Meeting**

Patrick Lang – Chairman

Monday December 4, 2023 – 4:00 PM to 5:30 PM

Sheraton, New Orleans

Meeting Room: Borgne

1. Attendance
2. Chairman's Comments
3. Review & Acceptance of Minutes
  - 3.1. Acceptance of the June 26, 2023, meeting minutes (Denver ASTM). Minutes have been posted to the TMC website.
4. Review Action Item List (Pat Lang)
5. Fuels Task Force Update (Pat Lang)
  - 5.1. No Activity this period (all action items have been addressed)
6. Rating Task Force Update (Bob Campbell)
7. Stats Topics
  - 7.1. Newly added agenda item to ensure any stats issued are addressed
8. Old Business
  - 8.1. Surveillance Panel Handbook Update (Andrew Stevens)
9. New Business
  - 9.1. Next item to address: Review and update "Out-of-Control" Document
  - 9.2. Work with TMC to refine access to TGC files on TMC website
10. Next Meeting: To be determined
11. Adjournment

**Attachment #2**

**Attendance List**

**December 4, 2023**

Technical Guidance Committee---Voting Membership List 12-4-23


NAME	COMPANY AND ADDRESS	PHONE NUMBER E-MAIL ADDRESS
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**Attachment #3**

**Action Item List**

**December 4, 2023**

## Technical Guidance Committee (TGC)

### Action Items List Status as of 12-4-23:

1. Action Item – TGC to review the current “DACA II” document.
  - *Item Completed*
2. Action Item – Create a Surveillance Panel Chairman Handbook to document the responsibilities associated with chairmanship positions.
  - *In Process: Most active item this reporting period, update provided today.*
3. Action Item – TGC to review the current document for “out of control” tests.
  - *Open*
4. Action Item – TGC to work on generating test procedure wording that would address the handling of testing anomalies.
  - *Open*

**Attachment #4**  
**Rating Task Force Report**  
**December 4, 2023**



# Rater Task Force Update to TGC

December 4, 2023

Passion for Solutions®



# As a Reminder... Format Changed

## Formats have changed to better support Standardized testing

- ▲ Spring – “Standardized Testing Deposit Workshop”
  - HD and PCMO
  - Invitees are from labs who participate in our industry
  - Ability to calibrate for all standardized test areas with single visit
- ▲ Fall – “Field Test Rating Workshop”
  - Invitees – Anyone interested

# Reminder...Standardized Testing Deposit Workshop

## **First official combined workshop help week of 3/6/2023 in San Antonio**

- ▲ Test labs only – 19 raters split into two groups
- ▲ Data indicates raters in a good spot
- ▲ New format well received

## **See report on TMC website for details**

- ▲ [https://www.astmtmc.org/ftp/refdata/gas/rating\\_workshop\\_data/2023/Final%20Report%20-%202023%20Standardized%20Testing%20Rating%20Workshop.pdf](https://www.astmtmc.org/ftp/refdata/gas/rating_workshop_data/2023/Final%20Report%20-%202023%20Standardized%20Testing%20Rating%20Workshop.pdf)

# Fall Field Test Workshop

 **Held October 17-19, 2023 in San Antonio**

 **13 Raters in attendance**

▲ Domestic and International

 **Format well received**

▲ May review hardware available to better support FT sector

# Next Workshop – Standardized Deposit Rating Workshop

 **March 10-15, 2024 – San Antonio**

# Manual 20 Info

Contact Information for TMC Manuals 20 & 21 and other rating scales and aids :

Yvonne Reese

ASTM International

100 Barr Harbor Drive

West Conshohocken, PA 19428

phone: (610) 832-9570

fax: (610) 834-7078

email: [yreese@astm.org](mailto:yreese@astm.org)

# **Attachment #5**

## **Surveillance Panel Chair Handbook**

**December 4, 2023**

# **Surveillance Panel Chair Handbook Update**

## **December 5, 2023**

Prepared By: Andrew Stevens

# Surveillance Panel Chair Handbook Update

## Scope

- Develop a Handbook for Surveillance Panel Chairs
  - Outline Chair Responsibilities
  - Provide Resources for Effective Panel Management
  - Single Point of Contact for Needed Resources
  - Establish a Baseline for Expectations of the Chair by the Panel



# Surveillance Panel Chair Handbook Update

## Main Topics

- History and Organization
- Panel Housekeeping
- Running Meetings
- Information Letter Process
- Semi-Annual Reports
- Statistics
- Developing New Procedures
- Chair Change Management
- Legal Information

# Surveillance Panel Chair Handbook Update

## Current Progress

- Initial Draft in Development

### Standard Guide for Standard Guide for D02.B0 Surveillance Panel Chairs' Handbook

<sup>1</sup> This handbook is under the jurisdiction of ASTM Committee D02 on Petroleum Products, Liquid Fuels, and Lubricants and is the direct responsibility of Subcommittee D02.B0.08 Executive Committee, Technical Guidance Committee Subcommittee.  
Current edition approved ????. Published ????. Originally approved in 2024. Last previous edition approved in 2024 as ???.

#### 1. Scope

1.1 This handbook covers the information and responsibilities necessary for the effective management of surveillance panels. While this handbook was developed primarily to aid surveillance panel chairs with the execution of their duties, it can also serve as a resource for any panel member or stakeholder. A task force under ASTM D02.B0.08 Executive Committee, Technical Guidance Committee Subcommittee was responsible for the creation of this document.

1.2 This handbook is arranged as follows:

	Subject	Section
Scope		1
Referenced Documents		2

4.1 *Handbook* – This handbook is meant to act as a resource primarily for surveillance panel chairs to facilitate the effective management of panels. The information and guidelines contained herein were developed via input from industry members and stakeholders and represents many collective years of experience. There are also references to external resources to provide additional information as well as to reference other guidelines or regulations that may be important to consider as a panel chair and member.

4.2 *Use* – This handbook is useful for the effective management of surveillance panels. Unless otherwise stated, the guidelines contained within are exactly that; guidelines and not strict regulations. However, these guidelines were developed through the collective experience and wisdom of numerous industry members and stakeholders. The surveillance panel chair would be wise to seriously consider them when leading their panel.

#### 5. History and Organization

#### 6. Panel Housekeeping

#### 7. Running Meetings

Yong-Li McFarland  
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